

## 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.

### 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.

## 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 charges. They won’t go anywhere from the ‘John Doe’ test account.*

**REVIEW:** John Doe’s current insurance carrier is: **‘Seguridad Falsa’ – 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.

The screenshot shows the Office Ally software interface. At the top, there are navigation tabs: Desktop, Appointments, Patient Visits (circled in red), Claims/Billing, Accounting, Manage Patients, Patient Portal, and Manage Office. Below the tabs, there are buttons for 'Add New Visit', 'Patient Visit List', 'Patient Look Up', and 'Reports'. The main area is titled 'Patient Visit List' and contains several filters: 'Visit Date' (By Date), 'Search For' (Patient Last Name, Starts With), 'Display Filter' (Office: -- All --, Provider: -- All --), and 'Status' (Open, circled in red). Other filters include 'Visit Type', 'Balance', and 'Balance Responsibility'. A 'Select Actions' button is on the right. Below the filters is a table with the following columns: Visit ID, Visit Type, Visit Date, Patient Name, Patient DOB, Provider, Status, Charges, Balances, Print BS?, Primary Insurance / Claim No, Secondary Insurance / Claim No, Edit, and Del.

Your three visits with poor, accident-prone, John Doe should show up on this list.

Send me an email to review your practice visits.

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!

**Office Ally Customer Support Phone (360)975-7000**

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