

OD Professional: Easy as 1, 2, 3

Many of the features of OD Professional involve only three steps.

Whether you are opening OD Professional at the start of the day or creating a patient invoice, OD Professional makes your life easy and simple with the minimal of steps.

Typical features of OD Professional that involves only three steps on the part of the end user include the following.

Opening ODPro

(when opening ODPro, you should...)

1. Open Patient and Contacts
Browse
 2. Open all Provider Schedules
 3. Open ActionManager
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Recalls

(when creating a patient recall, you should...)

1. Set Date
 2. Set Reason
 3. Set Recall on File (Apply then Finish)
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Patient Flow

(when creating procedures, a typical flow is...)

1. Check In (Front Desk)
 2. Dispensing
 3. Check Out
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Invoicing

(when creating invoices, you should check...)

1. Encounter Date
 2. Provider
 3. Insurance
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Patient Browsing

(when patient browsing, you should...)

1. Save
 2. Clear
 3. Browse
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Inactive Patients

(when making patients inactive, you should...)

1. Adjust Balance Due
 2. Delete Recall Dates
 3. Check Inactive
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Insurance Plans

(when adding insurance plans, you should...)

1. Add Plan Name
 2. Attach Fee Schedule
 3. Initialize Providers
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Emergency – Walk-ins

(when handling walk-ins, you should...)

1. Browse
 2. Schedule
 3. Refresh ActionManager
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Using OD Professional is easy as 1, 2, 3...

Please refer to the **Opening OD Professional** job aid for more information