

MANAGING APPOINTMENTS IN VIIVE

Scheduling appointments is only part of the picture when it comes to using an integrated scheduling system. Viive makes it easy to manage your appointment-related tasks quickly, such as patient check-in, finding available appointment times, rescheduling appointments, confirming appointments, managing patient lists, and patient check-out.

The screenshot shows the 'Appointment for Daniel J Sherwood' window. At the top, there are navigation icons for Patient, TxPlan, Contacts, Confirm Log, Confirm, and RadioVision. The patient information section includes: Patient: Daniel J Sherwood, Age: 42, Provider: Johan Robinsen, and Room: Operatory 3. The appointment date is 12/20/2012, time is 8:00 AM to 9:00 AM. Unit Allocations are: Pre: 0, Main: 4, Post: 2, Total Units: 6. A checkbox for 'Automatically calculate units based on procedures in appointment' is checked. The procedure list table is as follows:

Status	Tooth	Surfaces	Code	Description	Fee	Fee Schedule
			D0475	Decalcification Procedure	\$0.00	CDT-7 GENERAL PRACTICE
			D1110	Prophylaxis-adult	\$78.00	CDT-7 GENERAL PRACTICE
			D0274	Bitewing-four films	\$53.00	CDT-7 GENERAL PRACTICE

Below the table, there are fields for 'Appointment Notes', 'Status: Scheduled', 'Recare List' (with entries: 06/20/13 Prophy Recall, 12/20/13 Bitewings), 'Appt. Value: \$131.00', and 'Family Balance: \$0.00'. At the bottom right, there are 'Actions' checkboxes for 'Add to Callback List' and 'Apply Discount'. At the bottom, there are buttons for 'Check Out', 'Schedule', 'Cancel', and 'OK'.

Figure 1.

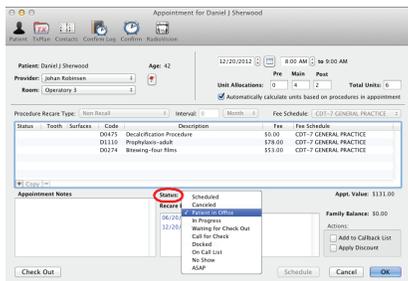


Figure 2.

Patient Check-In

During patient check-in, you have the opportunity to verify with your patients that the information you have on file for them in Viive is correct and up to date. Take a few minutes to review this information with patients as they arrive.

Additionally, you can update the patient's appointment status throughout the office visit to let others in your office know the status of the appointment at all times. When a patient has checked-in at the front desk, you can change their status to Patient in Office (Figure 2).

For additional information about changing an appointment's status, select the Help menu and search for the *Changing the status of an appointment* topic.

Scheduling/Rescheduling Appointments

Scheduling patient appointments in Viive is easy. From the Schedule window, select an operator and click and drag a time block to the desired length of time. Once the time block appears in the Schedule, you can select the patient, provider, and procedures needed for the appointment. You can also edit the time units, date, and time of the appointment if needed.

Viive also makes it easy to reschedule an appointment. Click and drag appointments to new time slots or operatories within the same day, or drag them to the Dock (Figure 3). Navigate to a new date, then drag the appointment from the Dock to the new time block on the new date.

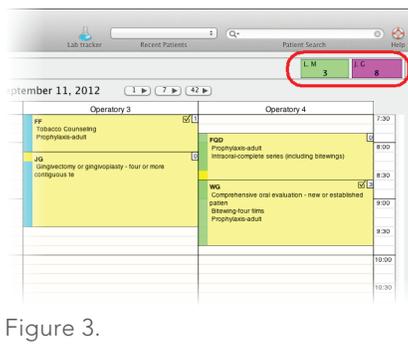


Figure 3.

For additional information about scheduling and rescheduling appointments, select the Help menu and search for the *Scheduling an appointment* and *Rescheduling an appointment* topics.

Confirming Appointments

To prevent wasting valuable time when patients forget appointments, you should always confirm patient appointments by phone, text message, email or some other means.

After you confirm an appointment, you can right-click the appointment and select Confirmation/Contact. This opens a dialog box from which you can indicate whether the appointment has been confirmed, change the appointment status, make notes concerning the confirmation attempt, and see any previous confirmation attempts. The top-right corner face of the appointment changes to indicate confirmation attempts made by your office. A number in the top-right corner of the appointment indicates how many confirmation attempts you made. A checkmark indicates that the appointment has been confirmed (Figure 4).

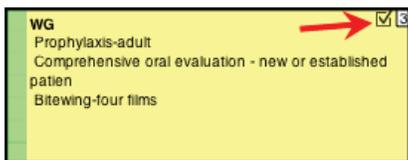


Figure 4.

For additional information about confirming appointments, select the Help menu and search for the *Confirming an appointment* topic.

Finding Available Appointment Times

Another common task is finding open appointment times that will work for a patient. You can spend your time flipping through the individual days of the Schedule, or you can let Viive do the looking for you.

When creating patient accounts, take the time to enter in a patient's best appointment time preferences. Make this practice part of your regular patient maintenance. From the Patient tab, click the Best Appt icon (Figure 5) to open a list of appointment times based on your practice's open days/hours. Then select which day(s) and time(s) are best for the patient to come in for appointments and click Save.

Once you have saved the Best Appt information for the patient, when you need to schedule an appointment, open the patient's account, and select File > Search for Appointment Slot. Set the appropriate appointment time units, provider, operator, and date range for the proposed appointment, select the Restrict to patient's best appointment times option, and click Search (Figure 6). A list of matching appointment time options will appear. Click a date/time for the appointment and click Use. Then finish creating the appointment by adding procedures, and click OK.

For additional information about finding available appointment times or using the Best Appt feature, select the Help menu and search for the *Searching for an appointment slot* and *Recording best appointment times for a patient* topics.

Using Lists to Manage Appointments

When patients need an appointment sooner than you have openings in your schedule, you can add them to either the ASAP List or On Call List. You can access these lists later if a time slot opens up. The difference between these lists are as follows:

- **ASAP List** - Use this list if you want to schedule a tentative appointment for the patient now at an available time slot, but have the option to reschedule it later for an earlier time slot if one opens up. Set the appointment status to ASAP.
- **On Call List** - Use this list the same way as the ASAP List, but the patient is not required to have another scheduled appointment.

If you need to follow up with a patient later to schedule an appointment, you can add the patient to the Callback List. You can add new or existing appointments to the Callback List.

For additional information about using appointment lists, select the Help menu and search for the *Adding an appointment to the ASAP List*, *Adding an appointment to the On Call List*, and *Adding an appointment to the Callback List* topics.

Patient Check Out

Patient check out is quick and easy with Viive. You can use the Check Out button to post finished procedures to a patient's account, open a sheet for finalizing details of insurance claim submission, and print receipts (Figure 7).

For additional information about patient check out, select the Help menu and search for the *Performing a patient check out* topic.



Figure 5.

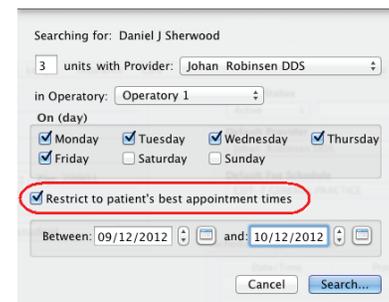


Figure 6.

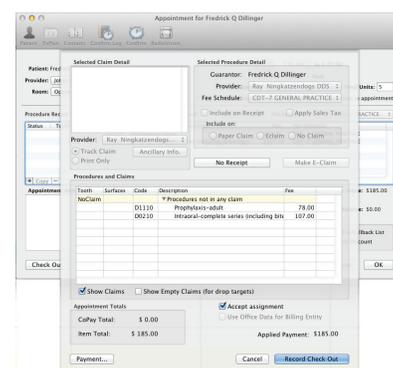


Figure 7.

More Information

Click the Help menu in Viive and search for the Help topics dealing with appointment management. You can also follow links within Help topics to related material.

For technical assistance, contact Viive Customer Support at 1-855-MAC-VIIVE.

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