

## ActionManager - Completing Tasks

*Is it necessary to complete all patient tasks listed on the ActionManager?*

What if a patient arrives for their scheduled appointment and does not have medical or vision insurance, is it necessary to open and complete the Primary Insurance task? Should you complete the Next Appointment task, if the patient is not scheduling a next or pre-appointment? Is it necessary to complete each listed task on the ActionManager for the scheduled patient?

*The answer depends on how OD Professional was setup and configured.*

- If completing the listed task moves the patient between handlers, then you should always complete the last task of each area.
  - For example; if you need to move the patient from the front desk to the dispensing handler, then you should always complete the last task in that area, moving the patient to the next handler.
- If the tasks do not move between handlers, then it is not necessary to complete all of the tasks.
  - For example; if all tasks are assigned to the Front Desk handler, then you don't have to complete all tasks.
- If a listed task is not required, such as those for special testing, product purchasing or appointment scheduling, then it is not necessary to complete all of the tasks.
  - For example; if the listed tasks include Contact Lens Orders and the patient is only purchasing a pair of glasses, then you don't have to open and complete the task for ordering contact lenses (only if it moves the patient to the next handler).

**No matter how OD Professional was setup or configured, it is recommended that you should always complete all tasks associated with checking a patient in.**


### Why only complete all tasks associated with Patient Check In?

If you are checking in multiple patients or are busy answering the phone, keeping track of which tasks were completed and which ones were not can be difficult. But with OD Professional's ActionManager, you are kept organized and reminded of which tasks you have completed.

**ODPro Tip:** The ActionManager status box colors;  
 red = not started;  
 yellow = initializing  
 green = completed



When you complete a task in the ActionManager, the small red status box turns green, an indication that the task has been completed. For example, if you are checking a patient in without insurance, taking the time to click on the Primary Insurance task and

Going Forward  turns the status box green, reminding you that you addressed this patient task.

Being busy, you may not remember that you addressed this area with the patient, even if they don't have insurance. But by completing this task, even if they don't have insurance, *OD Professional* turns the status box green, telling you that you addressed this patient task.

OD Professional keeps you organized through its ActionManager. By taking advantage of this feature, you will reap the benefits of a well organized and efficient patient check in process.

Please refer to the **Front Desk Check In Activities** job aid for more information.