Weekly 'To-Do' - **Practice**

(Estimate 10 minutes)
After you have reviewed the "Weekly 'To-Do' List" Step-By-Step, try out the following exercises for practice.
Email me when you're finished, and I'll check it out on my end to make sure that the information that you're sending is arriving properly.

> ## *HELP!*
> If you run into snags along the way, you can call **Office Ally Customer Support at (360)975-7000**. They can log into your account remotely to see what you're seeing in real time and address any issue causing you trouble.

Desktop

Messages – Inbox

When you login to your Practice Mate account and look at your '**Desktop'** tab, you should have one new message from me.
From: Tracy Gonzalez
Subject: Practice
Patient: Doe, John

- ☐ Click anywhere on the message to open the message and view details.
- ☐ Reply to the sender (me) by clicking the "**REPLY**" hyperlink above your message window and tell me something – anything that's on your mind.
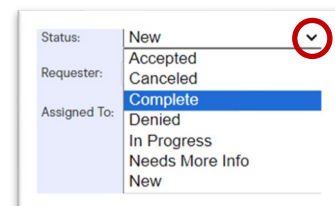

Tasks

You will have a new task in your task list below your **Messages – Inbox.**

- ☐ Click the Subject ("**Practice Task 1**") to open the task and see the details.

Since you completed the task already by replying to my test message (above), you can change the status of the task to "**Complete**".

- ☐ Click the carat **^** to pull down the status menu. Select "**Complete**" and click [UPDATE] at the bottom.

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Clicking "**Complete**" + [UPDATE] will notify me that you completed the task, and I will be prompted to review the task and complete any actions that I need to complete so that your claims can be processed and paid.

☐   Click the Subject ("**Practice Task 2**") to open the second task. Unfortunately, it is incomplete. It asks for insurance information but does not specify a patient. In this case, you need information from us in order to complete this task.

☐   Add a note in the description: "*Which patient is this for?*" and change the status to "**Needs More Info**" and click [**Update**].

This will prompt us to review the task and provide the information needed.

You can change the status to "**In Progress**" if you have seen the task and you need time to gather the information requested or complete the task.

Create Visits – Manage Patients Tab

Using the step-by-step instructions on the Weekly 'To-Do' List, create visits in Office Ally to reflect the following services rendered to and payment from **John Doe (DOB 1/1/1900).**

Don't worry about accidentally submitting any charges. They won't go anywhere from the 'John Doe' test patient record.

REVIEW: John Doe's current insurance carrier is: '**Pagamos Todo**' – ID# **ABC123**

VISITS:

DOS	Dx	POS	CPT	ICD-10 Pointer	Line Charge	Days or Units
1/1/2020	W61.62XD	11	40804	A	$200.00	1
1/2/2020	W21.02	10	30300	A	$350.00	1
1/3/2020	W55.21XA	2	90837	A	$200.00	1

**IN-OFFICE PAYMENT**: John Doe made a payment of $127.62 on check #123 on 1/3/2020.

Check out the visits that you entered:
• Go to the 'Patient Visits' tab and filter the results to show "**Open**" visits.

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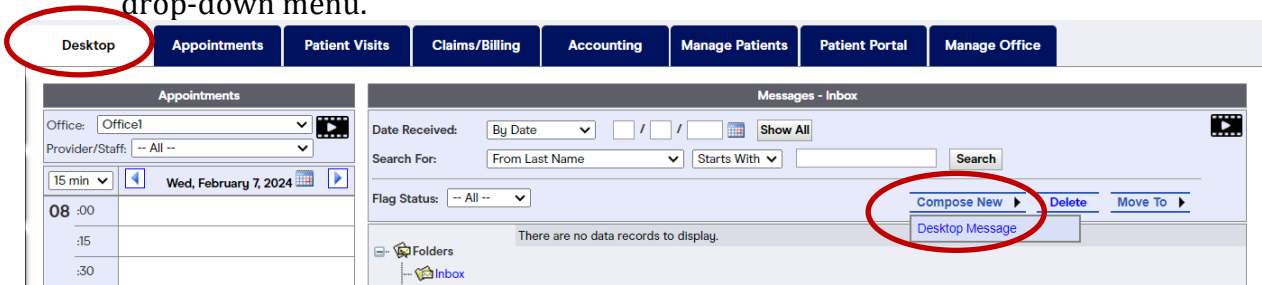*rev 2/7/24 v7 - PPL*
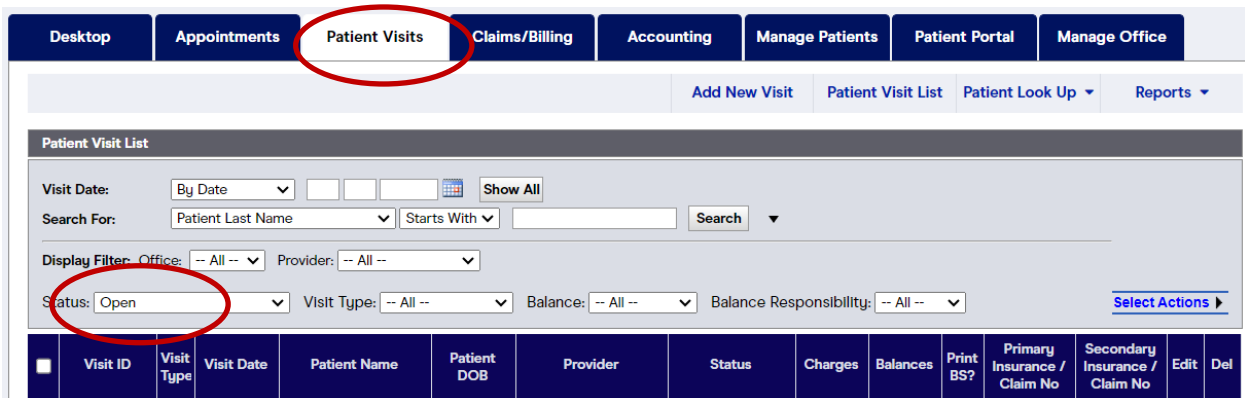
Your three visits with poor, accident-prone, John Doe should show up in this list.

Send me a message to review your practice visits.

- **Desktop**. Go to your 'Desktop' tab.
- **MESSAGE**. Hover over "**Compose New**" and click "**Desktop Message**" from the drop-down menu.

- **TASK**. You can also create a **TASK** assigned to me, and I'll manage tasks according to our procedure. That way, you will receive a message when I have addressed and completed your tasks.

I will review your charges and messages and I'll let you know what I find. If all the information in these practice tasks shows up on my end of the system, you can be confident that you're on the right track!