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

Office Ally Customer Support Phone (360)975-700
° PO Box 2022, White City, OR 97503 ° www.professionalpractice.net °
° Phone (541)234-4781 ° Email info@professional-practice.org °
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