Quick Reference Guide Examples

These examples show how to create step-by-step instructions for key clinical workflows.

Customize these examples to fit your practice's specific systems and procedures for a streamlined implementation experience. We recommend creating a guide for each workstation.

Quick Reference Example: Patient Check-In Process

1. On the schedule and filter for the appropriate Provider and Patient.
2. Assign the patient’s appointment to the clinical staff member by clicking "assign to me."
3. Click on the Progress note to start the intake process.
4. Check for any Alerts and add new alerts if necessary.
5. Reconcile the patient's information by clicking the reconciliation icon and clicking "select all"
6. Enter details for the patient’s History of Present Illness (HPI) and make any necessary updates.
7. In the physical exam utilize the treatment plan list I to document your exam.

Quick Reference Example: Before Patient Checkout

1. Open the Checkout/Billing System.
2. Add any Follow-Up Appointments as required.
3. Verify that all Consents have been signed.
4. Review the Progress Note for completeness and ensure all necessary Coding is correct.
5. Add any additional assessment or plan notes as needed.