



Front Desk Practice Scenarios

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

1. Patient Jeffrey Ball walks into the office as a new patient wanting to schedule an appointment for a rash that just appeared. There's an opening on the schedule at 1 pm, so he's able to be placed on the schedule for that time slot. His insurance information is collected and inputted, showing he has Aetna. The eligibility report shows that Mr. Ball has a co-pay of \$25, which is collected prior to his appointment. Mr. Ball is now ready to be seen by the doctor, so he can be marked ready for staff.

2. Sue Jones presents at the office for her scheduled appointment. Her appointment is not on the schedule but she has a paper appointment card, so she will need to be added to the schedule. She also presents a new insurance card that will need to be entered into the system. She advises you that she has moved and has a new address and phone number. She states she would like her daughter to be seen as well. There is an opening on the schedule. However, her daughter is new to the practice and you will need to enter her into the system from scratch. Abigail Jones has different insurance than her mother.

3. Patient Martha Smiles is scheduled for a Botox appointment. When she arrives to the office, Martha has a friend with her who would also like to be seen at the same time for fillers and botox. Martha is an established patient, however; her friend Rikki Smith is a new patient and will need to be added in the system. The front staff will also add a note on Rikki Smith's chart to make the clinical staff aware of the change in the schedule and that Miss Smith was a walk in with an already established patient.

4. Patient Mary Kay is checking out from her appointment and has a co-pay of \$60. She would also like to purchase a sunscreen which costs \$40. She pays a total amount of \$100. The staff then applies her payment and posts the charges into her account under the same visit. The patient would like to have a copy of her receipt with the CPT codes, however; the visit hasn't been signed off yet. Will these codes generate automatically on that copy or will the provider need to sign their note in order to provide these codes to the patient?



5. Patient Logan Wallace is scheduled to be seen for his appointment at 1 pm. He calls the office and states that he's running 30 min late and would like to know if he can still be seen. There is an opening at 1:30 pm so you tell him to come in and then move his appointment to the later time. The patient also mentions while on the phone that he wants the doctor to do a full body skin exam instead of a spot check. You put a note in his appointment to notify the clinical staff that the patient is running late and what time his appointment has been changed to. And also change the appointment type to full body skin exam.

6. Patient Angela Chase walks in as a new patient and would like to be added to the schedule for a future appointment. She's interested in having a laser consult for the following week at 2 pm. The front staff adds her to the system from scratch as well as schedules her appointment. Angela also decides while she's there that she wants to purchase a skin cream. She pays the total amount of \$50 in cash and the front posts the payment under simple charges. A printed receipt is also given to her before she leaves the office.

7. Justin Long presents for his annual full body skin exam visit and states that he has new insurance. He previously had BCBS, but is now switching to Aetna. The front staff deactivates his BCBS insurance and adds in his Aetna, however; under policy type, there are many options to choose from. For billing purposes, which policy best suits this insurance? It is also noted in Justin's account that he has a \$500 deductible.