Check Patient Out

Last Modified on 02/28/2025 7:34 pm EST

How to Check-Out Appointments Video Guide

1. Right click over the appointment, select Checked-Out

Test M.D., Shawn Scheduled 30 Mor 30 Mor Checked-In Checked-Out Cancelled Do Not Bill Reminder Sent Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Search Open Appointments Sand Appointments	ohei		шЦ	Intake Schedule E.J Fallent	+
Test M.D., Shawn Confirmed 30 Mor 30 Checked-In Checked-Out Cancelled Do Not Bill Reminder Sent Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Test, Danielle Search Open Appointments Annual Physical E Search Appointments	emh	er 4 th 2021		Scheduled	
Test M.D., Shawn No-Show 30 Mor W Checked-In Checked-Out Cancelled Do Not Bill Reminder Sent Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Search Open Appointments Search Appointments		, 2021		Confirmed	\cap
30 Mor Checked-In Checked-Out Cancelled Do Not Bill Reminder Sent Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Search Open Appointments Search Open Appointments		Test M.D., Shawn		No-Show	
Checked-Out Cancelled Do Not Bill Reminder Sent Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Search Open Appointments Search Appointments Search Appointments		30 Mor	~	Checked-In	4
Cancelled Cancel				Checked-Out	
Do Not Bill Reminder Sent Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Search Open Appointments Annual Physical E Search Appointments				Cancelled	
Reminder Sent Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Search Open Appointments Annual Physical E Search Open Appointments				Do Not Bill	
Telehealth test Bump Patient Ready Insurance test Appointment Recurrence Search Open Appointments Annual Physical				Reminder Sent	
test Bump Patient Ready Insurance test Composition Appointments Annual Physical Economic Search Appointments				Telehealth	
Image: Search Open Appointments Annual Physical Image: Search Open Appointments				test	
Patient Ready Insurance test Appointment Recurrence Test, Danielle Annual Physical				Bump	
Insurance test Image: Constraint of the second s				Patient Ready	
Appointment Recurrence				Insurance test	
Test, Danielle Annual Physical E			10	Appointment Recurrence	
Annual Physical E	-	Test, Danielle		Search Open Appointments	
Annual Exam		Annual Physical E Annual Exam	2	Search Appointments	
Add to Recall List			Ļ	Add to Recall List	
Global Call Reminders			3	Global Call Reminders	

2. The Quick Pay screen will load, where the Patient Validation verification can be ran again, ensuring all necessary information has been entered

History	Payments	Validate	Intake Assign
Insurance In	🕘 Patient Validation W	Vebpage Dialog	×
Coverage Ar 1 Y	Patient Valida Danielle Test checks.	tion Checks: has passed the v	alidation
			<u>0</u> K

3. If your practice does not take copays at check-in, the patient payment can be taken at this time from the Quick Pay window.

uick Pay	· · · · · · · · · · · · · · · · · · ·						-	ć
Patient - 🖉 🏟 Patie	nt Balance: \$914.00						i 🔥 93980-Test, Miche	ll 01-Jan-1990 (35y
Receipt Dationt A Claim	Order Ry Latter Brint A							
	i Oldel IX Letter Filit A							
ppointment Details								
145308 02/26/202	me 25 12:45PM	Resource Name Goldsmith, Clarence		Primary Care Physician None Reported		Choice - North		
C Transaction History	ents 🗸 Validate 🖉 Refresh Charges							
surance Information								
Coverage	Payer	Insured ID		Group/Policy Number			Сорау	
1	Aetna Test	00123154584		0357159789640123			\$0.00	
No claim is attached to this appointm Amount*	ent, current Charge Rate is 100%		25.00	Service Location * Choice - North				× Sea
Paid By * (1) Michell Test			~	Payment Plan				
Type Co-Pay	✓ Methor	s * Credit Card	~	Search Payment Plan				Sear
ID #				C 1 Active 3 Past Due				
Comment				Payment Batch				5
			li.	Search Payment batch				Jear
Associated with Claim Include Diagnosis		lude Comment						
Create Receipt	ant Tract to Day							
Create Necelpt								
eceipt Transactions								
Amount Paid	Post Date	Paid By	Туре	Method	ID # Commen	ıt	User ID	
🔊 Reverse Receipt	ipt Quick Statement	efresh						Receipt Total: \$(

4. Simply enter the Payment Amount, Payment Type (Co-pay), and Payment Method in the **Receipt Detail** area of the Quick Pay window.

New Receipt	t Detail				
No claim is a	attached to this appointment, current Charge	e Rate is 100%			
Amount *					25.00
Paid By *	(1) Michell Test				~
Type *	Co-Pay	~	Method *	Credit Card	~
ID #					
Comment					
Associa	ited with Claim		Include	Comment	10
Include	Diagnosis		🕑 Include	Procedure	
• Create	Receipt STake Payment Text to P	bay			

5. The yellow yield icon within the tabs indicate an item is ready to be printed or processed. For example, a pushpin above Orders could indicate that a follow up appointment requires scheduling.

Quick Pay		
Patient - 2 + Patient Balance: \$914.00		
Receipt Patient 🛕 Claim Order 🔺	Rx Letter Print 🔺	
Q 🗸 🗄 - 💆 🗖 🎓 🗘	🖺 🖶 🖉 🗃 🚠 🛤 👂 - 🗙 🔚 🤤 🔇 🖉 🎓	
Arranged By: Priority	Follow-up office visit in 6 months	
Norm	Test, Michell	Choice - Main Office
2 Test, Michell Male Next Appt: 03/03/2025 12:00PM Age: 35y	Male, Next Appt: 03/03/2025 12:00PM	02/28/2025
Scheduling Follow-up office visit in 6 months	Priority: Normal.	
	Appointment: Follow-up Visits at 02/28/2025 00:00am. 🦁	
	Processor: Front Office (Open)	
	Rendering: McKenna, Daniel Referring: ICD	:
	Responsible: Test, Michell Insurance: Aut	n:
	Scheduling Order Details: Add >>	

6. Selecting this tab displays Open Orders. Select the order below the patient's name. This will display the order details in the right side of the window. After reviewing the order details, you can schedule the appointment by selecting the double boxes in the upper right hand corner of the QuickPay window. This will minimize the QuickPay window to take you to the iScheduler to schedule the follow-up visit.



7. Once the appointment is scheduled, select the calendar box in the upper, left-hand corner to re-open the QuickPay window



8. Single click on the Processing status to Close the Order



9. Once any follow-up appointments are made and orders are closed, navigate to the **Print Queue** tab to view all items waiting to be printed. If no additional items need to be printed, navigate back to the Receipt Tab and use the **Print Receipt** button to print the receipt with the future appointment info.

	► Page 1 d	f1 Choice		CustomerF	Receipt
_ Cus 1 Friendly F 1 Indiana	tomer Recel amily Physicians I Virginia Avenue Suite 500 apolis, IN 46204-1 (317) 687-8111	pt ^{DC LL1}	NPI: 12345 Federal ID#:	67890, TIN: 36-4492602	
		A	pointment		
	ID #: 85 Appoint Check I Check C Renderi	526 nent Date: August 30 n: 08/31/2021 10:52A hut: 08/31/2021 12:44 ng Provider: Test M.D	, 2021 8:00:00 am M (EDT) PM (EDT) ., Shawn M.		
ayer	Payment M	ethod	Comment		Amount
Ce	o-Pay Credit Card			Total:	\$25.00 \$25.00
Futu	re Appointmer	Its			
Futu Indering Provider hawn M.	re Appointmer	its Referring Prov	ider Pi	rior Authoriza	ation
Futu Indering Provider Ihawn M. 91 - 120 Davs	re Appointmer 61 - 90 Davs	nts Referring Prov 31 - 60 Davs	ider Pi Current	rior Authoriza Total Balar	ation
	_Cus Friendly F Indiana	Customer Recei Friendly Family Physicians F 1 Virginia Avenue Suite 500 Indianapolis, IN 46204-11 (317) 687-8111 ID # 851 Appoint Check Ir Check C Check V Check C Check C Check Ir Check C	Customer Receipt Friendly Family Physicians PC LL1 1 Virginia Ävenue Suite 500 Indianapolis, IN 46204-1928 (317) 687-8111 ID #: 85526 Appointment Date: August 30 Check In: 03/31/2021 10:52A1 Check In: 03/31/2021 10:52A1 Payment Method Co-Pay Credit Card	Customer Receipt Friendly Family Physicians PC LL1 1 Virginia Avenue Suite 500 NPI: 12345 Federal ID#: Indianapolis, IN 45204-1928 (317) 687-8111 Appointment ID#: 85526 ID #: 85526 Appointment Date: August 30, 2021 8:00:00 am Check In: 08/31/2021 10: 52AM (EDT) Check Cut: 08/31/2021 12: 44PM (EDT) Rendering Provide: Test M.D., Shawn M. Payer Payment Method Co-Pay Credit Card Comment	Customer Receipt Friendly Family Physicians PC LL1 11/trginia Avenue Suite 500 NPI: 1234567890, TIN: Federal ID#: 36-4492602 Indianapolis, IN 46204-1928 (317) 687-8111 Repointment ID#: 36-4492602 ID#: 85526 Appointment Date: August 30, 2021 8:00:00 am Check In: 08/31/2021 10:52AM (EDT) Check Cut: 08/31/2021 12:44PM (EDT) Rendering Provider: Test M.D., Shawn M. Payer Payment Method Co-Pay Credit Card Comment ////////////////////////////////////