

## Quick “To-Do” List

*When you’re comfortable with the process, the following ‘Quick List’ may be a useful prompt to help ensure that you’ve covered all your bases without having to flip pages.*

### Quick Weekly “To-Do” List

1. ☐ Login to **Practice Mate**: <https://cms.officeally.com/practicemate>

Username: \_\_\_\_\_

Password: \_\_\_\_\_

2. ☐ **Desktop** – Review and address messages and tasks.
3. ☐ **Create Visits: *Manage Patients* Tab**
  - a. Find Patient Record > **Template** Tab
  - b. [Create New Visit](#) link
  - c. **Visit Info** Tab > Review patient info & edit Visit Date.
  - d. **Billing Info** Tab > Dx, DOS, **POS**, CPT, Pointer, Charge, Units ... [Update]+[Update]+ Repeat.

This (optional) quarterly log is for keeping track of when you’ve completed your weekly checklist.

Month	Data Entered Date	DOS Start	DOS End	Notes

