

iScheduler Guides

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Add a New Patient to the Database

Add a New Patient to the Database

New patients can be added to your database with either the Quick Create, Create MML or Full Patient Setup.

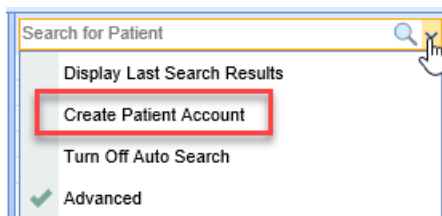
Video Guide

BEST PRACTICE: As a rule, always search for the patient prior to adding. This eliminates the possibility of creating duplicate patient charts.

1. To search for a patient, click the magnifying glass icon in the upper right corner of either the iScheduler or EMR and begin typing. The following search criteria can be used to search for a patient: a combination of patient First Name, and/or Last Name, DOB, or Chart Number.



2. If no results are found, use the drop down arrow and select Create Patient Account



3. Users may also choose to select the **New** button, located at the bottom of the search results pop-up



Quick Create

1. Quick Create allows you to create a patient account from this screen with minimal required fields. Enter criteria and select **Create**

Search for Patient

Create Patient Account

First Name *

Last Name *

DOB *

Gender *

Home * Ext

Work * Ext

Other * Ext

Responsible Party Same as Patient

Setup

BEST PRACTICE: Practices utilizing the patient portal, MyMedicalLocker, should consider using the "Create - MML" button from the Quick Create window. Read steps listed below for instructions on how to access the MML Admin screen from the Quick Create.

Create MML

1. Select Create-MML to quick create a patient account and connect to MML

Search for Patient

Create Patient Account

First Name *

Last Name *

DOB *

Gender *

Home * Ext

Work * Ext

Other * Ext

Responsible Party Same as Patient

Setup

2. Connect Patient

Patient, Test 01/01/2001(20y) Male

Key	Requested By	Date	Status
<div style="text-align: right;"> <input type="button" value="Print Key"/> <input type="button" value="Delete Key"/> <input type="button" value="Audit Key"/> </div>			

Full Patient Setup

1. To create a new account from the full patient Setup, select **Setup**

Create Patient Account

First Name *

Last Name *

DOB *

Gender * Unknown

Home * Ext

Work * Ext

Other * Ext

Responsible Party Same as Patient

Setup Create Create - MML Cancel

2. You are automatically directed to the New Patient Setup window. Fill out required fields (indicated by *) as well as additional fields, and click **Save**

Patient Setup

New Patient Setup

New Save Train More

Name: First * Test, Middle, Last * Patient, Nick, Suffix

Address: Address 1 * 123 Test Lane, Address 2, City, State, Country USA, Zip

Chart: Chart #, User Defined, DOB * 01/01/2001, RHC, Signature * 05/27/2021

Demographics: Gender * Male, Ethnicity, Race, Lang, Location Primary Location

Contact: Home, Work, Other, Email, Reminder

Status: Marital, Employed, Employer, Student

Provider: PCP Primary Care Physician, Referring Referring, Doctor Doctor, Rx Hist

Identification: Primary, Secondary, Old ID #1, Old ID #2, Old ID #3

Active Reportable Do NOT print Statements

Responsible Party Same as Patient

3. **Insurance:** Enter required and additional fields. Select "Same as Patient" if the patient is the guarantor which will populate demographic fields

Patient Setup

New Save Train More

Patient, Test Born 01-Jan-2001(20y) Gender Male

Cov.	Active	Payer	Primary ID	Group/Policy #	Copay

Guarantor

Coverage 1 Insured Same as Patient Individual Company [Populate Patient Information](#)

First Test Address 1 Phone Home Ext

Middle Address 2 Work Ext

Last Patient City Other (888) 888-8888 Ext

Suffix State Country Zip Code

Gender Male Email

Relationship Self Employer

DOB 01/01/2001 ID Type ID Value

Property Casualty

Insurance Policy

Start 05/27/2021 End Benefit Reset

Payer Aetna U.S. Healthcare Insured ID Member ID # XYZ123

Type Commercial Secondary ID

MSP Reason Group Name

Copay \$ %

Deductible Amount Met

Max out of Pocket Met

Authorization Required Do not perform 270 eligibility

[Document List](#) [Order Route](#) [Eligibility](#)

4. **Responsible Party:** Select **Populate Patient Information** if patient is the responsible party. If the responsible party is a different party, enter the required and additional fields as needed

Patient Setup

New Save Train More

Patient, Test Born 01-Jan-2001(20y) Gender Male

#	First Name	Last Name	Primary ID	Relationship
1	Test	Patient		

Responsible Party

Order 1 Type Same as Patient Individual Company [Populate Patient Information](#)

First Test Address 1 Home Ext

Middle Address 2 Work Ext

Last Patient City Other (888) 888-8888 Ext

Suffix State Country Zip Code

Gender Male Email

Relationship Self Employer

DOB 01/01/2001 ID Type ID Value

Email Patient Statements

Security Type Security Data

This patient has statements that are marked as past due.

5. **Emergency Contact:** Add up to two emergency contacts, then click Save

Patient Setup

New Save Train More

Patient, Test Born 01-Jan-2001(20y) Gender Male

Summary

Demographics

Insurance

Responsible Party

Emergency Contact

Comments

Case Management

Sliding Fee

Primary Contact

Name: Sally Patient

Relationship: Mother

Home Phone: (555) 555-5555 Ext: [] []

Work Phone: [] [] Ext: [] []

Other Phone: [] [] Ext: [] []

Email: sally@gmail.com

Granted Full PHI Access May Pick up Medications

Exclusions to PHI: []

Comments: []

Secondary Contact

Name: George Patient

Relationship: Father

Home Phone: [] [] Ext: [] []

Work Phone: [] [] Ext: [] []

Other Phone: [] [] Ext: [] []

Email: [] [] [] [] [] []

Granted Full PHI Access May Pick up Medications

Exclusions to PHI: []

Comments: []

Schedule an Appointment

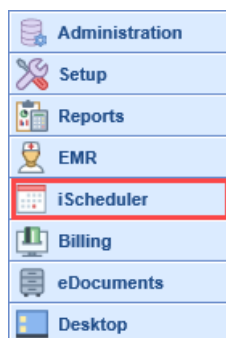
Scheduling an Appointment

Appointments can be scheduled via an open schedule, placeholders, or from searching for an open appointment in the iScheduler.

Video Guide

Schedule via an Open Schedule:

1. Navigate to the iScheduler



2. Select Date and Resource for the appointment to be scheduled

June 2021

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Resource

Personnel

- Brown MD, Michael
- Grogan MD, James
- Nurse Schedule
- Pain Dr., Robert
- Simpson MD. Homer

Group

- HHS Hospital
- Mercy Clinic
- Nicole Lewis
- Custom
- On-The-Fly
- Daily Schedule

3. Search for Patient (top right corner of iScheduler)

test

9401	Patient, Test	01/01/2001	Male
9367	Test, Brian	10/15/1989	Male
9386	Test, Candice L.	06/19/1983	Female
9400	Test, Claim	01/01/2001	Male
9329	Test, Jillian (Otolaryngology)	04/27/1970	Female
9391	Test, Kelly	08/08/2000	Female
9328	Test, Patient	07/19/1975	Female
9362	Test, Testy	01/01/2020	Female
9375	Tester, Jenny	04/01/1942	Female

9 results [New](#)

4. Select Patient (Name of patient will display in upper, right-hand corner)

Test, Kelly *Born 08-Aug-2000(20y)* Gender Female

test

5. On the schedule, select the date and time to add appointment. Select **Click to add appointment**

Pain Dr., Robert (0)	Pain Dr., Robert (1)	Pain Dr., Robert (0)
29 Tuesday	30 Wednesday	1 Thursday
	5am	
	15	
	30	
	45	
	6am	
	15	
	30	
	45	
	7am	
	15	
	30	
	45	
	8am	

- Enter details for the appointment (Appointment Type and Location are required), then select **OK**

Schedule Appointment X

Patient * Test, Kelly

Sched. With Pain Dr., Robert

Sched. On 06/30/2021 8:00AM To 8:15AM

Appt. Type * Established Patient Visit

Location * Greensboro Office

Chief Complaint Default

Review test results |

Comment Default

Referring Referring

Prior Auth. #

Assign Auth.

Schedule via Placeholder

- Select appropriate Resource and date for desired appointment
- Select the Placeholder, right click, **Assign**

Smith, Talis (0)		Smith, Talis (0)	
28 Monday		29 Tuesday	
	7am		
	15		
	30		
	45		
Greensboro Office VIP Patient Visit	8am	Greensboro Office VIP Patient Visit	
	15		
	30		
	45		
Greensboro Office Established Patient Visit		Greensboro Office Established Patient Visit	
Greensboro Office New Patient Visit		Greensboro Office New Patient Visit	
	15		
	30		
	45		
Greensboro Office Established Patient Visit		Greensboro Office Established Patient Visit	
Greensboro Office VIP Patient Visit		Greensboro Office VIP Patient Visit	
	10am		

3. Appointment Type and Location will be assigned, enter Chief Complaint as needed, select **OK**

Assign

Patient * Test, Kelly

Sched. With Smith, Talis

Sched. On 06/28/2021 8:45AM To 9:00AM

Appt. Type * Established Patient Visit

Location * Greensboro Office

Chief Complaint Default

Follow-up labs

Comment Default

Referring Referring

Prior Auth. #

Assign Auth.

OK Cancel

Schedule via Search Open

1. Select the Search Open to display appointments based on any combination of Resource, Location, Length, or Appointment Type within a designated time period.

BEST PRACTICE: To filter by Appointment Type, the Resource needs to be associated with that Appointment Type in Resource setup. Select **Search** to display results.

iScheduler

Today Time Period Search Open Search Rec

Resource: Smith, Talis

Location: Greensboro Office

Length:

Appt. Type: 2 Items

Period: 2 Days Weeks Months Years

Plus/Minus: 7 days Clear Search

Open Appointments: Date Resource Location

Wednesday, 07/07/2021

8:00 AM - 8:45 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

9:45 AM - 10:30 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

Thursday, 07/08/2021

8:00 AM - 8:45 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

9:45 AM - 10:30 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

Monday, 07/12/2021

8:00 AM - 8:45 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

9:45 AM - 10:30 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

2. Select the Placeholder icon to assign patient to desired placeholder

Monday, 07/19/2021

8:00 AM - 8:45 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

9:45 AM - 10:30 AM Smith, Talis
45 Greensboro Office (P)
VIP Patient Visit

Tuesday, 07/20/2021

3. Enter Chief Complaint as needed, then select **OK**

Assign

Patient: * Test, Kelly

Sched. With: Smith, Talis

Sched. On: 07/20/2021 9:45AM To 10:30AM

Appt. Type: * VIP Patient Visit

Location: * Greensboro Office

Chief Complaint: Default
1 year follow-up|

Comment: Default

Referring: Referring

Prior Auth. #:

Assign Auth.:

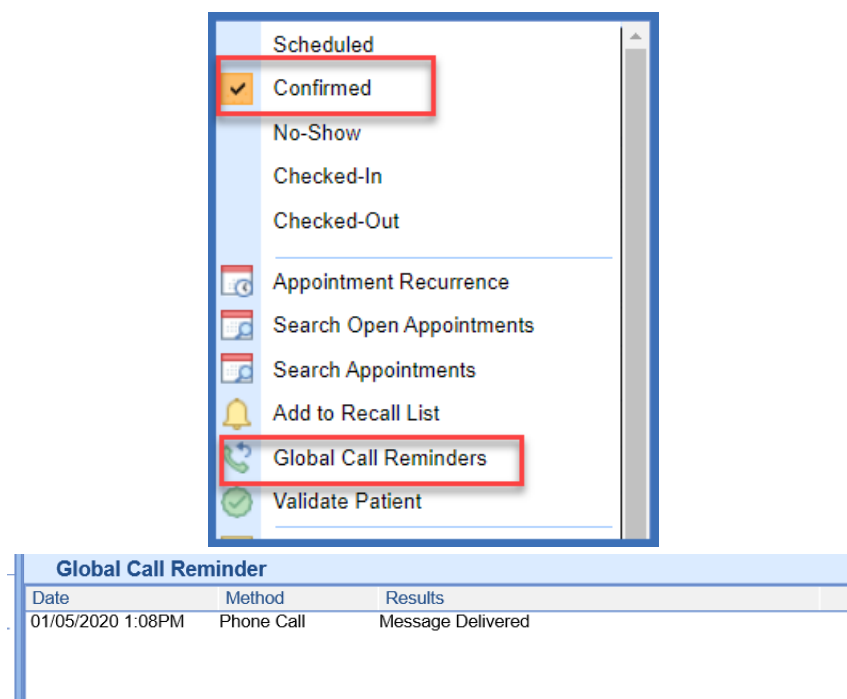
OK Cancel

Confirm an Appointment

Confirm an Appointment

Appointments can be manually confirmed for practices not utilizing automated appointment reminders.

1. Navigate to the iScheduler with appropriate Resource/Group selected.
2. Hover over the appointment you wish to Confirm, right click then select the Confirmed status.
3. Practices utilizing automated appointment reminders can use this same workflow to view the history of Global Call Reminders.



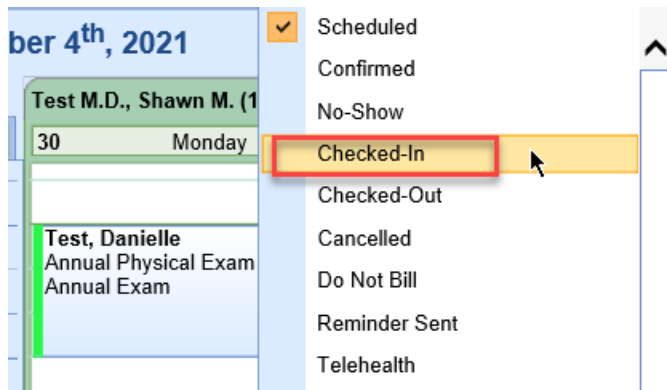
4. Additionally users may utilize the [Appointment Report](#) to view statuses.

Check Patient In

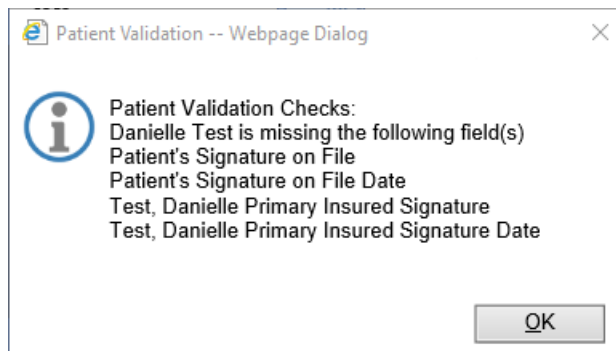
How to Check-In Appointments

Video Guide

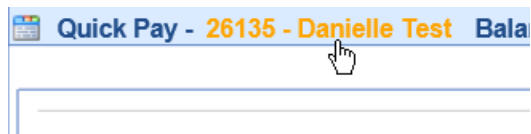
1. Right click over the patient appointment, select **Checked-In**



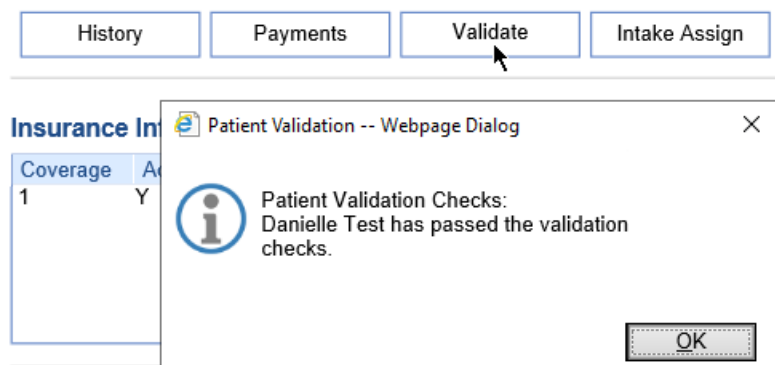
2. The Patient Validation runs looking for missing critical information that would impact billing, **Click OK**



3. Missing items can be added by clicking on the patient name in the upper left hand corner, taking you to the Patient Setup



4. After making corrections and saving the information, you'll be back at the Quick Pay screen, where the Patient Validation can be ran again, ensuring all necessary information has been entered



5. If your practice takes Co-pays at check-in, this may be entered from the Quick Pay window

Quick Pay - 26135 - Danielle Test Balance: \$0.00

1 Receipt 2 Claim 3 Orders 4 Prescription 5 Letters 6 Print Queue

Appointment Details

Appt. ID: 85526 | Date & Time: 08/30/2021 8:00AM | Resource Name: Test M.D., Shawn M. | Primary Care Physician: None Reported | Service Location: Family First Physicians

History | Payments | Validate | Intake Assign

Insurance Information

Coverage	Active	Payer	Insured ID	Group/Policy Number	Copay
1	Y	BCBS Anthem	987654		\$0.00

Enter New Receipt Detail

No claim is attached to this appointment, current Charge Rate is 100%
Appointment Estimated Balance: \$0.00 No claim, unable to calculate

Amount: \$25.00
Paid By: (1) Danielle Test
Type: Co-Pay | Method: Credit Card
ID #:
Comment:

Include Comment on Receipt
 Receipt Associated with Claim
 Include Diagnosis on Receipt
 Include Procedures on Receipt

Create Receipt | Take Payment

Receipt Transactions

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
-------------	-----------	---------	------	--------	------	---------	---------

Reverse Receipt | Print Receipt | Quick Statement | Total Paid:

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

Enter New Receipt Detail

No claim is attached to this appointment, current Charge Rate is 100%
Appointment Estimated Balance: \$0.00 No claim, unable to calculate

Amount: \$25.00
Paid By: (1) Danielle Test
Type: Co-Pay | Method: Credit Card
ID #:
Comment:

7. Select **Create Receipt** for cash, check, and non-PaySimple credit card payments. (Read more about our PaySimple credit card integration.)

Enter New Receipt Detail

No claim is attached to this appointment, current Charge Rate is 100%
Appointment Estimated Balance: \$0.00 No claim, unable to calculate

Amount: \$25.00
Paid By: (1) Danielle Test
Type: Co-Pay | Method: Credit Card
ID #:
Comment:

Include Comment on Receipt
 Receipt Associated with Claim
 Include Diagnosis on Receipt
 Include Procedures on Receipt

Create Receipt | Take Payment

8. For PaySimple credit card payments, select **Take Payment**

Most practices will wait to print the receipt until Check-Out in order to include future appointments, proof of visit, and proof of payment on the same printout. However, receipts will generate in the Receipt Transactions area and can be printed during Check-In, if necessary. Simply select the receipt and then select the **Print Receipt** button located at the bottom of the screen.

Scan Patient Documents and Cards

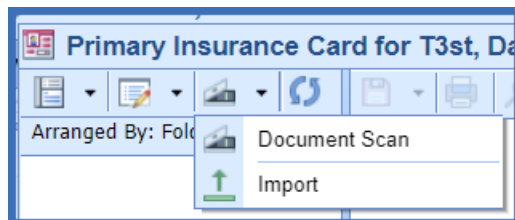
Scan Patient Documents and Cards

Select Patient from iScheduler to populate name in upper right corner

Use dropdown next to Patient to select folder you want to Scan/Upload into



Select whether to Scan or Import the document

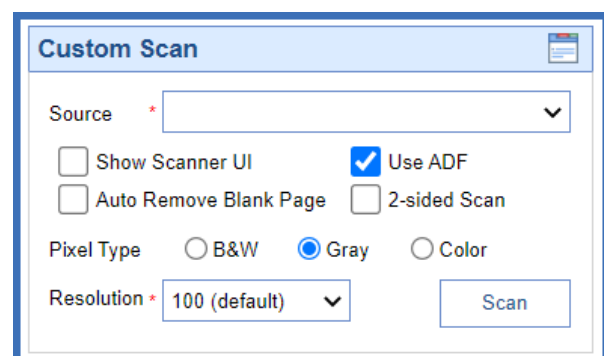


To Scan

Custom Scan

1. Select **Source** (scanner name)
2. Adjust Custom Scan Options, Pixel Type, and Resolution to fit your specific needs for the pages being scanned
3. Select the **Scan** button and wait for the pages to display

*More information on these settings [Custom Scan](#)




Save Documents

1. Enter a **File Name**
2. Set a **Received Date** & Enter a Comment (*if applicable*)
3. Verify correct **Menu, Folder, and Patient**
4. **Review** -select a user or group to review the file and comment (*if applicable*)
5. Select **Upload**.

**More information on these settings [Save Documents](#)*

Save Documents

Filename * pdf ▾


Received 

Type ▾

Comment


Menu * Patient ▾

Folder * Insurance.Cards.Primary Insurance ▾


Patient * T3st, Danielle 

Review

Assign to User/Group for Review

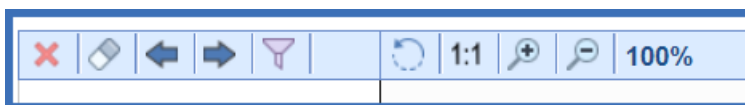
Search for Users and Groups 

Review Comment

 Normal

Clear Settings After Upload

Toolbar



Deletes a single page selected



Clears all pages on the screen



Moves through pages to display in the viewing pane



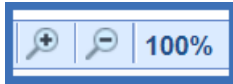
Filter useful in eDocuments



Allows rotation of the document previewer



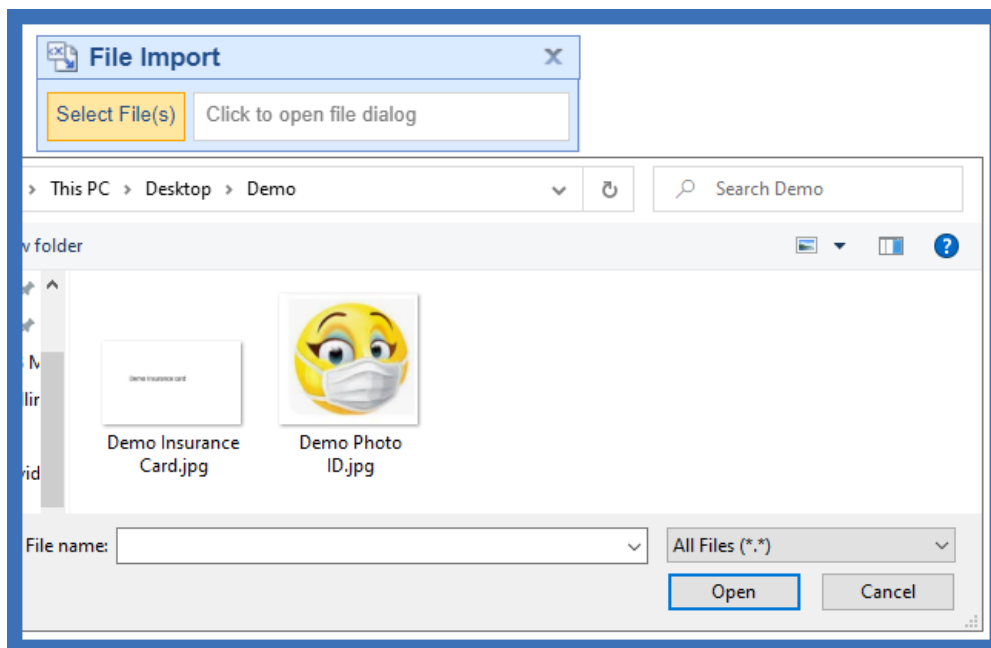
Changes viewing pane between actual size and fit-to-screen ratios



Zoom in or out on the selected page

To Import

Click Select File(s) then go to folder and select document to be imported

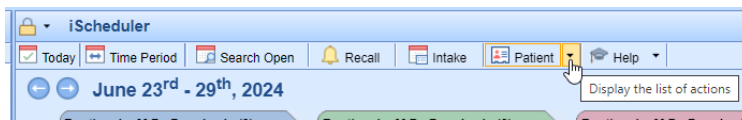


Take Photo

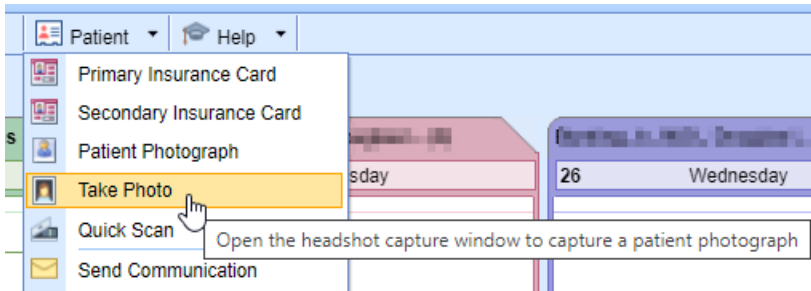
Taking a Photo for a Patient Headshot

A practice may decide to include a photo of the patient, as part of the patient's medical record. Practices with either an external camera, or a webcam may choose to take a photo directly through the software. The patient headshot will display in both the Patient Setup window, as well as the Patient's chart in the EMR.

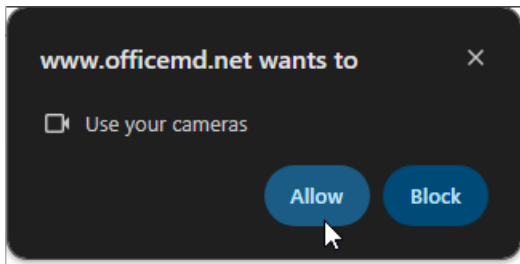
1. Navigate to iScheduler
2. Open the patient's chart
3. Navigate to the Patient dropdown menu in the toolbar



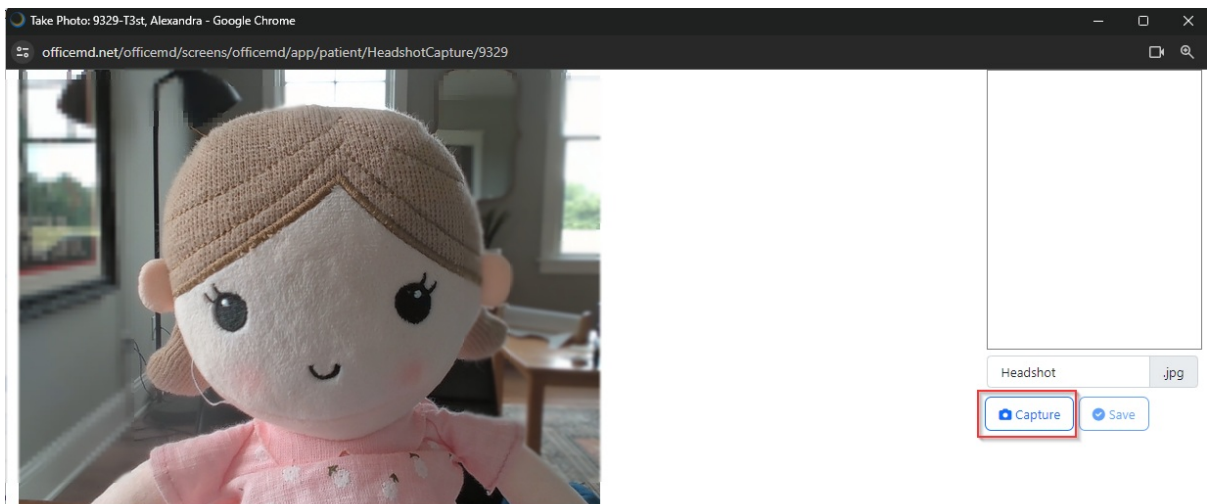
4. Select **Take Photo**



5. Your browser will request permission to access your connected camera. Choose **Allow**



6. Place the subject in the frame and choose Capture to record the image



7. The system will automatically label the image as "Headshot." Users may choose to modify the name of the file. Click **Save**



Headshot .jpg

Capture

Save

8. The patient headshot can be viewed in the Patient Setup and the EMR

Patient Setup

T3st, Alexandra Born 01/01/2001(23y) Gender Female

Chart 9329

Alexandra T3st

Next 3 Visits

Past 3 Visits

Balance: 0.00

Current	31 - 60	61 - 90	91 - 120	121 - 150	151 - 180	181 - 365	365+ Days
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Summary

Demographics

Insurance

Responsible Party

Emergency Contact

Comments

Case Management

Dialysis

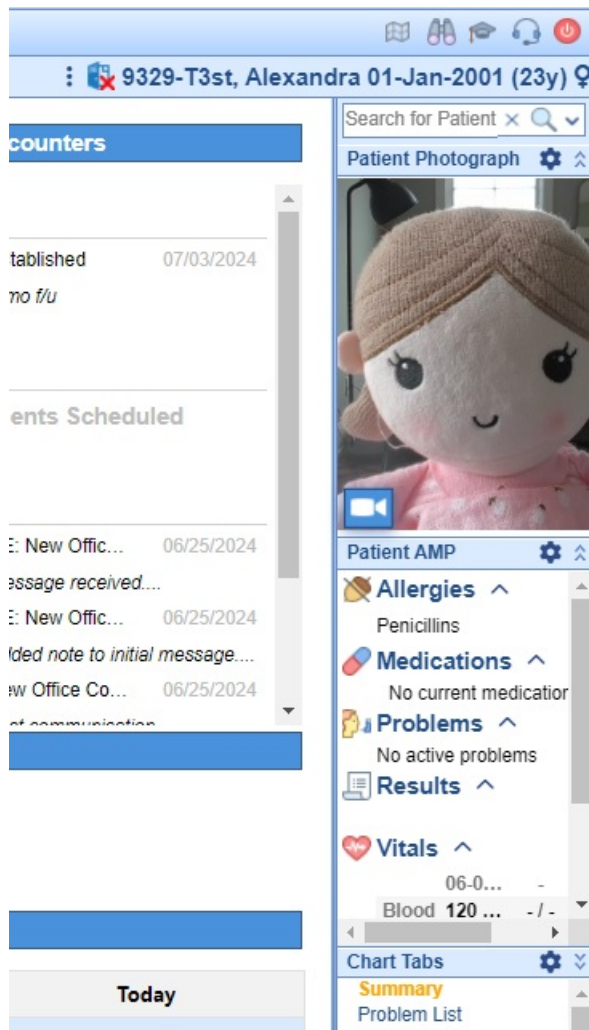
Sliding Fee

Immun. Registry

Patient Extension

Miscellaneous

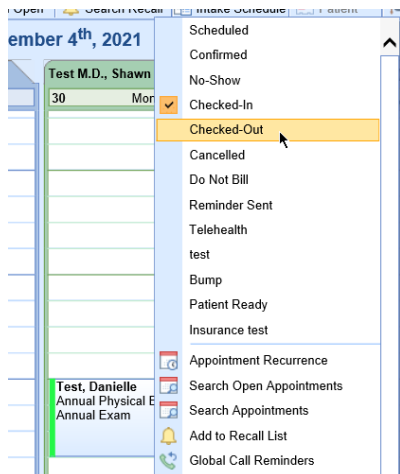
Referral Tracking



Check Patient Out

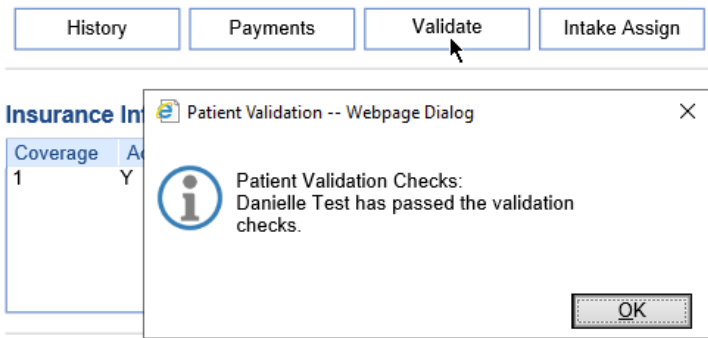
How to Check-Out Appointments **Video Guide**

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

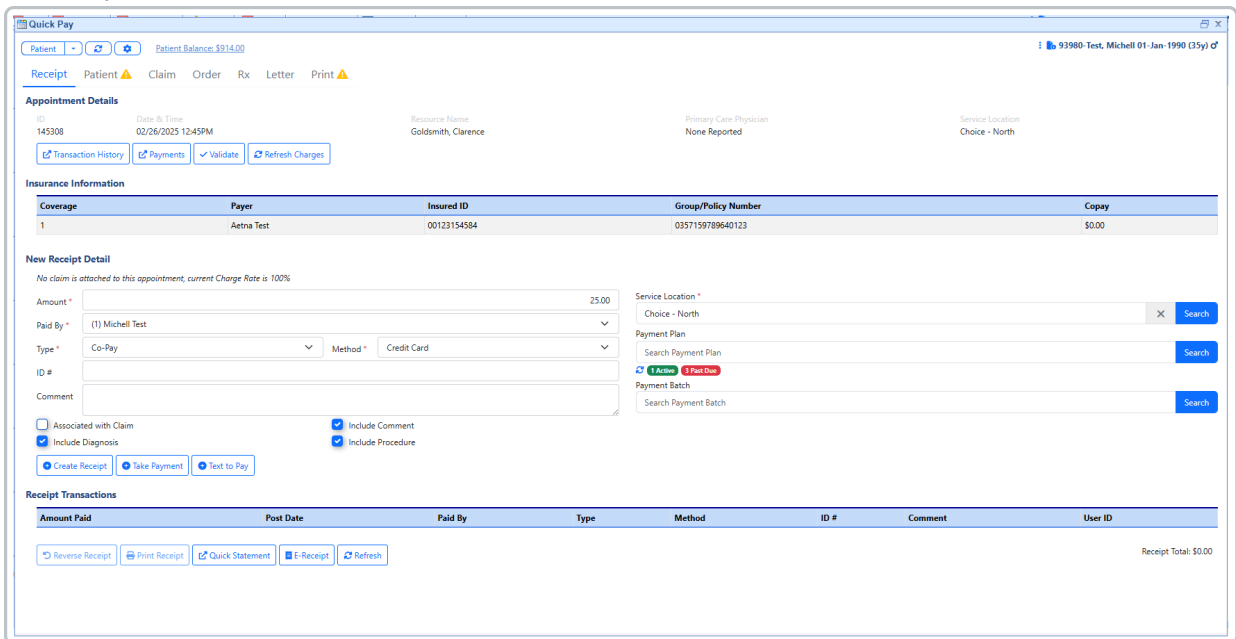


2. The Quick Pay screen will load, where the Patient Validation verification can be ran again, ensuring all

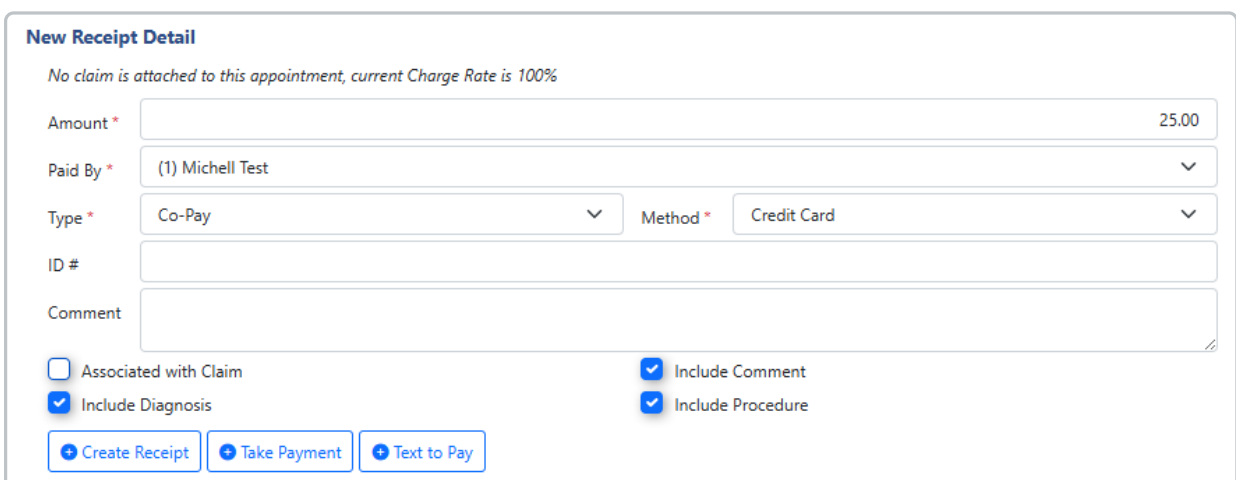
necessary information has been entered



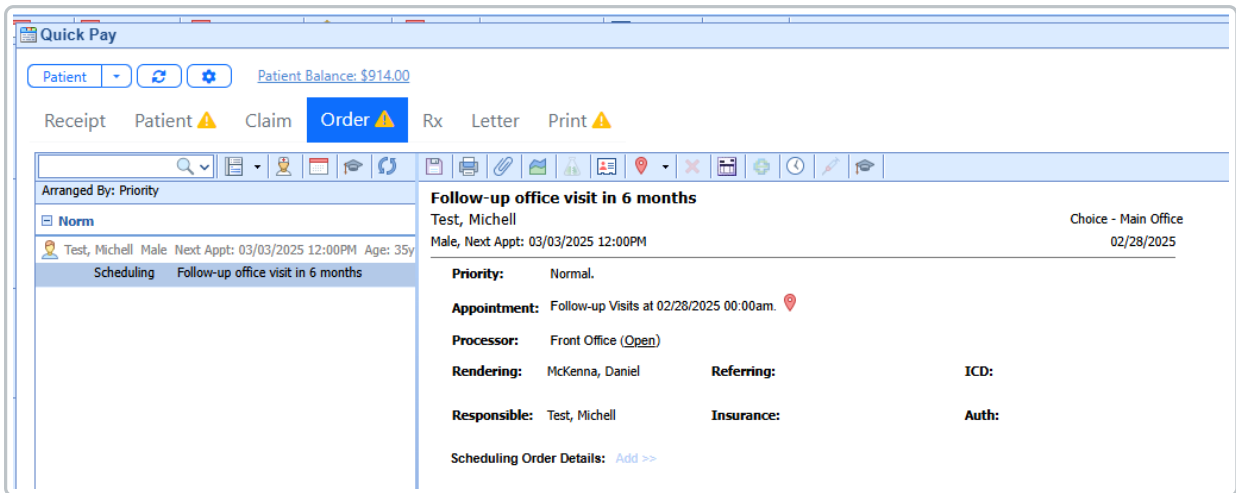
3. If your practice does not take copays at check-in, the patient payment can be taken at this time from the Quick Pay window.



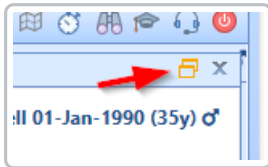
4. Simply enter the Payment Amount, Payment Type (Co-pay), and Payment Method in the **Receipt Detail** area of the Quick Pay window.



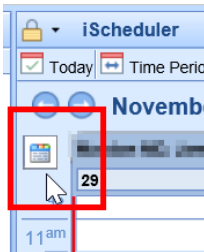
5. The yellow yield icon within the tabs indicate an item is ready to be printed or processed. For example, a pushpin above Orders could indicate that a follow up appointment requires scheduling.



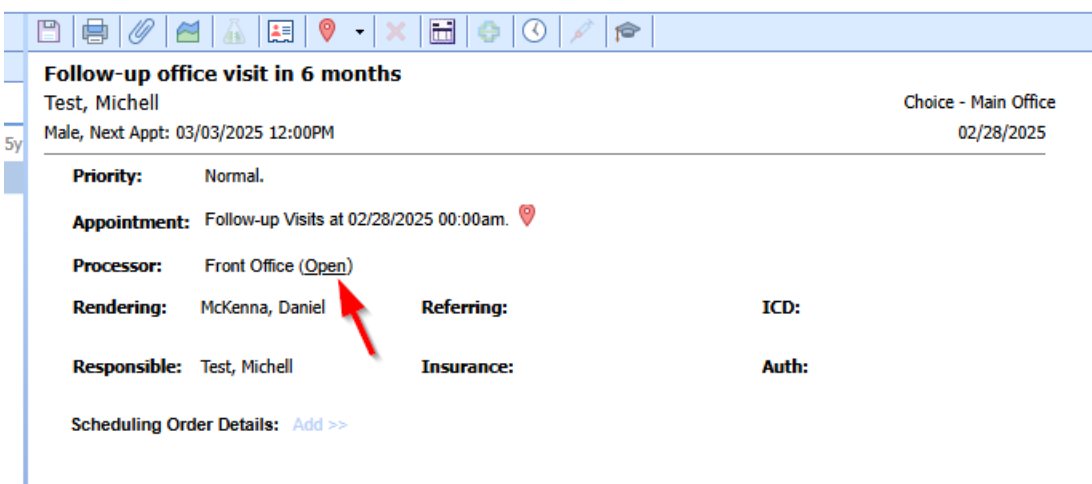
6. Selecting this tab displays Open Orders. Select the order below the patient's name. This will display the order details in the right side of the window. After reviewing the order details, you can schedule the appointment by selecting the double boxes in the upper right hand corner of the QuickPay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

Active Report Viewer - Internet Explorer

Page 1 of 1 Choice CustomerReceipt

Customer Receipt

Friendly Family Physicians PC LL1
1 Virginia Avenue
Suite 500
Indianapolis, IN 46204-1928
(317) 687-8111

NPI: 1234567890, TIN:
Federal ID#: 36-4492602

Patient		Appointment	
Chart #: 26135 Danielle Test DOB: 01/01/1985 100 Main St Knoxville, TN 37922	ID #: 85526 Appointment Date: August 30, 2021 8:00:00 am Check In: 08/31/2021 10:52AM (EDT) Check Out: 08/31/2021 12:44PM (EDT) Rendering Provider: Test M.D., Shawn M.		

Date	Payer	Payment Method	Comment	Amount
08/31/2021 1:25PM (EDT)	Danielle Test	Co-Pay Credit Card		\$25.00
Total:				\$25.00

Future Appointments				
Date	Time	Rendering Provider	Referring Provider	Prior Authorization
02/28/2022	8:00:00 am	Test M.D., Shawn M.		

Over 150 Days	121 - 150 Days	91 - 120 Days	61 - 90 Days	31 - 60 Days	Current	Total Balance
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

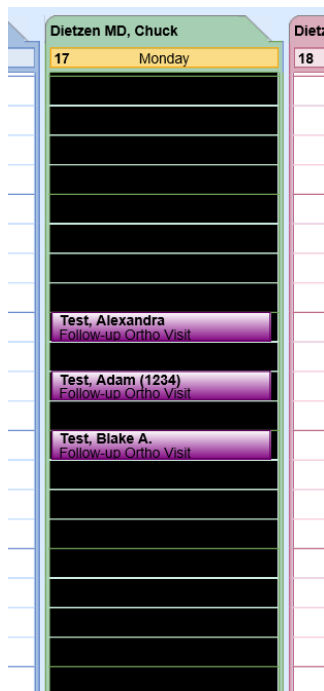
Receipt Batch ID: 17291 Balances may not include insurance pending or current day's charges.

Special Message with many characters

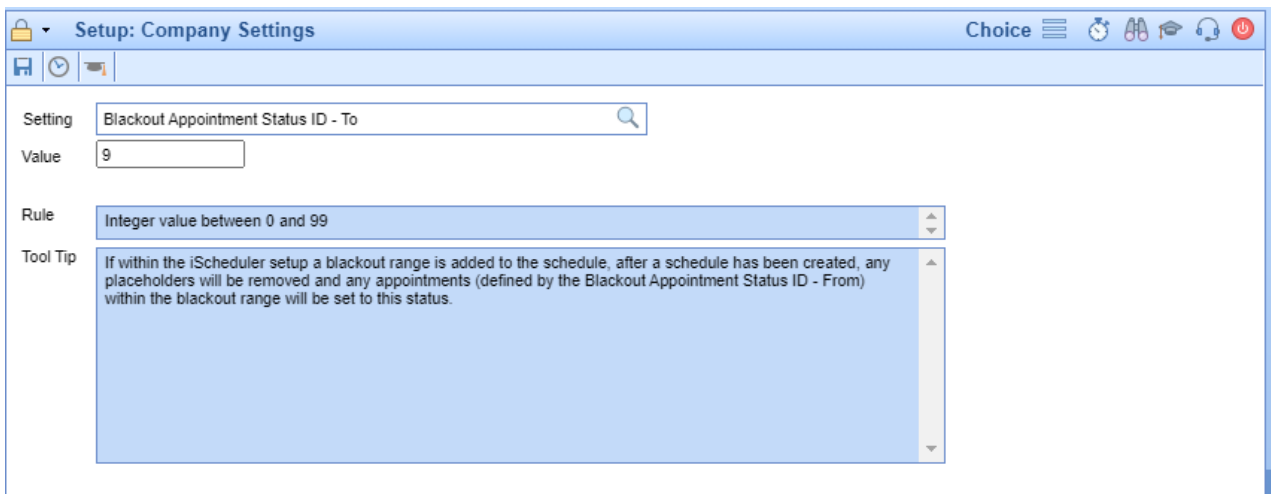
Printed on 08/31/2021 1:27PM (EDT) iSalus Healthcare Page 1 of 1

Using the Blackout Overlay Appointment Status ID

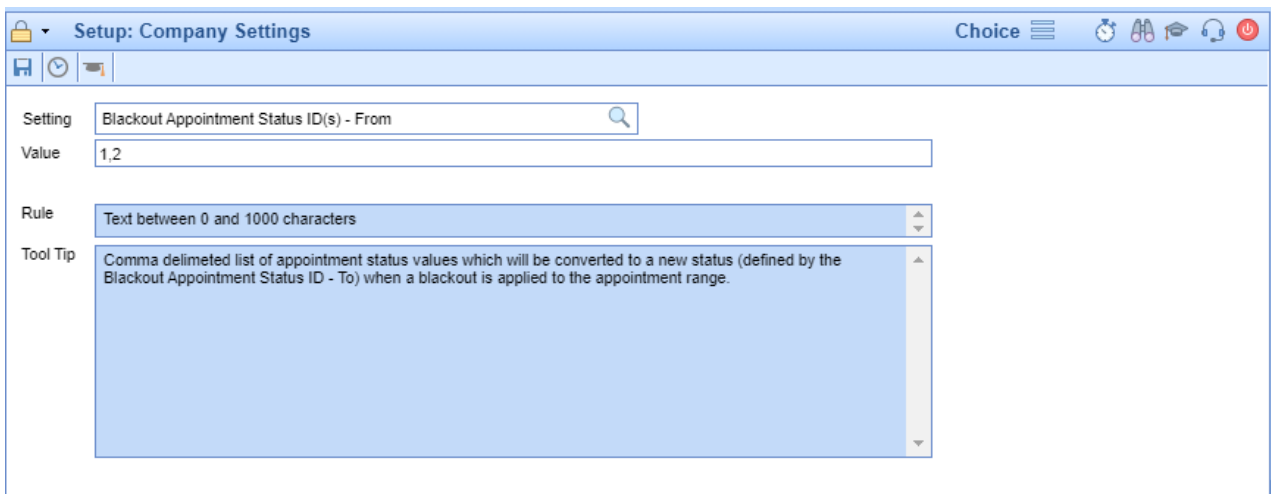
If a **Blackout Overlay** has been applied to a schedule, and the **Blackout Appointment Status ID - To/Blackout Appointment Status ID - From** settings have been configured, any existing appointments will be updated and placeholders will be removed as defined by both of the **Blackout Appointment Status ID** settings.



Existing appointments will be updated to the [Appointment Status](#) configured in the Blackout Appointment Status ID - To.



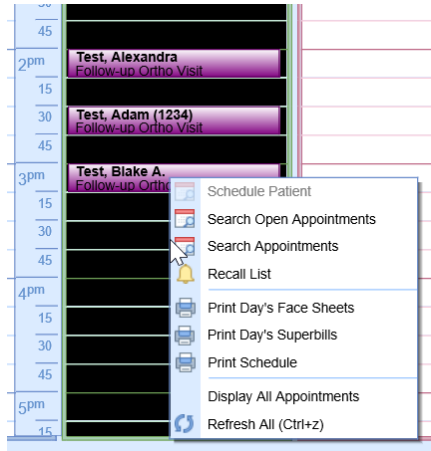
As defined by the Blackout Appointment Status ID - From.



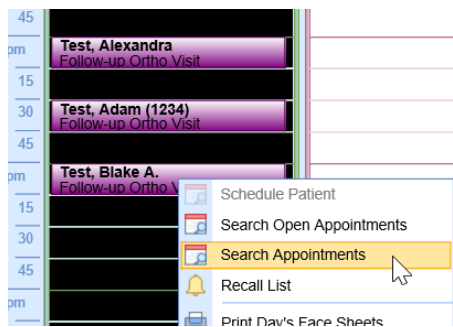
Front Office users or Administrators may be trained to review these appointments in the event that they need to be rescheduled.

Steps:

- 1. Right click over the schedule in the iScheduler



- 2. Select Search Appointments



- 3. Using the fields provided, set the search criteria to the corresponding data for the Blackout Overlay

A screenshot of the 'Search Appointments' dialog box. The dialog has several input fields: 'Chart #' (empty), 'First Name' (empty), 'Last Name' (empty), 'Begin Date' (05/17/2021), 'Primary ID' (dropdown), 'Status' (Do Not Bill), 'Resource' (Chuck Dietzen, MD), 'End Date' (05/17/2021), 'Value' (empty), 'Type' (dropdown), 'Location' (dropdown), 'Birth Date' (empty), and a 'Value' field containing '250'. There are 'Search' and 'Clear' buttons. Below the input fields is a 'Search Results' table with columns: #, Sel, Start, End, Type, Chart, Last, First, Resource. The table is currently empty with the text 'Search to Populate'. At the bottom, there are 'Letters' (dropdown), 'ReminderPro' (checkbox), and 'Close' (button).

PRO TIP: Practices may choose to use the Search Appointments to populate a list of patient appointments that need to be rescheduled, due a Blackout being applied to the schedule. Therefore, the criteria should be set to limit the number of results to only those that apply to the Blackout Overlay

occurrence.

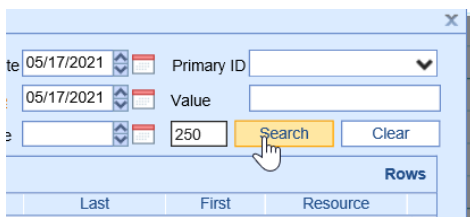
Status = the appointment status used in the Blackout Appointment Status ID - To

Resource = the resource in which the Blackout Overlay was applied to

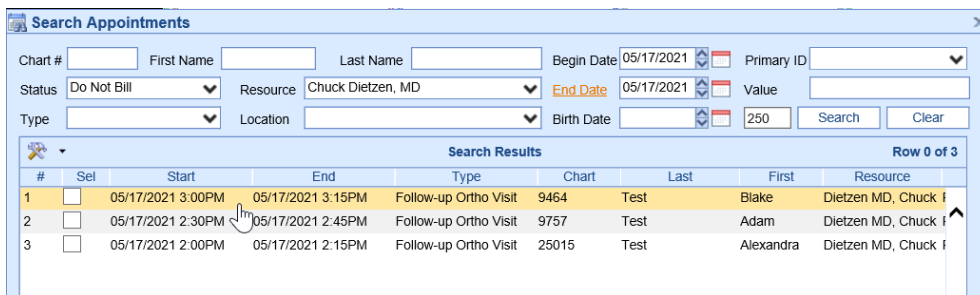
Begin Date = the date the Blackout Overlay was applied to

End Date = typically the same date as the begin date

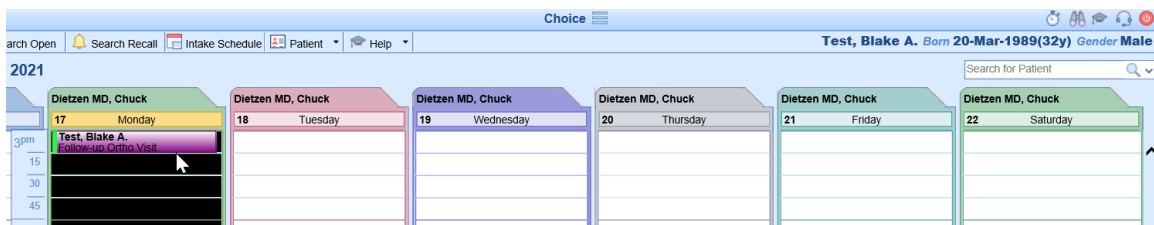
4. Click Search



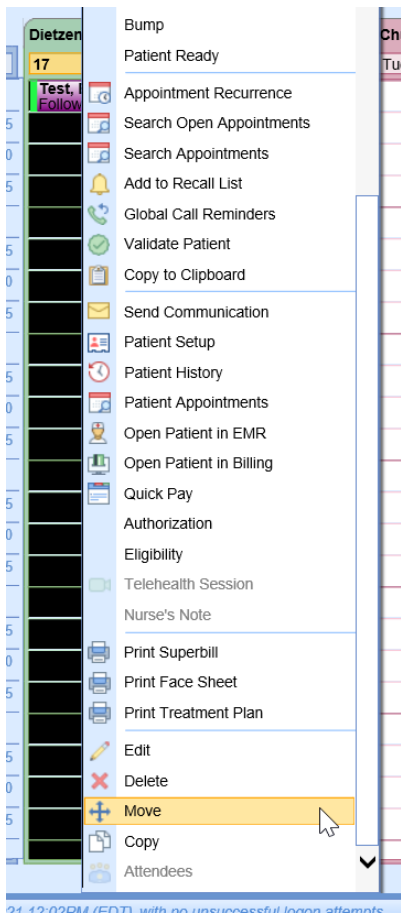
5. A list of results will populate in descending order



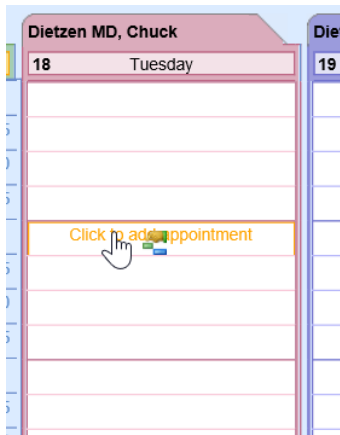
6. To open the appointment, double click on the search result



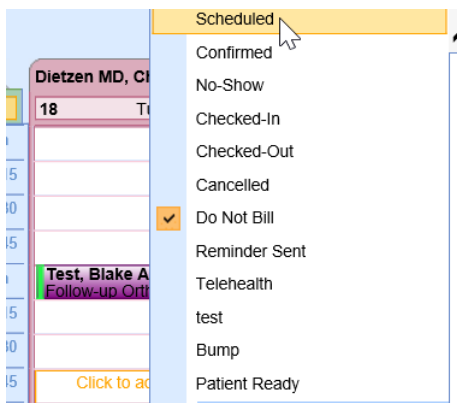
7. Right click over the selected appointment and select Move



8. Move the appointment to a new appropriate place



9. Right click over the appointment and change the Status to Scheduled (or any appropriate status for scheduling)



10. Right click over the schedule to re-open the Search Appointments report

The screenshot shows the 'Search Appointments' window with the following search criteria: Chart #, First Name, Last Name, Begin Date (05/17/2021), Primary ID, Status (Do Not Bill), Resource (Chuck Dietzen, MD), End Date (05/17/2021), Value, Type, Location, Birth Date, and 250. The search results table is as follows:

#	Sel	Start	End	Type	Chart	Last	First	Resource
1	<input type="checkbox"/>	05/17/2021 3:00PM	05/17/2021 3:15PM	Follow-up Ortho Visit	9464	Test	Blake	Dietzen MD, Chuck f
2	<input type="checkbox"/>	05/17/2021 2:30PM	05/17/2021 2:45PM	Follow-up Ortho Visit	9757	Test	Adam	Dietzen MD, Chuck f
3	<input type="checkbox"/>	05/17/2021 2:00PM	05/17/2021 2:15PM	Follow-up Ortho Visit	25015	Test	Alexandra	Dietzen MD, Chuck f

11. Re-run the report by selecting Search

The screenshot shows the 'Search Appointments' window with the 'Search' button highlighted. The search criteria are the same as in the previous screenshot. The search results table is as follows:

#	Sel	Start	End	Type	Chart	Last	First	Resource
1	<input type="checkbox"/>	05/17/2021 3:00PM	05/17/2021 3:15PM	Follow-up Ortho Visit	9464	Test	Blake	Dietzen MD, Chuck f
2	<input type="checkbox"/>	05/17/2021 2:30PM	05/17/2021 2:45PM	Follow-up Ortho Visit	9757	Test	Adam	Dietzen MD, Chuck f
3	<input type="checkbox"/>	05/17/2021 2:00PM	05/17/2021 2:15PM	Follow-up Ortho Visit	25015	Test	Alexandra	Dietzen MD, Chuck f

12. Repeat steps until all appointments haven been rescheduled and statuses have been updated

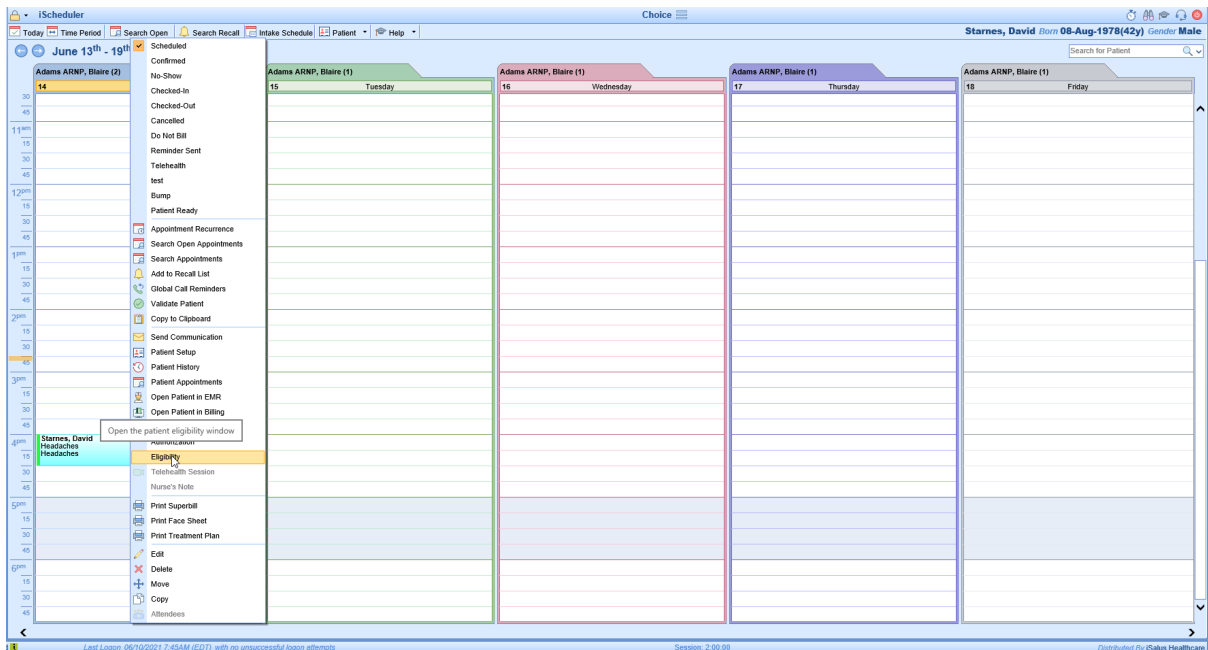
Checking Insurance Eligibility

Patient Eligibility can be accessed from multiple screens within the system. This document will reference the specific workflow for checking insurance eligibility from iScheduler but in addition the same workflow applies when accessed from:

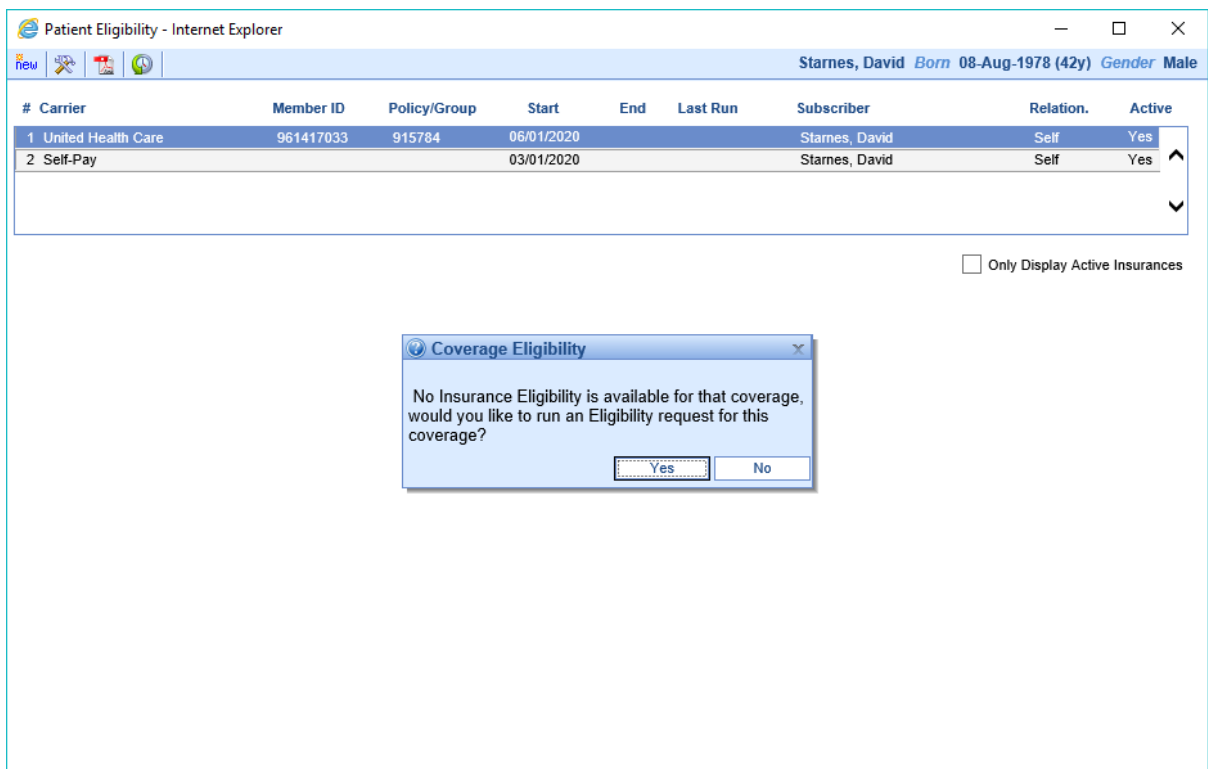
- Patient Setup: Select Eligibility from the More button
- Patient Insurance Setup Window: Use the Eligibility button
- Billing Query: Select Eligibility from the Patient card toolbar icon
- Quick Claim Window: Select the Eligibility toolbar icon

Workflow

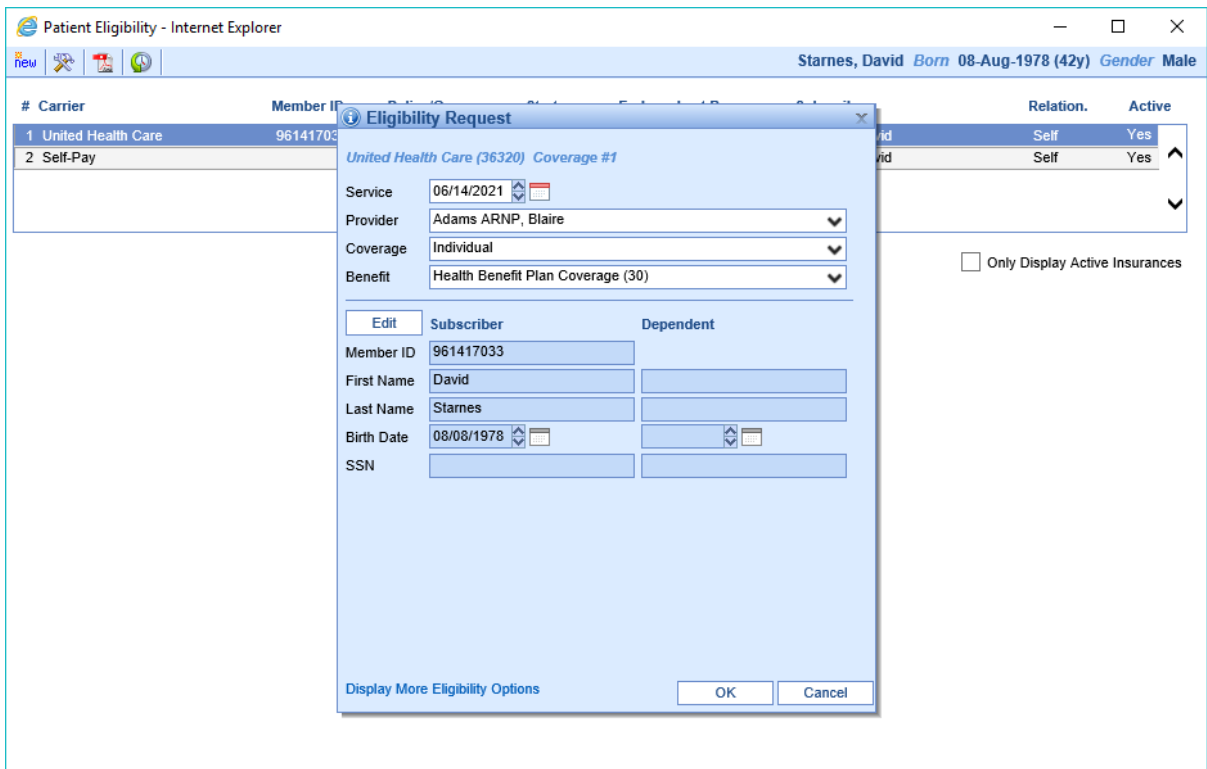
1. Within the iScheduler, from either the right-click Appointment menu or from the Patient Index Card menu, select Eligibility.



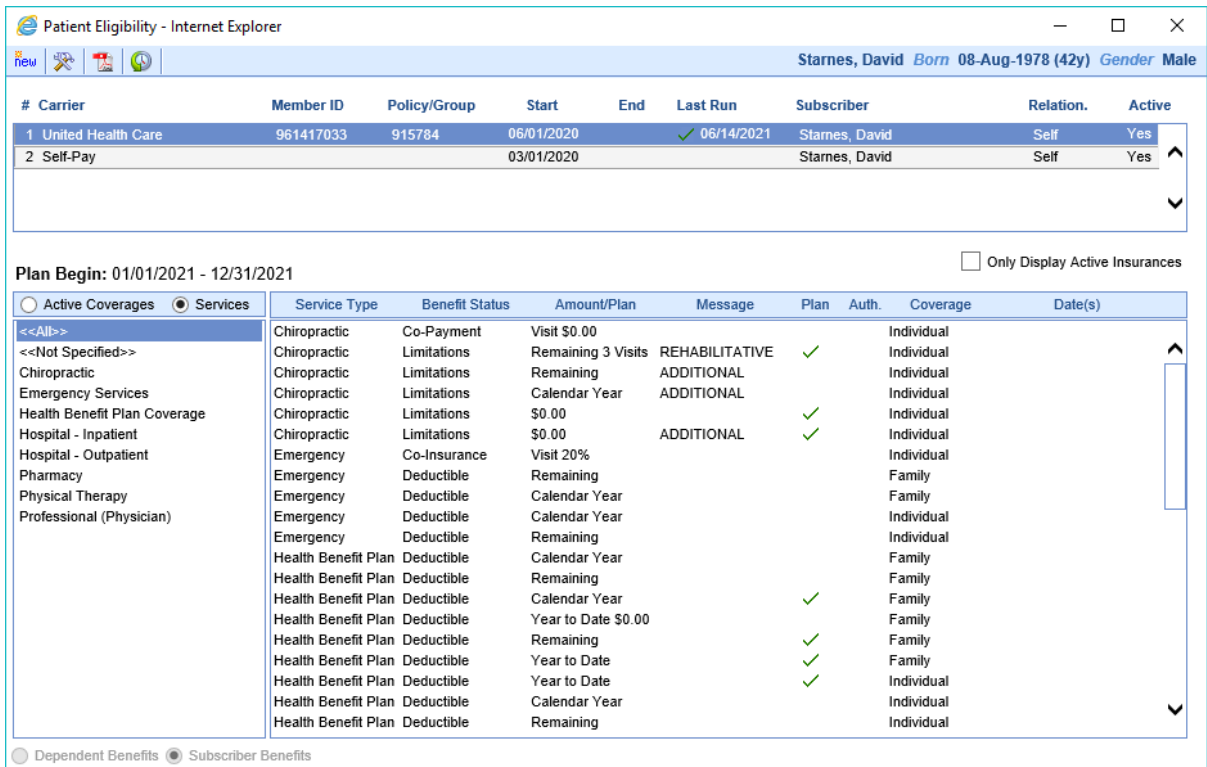
2. Select the insurance coverage to be checked. If the eligibility has been checked in the past, you will be able to view the previously obtained information. If eligibility has never been run for this patient, you will be prompted to run a check. In this case, Click Yes to run the eligibility check.



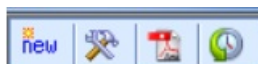
3. Verify that all the coverage information is correct and press OK.






- The coverage information will be returned after the response is received from the payer. Review the returned eligibility information either by Active Coverages or Services.



Additional information can be gained using the Eligibility toolbar



	Allows you to add/update insurance coverage to be checked.
	Opens the PDF report created upon checking eligibility. This report contains detailed information about the patient's coverage.
	Gives access to the patient's eligibility history by date.
