Combined

Where do I access the reports?

System Menu > Insights

Why does the download feature take so much time to load?

Try clearing cache, cookies and trying again. Report if it still persists.

What is the significance of the aging buckets?

The outstanding amounts owed by insurance carriers and/or patients at the location that are 30 days old or less. (For 0-30 bucket) The outstanding amounts owed by insurance carriers and/or patients at the location that are between 31 and 60 days old. (For 30-60) and so on.

Is there a way to pull a report to show lengths of time patients are waiting in be in tx after the are marked ready for op?

System Menu > Insights> Patient Time Tracker > Summary / Detail View as per the need.

Where do I find the collection and production adjustements made?

System Menu > Insights > Adjustments

How do I add some more information to my report?

Check columns at the bottom. Make sure the required ones are checked.

How to run a report for production by ADA code by location for a whole year at a time?

System Menu > Insights > Operational Reports > Utilization Report >Select View as Summary view >Select the date of service >Set Group by as "Treatment location" "Code" >In Treatment location select all the locations > Generate.

Which is the best report that would give me the list of cancelled appointments?

System menu> Insights> Appointments by Provider> Detail View > Appt Status> Cancelled

I need an AR report with total number of claims over 30 days.

System Menu > Insights >Claims > Summary View > The number will be specified at the top.

How do I get a list of patients with overdue recalls?

Patients with account status active|Recalls|patients with overdue recalls which are overdue by atleast _____

How would you suggest the method to print a new patient's report?

System Menu > Insights > New Patient Report > Download the required report in the required format and then print the file.

Where do I find the information on the adjustments made this month?

System Menu > Insights > Credit Balance Report

Am i able to see what codes are frequently used?

System Menu > Insights> Procedures > Detail View > Select provider /code

How to generate a report which shows all the appointments in a specific time frame?

System menu> Insights> Appointments by Provider> Select the date range needed.

How do I find the codes that have not been billed to an insurance? (Claim not created)

System Menu > Insights > Insurance Pending Procedures > Summary View > Conditions > Select the applicable one.

Why can't I click on generate for the filters I have set?

This report would be too large if it has a date range of more than 1 Month or if it contains more than 10 Providers. The client can use the download option for the same.

I need to know how much unapplied amount is there in insurance.

Insights > Aging > Summary View > Aging Type > Insurance

How do i run a report to see how many patients are attached to an insurance plan?

System Menu > Insights > Insurance plan > Filter out as necessary.

How to run the report for actual collections for my provider?

System Menu > Insights > Operational Reports > Income allocation Report > Select View as Net applied payments > Select Provider > Generate

Is it possible to see the AR aging for only patients without insurance?

Insights > Aging > Summary View > Aging Category > Patient Payment > Patient Flag > Insurance holder. The clients can find the patients with insurance in this manner, and can subtract this from the main list and find the one's without insurance.

How do I find all the adjustments made last month against the patients/insurance?

System Menu > Insights > Adjustments > Detail View > Insurance / Patient

What is the relevance of the date inside this report?

The date is the respective Transaction Date

Is there a way to see what is scheduled so far for the month?

System menu > insights> Appointments by provider > Detail View

I want to view the end of the day reports to balance accounts.

System Menu > Insights > Daily Journal

Where do I find the information on the adjustments made this month?

System Menu > Insights > Adjustments

Suggest a report for viewing the patients who were no-call no-show patients for the day.

System Menu > Insights > Appointments by Provider report > Detail View > Appt. Status > No show

I want to obtain a report with details regarding the production vs collection reports of individual providers.

System Menu > Insights > Income Allocation > Income Allocation > Group by > Providers > Select the required providers.

How can I generate a report that shows the production for a week?

System menu> insights> income allocation report>net production OR System menu> insights> income allocation extended report>gross production (As per the user's requirement)

How to get the report on the provider's working hours?

System Menu > Insights > Operational reports > Clock in / Clock out.

How do I find the total unapplied credits left with the practice?

System menu> insights> credit balance report

I can't seem to access any of the reports?

Check the permissions of this user under System Menu > Practice Settings > Administration > Respective Profile > Insights

How can I get a lost of patients that have prvious/upcoming appointments with a particular procedure code linked to it?

Patients with account status active|appointments|patients with upcoming appointments with procedure codes _____

How can I generate a report that shows the collection for a week?

System menu> insights>payment log report

How do I find the existing balances for patients?

Insights > Aging > Summary View > Aging Type > All

Insights > Aging > Summary View > Aging Type > Patient

What is the report where the aging reflects the patient payments and the respective patients do not have an insurance?

System Menu > Insights > Aging Report > Category > Patient Payment > Patient Flag > insurance holder.

How do I generate an aging report for a specific carrier?

Insights > Aging > Detail View > Aging Type > Insurance, the report generated will be sorted by carriers.

How do I know the number of patients a provider attended on a particular date?

System menu> Insights> Appointments by Provider> (Select the date and provider)

Is the adjustment report real time data?

This report shows data as of 11:59PM yesterday, local time.

How do I find the collections for the practice which were made through credit card, cash, and checks?

System Menu > Insights > Payment Log > Detail View > Payment Category > Select the required options.

What report should I run to get a monthly count of a certain procedure code?

System menu> Insights> Appointments by Provider> Detail View > Appt Type > Online Booked Appointments

How do I find out the appointment booked using the Online Booking feature by the patients?

Which is the report that would give me the details of patients subscribed to a particular insurance carrier?

System menu>patient lists>generate new list> click here to create a filter> set the fields as [Patients with account status active|Insurance|Patients with insurance carrier name as any of ____]>save> generate (select the carrier name as per requirement)

Which one is the report that shows production gross and net with payment category as Carecredit?

System Menu > Insights >Payment Reconciliation report > Required date range > Payment category > Care credit

How to generate a report for the production totals of different providers?

System Menu > Insights > Utlization > Group By > Provider > Set the necessary details

How do I find out the the number of appointments that are in the No Show status ?

System menu> Insights> Appointments by Provider> Detail View > Appt Status> No show

How to generate a report for all the transfers done through CS?

System Menu > Insights > Payment Log > Detail View > Payment Category > Transfer.

How would I know the list of patients who were checked out by a particular user?

System menu> insights> appointments by user> (Select the date and provider)

Is there a way in Carestack to see if a patient was seated past their appointment time?

System Menu > Insights> Patient Time Tracker > Summary / Detail View > App. Status

Created a new patient today, but it is not showing in the New patient Report. Could you please let me know why?

The Patient has to complete a certain procedure code which they can choose and that'd be set up from the backend. Only after completing that code would they be treated as a new patient. For example if the backend is set to treat a patient as a new patient when the code D0150 is completed, only after the patient completes that code would they be a part of the New Patient Report. This can be set to a particular code or any code based on the practice's c

I need a report for a entire year of collections in our system

income allocation report by net applied payments.

Which is the best type of report to generate for transfers made by insurance?

Payment Reconciliation or Daily Journal. There is filter in the Payment Reconciliation report, whereby the users can filter out the payments using their Payment Type and/or Payment Category.

Report that lists production by insurance carrier for a given time period

System Menu > Insights > Utilization > Set the primary Insurance Carrier > Generate.

Report for viewing the patients who were no-call no-show patients for the day.

Appointments by Provider report > Detail View > Appt. Status > No show.

End of the day report

Insights > Operational report > Daily Journal > Detail view

Is there a report I can print that shows unscheduled treatment?

Procedures report > provide the scheduled status as unscheduled

How can I get a report of all the insurance payments that were received for a particular month?

Payment Reconciliation or Payment Log > Set the Payment entity as Insurance

Clock in/Clock out report

System menu> Operational Reports > Clock in Clock out report > Select the time range and the user > Generate to see the number of working hours

Combined
Why aren't the codes populating the insurance plan fee?

Make sure that there is a fee schedule assigned to the insurance plan of the patient. Please navigate to Patient profile > Ins > Click on the insurance row > Click 'Plan Fee Schedule Assignment'. This would show the fee schedule assigned to the insurance plan.

How to change the fee for a code?

Navigate to System Menu > Practice settings > Fee tables > Fee Schedules > Find the required fee schedule > Click the pen icon next to it to edit > Make the necessary changes > Save/Save & Close.

Why am I not able to verify the insurance plan for the patient?

Please make sure that if the patient is having any terminated insurance plan, update the subscriber ID of the terminated plan to some junk value(eg. Subscriber ID: 00000)

Why is CareStack is not letting me refund a patient?

Please reverse the transactions of the receipt you wish to refund. This would restore the credits in the receipt. Once you do this, navigate to Patient profile > Billing > Payments > Refund/Adjust-off to make the refund.

Why is a claim in Saved with Error status?

Once you create a claim, it will be either in saved with error status or saved status. The saved with error status occurs when some kind of information is missing. You can see it at the top of the the claim form when opened.

Why does the system show ' SSN number/ Subscriber id already exists for the plan'?

This warning appears when you are trying to add an new insurance but there already exists the same insurance with the same subscriber information in this accout. To rectify this, you may navigate to Insurance Plans > Show Teriminated Plans > Reactivate it > Update its Subscriber id to 0000 (after changing it to Subscriber ID from SSN) and then save it. Now you will be able to save the other insurance plan with the correct subscriber id.

Navigate to Patient Profile > Billing > Payments > All payments > Select the required payment > Delete it.

How to rectify a wrongly posted payment?

Navigate to Patient Profile > Insurance > Hierarchy Assignments > Set the required heirarchy > Save.

How to transfer back to Insurance for an OverPayment?

You can navigate to the Insurance Posting page > Go to Transfer/Refund tab. There you will be able to tranfer the credit back to Insurance.

How to apply an unapplied credit amount to a patient?

You may navigate to Patient Profile > Billing > Unapplied Credits tab > Select the Credits > Select the codes > Post it

Where can i see the all completed procedures for a patient?

Navigate to Patient Profile > Billing > Completed Procedures tab

What happens to the document needed claims?

You can find the Documents required claims in Document Tab in claims section. You may use NEA to attach the required documents with the claims. Then those claims will be in Ready to Send status.

How to add in migrated credit to a patient ?

You can navigate to Patient profile > Billing > Add a new payment and select the payment type as Migrated credit . THis will add the credit to the patient

How to add an adjustment to a procedure code?

You may navigate to Patient Profile > Billing > Add new payment > Select the procedure code > Click on the + icon > Provide the adjustment type and adjustment code > Submit

How to Refund Unapplied Credits?

You may navigate to Patient profile > Billing > Refund/Adjust-Off tab > Fill in the details and click on the Refund button.

Why the need to update Eligibilty every month?

The eligibility updation is set to Every Month and the user is able to change it in the schedular settings. It can be set to Cusom period. If it is set to Every Month, then eligibilty has to be updated every month.

Why is the user not able to find and post the insurance payment?

This may be because the claim will be in closed status. The user would have to chnage the claim status to Reopen and then post the payment.

Where to see all the Payment and Claim activities ?

You can find this in Patient Profile > Billing > System Transaction

How to edit the Billing Details ?

You may navigate to Practice Settings > Payments > General > Billing Dentist > Edit

How to add Codes to NEA Recommendation list?

Navigate to Practice Settings > Payments > NEA Recommendation > Add code

How to change the DOS of a code in ledger ?

It is not possible to change the DOS of a completed code in ledger. Intead the user could delete the code and then add a new code.

How to Post Insurance Payments ?

Navigate to Insurance Payments > Select the Carrier > Select the Patient > Select the posting type > Post.

How to send Text To Pay Message to a patient ?

Go to Patient Profile > Billing > Ledger > Text to Pay button > Send Message

How to Adjust Off Unapplied credits ?

Go to Patient Profile > Billing > Payments > Refund/Adjust Off > Adjust Off Unapplied Credit

How to Print Payment Summary ?

Go to Patient Profile > Billing > Payments > Print Payment Summary

How to Add an Ortho Case ?

Go to Patient Profile > Billing > Ortho Case > Add Case

How to add in the Auth Response Details ?

Navigate to Patient Profile > Billing > Authorizations > Auth Response tab > Fill in the details

How to Delete a claim ?

Navigate to Patient Profile > Billing > Authorizations > Auth Response tab > Fill in the details

How to Terminate an Insurance plan ?

Navigate to Patient Profile > Insurance > Update Termination date near the Plan

How to add a memeber to an Insurance Plan ?

Navigate to Patient Profile > Insurance > Click on Add another member

How to add a new Carrier ?

Go to Practice Settings > Carriers > Add > Fill in the required details

How to add a new Plan ?

Go to Practice Settings > Plans > Add > Fill in the required details

How to add a new Collection Agency ?

Go to Practice Settings > Collection Agency > Add > Fill in the required details

How to add a new Fee Schedule ?

Go to Practice Settings > Fee Tables > Fee Schedules > Add

How to add an assignment to Fee Schedule ?

Go to Practice Settings > Fee Tables > Assignments > Add an Assignment

What is the carrier claim control no?

It can be found on the EOB.If they don't have one/can't find it they can put any # they want. That number is just for internal reference.

Is there a filter to see the oldest pending claims first instead of the newer.

The Claim grids in Menu > Claims are sortable> There is an aging filter you can sort by> It's just on the pending payments tab.

How to update a code to show N/A

Navigate to the chart>click code>N/A>Zero out cost

Combined
How to add explosion codes to patients chart

Either at time of booking > add treatments > explosion codes or advanced planner explosion codes

How to assign codes to a treatment plan

Select the required codes > right click> move to TX plan > create TX plan

How to create phases and add codes to phases

Select the required codes > right click >Add to phase > creare new pahse

How to print out treatment summary/invoice

right click on tx plan > print tx plan. On the new upadate we can select to print with fee details or without fee details

How to add discounts

Right click on the codes > apply discount

How to delete discounts

To delete an exisiting discount either delete it at after the code has been complted or apply a new discount of 0%

How to enable clinical lock out for a practice

Create a JIRA as a service request for this

Unable to change biling order

This can occur due to some underlying issue. Could create a JIRA if there exists no other problem.

Cannot take xrays and xvcapture clinical software(Apteryx).

Check if the software is installed or else recommend the client to contact their IT support to install the same

Why are some clients unable to edit the Care note templates?

Check if the client has the permission to do the same. If not let them know.

How to create carenotes from scracth

Practice settings > clinical > carenotes >Add resoponses > create template using the said responses> link it to a code under linked items >Add the template toa template category if needed

How to change tooth from primary to permenant

Select the tooth icon on the left and click on chnage all to permenent

How to enter values greater than 9 while using perio chart

While enter double didgit values press the ALT key

How to transfer xrays from one patient's chart to another patient

We cannot transfer the perio chart from one patient to another. We can create a new perio chart for the correct patient and delete the previous chart.

How to change the provider name for Carenotes

System Menu > Administrationc> Users > Provider details > User Setup > Edit > Save

How to edit clinical note templates ?

System Menu > Practice Settings > Clinical > CareNotes > Search for the care note template and click Edit on the right side.

How to unlink a tooth from a finalized carenote?

Delete the existing carenote and add a new note with the right tooth number.

How to generate unfinished notes report?

System Menu > Insights > Operational Report > Care Notes Tracker.

How to see all the patients for who the care note was not added?

Generate the report with Care note status as "(blank)". Using this you it will be possible to see all the patients who had completed a code but did not have a carenote added. The reason few patients are not seen in the provider specific report is because the carenote is associated with the provider until it is added.

How to add care notes to a patient?

Navigate to patient profile > Click on +Note > Search for the template in the search bar > click Add note

How to change direction for perio Charting on user level

Navigate to the User system> Practice Provider> select provider

Is there a way to print migrated treatments ?

From the patient's profile, please navigate to Billing>Migrated Transactions > Click on print on the top right > Select the date range > Print.

Add provider to clinical notes

in PS>clinical>care note>responses>search note> Edit> add the provider name and done

Tooth chart precedence display

Planned, Referred Out, Completed, Existing This practice, Existing Other Practice, Referred Out Completed, Condition.

Care Note character limit

16,000 - if a user copies and pastes everything pasted is considered so many times they paste fonts, characters, etc. that take up many more characters than 16k

How to send a treatment plan to a patient via the patient portal?

https://carestack.zendesk.com/agent/tickets/61048

How do I add a favorites list from one to all others?

Clinic Favorites Guide in Trello This can no longer be done in DoseSpot, Instead, clients should be creating Clinic Favorites that can easily be distributed to new providers in that location when they join.

Add care panel as a default

system menu>> User setting>> Under General>> Edit>> select the care panel from the Default Favorites Care Panel drop down>> Save.

Combined
Where to add a production type?

System Menu > Practice settings > Scheduler > Production Types > Add.

How to make the production type as a block?

System Menu > Practice settings > Scheduler > Production Types> Add > Set Display as block "Yes" It can't be edited for the existing production types. Only workaround is to add a new production type by deleting the existing one.

How to setup default duration of production type?

System Menu > Practice settings > Scheduler > Production Types> Edit > Set Default Duration as per the requirement.

How to change the Production Type Color?

System Menu > Practice settings > Scheduler > Production Types> Edit > Set Production Type Color as per need.

Need to enable cancelling reason while an appointment is cancelled

System Menu > Practice Settings > Scheduler > Scheduler settings > General settings> Edit > Enable Cancelling Reason as Yes > Save.

How to link the operatory to the provider in production calendar?

System Menu > Production Calendar > Select the Location > Provider Tab > Select the day > Click Edit > add operatory > Save.

Expand access to CareStack to 24/7 for a user.

System Menu > Practice Settings > Administration > Users > Select your User Name > Click on the Working Hours tab and then change these hours to their liking.

How to add a new Appointment Status/Flag?

System Menu > Practice Settings > Scheduler > Appointment Status > Add

Is it possible to delete an Appointment Status/Flag?

No but there's an option to activate/deactivate the corresponding flag.

How to activate/deactivate the Appointment Status/Flag?

System Menu > Practice Settings > Scheduler > Appointment Status > Select the flag > Actions > Activate/Deactivate

Is it possible to delete a Production Type?

Yes. System Menu > Practice settings > Scheduler > Production Types > Navigate to the respective Production Type and click on the red trash icon to delete it.

How do I deactivate a Production Type?

System Menu > Practice settings > Scheduler > Production Types > Navigate to the respective Production Type > Actions > Deactivate.

How to change the slot duration from 5 mins?

System Menu > Practice settings > Scheduler > Scheduler settings > General settings> Edit > Default slot duration

Is there a printer friendly way to print out the appointment schedule?

Print icon on top right of the Scheduler.

Can you please show me how to hide patient info so they dont see in the schedule?

Navigate to the scheduler by clicking on the calendar icon > Select Hippa view.

My Scheduler is showing no operatories to display. Why am I not able to see the operatories?

You have to set a custom filter by selecting the Location, Specialities, Provider,Templated production types> Click on Apply . You could also save this filter by clicking on Save and Apply.

How do I add another column in the scheduler ?

In order to add a new operatory, you would have navigate to System Menu > Practice Settings > Locations > Select the location > Operatory Settings > Add a new operatory. And then you would have to link the operatory to the provider in production calendar.For that you may navigate to System Menu > Production Calendar > Select the Location > Provider Tab > Select the day > Click Edit > add operatory > Save.

I need to extend the default count of the operatories

System Menu > User Settings > General > Edit >Set Default Operatory Count as per your need. You can extend it upto a count of 20.

I need to change the slot colour to Production type and margin colour to provider.

System Menu > Practice Settings > Scheduler > Scheduler settings >Customization of Scheduler Views >Edit > Appointment Block Color Settings > You can change the Appointment Slot Color and Appointment Margin Color

How to remove remove Referral Provider Missing data from scheduler appointment blocks

Navigate to system Menu > Practice settings > Scheduler > Scheduler Settings. and edit the details here.

How to add a schedular template at a location level?

System Menu > Production Calendar > Select the Location tab > Select the location > Select the day/date > Click Edit > add operatory > Save.

Where do I add a template in the Scheduler that occurs on every X day?

System Menu > Production Calendar > Select the Provider tab > Select the location > Select the Provider > Select the Day/Date>Click Edit >Set Recurrence Mode amd Applicable After Every accordingly > Save.

What determines the priorities of the templates within Production Calendar and how do I change it?

Priority is given to the template on the top. Drag the template to set the priority accordingly.

Why can I not see anything on my scheduler?

Production Calendar template missing (usual cases)

How to block a specific timing in the scheduler?

Navigate to the scheduler and then drag to select the timings and then select the Block tab.

How do I change the operatory count that I can see as a user?

System Menu > User Settings > General > Edit > Change Default Operatory Count to required number and then Save.

Where are all my custom scheduler filters saved?

System Menu > User Settings > Scheduler Filter

Which settings have the most priority, scheduler filters or production calendar template?

Production Calendar template since its a system wide setting.

Production Calendar setup.

System Menu > Production Calendar > Select the Provider tab > Select the Provider > Select the Day/Date>Add Plan>Select appropriate details and then add a location and link the operatories before hitting Save.

Every X day so and so timing to be blocked

Assign a production type as block > Production Calendar > Select Location > Click edit on the right top > Drag the area needed > Assign the production type > Save

Slots available for appointment

Dashboard > Find slot > Apply the filters > Search Appointment

How to Edit the responsible party on an account

Account Overview>bottom right "add/edit members">under Edit members you are able to change the RP

How to have the schedule take up the full screen?

Practice Settings> Scheduler> scheduler settings> default slot duration to 10 minutes

Combined
Where/what is system menu?

At the top right corner, there is a hamburger icon, with your name(the user's name) next to it. Clicking this would open the system menu

My system logs me out frequently. How do I change that?

System menu> practice settings> administration> profiles> edit

How do I change the permissions of a user?

System menu> practice settings> administration> profiles> manage permissions

One of our team members is locked out of the account

Navigate to System Menu > Practice settings > Administration > Users. Once here you can click on the required user > there is option to create temporary password.Only Super Admin from practice can do it.

How do I email the RCM team?

rcm-ops@carestack.com

Who can I contact regarding my invoices for Carestack?

Clients can log into their Chargebee account or they can email ar-us@carestack.com to update billing info

Contact Info for Sales Team

Jim Gerson Cell: (303) 941-0241 Dan-Direct: 407-675-4661

Contact Info for Sales Team

jgerson@carestack.com , dhall@carestack.com , nperry@carestack.com

Submitter Id and Vendor Id

Our submitter ID 006710039 Our vendor ID is 466

How to assign Lessons in Carestack University?

https://carestack.zendesk.com/agent/tickets/57465

Marketing contact number

4078336123

Clearing House (Change Healthcare)

866-371-9066

To internally contact the Clearing house, we use this contact

option 2 ---- 866-820-3660

Email for invoices

invoice@carestack.com

Change Healthcare - Payor Lists (Check Carrier ID)

https://access.emdeon.com/PayerLists/

Bluepay tech support

877-828-0720

Blue pay

https://secure.bluepay.com/

CS Pay email

cspay.support@carestack.com

Combined
How to create new forms?

System Menu > Practice settings > Office Wizard > Forms> Add

How to print an excuse letter?

Patient overview > Menu > Add Letter

How to send out referrals?

Patient overview > Clinical > Referrals > Refer out

How to add/deactivate a referral provider?

System Menu > Referral Provider

What is the Kiosk link?

practice.kiosk.carestack.com

How to change Kiosk password? / Locked out of kiosk

System menu > Practice settings > Office Assistant > Location > Edit > Change password

Onboarding forms are populating only for certain patients

Check if the form has all locations in it. To check that go to Office wizard > Select the form > Locations

How to add a letter into CareStack?

System Menu > Practice settings > Office Wizard > letters > add

How to make forms auto populate patient info?

Use quick links in the contents such as @pat_firstname etc

Can medical history forms be deleted?

This is a service request.

Add a location to kiosk

System menu > Practice settings > Patient Portal > Patient Connect > Location > Edit

What should I select to be sure my campaign messages have the logo for the individual locations?

When you select Location Specific Branding, CareStack will use the logos that are tied to the patient's home office location. Global branding uses the corporate logos.

Do you always have the option to set whether the message is delivered before or after the appointment within the campaign?

Whether or not the message is delivered before or after the appointment is oftendetermined by the campaign type and can only be set separately in certain campaigns.

Which is the only campaign you can choose whether the campaign should be sent out before/after a set date?

Automated Recall campaign lets you choose whether to send out the campaign before/after the Recall Due Date

Are the campaigns sent out to the patient or the RP?

By default, your campaign message(s) will be delivered to the patient. However, if the patient has opted out of that medium of communication, the message will be delivered to their responsible party.

How do you disable campaigns from being sent out on weekends?

Navigate to System Menu > Overview > Configuration > Set do not send messages on Sat and Sun.

How do you send appointment reminders to patients coming for a particular code?

You can set the desired codes in the campaign criteria under campaign recepients.

What should be the status of the code set in the campaign recepient settings so that the campaign will be triggered?

The campaigns are triggered irrespective of the code status; it triggers based on the appointment status.

What purpose does the 'Do NOT trigger messages for same-day reschedule' checkbox serve?

That checkbox is a scenario in which you have an appointment scheduled for today and a campaigns goes out as per the schedule.If you have rescheduled the appointment to the same day, and you do not want the second text/email go out, you tick this checkbox.

How do you check if a campaign has been sent out to a patient?

You can check if a campaign was sent out by clicking on Campaigns > Activities.

How do you stop the curbside check in messages when a patient comes in for an appointment?

The curbside check in is actually a campaign and you can disable it by navigating to Campaigns > Recurring Campaigns > Disable Curbside check in

Can you send out emails to patients on the patient list?

You cannot send emails from the patient list. You can only send out text messages.

How do you send out emails to patients on the patient list?

In order to send out emails, you can run a Promotional Campaign and build the query builder just like that in a patient list

How to email patient notes?

Go to patient chart > Right click on the note > select print > Copy and paste in an email and send to the desired recipient

How to delete patient notes ?

Patient overview> Notes > Click on the note > Click on the trash icon > Click yes for the pop up

How do I set Patient alerts?

Patient overview > Patient alerts > Add alerts > Fill inn the feilds > Set the touch points > Save

How do I remove a patient from the family account?

Patient overview > Add/edit > Trash icon > Save

How to change the RP of a family account ?

Patient overview > Add/ edit > Change RP > Select the new RP > Save

Can I delete a Medical History form?

Yes, if its in the draft status. If its in teh completed status it will be a service request

Can I make changes in the existing medical history form?

You can Add a note by clicking on +Note to the side of the responses

Do we have to fill in the responses in every new medical hist form ?

No, the previous responses will autopopulate

There is no place for the provider to sign in Med Hist form

In Practice settings > Medical History Forms > Settings > Check Add provider signature

The client gets "Something went wrong" while trying to add med hist form to a pt below 12 years

Check in Practice settings > med hist forms> Child-- check if configured

A condition is not seen in the med hist form for certain patients

The med hist forms might be added to patients before the condition was added in the form

Fo

This would be a service request

How do I download medical history form?

Click on print option on top > In the print page there will be an icon on top to download> save as pdf file

How do you delete a patient who was added by mistake?

You cannot delete a patient if he/she has been added to CS. You can either mark him as inactive or duplicate and merge into another account if he doesn't have any codes or payments

How do you prevent statements from being generated for a patient?

You can set the DNSS label for the patient.

How do you prevent multiple messages from being going out to patients who have several appointments in a day?

You can use the @otherappointment quick link in the campaign content to serve this purpose

Patient portal link

practice.patient.carestack.com

How to add a form in to the patient to be filled via patient portal?

Click on +Forms > select the form> save as draft

How to reset patient portal for a patient?

Go to patient profile>edit info>deselect the check box for patient portal > save > again click on edit info and check the box > save

How do you deactivate a referral source?

To deactivate a referral source,go to Practice settings > Referral source> search for it, then click the Deactivate hyperlink to the right of it

What is the purpose of the ABP flag?

When benefits are assigned to the patient, that means that the patient will be responsible for paying their treatment fees, and any insurance benefits will be reimbursed back to the patient.

What does RX mean?

Premedication Alert

How to add a new user?

PS > Administration > User > Add > Save & Continue > Login Details > Edit > Create Temporary Password > have user login with username/email and temp password

Send Treatment plan in Portal

Treatment plan>SELECT plan>Present plan>Send to patient>send

To reset the Patient Connect password for a user

System Menu > Practice Settings > Office Assistant > Select the Location > Change Password

How to add a payment plan with an MSB balance

Add New Payment>Select the codes and link codes and create payment plan