

Misc Automating Partner



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- Computers are excellent at performing routine tasks.

rou·tine

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Noun

A sequence of actions regularly followed; a fixed program; "I settled down into a routine".

Adjective

Performed as part of a regular procedure rather than for a special reason; "a routine annual exam".

Synonyms

noun: rit

adjective: regular - ordinary - usual - customary - everyday

- Does your day include routine tasks?



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- So what are some routine tasks that Partner can help you with?



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Encounter Forms:

- Visit specific procedures/diagnoses
- Supplemental materials
- Customized chart notes
- Informational handouts
- Vaccine information statements (VIS)
- English vs Spanish handouts
- HIPAA or Financial Policy notices

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Demographic Update Forms:

- Yearly
- Quarterly
- One per patient (or per family)
- Blank, or populated with data

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Encounter Forms?

- But we have an E.H.R.!

- Even with an E.H.R., though you may not need the encounter forms themselves, you may still find the other materials useful!

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Form Letters:

- Adding/removing flags
- Logging when a form is printed (visible through 'oops' and 'tater')
- Tracking a date or other value (visible through 'fame' or 'notjane')
- Transferring patient to another office (generate a letter, problem list, immunization hx, demographic summary, and more)

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Missed Appt Fees:

- Posting a designated procedure (ie 'Missed Appt Fee') through 'checkout' can automatically mark the related appointment as *missed* in 'inquire'.
- Generating a form letter can automatically post a designated charge to a family.

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Month End Reports:

- 'aging', 'insaging' and 'daysheet' generated 1am on the first of the month
- Reports available in 'SRSFiles'
- Just send them along to your accountant

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Periodic 'scan' Reports:

- Print 'scan' (per provider) three or four times throughout the day
- Include just morning (or just afternoon) appointments
- Keep providers informed with most recent schedule details all day long



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Does anyone have any other automated tasks that they would like to share with the rest of the class?



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Thank You!



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