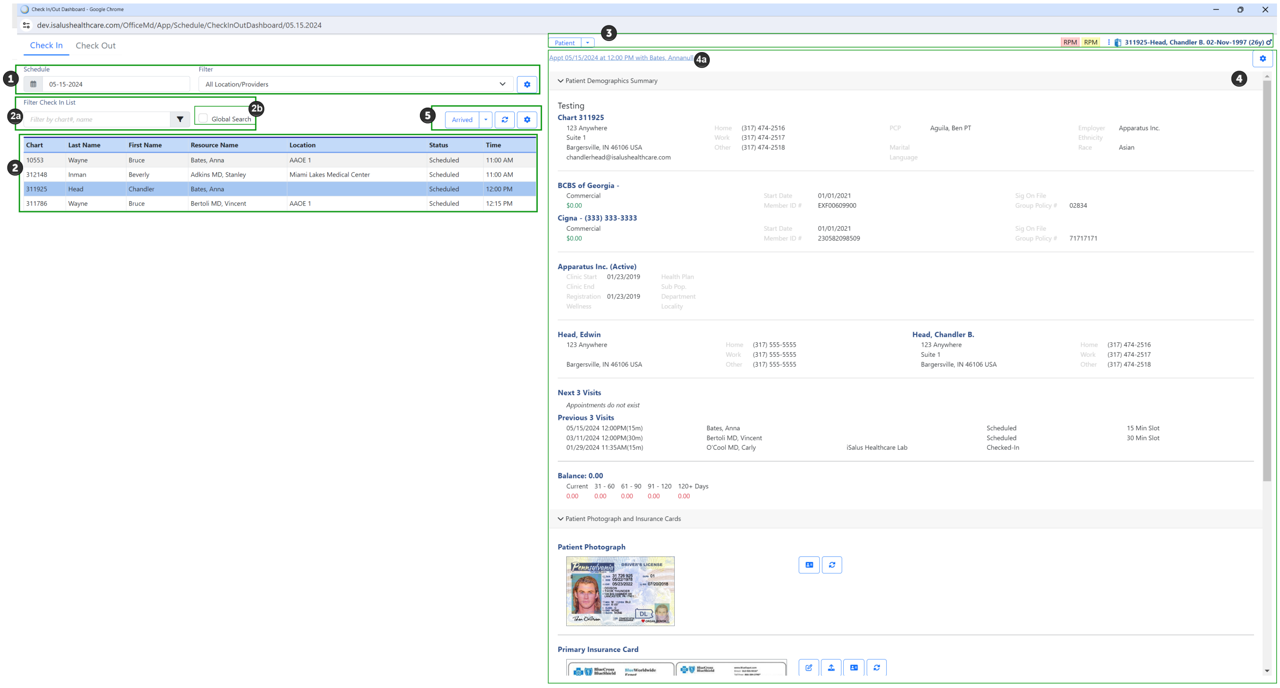
Check In/Out Dashboard Overview Summary

Last Modified on 07/25/2024 11:09 am EDT

To get started with this new feature, users will access the Check In/Out Dashboard button on the iScheduler toolbar. This launches the dashboard into a new window for viewing flexibility. You will need to review and configure your user settings by clicking this link, and then with those settings in place this article provides brief overview to get you started. You can also access this link to the Check In-Out Dashboard Overview Video for a 17 minutes tutorial that walks you through the dashboard.



1. Once in the dashboard, users will notice that their calendar date defaults to today's date and they have access to the Filter field to access/create/default a filter, as desired. The gear icon to the right of the Filter field allows users to access their dashboard filters - click here to access Check In-Out Dashboard Filter setup instructions and information.
2. For users that have a supported iScheduler default, they will notice that their patient list is displaying the same patients that are accessible for that day in iScheduler – no need for a filter, although users can achieve a more custom patient list display by creating and using a filter.
    1. The search field allows users to quickly find a patient in the their patient list
    2. Should the search not return the patient or if the user needs to locate another patient they know will not be in their filtered list, the user can check the Global search checkbox and then perform a search – the Global search ignores the Date/Filter and returns the *next scheduled appointment for the searched patient (including today's date). Users can select the patient and display data just as if they selected from the filtered patient list. Refresh will uncheck the Global search and return the user back to their filtered patient list.*
3. Once you have selected a patient in step 2, you will notice that you are seeing the newer consolidated patient header view for that patient and all associated patient header functionality. This section also provides access to the Patient Screen and the associated drop-down menu that exists in iScheduler for convenience.
4. The Patient View area will display patient specific data for the selected patient.
    1. What displays is driven by the user's setup for this Patient View section. User's can determine what type of display they prefer: List View where the sections allow continuous scroll, or Tab View where only one section at a time will display. User's can determine which of the available sections they

want to display, and then when in List View which of those sections should be expanded. Note: This setup is configurable for the Check In tab and separately for the Check Out tab.

5. The Status Update button is defaulted to display Check In when on the Check In tab, Check Out when on the Check Out tab, and then the drop-down arrow displays all Practice available Appointment Statuses. The settings icon to the right of the Status Update button allows the user to configure this status button for improved efficiency. In the settings you can set statuses to enabled (display/do not display), and you can designate the Status Update button to display/set a *New Status* based on the *Current Status* of the appointment selected. This allows users to update patient's more efficiently based on practice workflows. At any time the users needs to deviate from the Status Update buttons designated *next status* the user would access the drop down arrow and select the desired practice defined and enabled status they need.