User Settings Written Tutorials

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If you prefer to review this detail by watching video clips then click on this link to open User Settings Video Tutorials page and watch the brief video clips that walk you through the function for each of the user settings that we have outlined below.

This article reviews the user settings that are available for users to configure their view of the the Check In-Out Dashboard to mirror their desired workflow and provide more efficiency in processing patients in to the office and out of the office.

There are three areas where users can customize their Check In-Out Dashboard:

- Patient List Filter Settings (determines what patients display in the Patient List of the dashboard
- Status Update Button Settings (determines what statuses display for the action button and status drop down list)
- Patient View Section Settings (determines what data categories display for user when a patient is selected) and user can select dashboard display style as List View or Tab View

Patient List Filter Settings

Check In Filter Settings are accessed on the dashboard using the and provide users with the ability to access existing shared filters and create new filters specific to their user login. For details on defaults and data organization, refer to the section titled 'Defaults for displaying Check In/Out Dashboard Patient List Data'. This section is dedicated to explaining the filter settings.

On the Check In Filter Settings screen, existing and available filters are listed on the left side. Selecting an existing filter enables users to view various settings under the defined tabs. Shared filters are read-only for users without permission to create them. While users can set shared filters as their personal defaults, editing a shared filter requires appropriate role access. However, all users can utilize the copy functionality to duplicate a shared filter and create a personal version that can be edited.

Users can designate a single filter as their Default Filter, ensuring that their preferred patient population loads when they open the Check In Dashboard. They can also switch between different filters as needed, updating their Patient List accordingly. Restoring the default filter occurs either when the dashboard is closed and reopened or when the user manually toggles back to their default filter.

The toolbar buttons on this setting screen include:

- New: Allows users to create a new filter.
- Save: Saves new filters or changes to existing filters.
- Copy: Creates a duplicate of a filter for creating a new one.
- Delete: Removes the selected filter.

The setup tabs on this screen include the main tab – the Details tab which is used to create new, edit existing, or view shared filters. The components on this tab include:

- Tool-tip: Optional text description for tool-tip popup (e.g., includes Checked In, or Excludes Checked-In).
- Active checkbox: Indicates whether the filter is active.
- Shared checkbox: Indicates if the filter is shared (requires security role).
- My Default Filter checkbox: Allows users to set their personal default filter.

Other tabs include:

- Type tab: Select desired Appointment Types for the filter.
- Status tab: Choose desired Appointment Statuses for the filter.
- Resource tab: Select preferred Resources for the filter.
- Group tab: Choose the desired Groups for the filter.

Users can configure filters to pull in any combination of data items but should exercise caution to avoid inadvertently filtering out data they wish to see. Users can set Shared filters as a default but cannot edit Shared filters without proper Role assignment. However, users without the Role to create (and edit) Shared filters can utilize the copy feature to create their own custom variation of a Shared filter.

How to create Patient List Filters:

Users will create filters by accessing the dashboard setting icon to the right of the Filter field (this example is for the Check In tab) filter:

1. Details tab - select an existing filter to edit or copy (if wanting to create a user custom version of a shared filter)
   Settings for steps 2 through 5 below assume that we should pull everything unless you select only certain items to display.
2. Set the appointment types that this filter should display
3. Set the appointment statuses that this filter should display
4. Set the resources that this filter should display
5. Set the Group that this filter should display

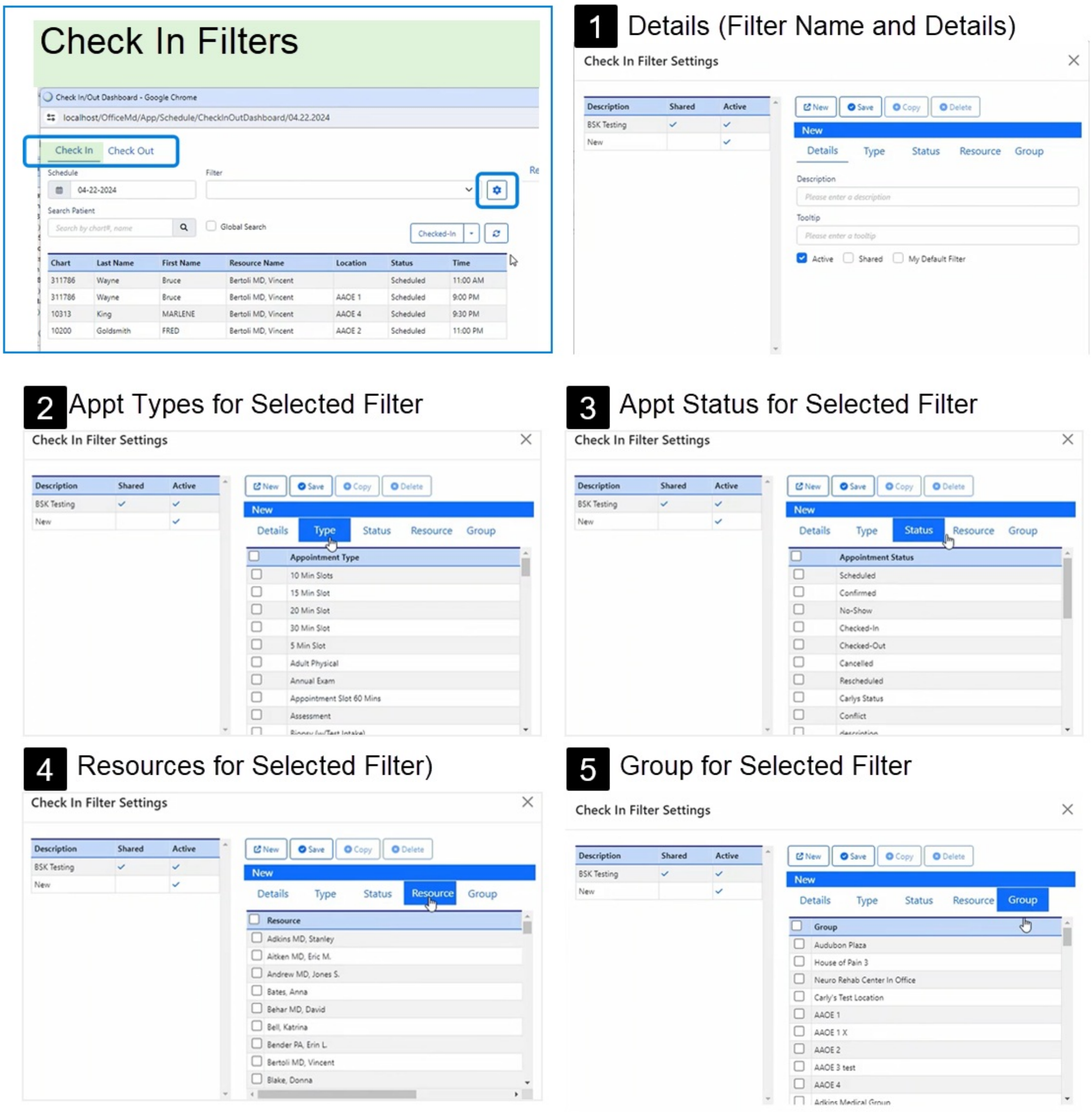


Chart	Last Name	First Name	Resource Name	Location	Status	Time
311786	Wayne	Bruce	Bertoli MD, Vincent		Scheduled	11:00 AM
311786	Wayne	Bruce	Bertoli MD, Vincent	AAOE 1	Scheduled	9:00 PM
10313	King	MARLENE	Bertoli MD, Vincent	AAOE 4	Scheduled	9:30 PM
10200	Goldsmith	FRED	Bertoli MD, Vincent	AAOE 2	Scheduled	11:00 PM

Description	Shared	Active
BSK Testing	✓	✓
New		✓

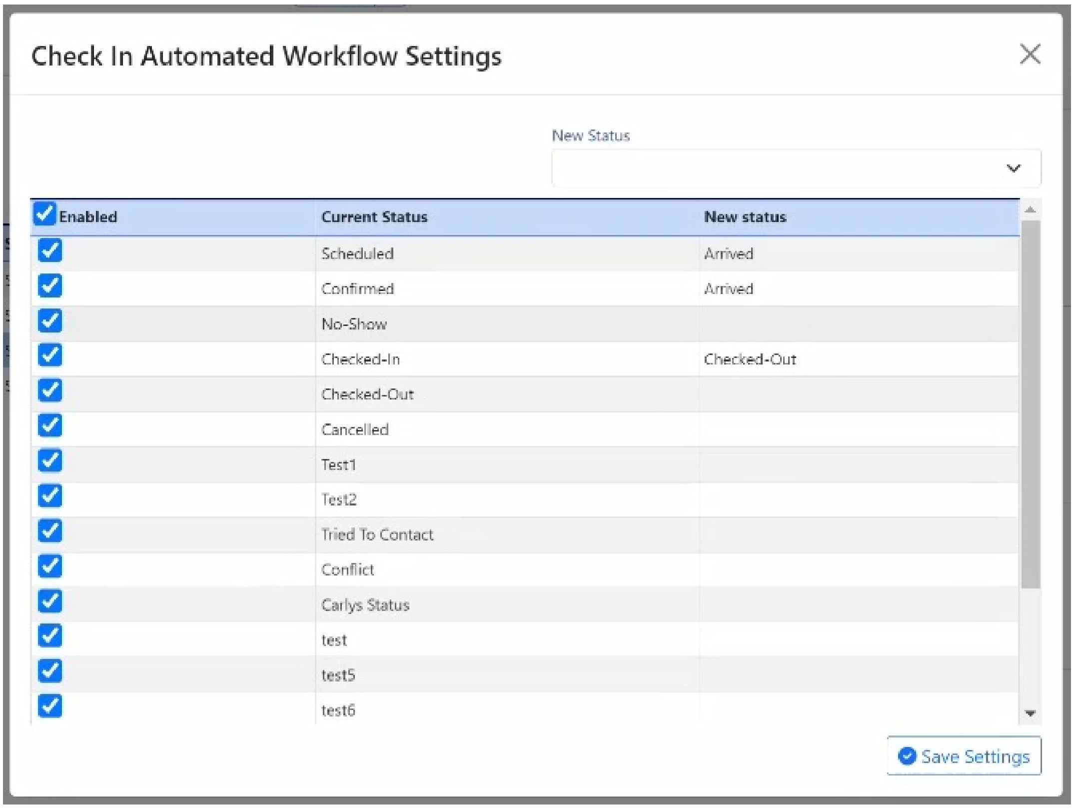
Check Out Patient List Filter Settings

This setting screen has the same functionality as the Check In Filter Settings screen described above but creates filters that apply to the Check Out tab.

Status Update Button Settings

All users have the ability to set their Status Update button to display those statuses they require access to in the Check In-Out Dashboard. This action button updates the selected patient appointment to the displayed appointment status. The Status Update defaults to display Check In on the Check In tab and Check Out on the Check Out tab. Users can access the drop-down arrow for other Practice available Appointment Statuses, as needed.

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.



☑ Enabled	Current Status	New status
☑	Scheduled	Arrived
☑	Confirmed	Arrived
☑	No-Show	
☑	Checked-In	Checked-Out
☑	Checked-Out	
☑	Cancelled	
☑	Test1	
☑	Test2	
☑	Tried To Contact	
☑	Conflict	
☑	Carlys Status	
☑	test	
☑	test5	
☑	test6	

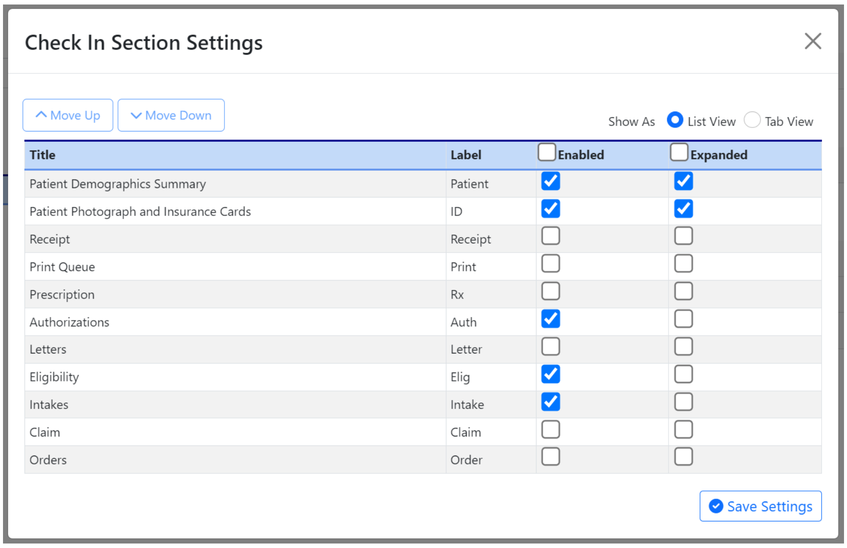
Patient View Section Settings

The Patient View area will display patient specific data for the selected patient and is driven by the user's setup for this Patient View Section Settings screen for the tab they are working in. Note: This setup is configurable for the Check In tab and separately for the Check Out tab.

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.

Users can determine what type of display they prefer: List View or Tab View (see example section at the bottom of this page):

- List View where the sections allow continuous scroll
- Tab View where only one section at a time will display.



Show As ● List View ○ Tab View

Title	Label	☐ Enabled	☐ Expanded
Patient Demographics Summary	Patient	☑	☑
Patient Photograph and Insurance Cards	ID	☑	☑
Receipt	Receipt	☐	☐
Print Queue	Print	☐	☐
Prescription	Rx	☐	☐
Authorizations	Auth	☑	☐
Letters	Letter	☐	☐
Eligibility	Elig	☑	☐
Intakes	Intake	☑	☐
Claim	Claim	☐	☐
Orders	Order	☐	☐

Example of Tab View vs List View