iScheduler Guides

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Add a New Patient to the Database

Add a New Patient to the Database

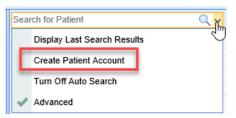
New patients can be added to your database with either the Quick Create, Create MML or Full Patient Setup. **Video Guide**

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	٩.
Cr	eate Patient Account	x
First Name *	Test	
Last Name *	Patient	
DOB *	01/01/2001 🚔 💳	
Gender *	Male 🗸	
Home *	Ext	
Work *	Ext	
Other *	(888) 888-8888 Ext	
✓ Responsi	ble Party Same as Patient	
Setup	Create Create - MML Canc	el

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	Q 🗸
(Cre	eate Patient Acc	ount			×
First Name	*	Test				
Last Name	*	Patient				
DOB	*	01/01/2001 ᅌ				
Gender	*	Male	~			
Home	*		Ext			
Work	*		Ext			
Other	*	(888) 888-8888	Ext			
✓ Respon	sit	ble Party Same	as Pati	ent		
Setup		Create	Creat	te - MML	Canc	el

2. Connect Patient

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

Key	Requested By	Date	Status
			~
			~
Print Key	Delete Key Audit Ke	ev l	Connect Patient

Full Patient Setup

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

(Create Patient Account								
First Name	*	I							
Last Name	*								
DOB	*	\$							
Gender	*	Unknown 🗸							
Home	*	Ex	t						
Work	*	Ex	t						
Other	*	Ex	t						
✓ Responsible Party Same as Patient									
Setup		Create Cr	eate - 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 Save	r⇔ … Train More								New	Patient Setup	۶¢
	Middle Last • Nick Suffix	Test Patient]]]	ddress Address 1 Address 2 City State Zip	• 123 Test Lane	Count	try U:	SA 🗸	RHC Signature	01/01/2001	
Summary	Demographics Gender	Male	• 7		Home	•	Ext			Status Marital		~
Demographics	Ethnicity		~	R	Work		Ext			Employed		~
Insurance	Race		↓ ✓	M	Other		Ext			Employer		
Responsible Party	Lang.		~		Email					Student		~
Emergency Contact	Location	Primary Location	Q	ļ	Reminder				~			
Comments	 Active 	 Reportable 	Do NOT print S	taten	ments							
Case Management	Provider											
	PCP	Primary Care Physic	ian									
Sliding Fee	Referring	Referring			<u> </u>)						
Immun. Registry	Doctor	Doctor			<u> </u>							
Patient Extension	Rx Hist.				~							
Miscellaneous	Identification											
Referral Tracking	Primary	~										
	Secondary	~										
	Old ID #1											
	Old ID #2											
	Old ID #3											
	Responsible	Party Same as Patie	nt									

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	f ^œ ••• Train More		Pa	tient, Test Bor	n 01-Jan-2001(20y) Gender Male
	Cov. Active	Payer		Pri	mary ID	Group/Policy #	Copay
							^
	Guarantor						
Summary	Coverage	1 🗸	Insured (Same as Patient	Individual	Company	Populate Patient Informatio
Demographics	Eist	Test	Address 1			Phone	Ext
Insurance	Middle		Address 2			Signature	
	Last	Patient	City				
Responsible Party	Suffix		State	~	Country	Zip Code	
mergency Contact	Gender	Male 🗸	Email				
Comments	Relationship	Self 🗸	Employer				
Case Management	DOB	01/01/2001	Property Casu	ally			
Sliding Fee	Insurance Policy						
Immun. Registry	Start	05/27/2021 🔅 🗂 End	0	Benefit Reset	0		
Patient Extension	Payer	Aetna U.S. Healthcare		Insured ID	Member ID # 🗸	XYZ123	×
	Type	Commercial	~	Secondary ID	~		
Miscellaneous	MSP Reason		~	Group Name			
Referral Tracking	Copay	🖲 \$ O %		Group/Policy #		Plar	n Code
	Deductible An	mount Met	0				
	Max out of Po	ocket Met	0				

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		P	atient, Tes	t Born O	1-Jan-	2001(20y) G	ender M	ale
	Hell Gave	Train more								
	# First Nam					Primary ID	R	elationship		
Г]	1 Test	Patient								^
										~
	Responsible Par	ty								
Summary	Order	1 🗸	Type	Same as Patie	nt 🔾 Individu	al O	Company	Populat	e Patient In	formation
	First	Test	Address 1				Home		ем 🕂)
Demographics	Middle		Address 2				Work		Ext	
Insurance	Last	Patient	City				Other	(888) 888-8888	Ext	
Responsible Party	Suffix		State	~	Country	~	Zip Code		1	
Emergency Contact	Gender	Male	✓ Email						-	
	Relationship	Self	 Employer 							_
Comments	DOB	01/01/2001	ID Type		V ID Value					_
Case Management		lient Statements	10 1990							
Sliding Fee		у Туре		✓ Security Da	ta					
Immun. Registry		int has statements that are	marked as past-due							
Patient Extension										
Miscellaneous										
Referral Tracking										

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

Patient Setup	New Save	Train More	1	Patient,	, Test Born 01-Jan-2001(20y)	Gender Male 🔎
	Primary Contact Name Relationship Home Phone Work Phone Other Phone Email	Sally Patient Mother (555) 555-5555		Secondary Contac Name Relationship Home Phone Work Phone Other Phone Email	t George Patient Father ExtExt	~
Summary	Granted Fu		May Pick up Medications		I PHI Access Aay Pick up Med	ications
Demographics	Exclusions to P	н		Exclusions to P	941	
Insurance Responsible Party			Ĵ		I	Ĵ
Emergency Contact	Comments			Comments		
Comments			^			^
Case Management			~			~
Sliding Fee						

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

30 6 13 20	Mo 31 7 14 21 28	Tu 1 8 15 22	2 9 16 23	Th 3 10 17 24	Fr 4 11 18 25	5 12 19 26
P B G N	sou erso rowi iroga	onn n Mi an N e Sc	D, M 1D, v hed	Jam ule		*
S	ain imp: oup				mer	
N N C	lins r lercy licol usto n-Ti	/ Cli e Le om	nic wis			^

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

	tes	st	×Q
			Ľ
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)



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

Pain Dr., R	obert (0)		Pain Dr.,	Robert (1)	Pain Dr., Robert (0)
29	Tuesday		30	Wednesday	1 Thursday
		5 ^{am}			
		15			
		30			
		45			
		6 ^{am}			
		15			
		30			
		45			
		7 ^{am}			
		15			
		30			
		45		Click to add appointment	
		8am		<u>(</u>)	
		15			

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

🖆 Schedul		X						
Patient *	Patient * Test, Kelly							
Sched. With								
Sched. On	06/30/2021	8:00AM	To 8:15AM					
Appt. Type *	Established Pa	atient Visit		~				
Location *	Greensboro O	ffice		~				
Chief Compla	<u>iint</u>			Default				
Review test	results			^				
				\sim				
Comment				Default				
				\sim				
				\sim				
Referring	Referring			Q				
Prior Auth. #								
Assign Auth.				~				
			ОК	Cancel				
			\					

Schedule via Placeholder

- 1. Select appropriate Resource and date for desired appointment
- 2. Select the Placeholder, right click, Assign

Smith, Talis (0)	_	Smith, Talis (0)
28 Monday		29 Tuesday
	7 ^{am}	
	15	
	30	
	45	
Greensboro Office	8 ^{am}	Greensboro Office
VIP Patient Visit		VIP Patient Visit
	15	
	30	
Greensboro Office Established Patient Visit	45	Greensboro Office Established Patient Visit
Greensboro Office New Patient Visit	📑 Assign	Greensboro Office New Patient Visit
New Follow Val	レズ — 10	HOW F DECK VIAL
Greensboro Office	30	Greensboro Office
Established Patient Visit Greensboro Office		Established Patient Visit Greensboro Office
VIP Patient Visit	45	VIP Patient Visit
	10 ^{am}	

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

	📫 Assign						X
1	Patient *	Test, Kelly					Q
1	Sched. With	Smith, Talis					
	Sched. On	06/28/2021		8:45AM	То	9:00AM	
	Appt. Type *	Established Pa	atie	nt Visit			~
1	Location *	Greensboro O	ffice	e			~
	Chief Compla	<u>iint</u>					Default
	Follow-up la	bs					~
1							\sim
1	Comment						Default
1							~
1							\sim
	Referring	Referring					Q
	Prior Auth. #						
	Assign Auth.						~
					Ok	ներու ներաներություններություններություններություններություններություններություններություններություններություն	Cancel
l						\mathbf{O}	

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.

🔒 🚽 iS	cheduler				
🔽 Today 🛛	🕂 Time Pe	eriod 🔽 S	earch Open	🔔 Search	Re
Resource	Smith, Tali	s		•	~
Location	Greensbor	o Office		•	~
Length				•	~
Appt.Type	2 Items				~
Period *	200	Days 💿 W	eeks 🔵 Mo	nths 🔵 Yea	ars
Plus/Minus	7 days	5	Clear	Search	
Open Appo	ointments	Oate	O Resource	e 🔿 Locatior	n
Wednesda	ay, 07/07/20	21			
8:00 AM - 3		Smith, Tali Greensbor	s o Office (P)		
VIP Patien 9:45 AM - 1 45		Smith, Tali Greensbor	s o Office (P)		
VIP Patien					
Thursday, 8:00 AM -	07/08/2021	Smith, Tali			
45 🗳 VIP Patien			s o Office (P)		
9:45 AM - 45 🗳 VIP Patien		Smith, Tali Greensbor	s o Office (P)		
Monday, 0	7/12/2021				
8:00 AM - 6 45 🚅 VIP Patien		Smith, Tali Greensbor	s o Office (P)		
9:45 AM - 45 🗳 VIP Patien		Smith, Tali Greensbor	s o Office (P)		

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



3. Enter Chief Complaint as needed, then select \mathbf{OK}

🛃 Assign		x
Patient *	Test, Kelly	Q
Sched. With	Smith, Talis]
Sched. On	07/20/2021 9:45AM To 10:30AM]
Appt. Type *	VIP Patient Visit	~
Location *	Greensboro Office	~
Chief Compla	<u>iint</u>	Default
1 year follow	v-up	~
		\sim
Comment		Default
		\sim
		\sim
Referring	Referring	Q
Prior Auth. #		
Assign Auth.		~
Assign Aum.		•
	ОК	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.

			Scheduled	
		~	Confirmed	
		_	No-Show	
			Checked-In	
			Checked-Out	
		:0	Appointment Recurrence	
		- 0	Search Open Appointments	
		Q	Search Appointments	
		<u></u>	Add to Recall List	
		Ś	Global Call Reminders	
		0	Validate Patient	
-	Global Call Ren	ninde	r	-
	Date	Meth	nod Results	
	01/05/2020 1:08PM	Phon	e Call Message Delivered	

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

ber 4 th , 2021	~	Scheduled	
		Confirmed	
Test M.D., Shawn M. (1		No-Show	
30 Monday		Checked-In	
	-	Checked-Out	
Test, Danielle		Cancelled	
Annual Physical Exam Annual Exam		Do Not Bill	
-		Reminder Sent	
-		Telehealth	

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

Patient Validation Webpage Dialog	\times
Patient Validation Checks: Danielle Test is missing the following field(s) Patient's Signature on File Patient's Signature on File Date Test, Danielle Primary Insured Signature Test, Danielle Primary Insured Signature Date	
QK	

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

	Quick Pay -	26135 - Danielle Test	Bala
		40	
-			

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

History	Payments	Validate	Intake Assign
Insurance In Coverage A 1 Y			×
	checks.		<u>O</u> K

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

	., 10	135 - Danielle	Durun			1 Receipt	2 Claim	3 Orders	4 Prescription	5 Letters	6 Print Qu
						Treceipt	2 Olaini	2 010613	- r rescription	2 Letters	<u>o</u> rnin du
ppointm			_								
ppt. ID	Date &		Resource			y Care Phys	sician	Service Lo			
5526	08/30/2	021 8:00AM	Test M.D.,	Shawn M.	None R	eported		Family Fire	t Physicians	Q	
Histor	ry	Payments	Valida	te Int	take Assign]					
surance	Inform	nation									
Coverage								ed ID	Group/Policy		Сорау
	Y	BCBS Anthem					9876	54		1	\$0.00
nter New	Recei	pt Detail									
lo claim is a ppointmen Amount Paid By	attachec t Estima * \$25.0 * (1) Da	to this appointm ted Balance: \$0. 0 anielle Test	00 Noclaim,ι	unable to calcu	ulate	v] Include Com] Receipt Ass	ment on Rece ociated with C	laim 🗸	Include Proce	
lo claim is a ppointmen Amount Paid By Type	attached t Estima * \$25.0	to this appointm ted Balance: \$0. 0 anielle Test	00 Noclaim,ι	-	ulate] Receipt Ass	ociated with C	laim 🗸	-	iosis on Receij adures on
lo claim is a ppointmen Amount Paid By	attachec t Estima * \$25.0 * (1) Da	to this appointm ted Balance: \$0. 0 anielle Test	00 Noclaim,ι	unable to calcu	ulate			ociated with C	laim 🗸	Include Proce	
lo claim is a oppointmen Amount Paid By Type D #	attached t Estima \$25.0 (1) Di Co-Pi	to this appointm ted Balance: \$0. 0 anielle Test ay	00 Noclaim,ι	unable to calcu	ulate] Receipt Ass	ociated with C	laim 🗸	Include Proce	
lo claim is a ppointmen Amount Paid By Type D # Comment	attached t Estima \$25.0 (1) Da Co-Pa	to this appointm ted Balance: \$0. 0 anielle Test ay tions	00 Noclaim,ι	unable to calcu	ulate] Receipt Ass	ociated with C Dt Take F	laim 🗸	Include Proce	
o claim is a ppointmen Amount Paid By D # Comment ecceipt Tr	attached t Estima \$25.0 (1) Da Co-Pa	to this appointm ted Balance: \$0. 0 anielle Test ay tions	00 No claim, u	Credit Card	ulate		Receipt Ass	ociated with C Dt Take F	aim 🔽	Include Proce	edures on

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%

Annointmer	at Estimated Balance: \$0.00	o claim, unable to calculate
Amount	• \$25.00	
Paid By	 (1) Danielle Test 	✓
Туре	* Co-Pay 🗸 🗸	Method* Credit Card 🗸 🗸
ID #		
Comment		^
		\vee

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

o claim is attac	eccipt Detail Iched to this appointment, current Charge Rate is 100% stimated Balance: \$0.00 No claim, unable to calculate		
Paid By 1	525.00 (1) Danielle Test ✓ Co-Pay ✓ Method* Credit Card ✓	Include Comment on Receipt Receipt Associated with Claim Create Receipt Take Payment	 ✓ Include Diagnosis on Reco ✓ Include Procedures on Receipt

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

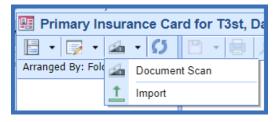
Scan Patient Documents and Cards

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

	ठाँ 🔒 🎓 🖓 🥝
ule 🔝 Patient 🕕 🎓 Help 🔹	📳 T3st, Danielle <i>Born</i> 01-Jan-1975(47y) <i>Gender</i> Female
Primary Insurance Card	Search for Patient 🛛 🗙 🔍 🗸
Secondary Insurance Card	
Patient Photograph	

Select whether to Scan or Import the document



To Scan

Custom Scan

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

*More information on these settings <u>Custom Scan</u>

Custom Scan	
Source *	~
Show Scanner UI ✓ Use ADF Auto Remove Blank Page 2-sided Scan	
Pixel Type 🛛 B&W 💿 Gray 🔿 Color	
Resolution * 100 (default) V	n

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 <u>Save</u> <u>Documents</u>

Save Docu	iments									
Filename										
* pdf										
Received										
Туре										
Comment	۵ ۲									
Menu *	Patient 🗸									
Folder *	Insurance.Cards.Primary Insurance									
Patient *	T3st, Danielle									
Review Assign to Us	er/Group for Review									
Search for	Search for Users and Groups									
	*									
	•									
Review Comment										
🔶 Normal	-									
🗸 Clear S	ettings After Upload Upload									

Toolbar





Deletes a single page selected

	_
_ ^	П
\sim	

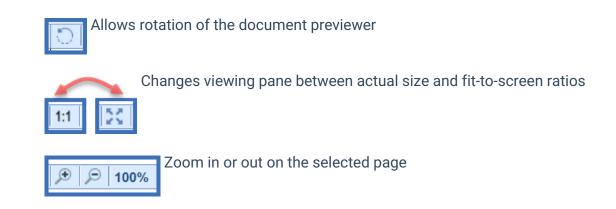
Clears all pages on the screen



Moves through pages to display in the viewing pane



Filter useful in eDocuments



To Import

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

File Import	x
Select File(s) Click to open file dialog	
> This PC > Desktop > Demo	✓ Č Search Demo
v folder	■ → ()
N Iir Joemo Insurance Card.jpg Demo Photo ID.jpg	
File name:	All Files (*.*) V Open Cancel

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.

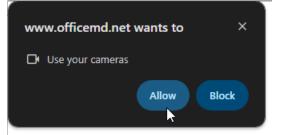
- 1. Navigate to iScheduler
- 2. Open the patient's chart
- 3. Navigate to the Patient dropdown menu in the toolbar

1	G • iScheduler
	🔽 Today 🖶 Time Period 🛛 🔽 Search Open 🛛 🔔 Recall 🗧 Intake 🛛 📃 Patient 🏋 🕿 Help 🔻
	G June 23 rd - 29 th , 2024

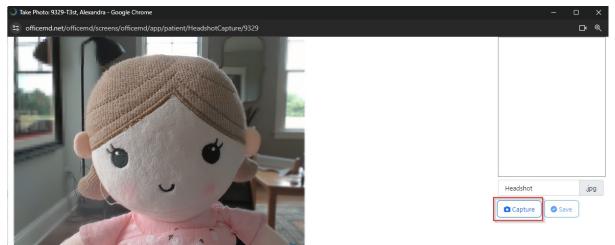
4. Select Take Photo

		Patient 🔹 🎓 Help 🔹	_	
		Primary Insurance Card		
		Secondary Insurance Card		
s	8	Patient Photograph		Contract, Science, Construct, St.
		Take Photo	sday	26 Wednesday
		Quick Scan Open the head	dshot capture window to	capture a patient photograph
	Μ	Send Communication		

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

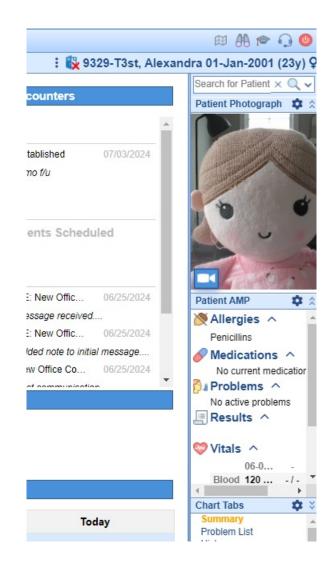


7. The system will automatically label the image as "Headshot." Users may choose to modify the name of the file. Click **Save**



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

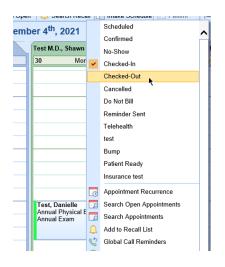
Patient Setup			T3st, Alexandra Bor	m 01/01/2001(23y) Gender Female 🔎 🏟
	W O Alexandra T3st H W	ome	PCP SSN Marital Language	Employer Ethnicity Race
	Next 3 Visits	and the second second	- Distances - Distance	
Summary			Surger Surger	Contract of the Aut
Demographics	CONTRACTOR AND ADDRESS OF	article and disclose - Barris		
Insurance	Balance: 0.00 Current 31 - 60 61 - 90	91 - 120 121 - 150 151 - 1	80 181 - 365 365+ Days	
Responsible Party	0.00 0.00 0.00	0.00 0.00 0.00	0.00 0.00	
Emergency Contact				
Comments				
Case Management				
Dialysis				
Sliding Fee				
Immun. Registry				
Patient Extension				
Miscellaneous				
Referral Tracking				



Check Patient Out

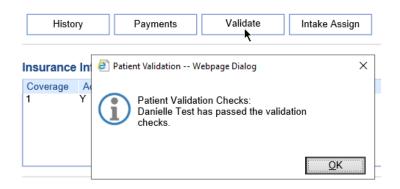
How to Check-Out Appointments Video Guide

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.

Image: International Calinal Control Factor Reference Image: International Control Factor Referenc	8												Quick Pay
Appindement Parkan Series Locations Manual Camponent Balch Series Locations Manual Camponent Balch Manual Camponent Balch Manual Camponent Balch Manual Camponent Balch Series Locations Manual Camponent Balch Series Regard Balch S	i 01-Jan-1990 (35y) (i 🔥 93980-Test, Michell									Patient Balance: \$914.00	3.0	Patient *
Open Statistics Descent Statistics Descent Statistics Descent Statistics Descent Statistics 1000 Open Statistics										Letter Print 🗛	Claim Order Rx	Patient 🔺 🛛 🔾	Receipt
Open Statistics Descent Statistics Descent Statistics Descent Statistics Descent Statistics 1000 Open Statistics												t Details	Appointment
Instruction Holds Payment Restrict Charges Payment Nexred ID Group/Policy Number Capay 1 Aetra Test 0.012315454 0.03715978640123 50.00 Now Receiped Detail Now Receiped Detail Capay Service Location * Convert Paid by * (1) Mideal Test 25.00 Service Location * Paid by * (1) Mideal Test 25.00 Service Location * Paid by * (1) Mideal Test 25.00 Service Location * Paid by * (1) Mideal Test 25.00 Service Location * Paid by * (1) Mideal Test 25.00 Service Location * Paid by * (1) Mideal Test Convert Convert Paid by * (1) Mideal Test Paid by Convert Flan Convert Flan ID # Convert Search Payment Flan Convert Flan ID # Convert by Paid by Convert Flan Convert Batch						re Physician			Resource Name		te & Time		
Insurance life Payer Insured ID Group/Mile Number Gop/Mile Number			Choice - North			rted	None Rep		Goldsmith, Clarence		26/2025 12:45PM	02/2	145308
Format Payer Insured ID Group/Moling Number Copy 1 Action Test 0023134584 0337159789640123 50.00 Nor Receipt Detail Service Location * Colspan="4">Colspan= 4"Colspan="4">Colspan= 4"Colspan="4">Colspan= 4"Col										Refresh Charges	Payments 🗸 Validate 🦉	tion History	ピ Transacti
1 Aeton Text 00123154584 0037159789840123 \$0.00 Service Location * Coloce - North Paid By* (1) Michell Text > Coloce - North Paid By* (1) Michell Text > Coloce - North Type * Co-Ray Cedat Card > 10 # Search Rayment Plan 10 # Search Rayment Blatch 10 # Search Rayment Blatch 10 # Include Comment Search Rayment Blatch 10 # Include Procedure 11 Module Procedure Include Procedure 12 Content Rocipit Type Method ID # Comment												ormation	Insurance Infe
New Receipt Detail A colonis is statubated to this appointment, current Charge Rate is 100% A colonis is statubated to this appointment, current Charge Rate is 100% Part 6 / (1) Michell Test Type * Co-Pay Method * Credit Card Payment Plan 10 a Comment 10 a Comment Concolered with Chaim Concolered with Chai		Сорау				Number	Group/Poli		Insured ID		Payer		Coverage
Action is attached to this appointment, current Okroge Rote is 100% Anount* Anount* Anount* Anount* Conference Anount* Conference Anount* Conference Anount* Conference Conference </td <td></td> <td>\$0.00</td> <td></td> <td></td> <td></td> <td>40123</td> <td>0357159789</td> <td></td> <td>00123154584</td> <td>t</td> <td>Aetna Tes</td> <td></td> <td>1</td>		\$0.00				40123	0357159789		00123154584	t	Aetna Tes		1
Include Disprovis Include Procedure © Create Receipt © Tack to Pay Create Receipt © Tack to Pay Amount Paid Post Date Paid By Type Method ID # Comment User ID	X Search Search Search						Choice - North Payment Plan Search Payment Plar C (1Active) (2 Past Due Payment Batch	~				Co-Pay	Paid By * Type * ID # Comment
© Create Receipt © Taske Report Receipt Transactions Amount Paid Post Date Paid By Type Method ID # Comment User ID													
Receipt Transactions Amount Paid By Type Method ID # Comment User ID									5 Procedure	 Include 			
Amount Paid By Type Method ID # Comment User ID											Payment View Iext to Pay	Geceipt 🔮 lake	Create N
												sactions	Receipt Trans
D Reverse Receipt		User ID		Comment	ID #		Method	Туре	Paid By	Post Date		iid	Amount Pai
	Receipt Total: \$0.0								sh	t E-Receipt 2 Refres	nt Receipt 🛛 🛃 Quick Statemen	Receipt 🖶 Prin	D Reverse

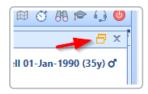
4. Simply enter the Payment Amount, Payment Type (Co-pay), and Payment Method in the **Receipt Detail** area of the Quick Pay window.

New Receipt	t Detail			
No claim is	attached to this appointment, current Charge Rate is 100%			
Amount *				25.00
Paid By *	(1) Michell Test			~
Type *	Со-Рау	~	Method * Credit Card	~
ID #				
Comment				
Associa	ated with Claim		Include Comment	/
🕑 Include	Diagnosis		Include Procedure	
● Create	Receipt Take Payment Text to Pay			

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.

Cuick Pay											
Patient Patient Balance: \$914.00											
Receipt Patient 🛆 Claim Order 🔔 Rx Letter Print 🛆											
्र 🗄 - 🙎 🗖 🎓 💋	🖺 🖶 🖉 🗃 🚠 🛤 💡 🔹 🗶 🔚 🥥 🖉 🎓										
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: 35	Male, Next Appt: 03/03/2025 12:00PM	02/28/2025									
Scheduling Follow-up office visit in 6 months											
	Appointment: Follow-up Visits at 02/28/2025 00:00am. 💡										
	Processor: Front Office (Open)										
	Rendering: McKenna, Daniel Referring:	ICD:									
	Responsible: Test, Michell Insurance:	Auth:									
	Scheduling Order Details: Add >>										

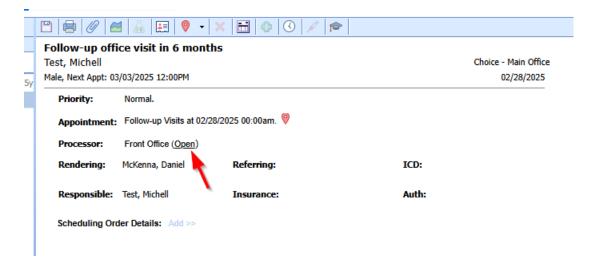
6. Selecting this tab displays Open Orders. Select the order below the patient's name. This will display the order details in the right side of the window. After reviewing the order details, you can schedule the appointment by selecting the double boxes in the upper right hand corner of the QuickPay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



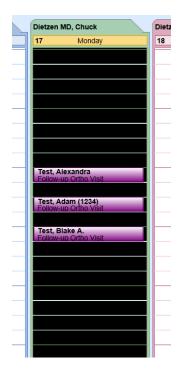
9. Once any follow-up appointments are made and orders are closed, navigate to the **Print Queue** tab to view

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.

Active Report Viewer - Internet Explorer										
and a second sec										
		Friendl	Istomer Rec y Family Physician 1 Virginia Avenue Suite 500 anapolis, IN 46204 (317) 687-8111	PC LL1		567890, TIN: : 36-4492602				
	Patient				Appointment					
Chart #: 26135 ID #: 85526 Danielle Test DOB: 01/01/1985 Appointment Date: August 30, 2021 8:00:00 am 100 Main St Check In: 08/31/2021 10:52AM (EDT) Knoxville, TN 37922 Check Out: 08/31/2021 12:44PM (EDT)										
Date		Payer	Payment	Method	Comment		Amount			
							\$25.00			
						Total:	\$25.00			
		Fu	ture Appointm	ents						
Date Time	R	endering Provid		Referring Pr	ovider F	rior Authori	zation			
02/28/2022 8:00:00 am	Test M.D.,									
Over 150 Days 12	1 - 150 Davs	91 - 120 Davs	61 - 90 Davs	31 - 60 Days	Current	Total Bal	ance			
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				
Receipt Batch ID: 17291			Bal	ances may not includ	le insurance pending	or current day's	charges.			
Special Message with many Printed on 08/31/2021 1:27PM (EDT)	characters		iSalus H	esithcare		P	age 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.

🔒 🔹 Se	etup: Company Settings		Choice 🗮	Š	# @	Q 🔇)
Setting Value	Blackout Appointment Status ID - To						
Rule	Integer value between 0 and 99	*					
Tool Tip	If within the iScheduler setup a blackout range is added to the schedule, after a schedule has been created, any placeholders will be removed and any appointments (defined by the Blackout Appointment Status ID - From) within the blackout range will be set to this status.	-					
		-					

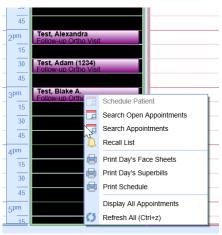
As defined by the Blackout Appointment Status ID - From.

🔒 🕶 Se	etup: Company Settings		Choice 🗮	Ö A P	G 🕘
H 🕑 1					
Setting	Blackout Appointment Status ID(s) - From				
Value	1,2				
Rule	Text between 0 and 1000 characters	÷			
Tool Tip	Comma delimeted list of appointment status values which will be converted to a new status (defined by the Blackout Appointment Status ID - To) when a blackout is applied to the appointment range.	*			

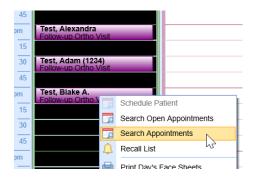
Front Office users or Administrators may be trained to review these appointments in the event that they need to be rescheduled.

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

\overline Sear	ch Appoin	tments										X
Chart #		First Name		Last Nam	e		Begin Date	05/17/2021 😂 💳	Primary ID			~
Status	Do Not Bill	~	Resource	Chuck Dietzen,	MD	~	End Date	05/17/2021 😂 💳	Value			
Туре		~	Location			~	Birth Date		250	Search	Clear	
😤 -					Sea	arch Results				J.	Rows	s
#	Sel	Start		End	Ту	ре	Chart	Last	First	Resource	ce	
Search	to Populate											^
<							7				>	~
Letters					▼ 📄	Reminder	Pro				Close	

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.

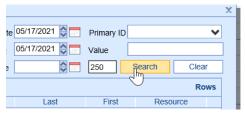
Status = the appointment status used in the Blackout Appointment Status ID - To

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



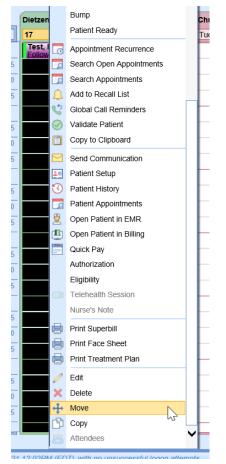
5. A list of results will populate in descending order

🔜 Sea	rch Ap	pointments								
Chart	#	First Name		Last Nar	ne	Begin Date	05/17/2021 😂 💳	Primary ID		~
Status	Do No	ot Bill 🗸 🗸	Resource	Chuck Dietzer	i, MD	End Date	05/17/2021 😂 💳	Value		
Туре		~	Location		```	 Birth Date 	\$	250	Search	Clear
*	•				Search Resul	ts				Row 0 of 3
#	Sel	Start		End	Туре	Chart	Last	First	Resou	irce
1		05/17/2021 3:00PM	05/17/20	021 3:15PM	Follow-up Ortho Visit	9464	Test	Blake	Dietzen MD	, Chuck F
2		05/17/2021 2:30PM	05/17/20	021 2:45PM	Follow-up Ortho Visit	9757	Test	Adam	Dietzen MD	, Chuck I
3		05/17/2021 2:00PM	05/17/20	021 2:15PM	Follow-up Ortho Visit	25015	Test	Alexandra	Dietzen MD	, Chuck F

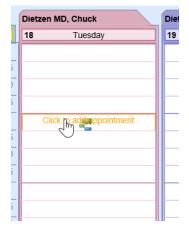
6. To open the appointment, double click on the search result

	Choice 📃 Č 船 🕈 🖓 🧿										
arch Op	en \mid 🔔 Search Recall 🔚 Intake	Schedule 🔝 Patier	t 🔹 🎓 Help 🔹					Test, Blake A. Bo	m 20-l	lar-1989(32y) Gender	Male
2021									Se	arch for Patient	Q 🗸
	Dietzen MD, Chuck	Dietzen MD, Chu	k Diet	etzen MD, Chuck		Dietzen MD, Chuck		Dietzen MD, Chuck	Die	tzen MD, Chuck	
	17 Monday	18 Tue	sday 19	Wednesday		20 Thursday		21 Friday	22	Saturday	
3pm	Test, Blake A. Follow-up Ortho Visit										
15	k										\sim
30											
45											
4pm											

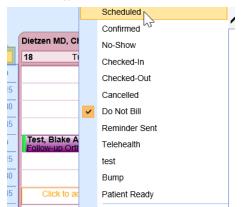
7. Right click over the selected appointment and select Move



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

hart #	ŧ	First Name		Last Name	•	Begin Date	05/17/2021 😂 💳	Primary ID		~
tatus	Do N	ot Bill 🗸 🗸	Resource	Chuck Dietzen,	MD 💊	End Date	05/17/2021 😂 💳	Value		
ype		~	Location		~	Birth Date		250	Search	Clear
R	•				Search Result	s			Ro	ow 1 of 3
#	Sel	Start		End	Туре	Chart	Last	First	Resource	e
1		05/17/2021 3:00PM	05/17/20	21 3:15PM F	ollow-up Ortho Visit	9464	Test	Blake	Dietzen MD, C	huck I
2		05/17/2021 2:30PM	05/17/20	21 2:45PM F	ollow-up Ortho Visit	9757	Test	Adam	Dietzen MD, C	huck F
5		05/17/2021 2:00PM	05/17/20	21 2:15PM F	^Ξ ollow-up Ortho Visit	25015	Test	Alexandra	Dietzen MD, C	huck f
			E.							

11. Re-run the report by selecting Search

👼 Sear	rch Appointm	ents								Х
Chart #	Fi	irst Name	L	ast Name		-	05/17/2021 😂 💳			~
Status	Do Not Bill	~	Resource Chuck	Dietzen, MD	~	End Date	05/17/2021 😂 🗖	Se valué atabas <mark>e</mark>	using selected criteria	
Туре		~	Location		~	Birth Date	\$	250	Search Clear	·
≫ •	•			Se	arch Results				Row 0 of	f 2
#	Sel	Start	End	Ту	уре	Chart	Last	First	Resource	

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.

🔒 🗸 iScheduler			Choice 🗮		ँ A 🎓 🖓 🔕
	🕽 Search Recall 🔚 Intake Schedule 🔛 Patient 🔹 🅬	Help -		Starnes, David E	Born 08-Aug-1978(42y) Gender Male
□ □ June 13 th - 19 th Scheduler					Search for Patient Q 🗸
Commence			Adams ARNP, Blaire (1)		
140-5110/1	Adams ARNP, Blaire (1) 15 Tuese	Adams ARNP, Blaire (1) 16 We	Adams ARNP, Blaire (1) dnesday 17	Adams ARNP, Blaire (1) Friday
30 Checked-		lay 16 We	unesday 17	Inuisuay	Filday
45 Checked-	Dut				^
Cancelled					
15 Do Not Bi					
30 Reminder Teleheatt					
45					
12 ^{pm} Bump					
15 Damp Patient Re	ate				
45 Appointme	en Appointments				
1pm Search Ap					
15 Add to Re					
30 Sinhai Ca	I Reminders				
45 Ø Validate P					
2pm Copy to C					
15 Send Con					
30 Send Con					
To Patient Hi					
3pm Patient Ap					
15 Qpen Pati					
30 Den Pati					
45 Open the patient elig					
4pm Starnes, David Headaches Pouronzan					
15 Headaches Eligibity					
30 Teleheatt	Session				
45 Nurse's N	ste				
5pm Print Supe	III				
15 Print Face					
30 Print Trea	iment Pian				
45 / Edit					
6pm × Delete					
15 the Move					
30 Copy					
45 Attendees					×
<					>
	M (EDT) with no unsuccessful logon attempts		Session: 2:00:00		Distributed By iSalus Healthcare

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.

<i>e</i> Patient Eligibility - Internet Expl	orer							_		×
ñew 🙊 📆 🚱						Starnes, David	Born 08-Au	g-1978 (42y)	Gender	Male
# Carrier	Member ID	Policy/Group	Start	End	Last Run	Subscriber		Relation.	Acti	ive
1 United Health Care	961417033	915784	06/01/2020			Starnes, David		Self	Yes	
2 Self-Pay			03/01/2020			Starnes, David		Self	Yes	^
										~
							Or	nly Display Acti	ve Insurar	nces
		No Insuran	ge Eligibility ice Eligibility is ike to run an E	availabl ligibility r	equest for t	verage, his No				

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

<i>e</i> Patient Eligibility - Internet Explorer						-		Х
ñew 🙊 📆 🚱				Starnes, Davi	d <i>Born</i> 08-Aug	j-1978 (42y)	Gender	Male
# Carrier Member I	Eligibili	ty Request		×		Relation.	Acti	ve
				/id		Self	Yes	
2 Self-Pay	United Heal	th Care (36320) Coverage #1		vid		Self	Yes	\mathbf{n}
	Service	06/14/2021 🛟 💳						~
	Provider	Adams ARNP, Blaire		~				•
	Coverage	Individual		~		ly Display Acti	ivo leouro	
	Benefit	Health Benefit Plan Coverage (3	(0)	~		y Display Acti	ive msura	ices
	Edit	Subscriber	Dependent					
	Member ID	961417033						
	First Name	David						
	Last Name	Starnes						
	Birth Date	08/08/1978 🛟 📩						
	SSN							
	Display More	Eligibility Options	ок	Cancel				
		2	UK	Galicei				

4. 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.

Patient Eligibility - Inte	rnet Explorer				Ctown of I	Devid Deve 00 A	- 4070 (42-)		>
ew 🔆 🛣					starnes, t	David Born 08-A	ug-1978 (42y)	Gender	IVIa
# Carrier	Member ID	Policy/Group	Start End	Last Run	Subscriber		Relation.	Act	ive
1 United Health Care	961417033	915784 00	6/01/2020	06/14/2021	Starnes, D	avid	Self	Yes	
2 Self-Pay		0:	3/01/2020		Starnes, D	avid	Self	Yes	
									_
							alu Diantau Anti		
lan Begin: 01/01/2021	- 12/31/2021						only Display Acti	ve insura	nce
Active Coverages 💿	Services Service Type	Benefit Status	Amount/Plan	Message	Plan Au	th. Coverage	Date(s)	
<all>></all>	Chiropractic	Co-Payment	Visit \$0.00			Individual			
<not specified="">></not>	Chiropractic	Limitations	Remaining 3 Visits	REHABILITATIVE	\checkmark	Individual			1
Chiropractic	Chiropractic	Limitations	Remaining	ADDITIONAL		Individual			Γ
Emergency Services	Chiropractic	Limitations	Calendar Year	ADDITIONAL		Individual			
Health Benefit Plan Coverag	e Chiropractic	Limitations	\$0.00		\checkmark	Individual			
Hospital - Inpatient	Chiropractic	Limitations	\$0.00	ADDITIONAL	~	Individual			
Iospital - Outpatient	Emergency	Co-Insurance	Visit 20%			Individual			
Pharmacy	Emergency	Deductible	Remaining			Family			
Physical Therapy	Emergency	Deductible	Calendar Year			Family			
Professional (Physician)	Emergency	Deductible	Calendar Year			Individual			
	Emergency	Deductible	Remaining			Individual			
	Health Benefit Pla	n Deductible	Calendar Year			Family			
	Health Benefit Pla	n Deductible	Remaining			Family			
	Health Benefit Pla		Calendar Year		\checkmark	Family			
			Year to Date \$0.00		•	Family			
	Health Benefit Pla	n Deductible				,			
						Family			
	Health Benefit Pla Health Benefit Pla	n Deductible	Remaining		1	Family Family			
	Health Benefit Pla Health Benefit Pla Health Benefit Pla	n Deductible n Deductible	Remaining Year to Date		~	Family			
	Health Benefit Pla Health Benefit Pla	n Deductible n Deductible n Deductible	Remaining			•			

Additional information can be gained using the Eligibility toolbar



new	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.