

Check In-Out Dashboard Overview Video Detailed

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

Video Timeline Notes

Use this list to jump to desired topic/time you want to see.

Launch the Dashboard

00:10 Launch Check In/Out Dashboard

Dashboard Section Overview

00:37 The 3 Main Sections of the Dashboard

00:43 Filter Section

01:12 Patient List Section

01:29 Patient View Section

User Settings Explained

02:33 User Settings for each dashboard tab *(for detailed user setting video clips [click here](#))*

Dashboard Tab and Filter Use Cases

03:10 Use Cases for Dashboard Tab and Filter Use

Patient View Display Option's for Users

04:10 Patient View Tabs vs List View User Setting

Calendar Date Use Cases

05:44 Calendar - Navigating to Dates other than Today

Patient List Filter Use Cases

06:24 Patient List Filter

Global Patient Search

06:45 Patient Global Search (ignores the calendar and filter)

Appointment Status Change Functionality

08:04 Appointment Status Change Button functionality

Use Case for Tabs (In and Out) and Independent User Settings

09:03 User Settings and how they impact Check In and Check Out tabs

Patient View Section Category Details

09:44 The remainder of this video is walking through each of the Patient View Sections to point out functionality

Patient IDs

10:12 Patient Photograph and Insurance Cards (ID) tab details

- 10:25 USB Patient Photo capture
- 11:36 New Patient ID card scan
 - 12:03 New Copy Patient ID Card to Patient Photo user setting functionality
 - 12:46 Describes other use cases of Copy functionality in scanning
- 13:08 Insurance card scanning (front and back)
 - 13:18 Displaying Primary and Insurance card details input in Patient Detail (with edit capabilities)

Intakes

14:15 Intakes and updated functionality allowing users to see combination of Intake Schedule Details with full Intake functionality in one place

Receipts

15:20 Receipts - full functionality same as Quick Pay screen

Validation Check Indicators Explained

15:28 Validation check indicators explained (these are applied to most tabs but vary in function)

Patient Setup

16:28 Patient - full access to Patient Setup details allowing for quick patient updates

Print Queue

16:48 Print queue provides same functionality as you have in Quick Pay

Authorizations

17:03 Authorizations provides same functionality as you have in Quick Pay

Eligibility

17:15 Eligibility provides same functionality as you have in Quick Pay

Claim (Superbill)

17:31 Claim (Superbill) provides same functionality as you have in Quick Pay

Orders

17:36 Orders provides same functionality as you have in Quick Pay

Prescriptions (RX)

18:10 Prescriptions (RX) provides view of New and Current medications with status and pharmacy details

Letters

18:56 Letters provides same functionality as you have in Quick Pay
