Actions from the Scheduler

Create a claim from the Scheduler

After the patient has been seen you can create a claim right from within the appointment scheduler. Creating claims from the scheduler will use the appointment resources as the billing provider on a claim. Follow the steps below to create a claim from an appointment:

1. Select **Appointments** > **Scheduler**.

2. Find your appointment on the calendar.

3. **Right-click on the appointment** you would like to create a claim for and select **Create Professional Claim for visit** or **Create Institutional Claim for visit**

> ✨ You can also view previous or open claim records by right-clicking on the appointment and selecting one of the following:
>
> 1. **Find Claim For Visit**: Select this option to open claims created for the selected visit.
>
> 2. **Find Claims For Patient**: Select this option to open all claims for this patient.

Enter patient payments in the Scheduler

Post patient payments or print receipts directly from the scheduler section. In Application Credit Card Processing also available from the scheduler.

> ⚠️ All payments posted in the appointment section post as account credits. Please reference our **Post Patient Payment Help Article** for steps on how to post patient payments.

Who can use this feature?

Users with the Patient Payment permission set to **Post Only** can post patient payments (as a credit) within the Scheduler section , but not apply the payment towards the patient's charges.

Users with the Patient Payment permission set to **Apply** can post and apply patient payments,

discounts, adjustments, and credits within the Scheduler section.

1. Select **Appointments** > **Scheduler**.

2. Click on the **Search for appointments by patient or comment** field and type in the patient's name. Or click on the **Advanced Search** field and use the filters to narrow down your search.

3. Locate and **right-click on the appointment** > Select **Edit Appointment.**

    🪄 You can also click on the appointment and select **Edit** .

4. Click on the **Payment** tab.

5. Enter the **Payment** information.

6. *Optional*: Check the **Print receipt** box and select your print option to print or send a patient receipt.

7. *Optional*: Click the **Specify separate copay and payment amount** checkbox to post an amount as a "*payment*" and an amount as a "*copay*" at the same time.

8. Enter the **Received/Check Date.**

9. *Optional*: Add the **Check #.**

10. Select the Payment **Type.**

    🪄 Create an Unapplied Copay Credit by selecting Copay, and populating the Date Of Service (DOS). Reference our **Unapplied Copay Credits** Help Articles for more information.

11. Select the **Source** of the payment.

    🪄 If the In-app Credit Card Processing feature is enabled, after saving the payment, you will needed to enter the card information into the Enter Payment Window pop-up. For a detailed step by step guide, please reference the Processing a Credit Card Payment & Printing Receipts Help Articles

12. Type a **Memo**.

13. Click **Save**.

14. Verify the credit information, then click **Save.**

Print your Schedule

Appointments in statuses that have been selected as inactive or deleted, such as the default statuses *No Show"* or *"Canceled"* are not printed. Follow the steps below to print your schedule.

1. Select **Appointments** > **Scheduler**.

2. Click the **Print** button and select whether to print the **Daily or Weekly Schedule**.

3. Make your selections (e.g., Department, Resources, Providers, Facilities, etc.) then click **Print** again.

Print a Superbill for an Appointment

Follow the steps below to print a Superbill for a specific appointment.

1. Select **Appointments** > **Scheduler**.

2. **Locate the appointment** on the calendar.

3. **Right-click on the appointment** and select **Print Superbill**.

4. Select the **Superbill** from the list.

5. Print the Superbill.

Print a Label for an Appointment

Follow the steps below to print a Label for a specific appointment.

1. Select **Appointments** > **Scheduler**.

2. Locate the appointment on the calendar.

3. **Right-click on the appointment** and select **Print Label**.

4. Select the **Label** from the list.

5. **Print** the Label.