Admin Training Outline

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Topics Covered Include

What you should know

Calendar

- How to make appointments – the steps on how to schedule new appointments for New or Existing patients.
- Changing same day appointments with click and drag – with a click and drag of the mouse, you may easily change the start and finish times of your appointments if needed.
- Rescheduling appointments with cut and paste– with cut and paste, you may easily reschedule appointments to a different day on the calendar as needed.
- Cancelled and No Show appointments – the steps on how to easily cancel and/or mark appointments as no show as needed.
- Call lists for cancelled and no shows - How to add the cancelled and no show patient appointments to the "patients needing an appointment" call lists in TDO.

Check-in

- Check-in patient on calendar and appointment turns yellow – 1st step in the Check-in process. Patient Check In
- Take patient photo – you may use a digital camera or a web camera to take the patient photo through TDO's Image Acquire screen.
- Have patient register via the web, tablet pc or on paper – will give an overview of each of these options for patient registration, so you may collect the patient's contact information, medical history, pain history and consent forms. How to use the Infograbber
- Scan in documents/radiographs – will review the settings for each, so you may easily scan documents and x-rays into the patient record through TDO's Image Acquire screen.
- Enter in patient's insurance information – this should be done in the patient's "Insurance" tab in TDO. Here you may record carrier, profile, subscriber and benefits information. Insurance Information in TDO
- Send instant message to assistant, patient is ready – overview of the Instant Messenger in TDO and how you may use it to communicate internally throughout the office.

Check-out

- Check-out patient on calendar – 1st step to begin the check-out process.
- Make next appointment (if needed) – If the patient is returning for an appointment, be sure to schedule their new appointment on the calendar.
- Go through auto check-out steps, by clicking on "Fees" first – the auto check-out steps begin with

presenting and/or posting the patient's fees.

- Go through Fees, Receive Payment, Walkout Slip, Insurance Claim – all are critical steps in the patient's check-out.
- Finally, click "Mark patient as out" at the end of the check-out steps – this completes the patient's check-out.

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