Check In/Out Dashboard Overview Written Detailed

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If you prefer this link allows you to watch Check In-Out Dashboard Overview Video to learn about the setup and use of this new dashboard. You will have the ability to fast-forward to the area you wish to view, if desired. The same content is outlined below and the main categories notate the video time you can forward to in order to locate specific items.

Accessing the Dashboard

Open iScheduler:

- Locate and click the Check-In/Out icon on the toolbar.
- This will launch the Check-In/Out Dashboard

The Three Main Dashboard Sections

1 Filter Section (Top Left):

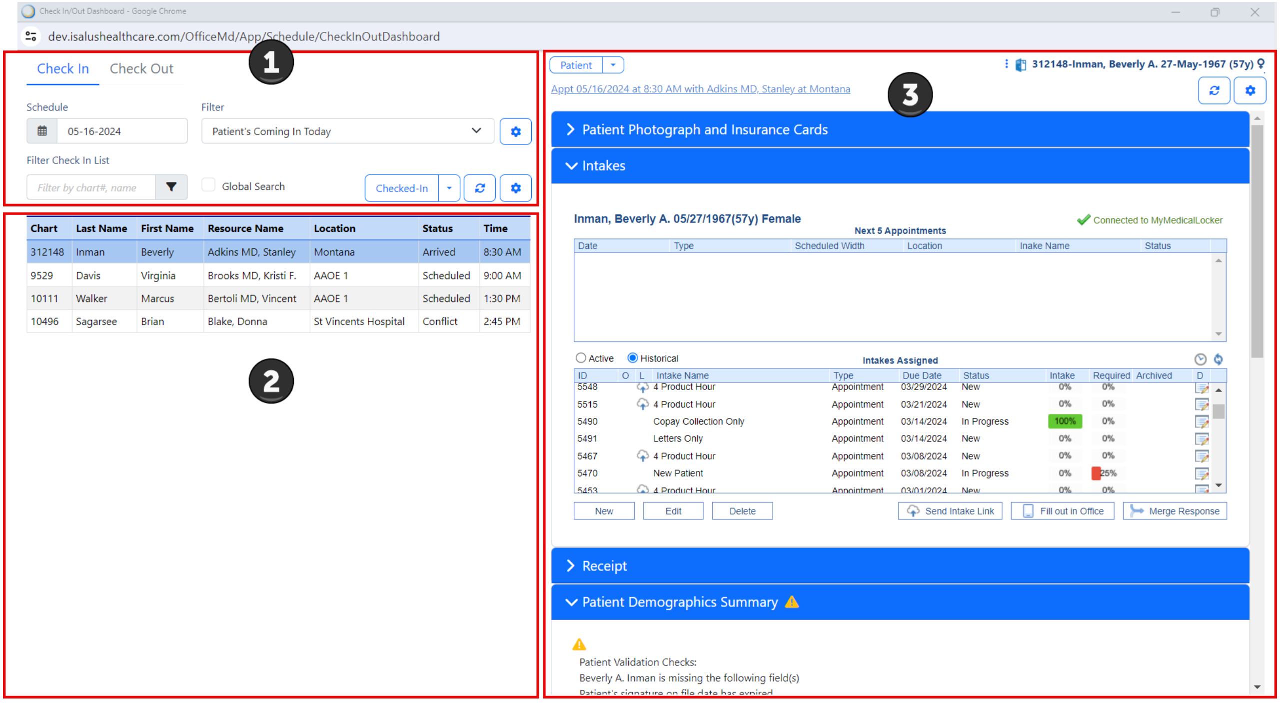
- Displays the scheduled date and patient list filter.
- Use the drop-down arrow to toggle between filters. The default filter shows today's patients.

2 Patient List:

- Displays patients based on the selected filter.
- Search for patients using the search box by typing their name.

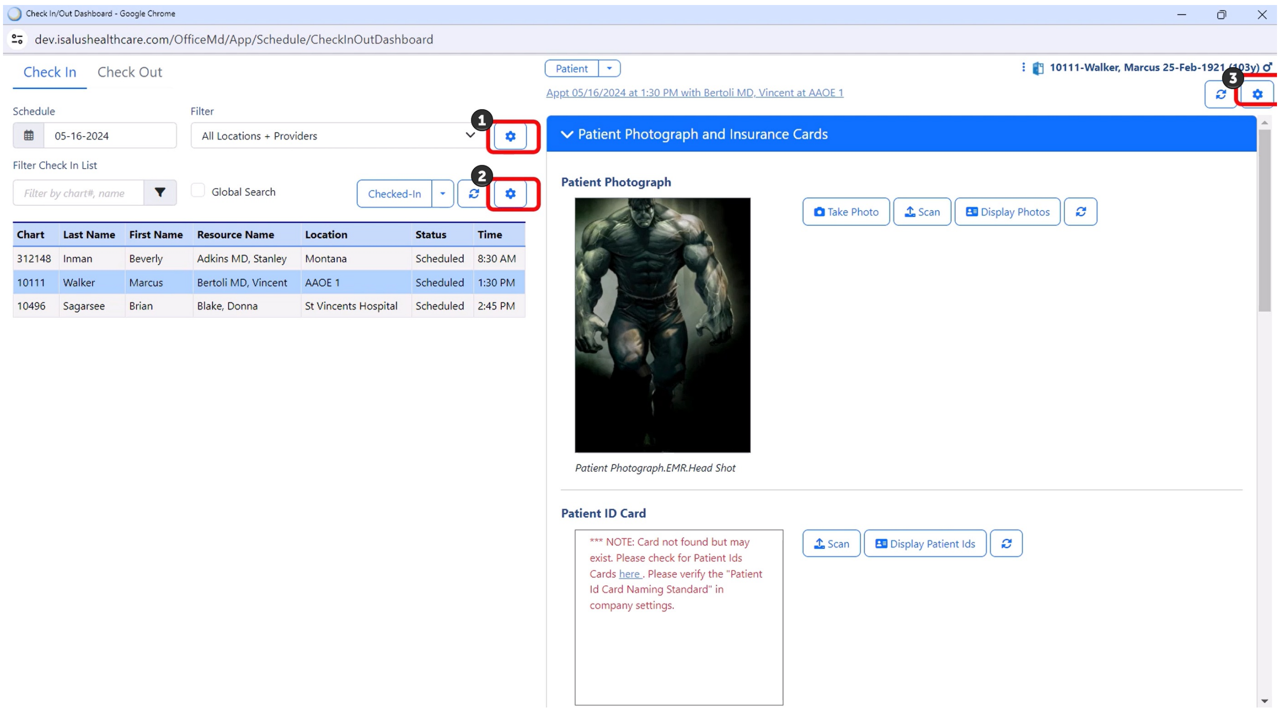
3 Patient View Section:

- Shows patient details including MML status icon and access to the patient flags module.
- Click on a patient name to load their details in iScheduler.



Check-In and Check-Out Tabs

- Check-In and Check-Out tabs have distinct settings for each of the three main Dashboard Section outlined above. This broad user setup allows tremendous flexibility in configuring steps to mimic a user's real world workflow for maximum data processing efficiency.



Date Selection and Filtering

Default Date:

- The system date is set by default. Change the date to view patients from different days.
- The date remains until the window is closed or a new date is selected.

Global Patient Search

- Use the Global search to locate patients ignoring the current filter.
- Uncheck Global to return to the filtered patient list.

Appointment Status Updates

Changing Patient Status:

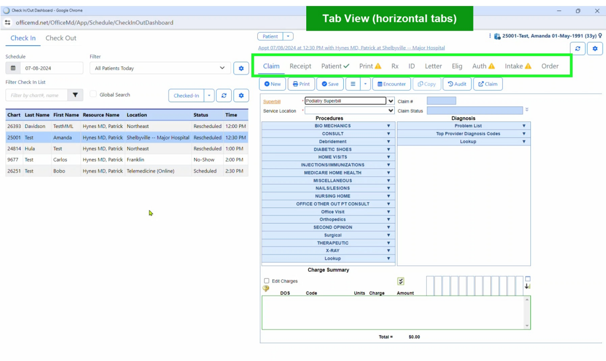
- Update the patient status (e.g., from Scheduled to Checked-In) using the drop-down menu.
- These statuses are controlled through the settings screen.

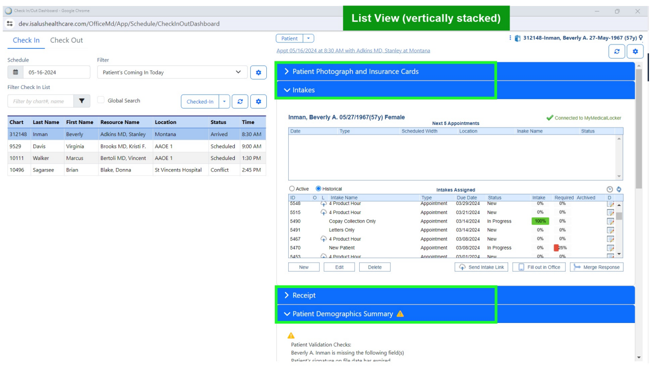
Patient View Functionality

In the patient view section, users can choose their Patient View display style. User can also choose to display any of the categories (and choose their desired display order) that are outlined below. The flexibility in configure how to display patient data, what data to display, and what order to display the data is intended to streamline the check-in process by allowing the user to set their dashboard screen to mimic their physical workflow.

Tabs vs. List View (setting the desired user display view):

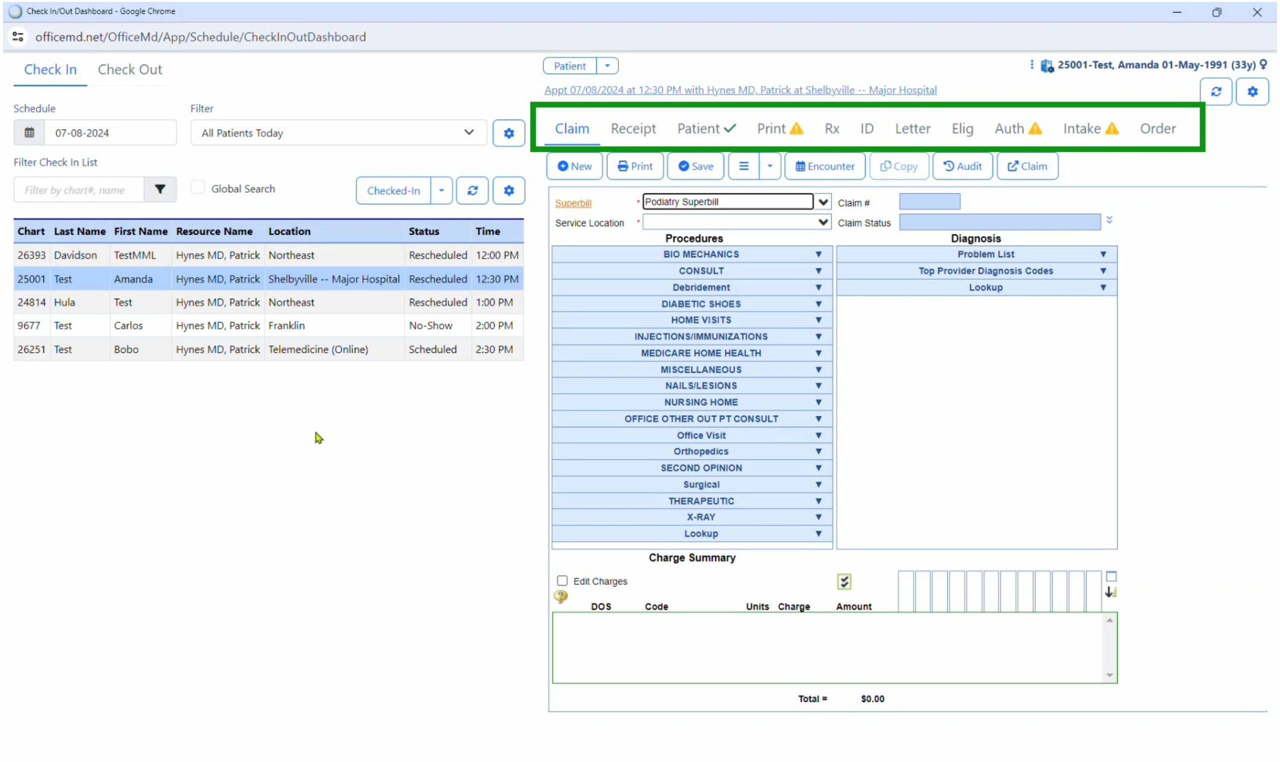
- Tab View: Categories are displayed as tabs at the top.
- List View: Allows scrolling through categories vertically.





Validations and Indicator Icons for most category tabs

The dashboard includes validation icons that draw user attention to patient categories that may require action using icons like a green check mark to indicate the tab passed data validation checks or a yellow triangle that indicates there may be a need to review/update data for the tab displaying the indicator.



Patient Photograph and ID Cards:

This is a new category that seeks to make capturing of patient photos, ID Card, and Insurance Cards more efficient. This category provides:

- Display of most recent scans for each category for at a glance confirmation that you have the latest patient information captured
- Adds the ability to capture patient photos using USB cameras.
- Adds the ability to configure an store patient ID cards similar to insurance cards.
    1. Adds a new user setting that can be configured to copy Patient ID card image to the Patient Photo (to prevent the need for duplicate scanning)
    2. This copy functionality can be utilized during the scanning process to create a copy for other scans, if desired (by just checking the Copy check box during the scanning process AND indicating which folder to save the copy)
- Scans for Primary and Secondary Insurance Cards are visible on screen (and include front and back scans)
    1. We also added the ability to see Primary and Secondary Insurance plan details currently stored for a patient

Intakes

Full functionality for assigning, processing, and merging intakes. We have also added the ability to see intake percentages and other intake schedule details from this view of the patient intake.

Receipts

Full functionality for creating and printing receipts is available.

Patients

View and update Patient Setup screen data elements.

Print

View and process Print queue items.

Authorizations

Full functionality to view, update, and create Authorizations.

Eligibility

Full functionality to view and run eligibility checks.

Claim

View, edit, and complete claims (Superbills).

Order

View and update outstanding or incomplete Orders for the patient.

Rx

Read-only access to current and new prescriptions.

Letter

Full functionality – ability to create and print letters.

User Setup to Get Started

Watch the User Settings Video Tutorials to learn more about configuring your users setting to take advantage of the flexibility of display to streamline your processing of patient data.

Conclusion

That's a wrap, thank you for using our new Check-In/Out Dashboard and we look forward to your feedback on what works well and how we can improve!