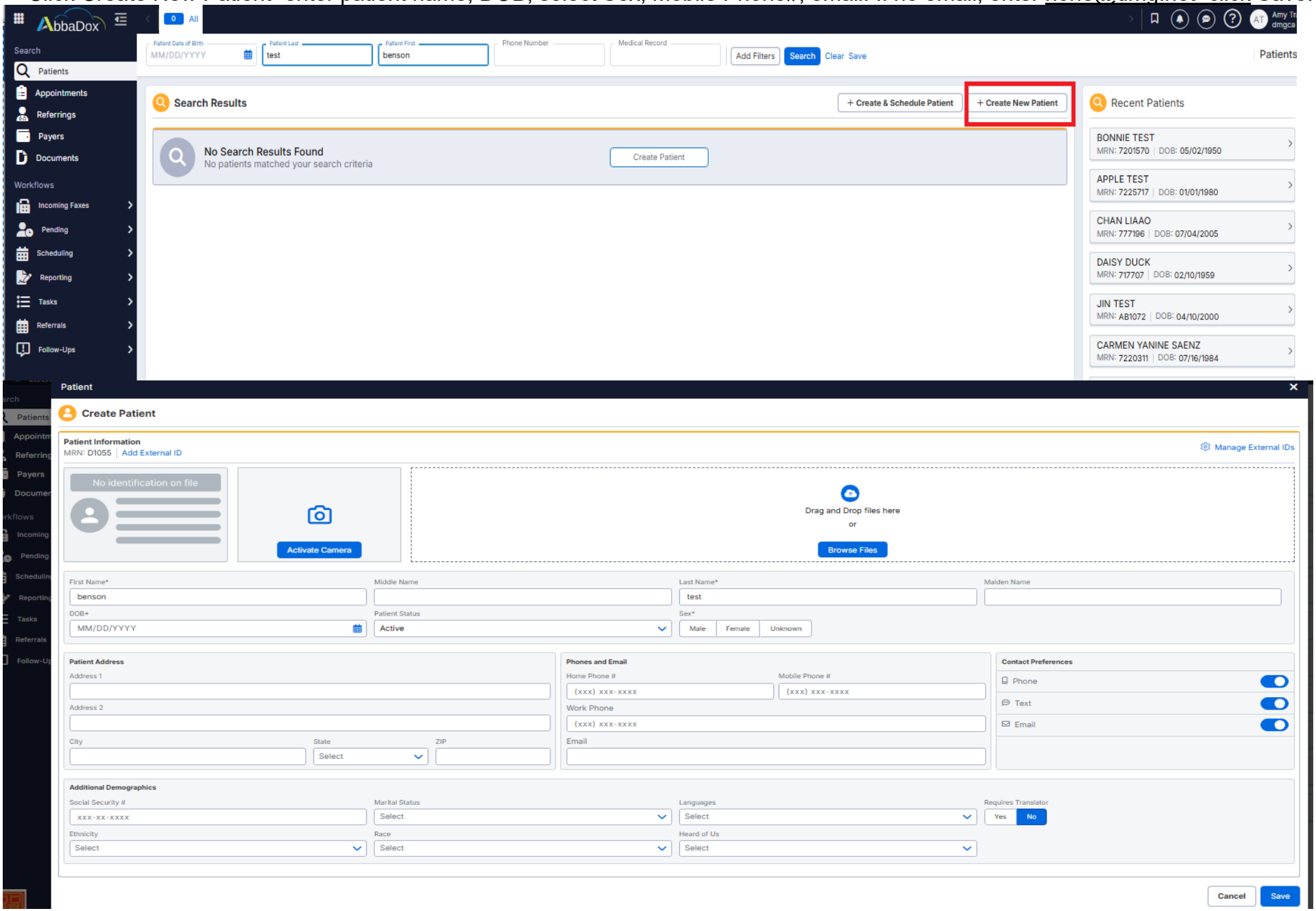
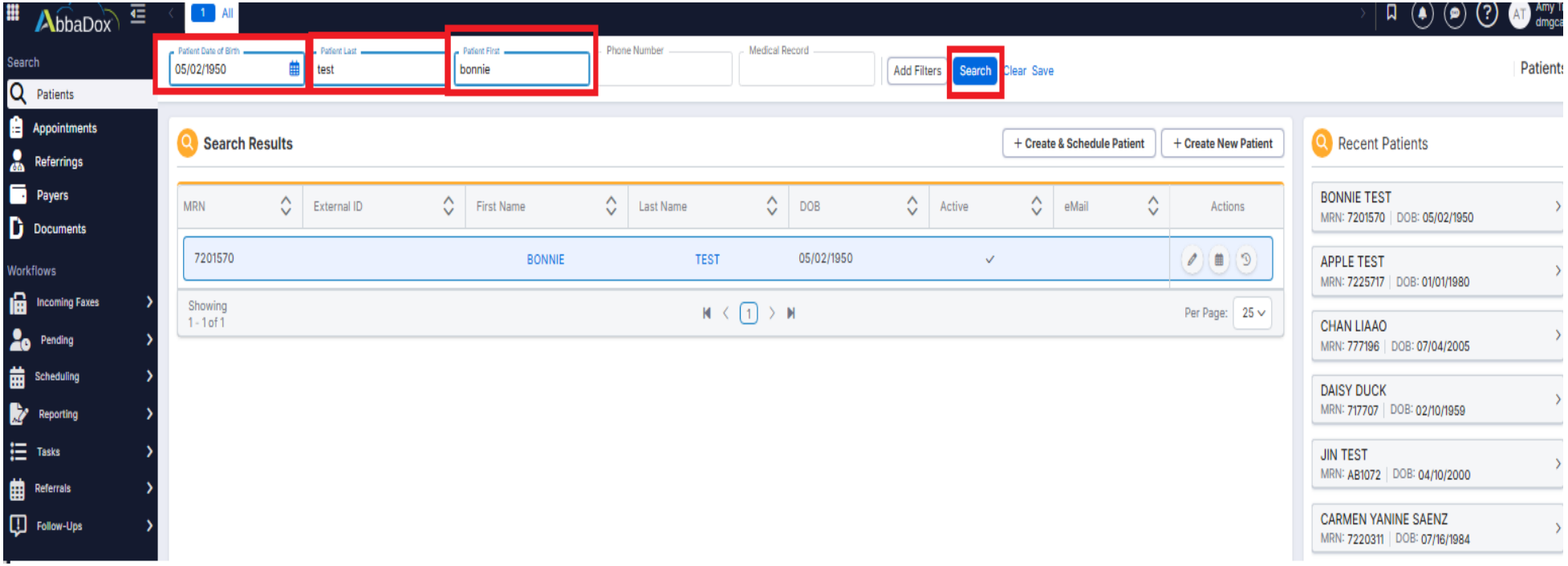
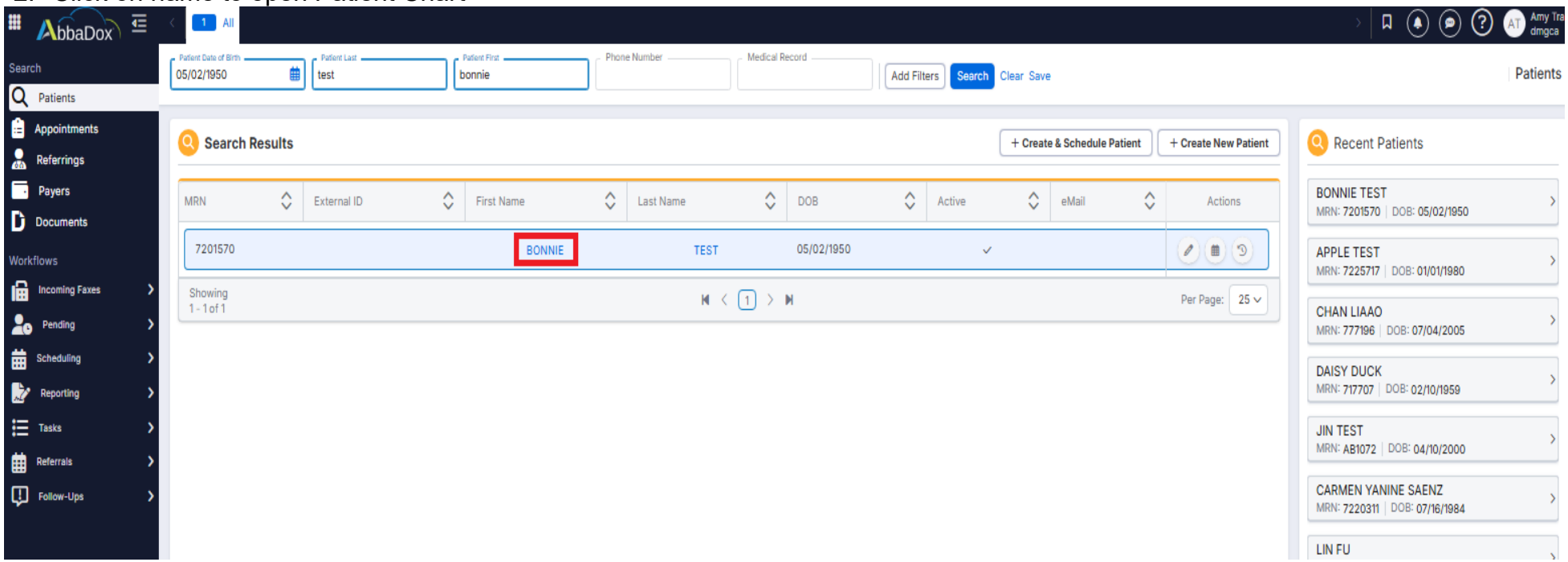
SCHEDULING

1. In the Patient search: enter patient date of birth, last name, first name> click search
   Click Create New Patient>enter patient name, DOB, select Sex, Mobile Phone#, email. If no email, enter none@dmg.net>click Save:

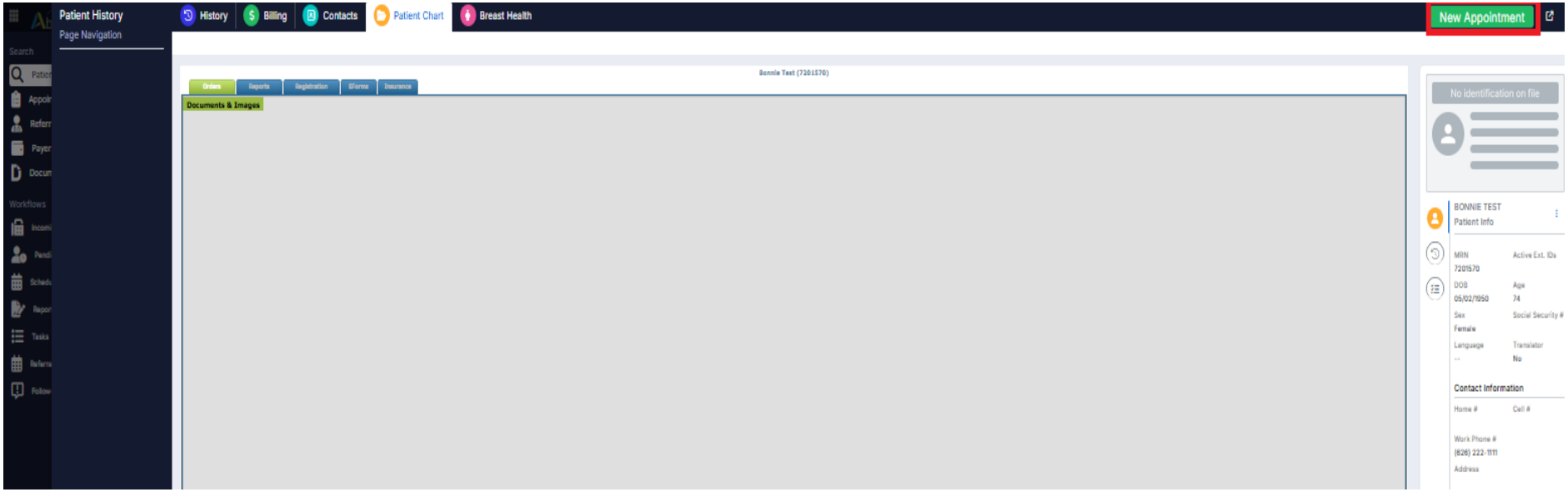




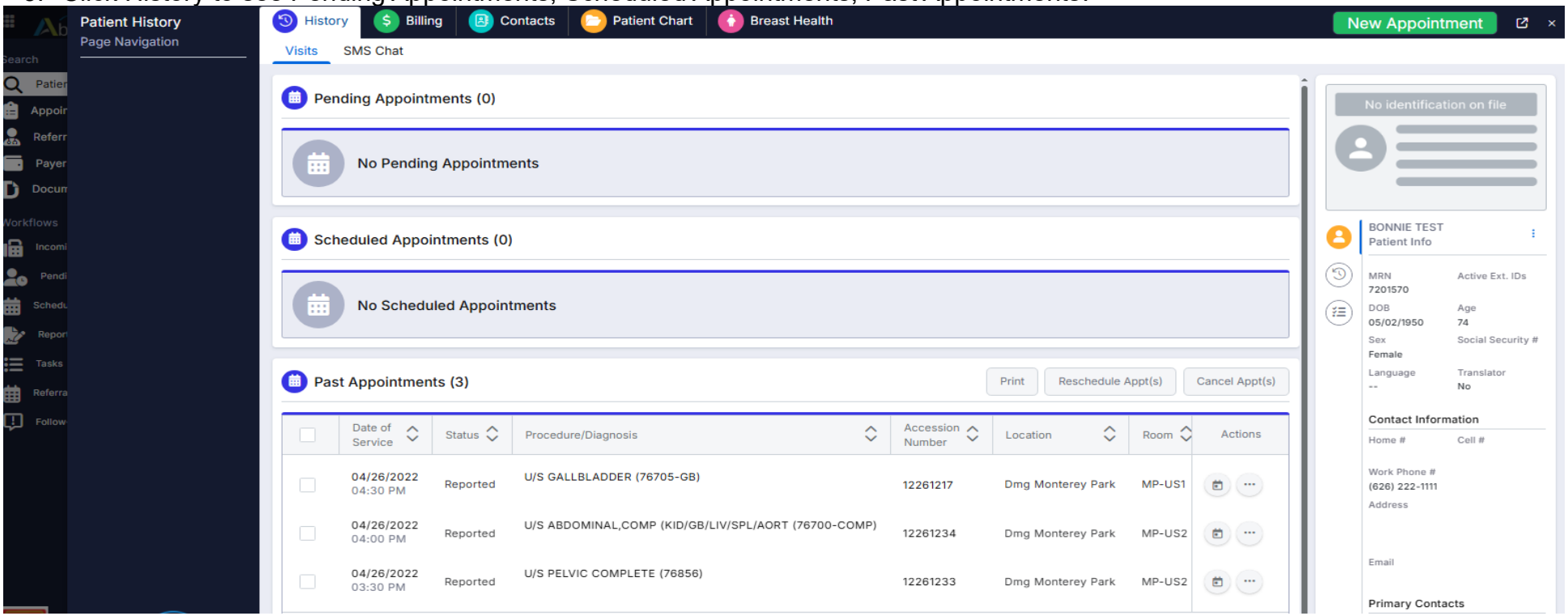
2. Click on name to open Patient Chart



Patient chart to see documents related to the patient:
Order tab:orders, eligibility, authorization. Reports tab:Reports Registration tab: IDs. Eforms tab: Patients exam questionnaires, Patient consent, Tech Worksheets.

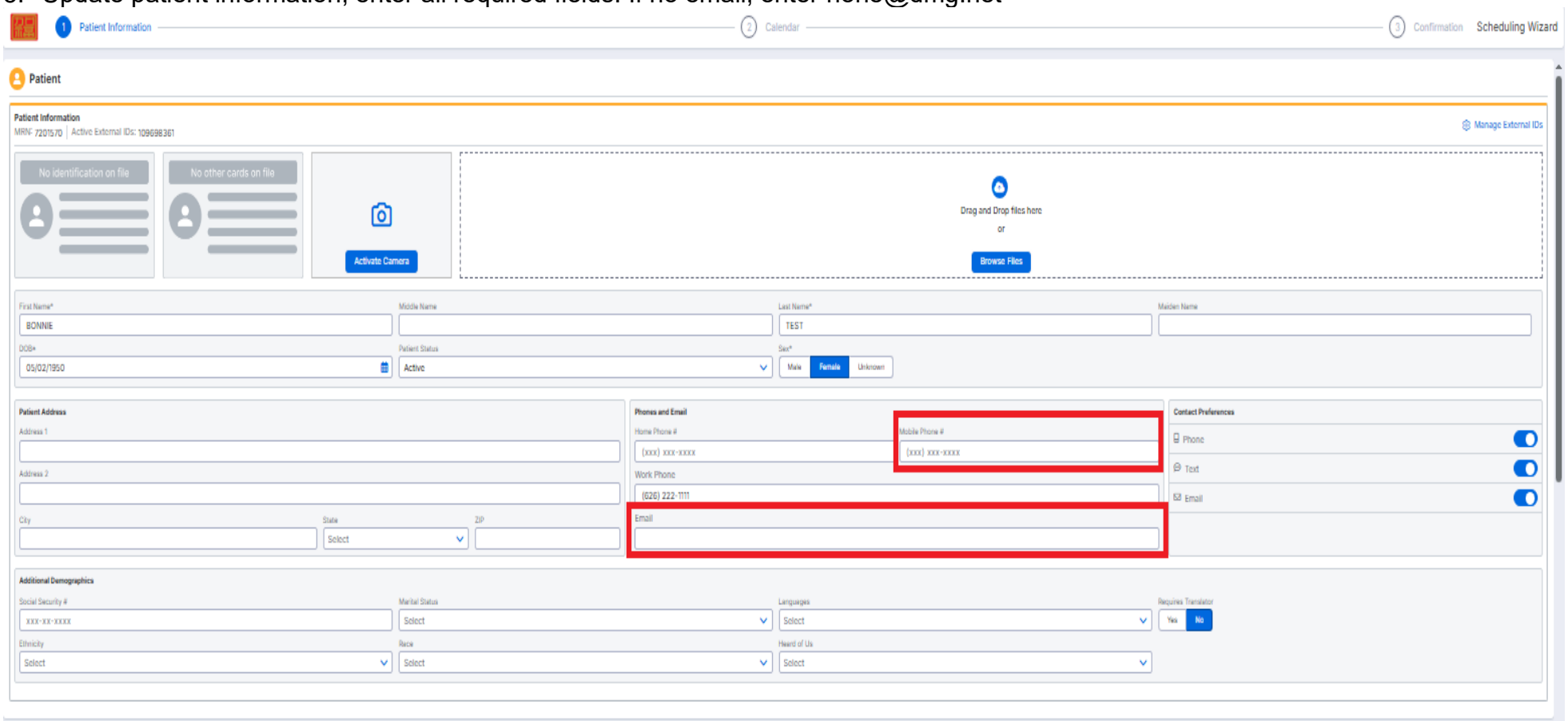


3. Click History to see Pending Appointments, Scheduled Appointments, Past Appointments:

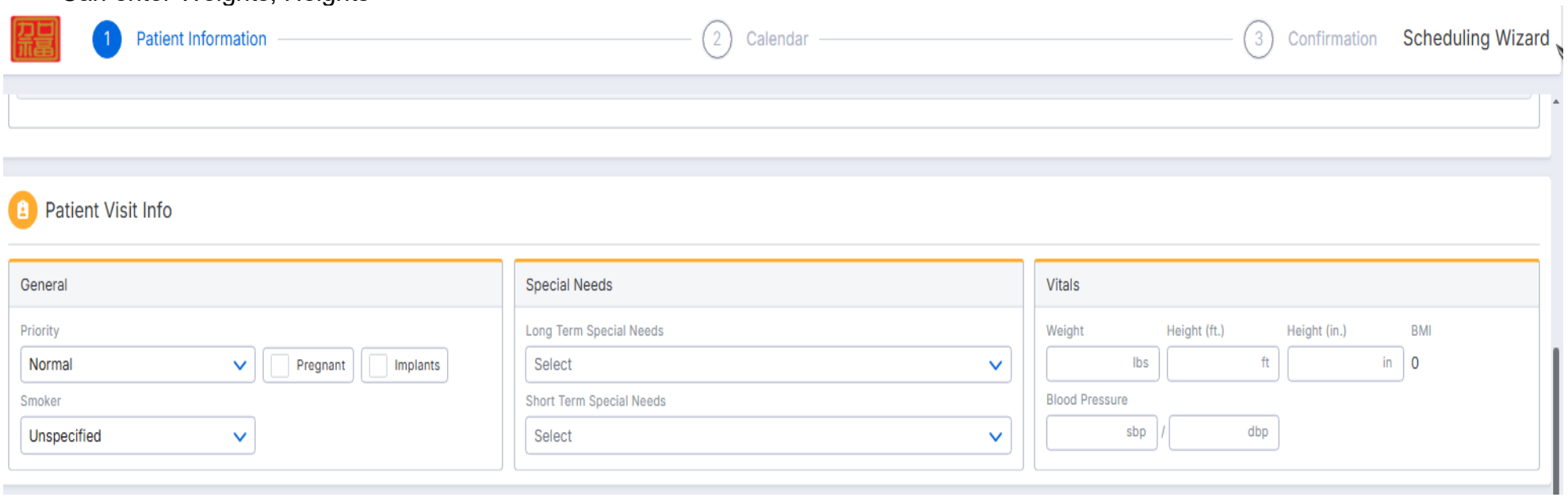


4. Click New Appointment to open Scheduling Wizard:

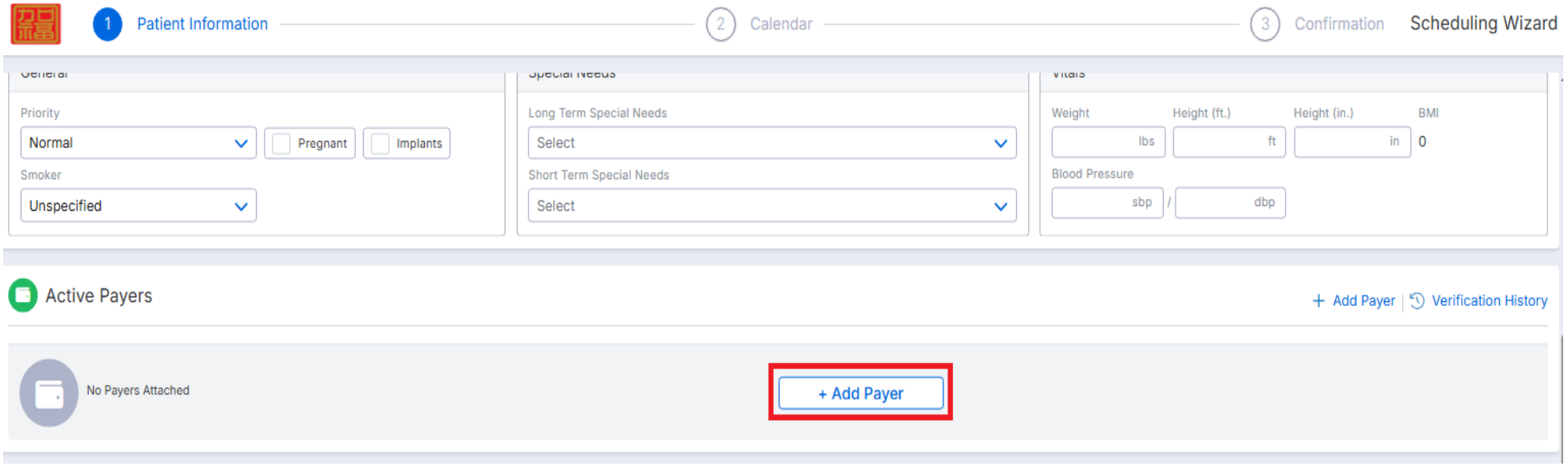
5. Update patient information, enter all required fields. If no email, enter none@dmg.net



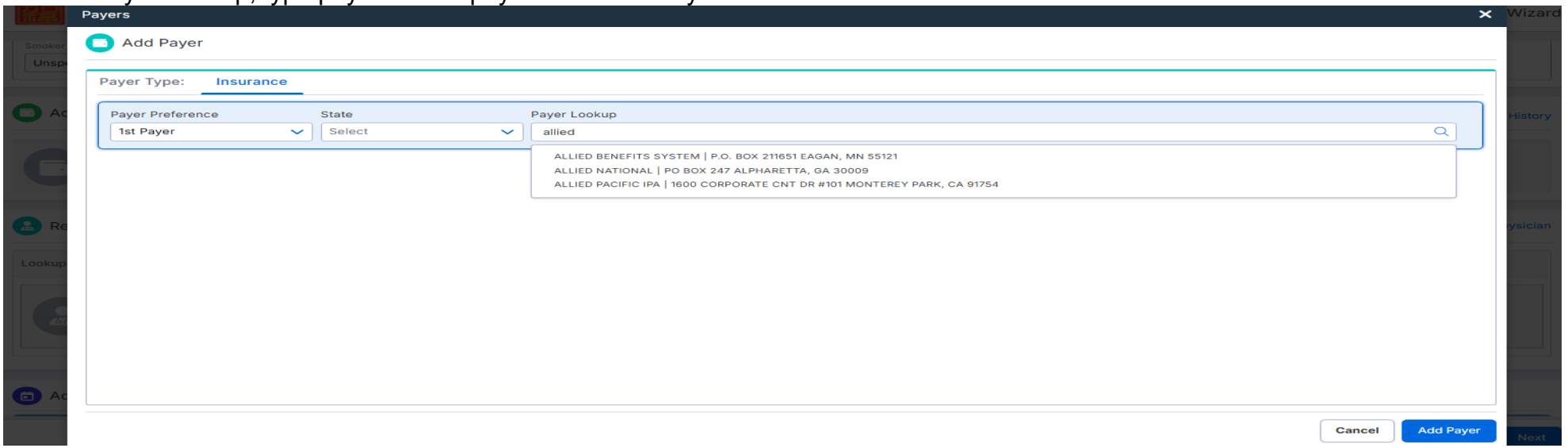
6. In the Patient Visit Info:
   Can click Implants for patient with implants
   Can select Special Needs
   Can enter Weights, Heights



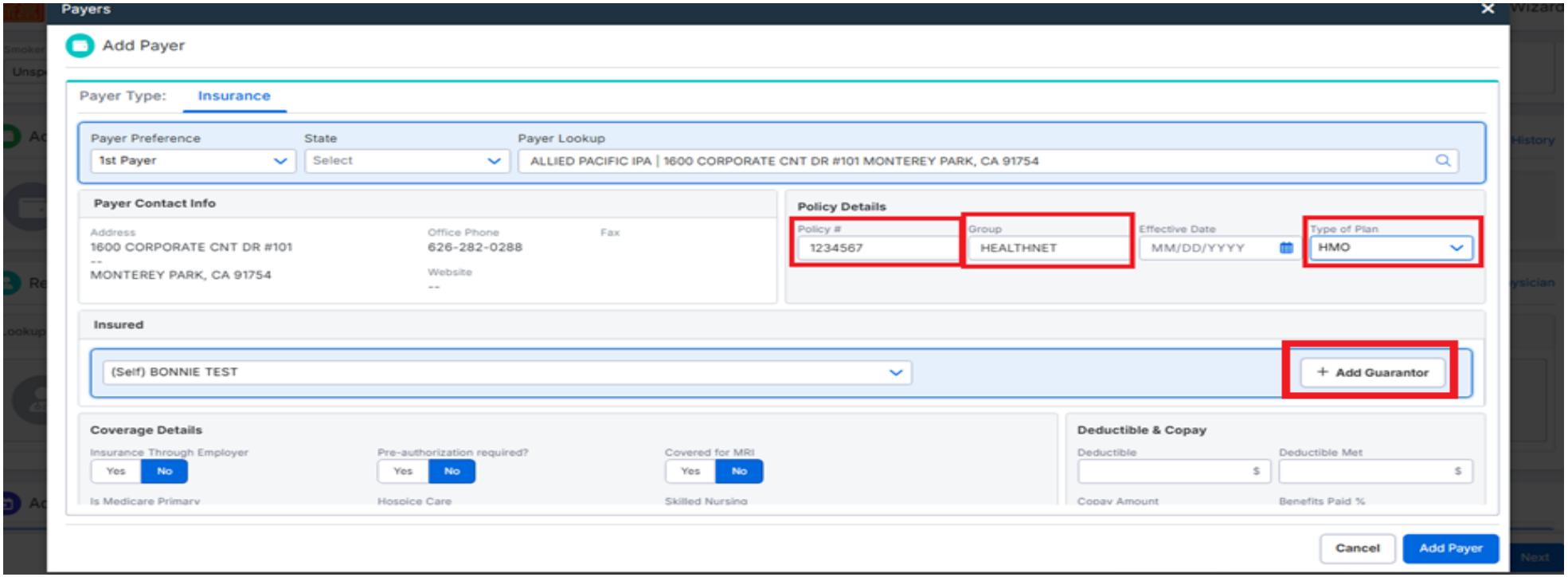
7. In the Active Payers: click Add Payer:



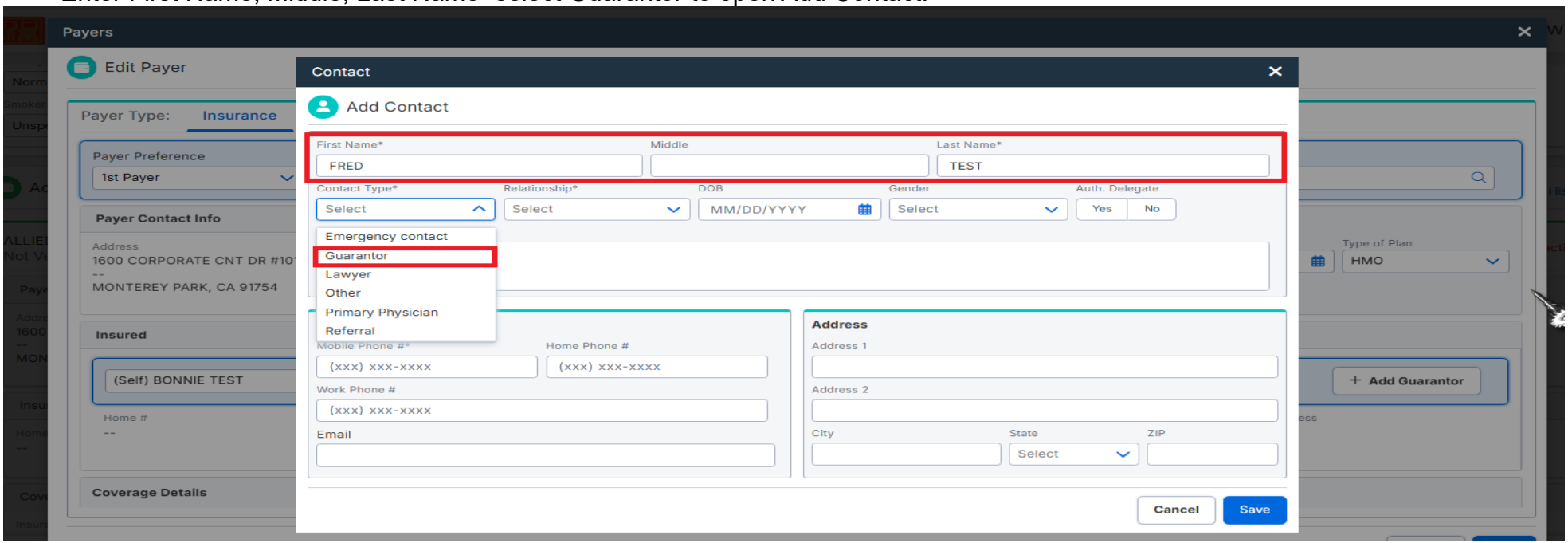
In the Payer Lookup, type payer>select payer>click Add Payer:



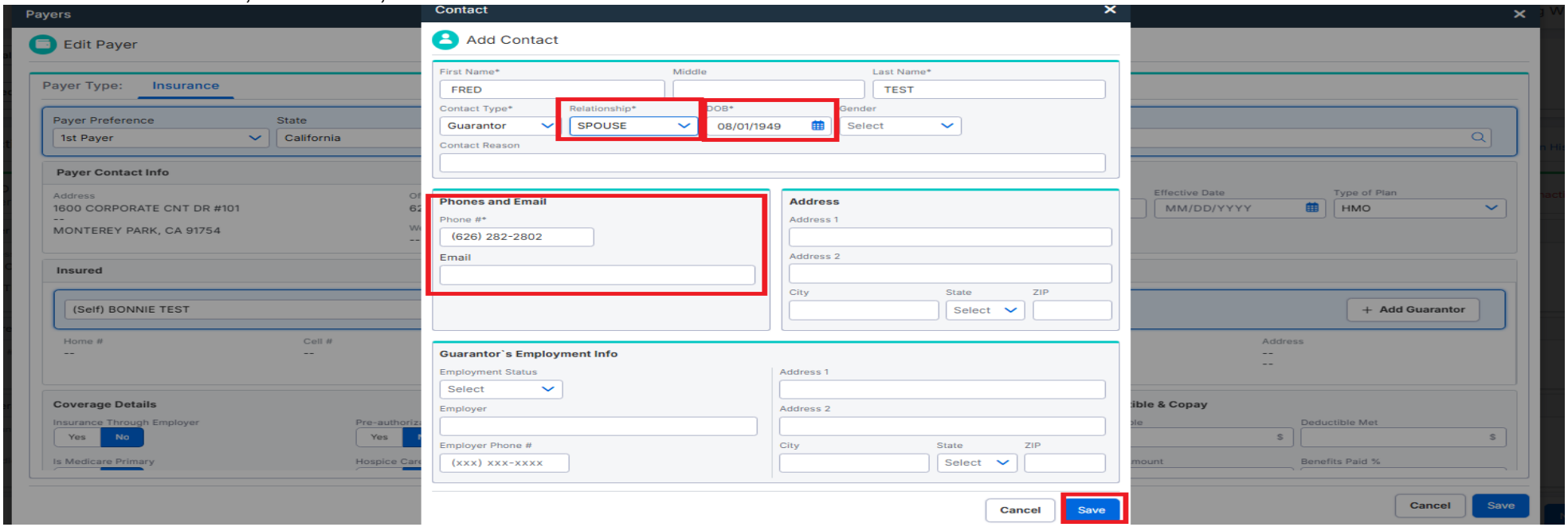
In the Insurance, enter Policy#> select HMO in Type of Plan> Under **Coverage Details:**Enter Prefix of member id & healthplan name in Representative Spoke With :



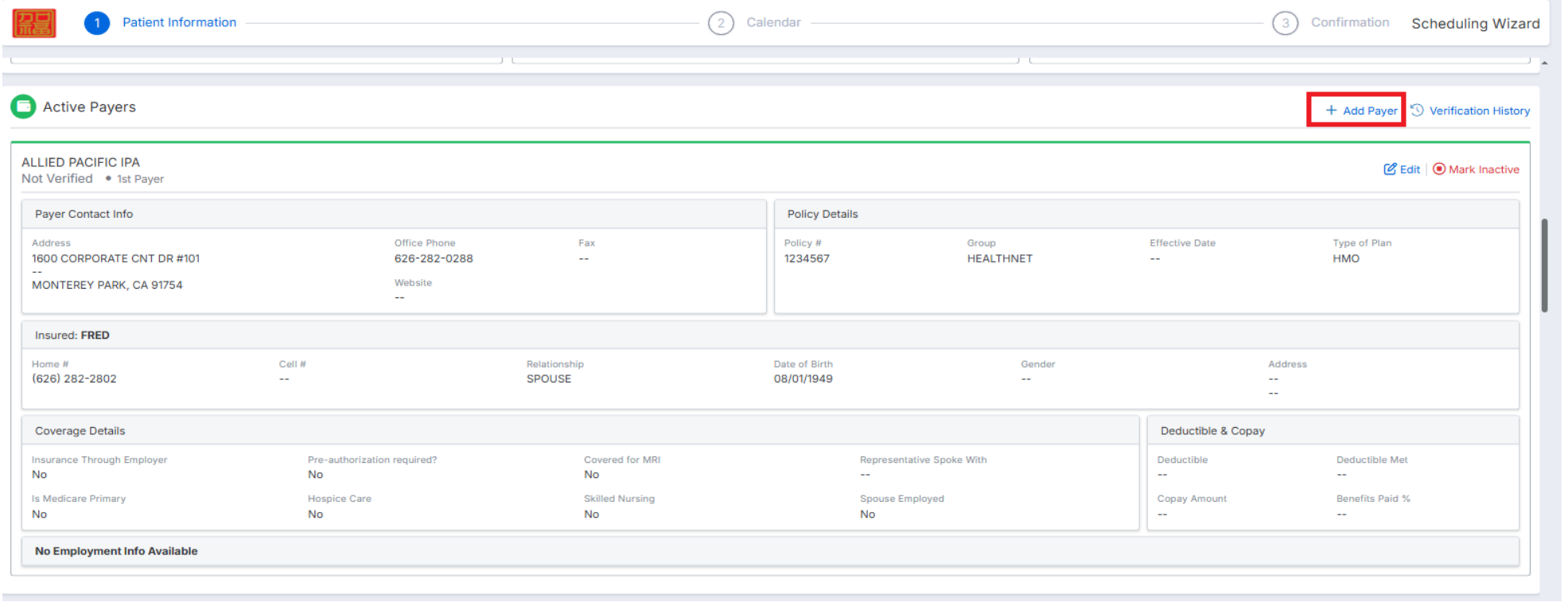
8. Insured is default to Self. If insured name is under spouse/parent, click Add Guarantor:
   Enter First Name, Middle, Last Name>select Guarantor to open Add Contact:



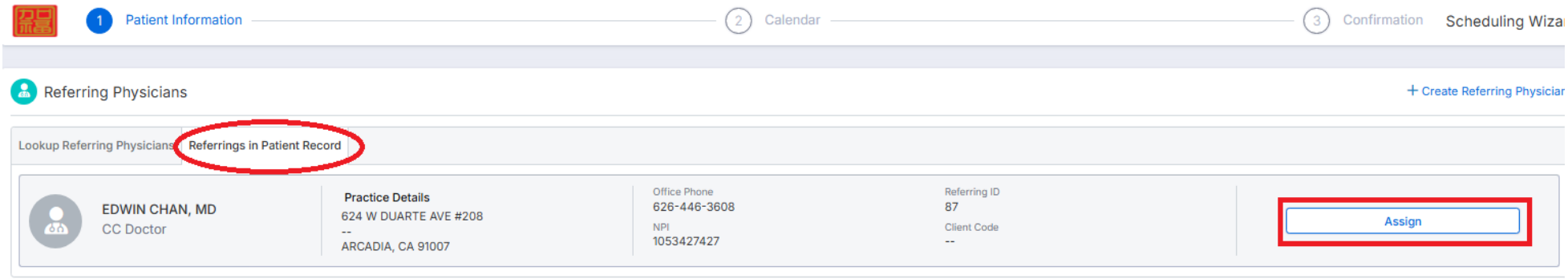
Select SPOUSE, enter DOB, enter Phone>click Save:



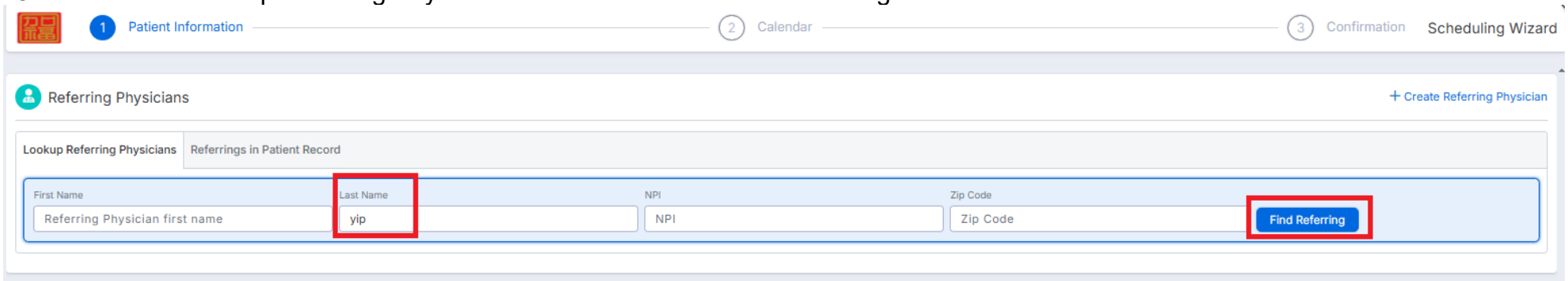
If there is secondary insurance>click Add Payer>(repeat steps as above):



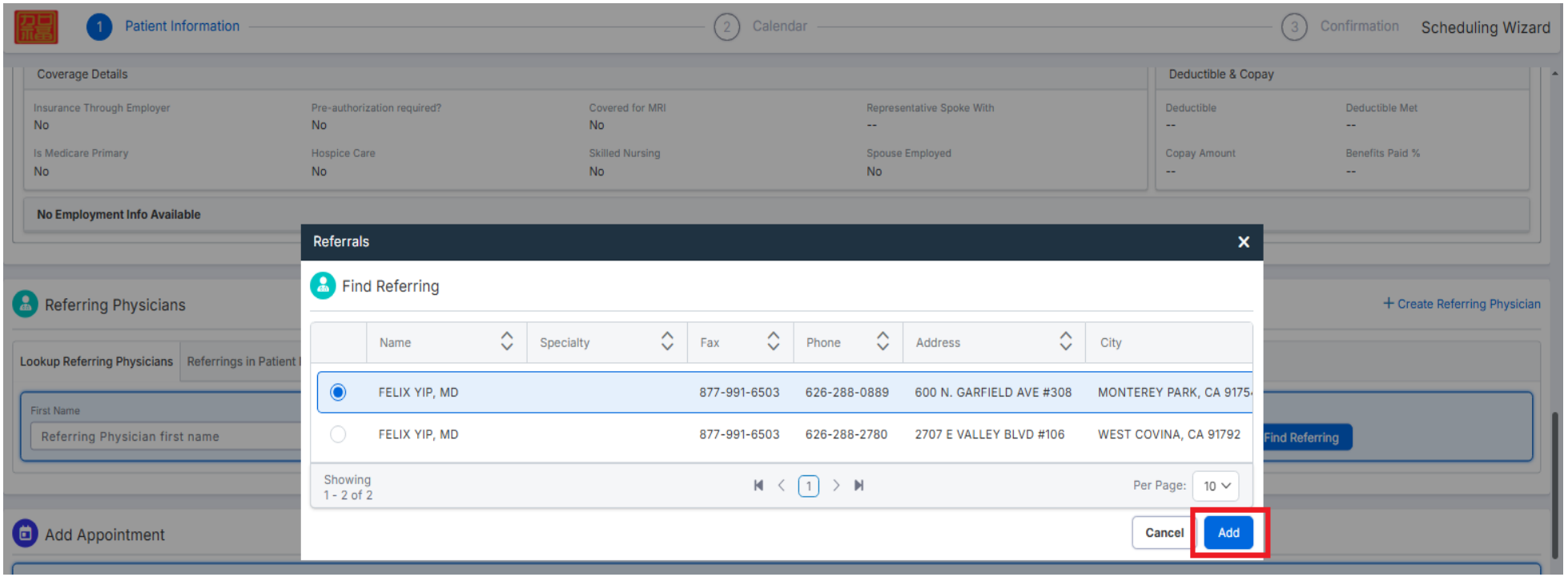
9. In the Referring Physicians, if “Referring Physician in Patient Record” is the same referral>click Assign:



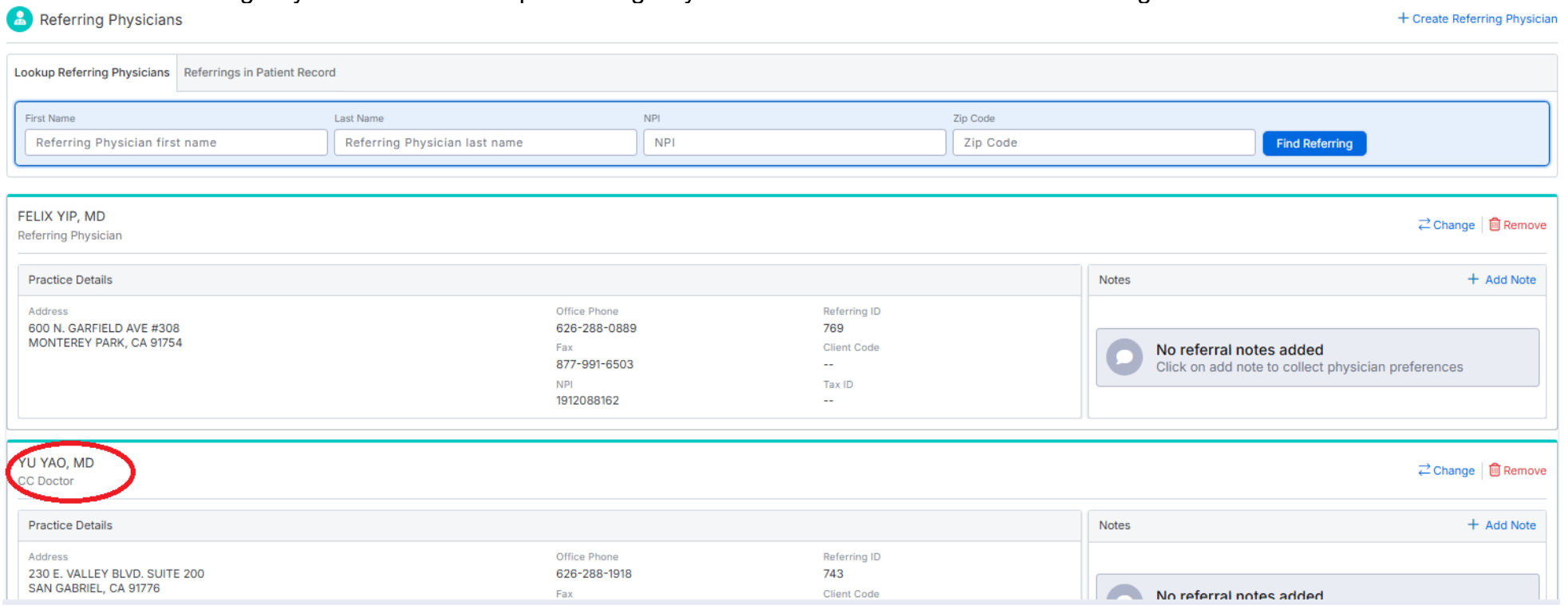
Otherwise click Lookup Referring Physicians>enter name>click Find Referring:



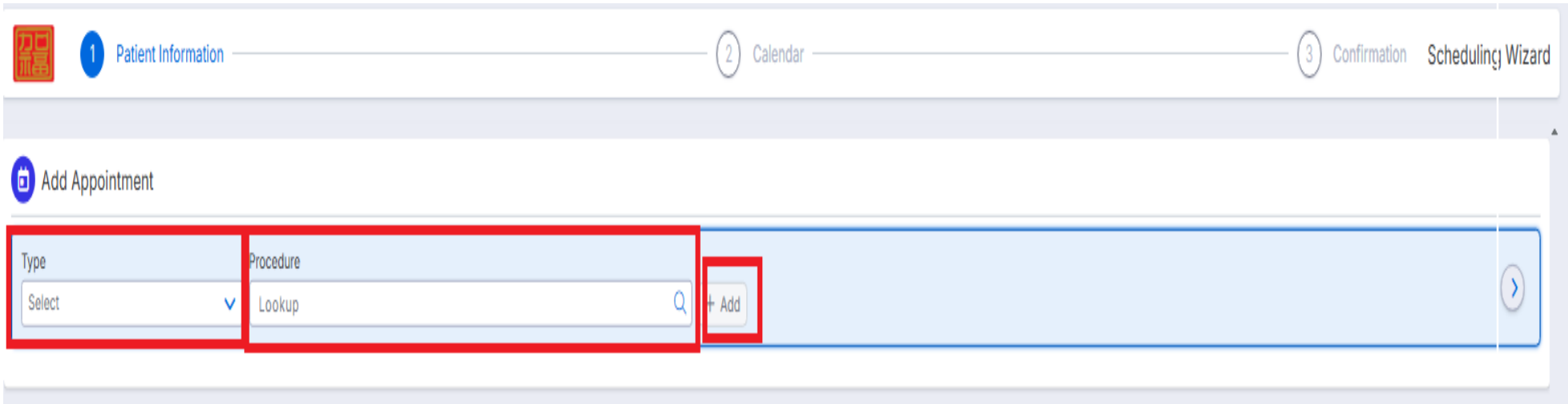
>select name>click Add:



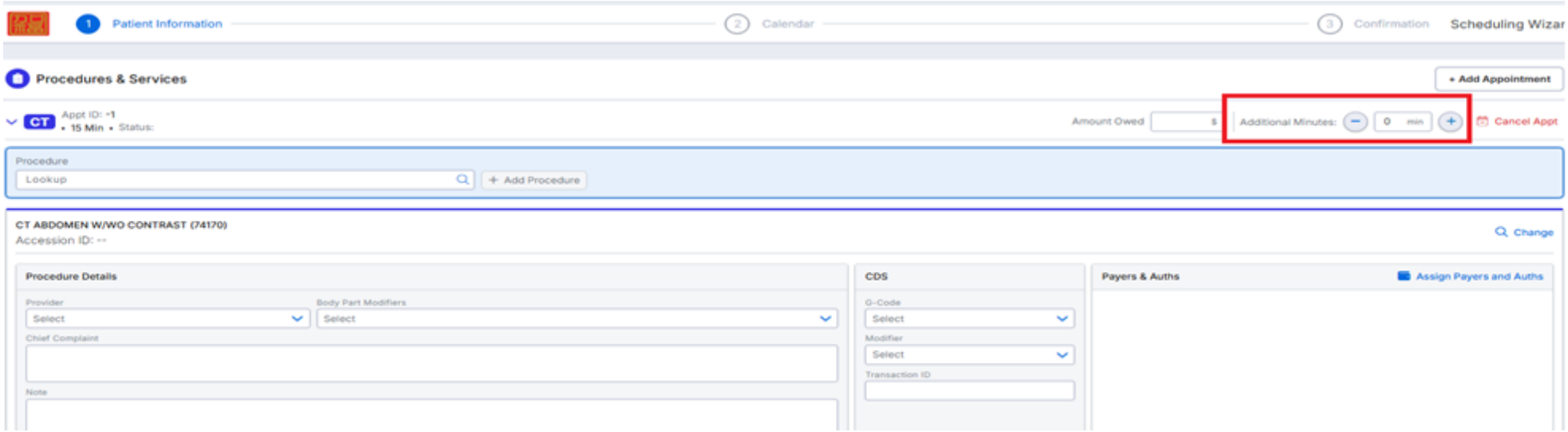
To add CC Referring Physician> click Lookup Referring Physicians>enter name>click Find Referring:



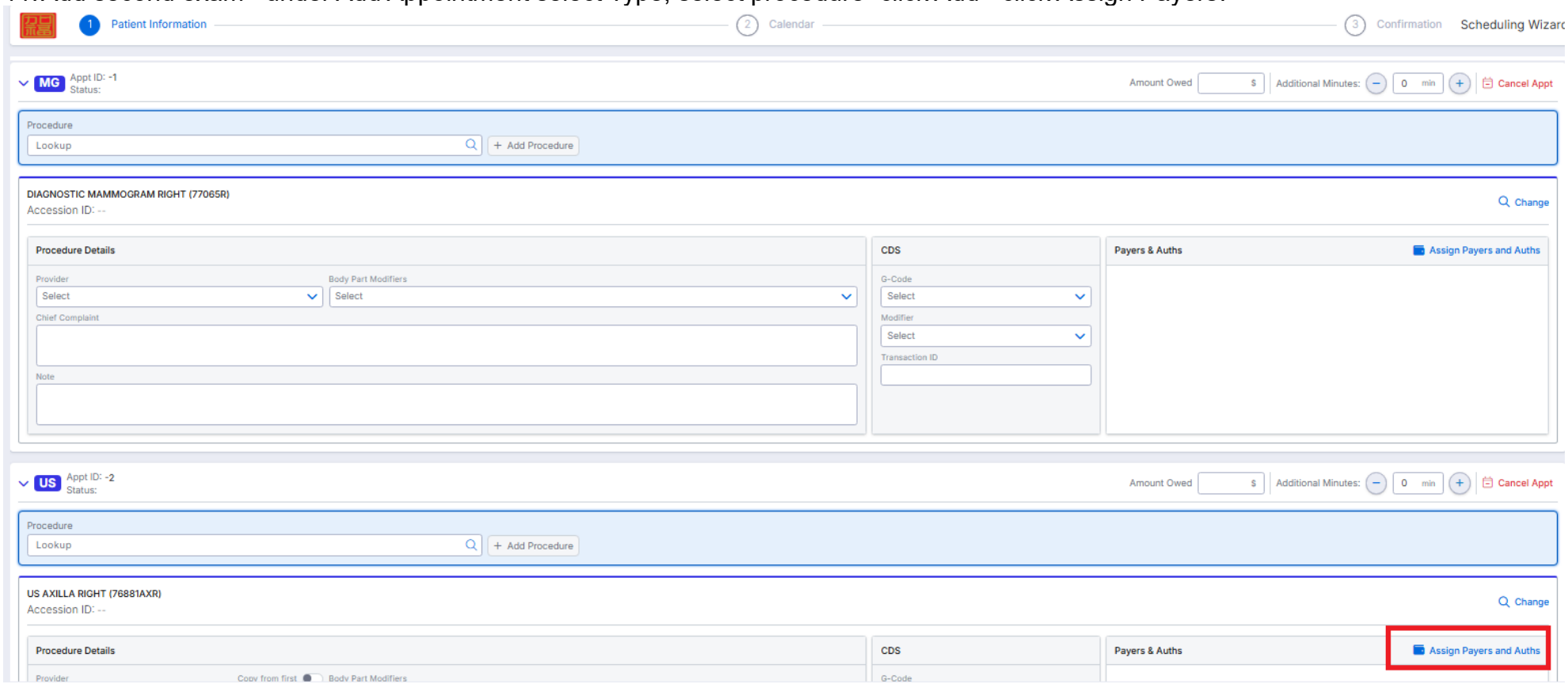
10. Add Appointment(s):
    Type>select exam type>enter Procedure>click Add:



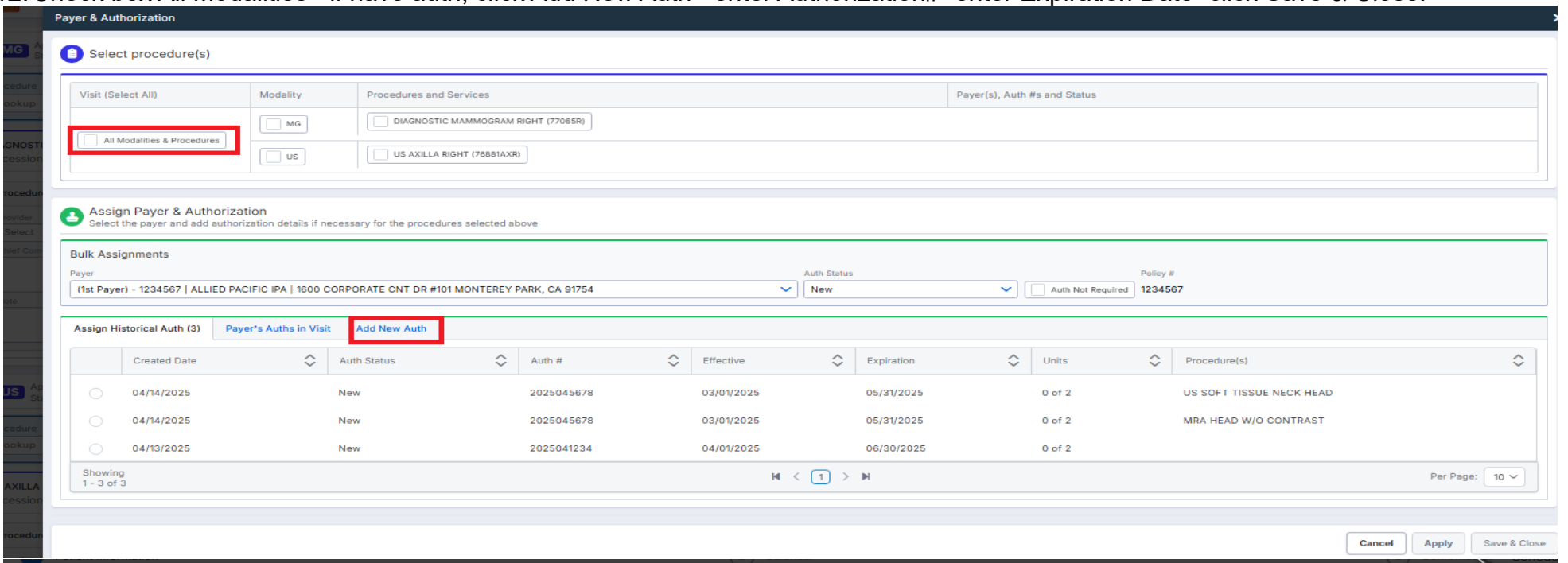
For additional time, click + in addiitional minutes:

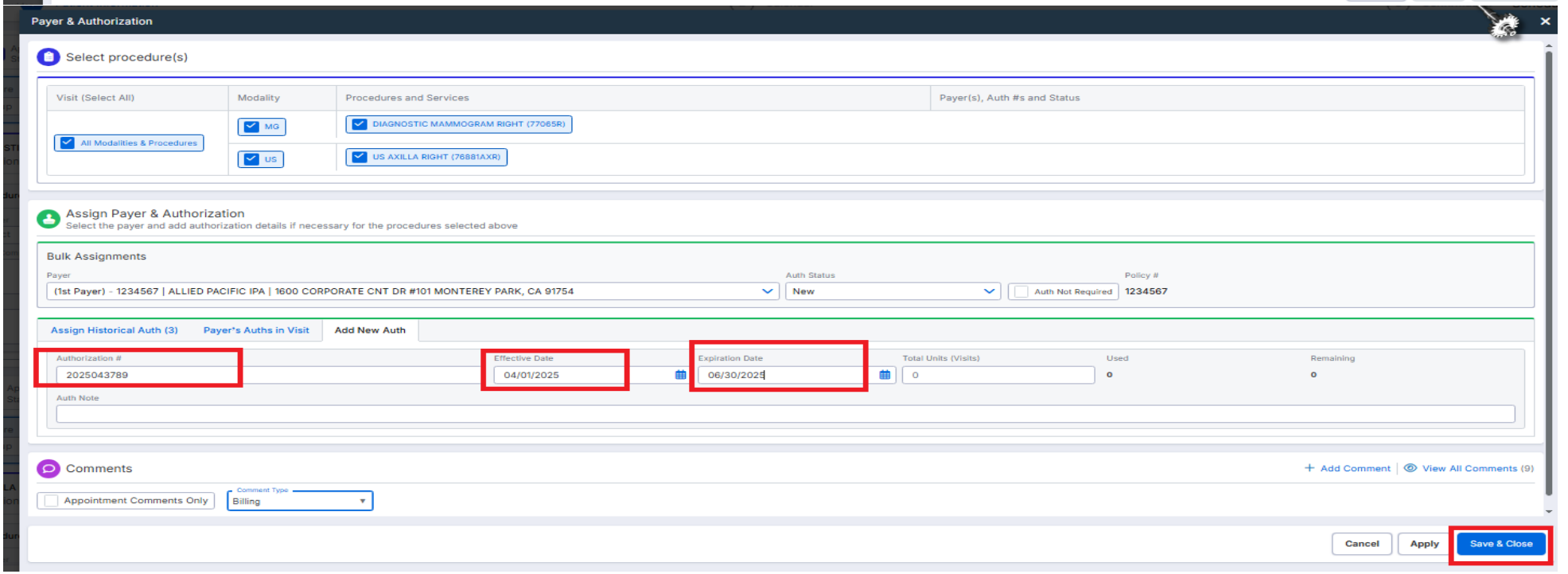


11. Add second exam> under Add Appointment select Type, select procedure>click Add >click Assign Payers:

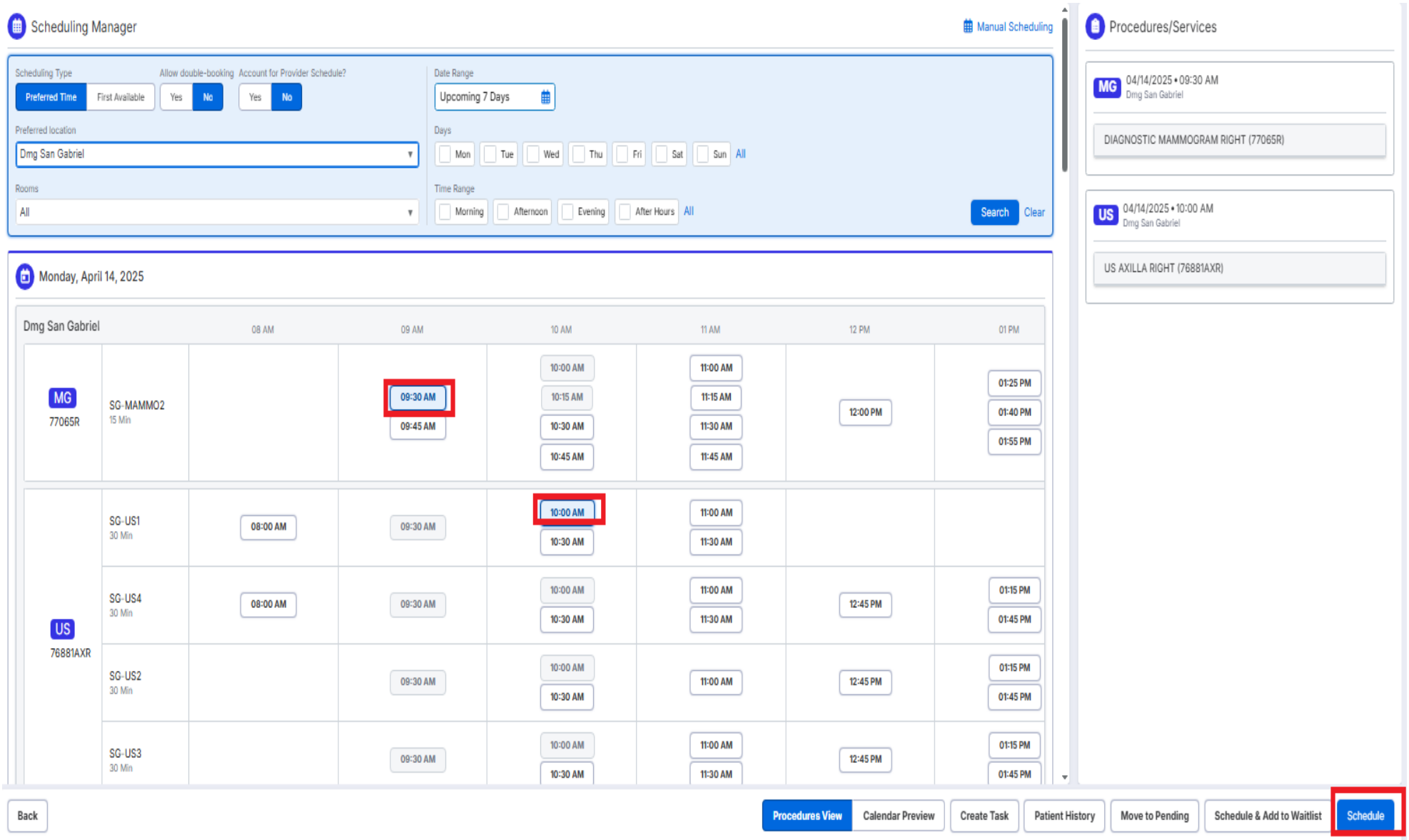


12. Check box All Modalities> if have auth, click Add New Auth> enter Authorization#>enter Expiration Date>click Save & Close:

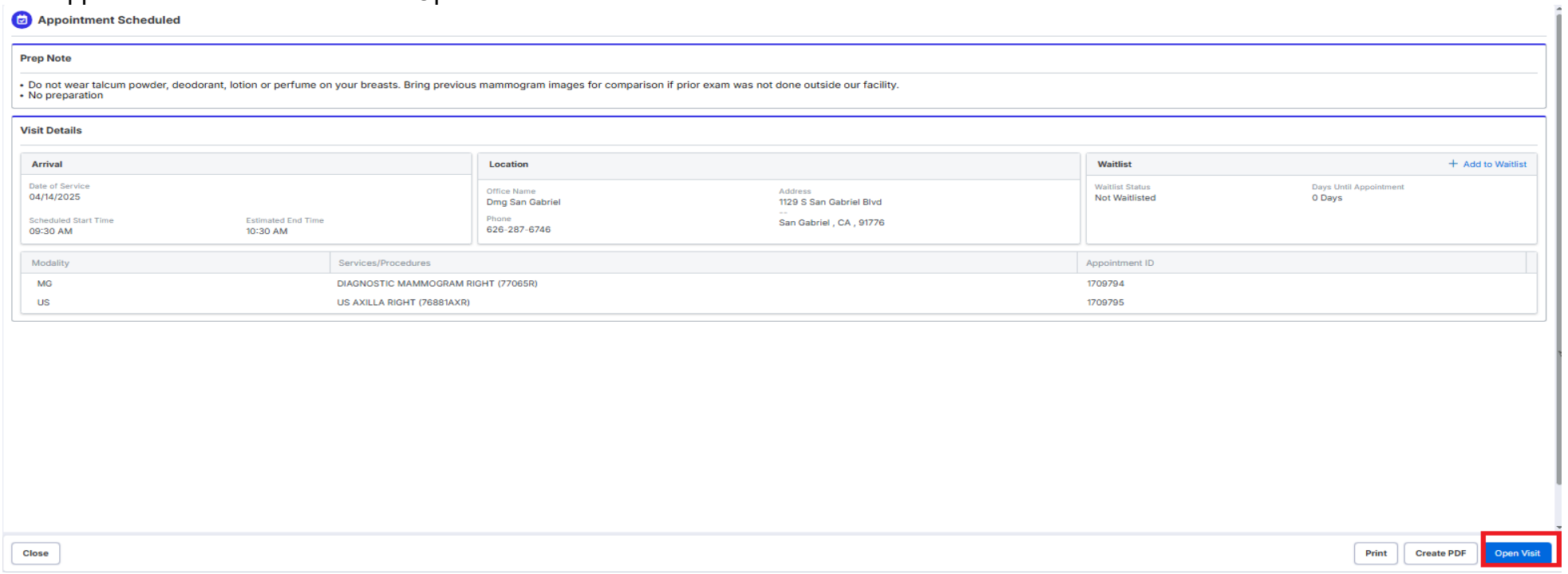




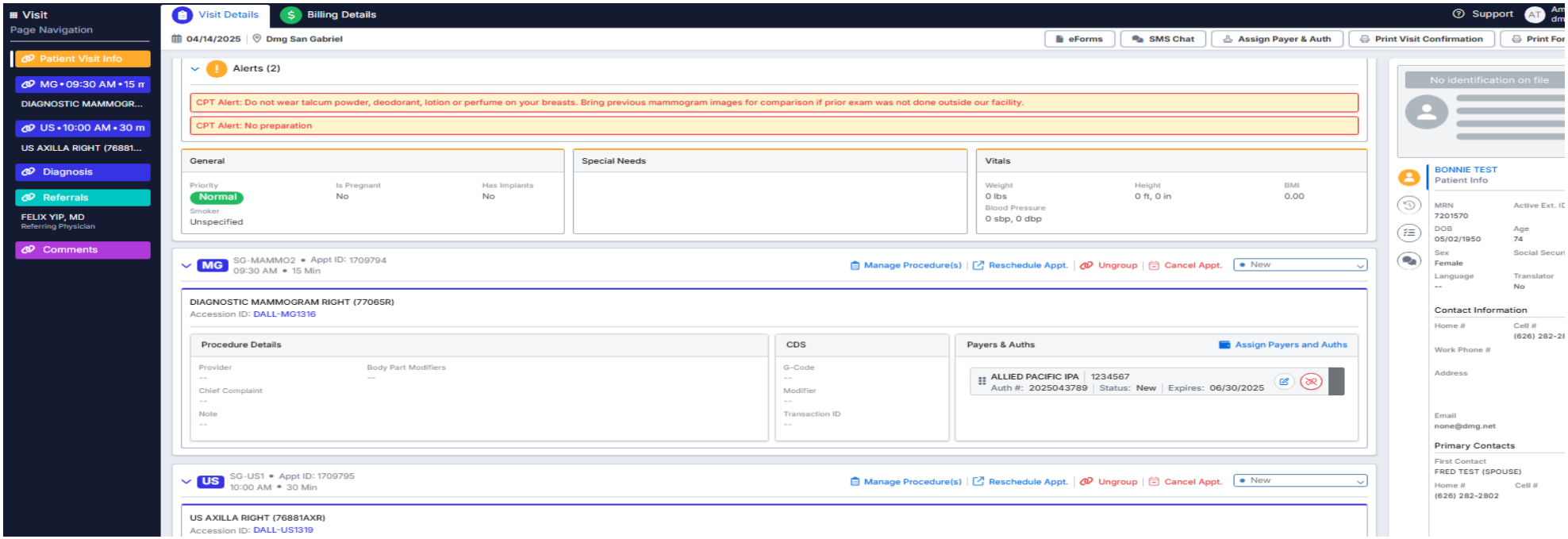
13. Click Next to open Scheduler Manager> On Scheduler Manager>click Preferred Time or First Available> Preferred Location>click Search>select time slots>click Schedule:



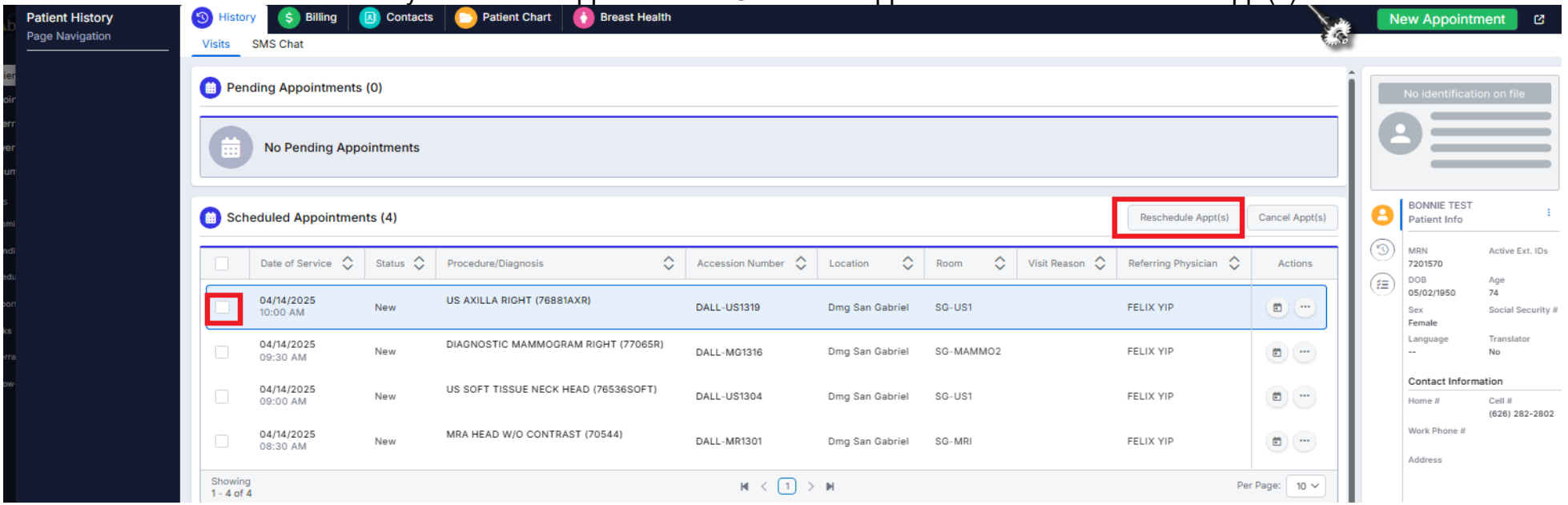
Appointment is scheduled>click Open Visit:



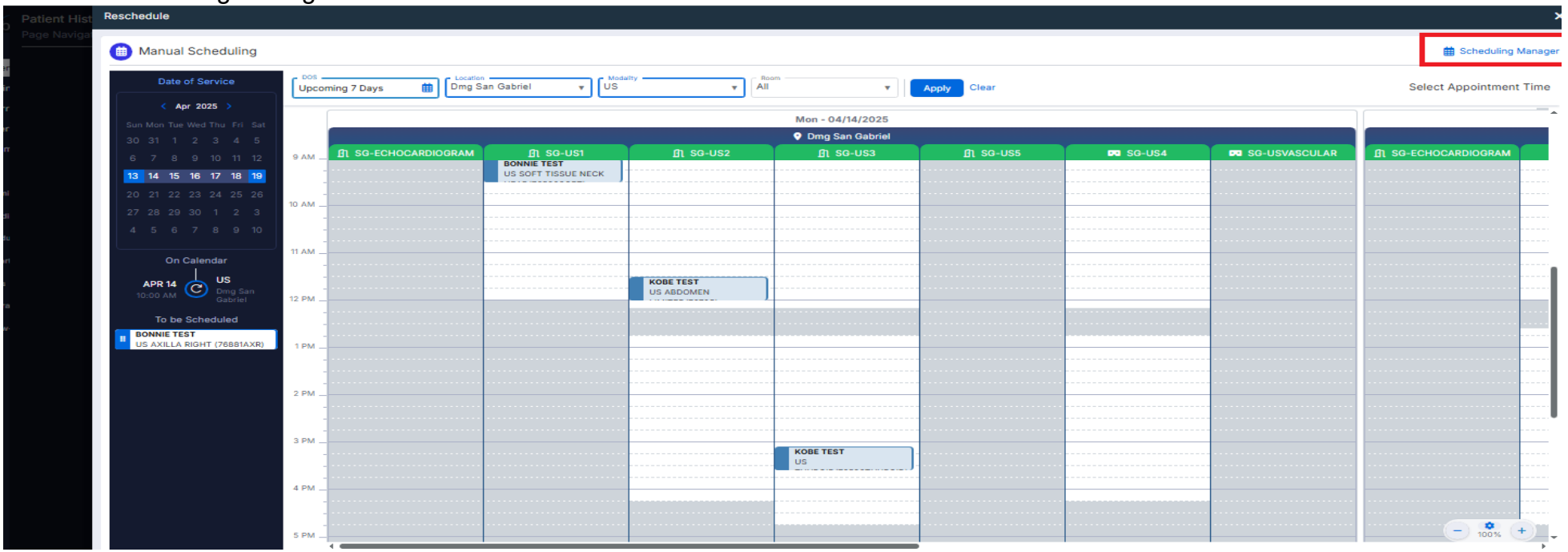
Visit Details:

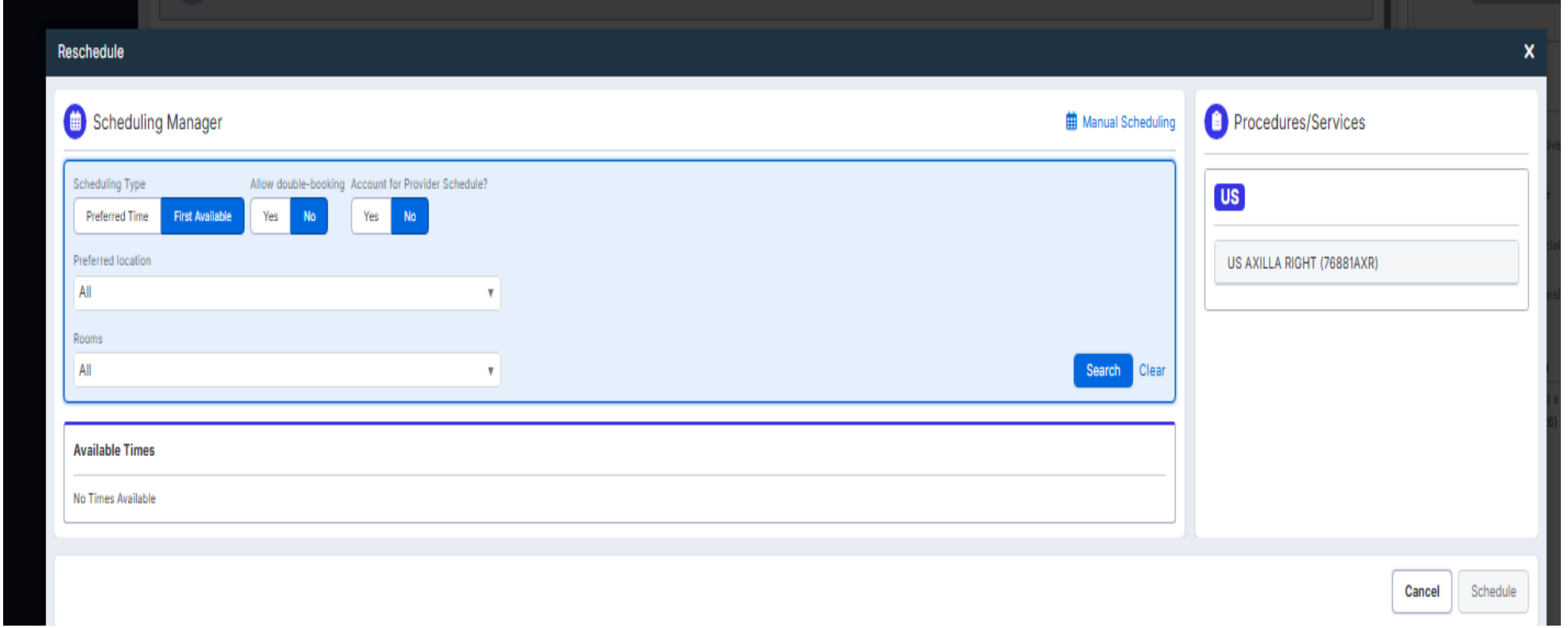


14. To reschedule> In Patient History>Scheduled Appointments>Check box Appointment>click Reschedule Appt(s):

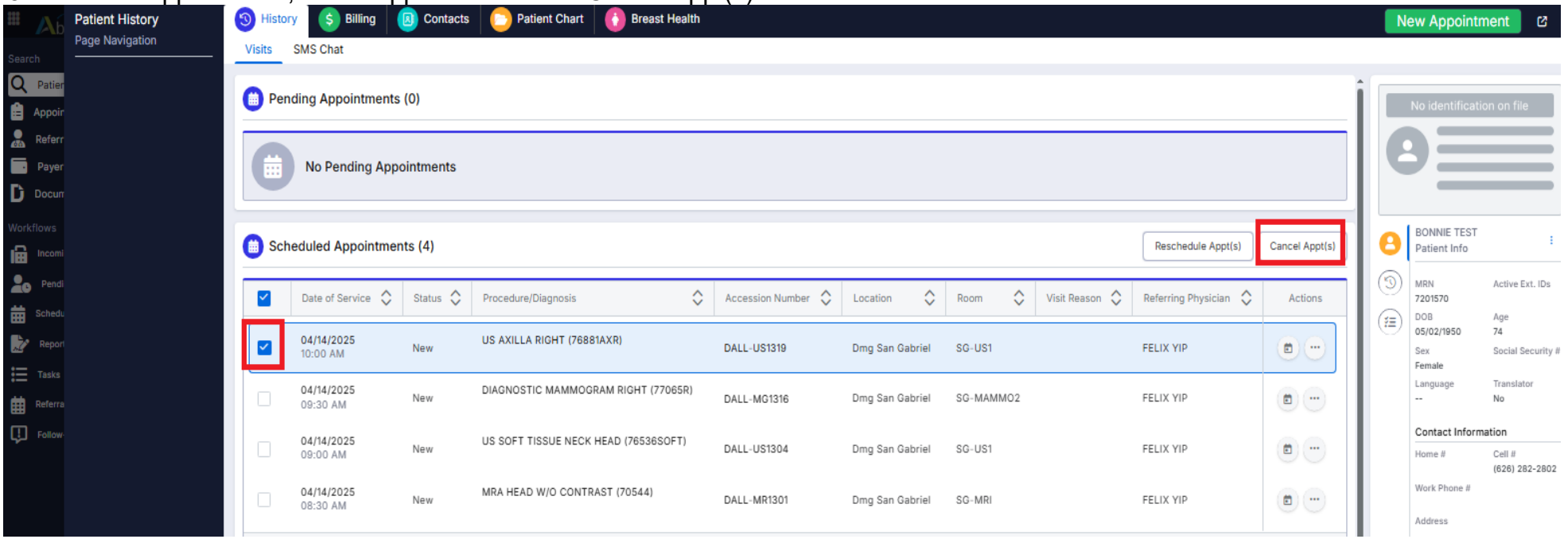
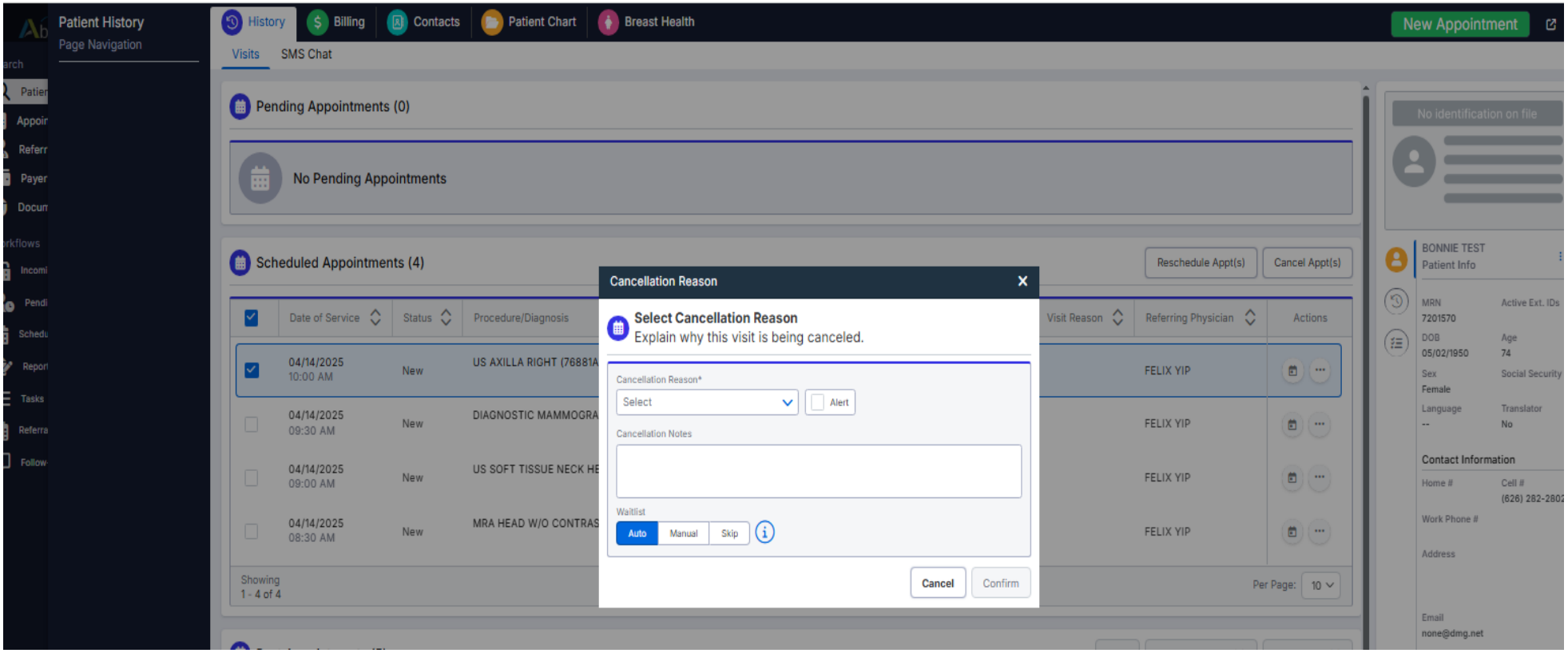


Click Scheduling Manager:





15. To cancel Appointment, select appointment>click Cancel Appt(s) :



select cancellation reason>enter cancellation note>click Confirm: