Front desk practice scenarios and questions

Go through the scenarios and questions below either individually or as a group to practice navigating around the practice management system.

Practice scenarios:

Patient comes into the office for an acne visit, she would like you to note that she had an allergic reaction to the doxycycline that was prescribed at her last visit. How would you notate this in her chart?

Patient calls the office to schedule an appointment for her excision and would like to know what the cost for that visit would be. You schedule the excision appointment and inform Jessica that you will call her back after discussing what codes will be used for that procedure. How would you send the provider a message to get these codes? Once you get the codes needed for the estimate where do you add these in order to be able to provide the patient with an estimated cost for the visit?

Patient calls the office to ask the office for a payment plan for his outstanding $500 balance, after speaking to the patient and approving the payment plan, Where will you make a note of the conversation with the patient and the terms of the payment plan?

Patient comes into the office for her annual skin check and informs you that she has new insurance. You will need to scan the insurance card into her documents and rename the insurance card. You will need to also update her insurance profile and eligibility and benefits.

Patient calls to schedule a new patient appointment, he tells you that his primary care physician referred him to the practice, he also would like his gastroenterologist to be added to his provider list. Where will you add his PCP/ Referring physician information? How will you make the PCP a referring physician as well? How would you add the other physician?

Patient calls to request a refill of his Triamcinolone medication, but the MAs are currently busy so you take a message. You then want to communicate this message to the MAs. Where will you go to send the MAs this message?

Patient asks you about a HIPAA contact that they want to add, how would you help them add this?

Patient calls the practice stating she received a statement for $400 and would like to know if her insurance paid. Where can you locate the statement? Where can you see if insurance paid anything towards the visit?

Patient comes into the office with a copy of her insurance card. Your scanner is down, what is another way to get a copy of her insurance card and driver's license in the system?

Patient comes in and states she has done all her information in the SADIO account, how can we check that all consents have been signed and her information has been updated?

You updated a consent last night, will these automatically get added to the patient's consent to be signed or will you have to manually add this updated consent for scheduled patients?

How would you add an additional consent to a patients apoointment that is not a one time consent?

A patient calls and asks to have their email verification link resent how do you resend it?

How do you know if a patient has created a SADIO patient portal?

Does the office or EZDerm have the ability to reset patient’s SADIO password?

It's the end of the day, and you are trying to run a report to balance out for the day, what report should you run in EZDERM?

You have entered a patient's insurance profile and checked eligibility and eligibility is showing a yellow (x) where would you click to see what is causing the yellow (x) and read the eligibility report?

Patient is checking out after her medical visit and has a co-pay of $60, she would also like to purchase a product. Where do you enter the item? Once you have entered the item, you collect for both the item of $50 and the copay of $60. How do you post the payment? Once payment is collected there is an unapplied amount of $60 why is that?

If you complete a to-do for a patient, does this complete it for just you or everyone that it was sent to?

In the documents section can you delete the current folders? Can you rename them?

Patient called stating he would like a copy of his receipt emailed to him, the office does not have encrypted email messaging, what can you do to send this to the patient?

Your old co-worker who is no longer at the office made an alert for a patient stating they are SELF PAY, Patient Jennifer came in with new insurance and you want to delete that alert, can you delete this? If not, what can be done to remove/edit this alert?

Questions:

- What is the difference between the Public and Private insurance list?
- How do you scan the EZcheck in QR Code
- How do you print the schedule
- Can the patients see the appointment note in their portal
- Can the patients see the patient note in their portal
- Can the patient see the Alerts in the portal
- How do you scan in the insurance card and ID?
- How do you add new insurance to the patient's chart?
- How do you check eligibility?
- How do you add a PCP or referring physician in the PM system?
- How do you reschedule an appointment?
- How do you cancel an appointment?
- Where can you locate a statement in the patient's chart?
- How can you tell if a patient signed their consents prior to coming into the office?
- What happens if an office updates the clinic note and does not read the pop-up alert that shows up?
- How do you document a patient's payment for a Copay?
- How do you document a patients payment for an Item?
- How do you use the cost estimator for a future visit?
- Can I create a new patient from the calendar without scheduling them?
- When does the system send eligibility checks out? What if I have a walk-in patient who wants an appointment for today?
- How do I prevent my staff from viewing financial information?
- Can I create calendar blocks? For example, the provider is OOO every Tuesday afternoon.
- How do I add a secondary insurance for a patient?
- How do I scan in biopsy results that I receive from the lab?
- Why does my calendar only show to 6 PM?
- How can I have the same 3 providers' calendars show up every time I sign into EZDERM?
- Can I view a provider schedule next to a laser schedule?
- How does the first available appointment work?
- How does the system alert patients of their appointments? How often?
- How do you add a patient to the waitlist
- How do you check out a patient (entire process)
- How do you add the time zone for the clinic to the schedule

- Where do you need to add a referring physician if you would like this to show up in a report as well as the claim
- Where can you see if a patient filled out Sadio before being seen at the clinic
- How do you resend the Sadio verification link
- How would you reset the Sadio password
- Can you rename folders in the documents
- Can you create new folders in documents
- If a patient would like something emailed to them but the office does not have an encrypted email, what can the office do?
- How do you add contacts
- How do you add items
- How would you update access permissions
- How would you update Appointment types
- How would you add an appointment series
- What is the purpose of an Appointment Series