Training 7:
Appointment Scheduler

Time: 60 Minutes

Audience: Front Desk, Office Managers

Pre-requisite: Completion of Practice Setup Wizard, Training 3

Training Policy: Due to the limited number of live sessions, if you are unable to attend, please cancel your registration at least 24 hours in advance. Registration for all sessions closes 24 hours before the start time. If no one shows up five minutes after the session starts, the class will be canceled and will need to be re-scheduled.

Here's What You'll Learn

Overview

This session will teach you how to effectively use the features of your office and provider calendar. You'll learn how to set up the scheduler with appointment reasons, resources, and time blocks. In addition, you'll be trained in scheduling appointments, receiving copays, and checking patient eligibility.

Objectives

- Set Up Scheduler
- Find and Schedule Appointments
- Check Patient Eligibility
- Collect Patient Co-payments
- Generate Appointment Detail Report

Outline

Introduction

- Training Overview
- Review Login Instructions

Appointments

- Navigating the Scheduler

Setting Up Appointment Scheduler

- Appointment Options
- Scheduling Resources
- Appointment Reasons
- Time Blocks

Scheduling Patient Appointments

- Add Patient Case
- Add Authorization
- Appointment Confirmation Status
- Notes

Schedule Non-Patient Appointment

- Include All Attendees

Appointment Reminders

- Email
- Phone Call

Eligibility

- Batch Eligibility Checks
- Individual Patient Eligibility Checks

Generate Appointment Detail Report

- Add Filters

Checking In Patient and Patient Payment

- Collect Patient Co-payment

Find Appointment

Next Steps

- Register for Live Training Webinars