

Appointment and Communication – Practice Session

Required before start of Practice Session:

- One fake patient per trainee
If there are no fake patients in the database, create one using your favorite rock star/actor/sports star.

Note: *Keep in mind, the data is to be entered in your live database. After the exercises have been completed, please refer to the **End of Practice Session checklist** to ensure practice data is separated or removed from your live database.*

Perform each task below in the order listed to achieve the desired results. Each task will be related to previous tasks performed.

1. Enable your User Notifications and subscribe to All Providers, Operatories, and Status Changes.
2. In the Schedule, set the Calendar View
 - a. By Operatory, select the operatories.
 - b. By Provider, select the providers.
 - c. By Operatory Group, select the group(s).
 - d. Set the View options based on your own preference.
3. Change View mode to Weekly view.
4. Change back to a Daily View.
5. Add a Day Note.
6. Select your fake patient and Add/Edit your patient's Preferred Appointment Day/Time.
7. Search for Openings and Schedule your patient for an appointment
 - a. Check for any procedures in the Tx Planner to associate with the appointment.
8. Print the Day Sheet for the booked Appointment Date.
9. Request Patient Forms that are due for the patient.
10. Mark the Appointment as a Broken Appointment and reschedule.
11. Mark the Appointment as a No Show and Save.
12. Locate your patient's Appointment List (all recare, future, past, and missed appointments).
13. Create a New Patient and an appointment at the same time (Patient: Helena Jadranko, F, BD: 05/22/1990)
 - a. Schedule the appointment sometime next week.
14. From the Appointment Detail window
 - a. Update her address to 1587 Front Street, Southfield, MI 48075
 - b. Email: helenajad@mail.net
 - c. Preferred Contact Method is Email
15. Mark Helena's appointment as an ASAP appointment.
16. Go to Today.
17. Locate the Fill Openings list.
18. Attempt to book the No Show appointment and Cancel the action.
19. Find the ASAP appointment list and reschedule the appointments in the list to Today.
20. Reschedule it again using the Pinboard.
21. Add an Appointment Note indicating the patient will bring in their insurance information on the appointment date.
22. View the appointment's History.
23. Using the Appointment Panel
 - a. Change Arriving patient appointment status to Here.
 - b. Collect Mobile number: 248-915-0670

24. Locate where you will be scanning additional documents for the patient.
25. Change the Appointment Status to Ready.
26. Pretending the student has finished with the patient, change the appointment status to Checkout.
27. Add and Schedule the Recare.
28. **Optional** – Perform Patient Walkout process. Only if your role requires you to perform these actions.
 - a. Create Claim (only if clinic submits to insurance)
 - b. Collect Payment
 - c. Print Statement
29. Change appointment status to Complete.
30. Locate Text Messages and Statements sent to Patient/Guarantor (Patient Connection).
31. Locate Appointment Requests list, approve any outstanding requests.
32. Confirm the appointments for the following clinical day using the Unconfirmed Appointments list.
33. If submitting to insurance, check the Insurance Eligibility for scheduled patients.
34. Print the Next Business Day Route Slip.
35. **Optional** – Based on user role, check Patient Communications and make necessary adjustments to match your clinic needs.

End of Practice Session checklist:

- Delete the appointments created
- Delete the payments entered
- Delete the procedures added
- Delete the patient's Recare
- Update test patient status to Inactive Status
- Change patient name to indicate they are a test patient (ex. Janet Test)