Unified Practice Clinic Front Desk Staff Training Checklist

How to use the calendar to view, book, cancel and reschedule appointments

- ☐ The calendar webinar
- ☐ Booking, canceling & rescheduling a singular appointment
- ☐ Booking, canceling & rescheduling repeat appointments
- ☐ Understanding appointment icons
- ☐ Seeing practitioner availability on the calendar
- ☐ Understanding & resolving matching errors
- ☐ Overriding clinic appointment reminders for a specific appointment
- ☐ Printing the schedule

How to navigate the patient file

- ☐ An overview of navigating the patient file
- ☐ Printing a patient's file: demographic information, insurance information, appointment history and forms
- ☐ Printing notes (SOAP notes) from date(s) of service

How to sell inventory items on or outside of an appointment/date of service

- ☐ Selling inventory items within a date of service
- ☐ Selling inventory items outside a date of service
- ☐ Printing a product sale statement

How to receive payments, apply credits and reconcile balances

- ☐ How to receive a payment
- ☐ How to edit a payment
  - ☐ How to edit a final payment.
  - ☐ Adding and changing copays
- ☐ How to remove an allocation
- ☐ How to refund a payment
  - ☐ How to refund a payment into another form
- ☐ How to apply a credit
- ☐ How to share credit between patient files
- ☐ How to create and sell packages
- ☐ Billing status definitions
- ☐ Watch the Billing & Payments Webinar

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How to create a super bill, statement or invoice for a patient

- ☐ How to generate a superbill, invoice or patient statement
- ☐ How to generate a claim form/HCFA/CMS1500

How to run reports to assist with clinic management

- ☐ Reports available within Unified Practice
- ☐ Balance due report
- ☐ Notifications reports