



Patient Approval Statuses

Pre-Approved

Purpose:

The Pre-Approved page allows practices to set various approval settings, including whether appointments are confirmed automatically and setting up certain patients for automatic pre-approval.

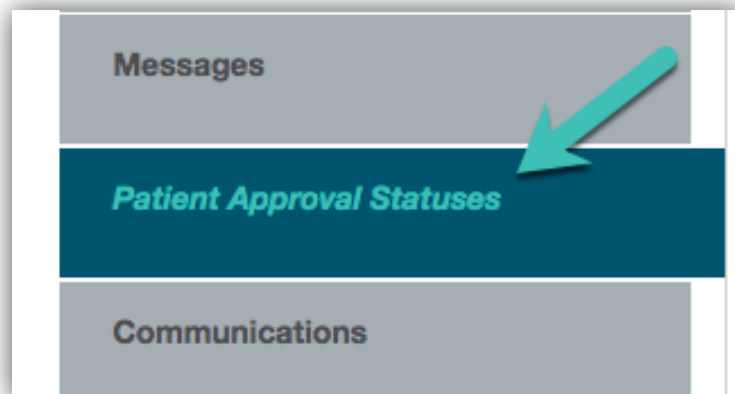
Best Practices and Examples:

Practices would use these features to achieve the following:

- You want all appointment requests to be approved automatically rather than manually approving pending requests
- You want to manually approve requests but have requests from specific patients confirm automatically (pre-approving patients)

Directions for Automatically Accepting Appointments:

Step 1 – Navigate to the ‘Patient Approval Statuses’ tab.





Step 2 – On the main page, you will see a section that says ‘Confirm All Requests Automatically.’ To automatically confirm the requests, check the checkbox next to ‘Automatically confirm all appointment requests.’ All requests, including those from patients via the mobile app, patients via web, the wait list, and the referral tool will be confirmed automatically.

A screenshot of the 'Patient Approval Statuses' page. At the top, there are two tabs: 'Pre-Approved' and 'Pre-Denied'. Below the tabs is the heading 'Confirm All Requests Automatically' followed by the subtext 'If checked, there's no need to input pre-approved patients.' There is a checkbox labeled 'Automatically confirm all appointment requests.' which is currently unchecked. A teal arrow points to this checkbox. Below the checkbox is a teal 'Save' button.

Step 3 – Click ‘Save’ to apply your settings.

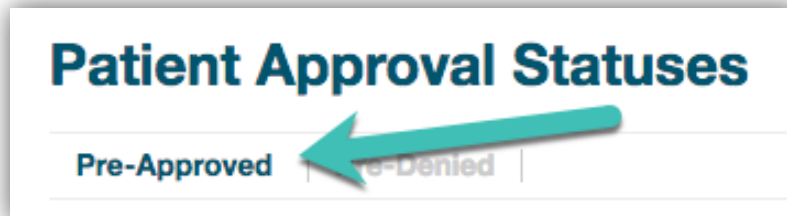
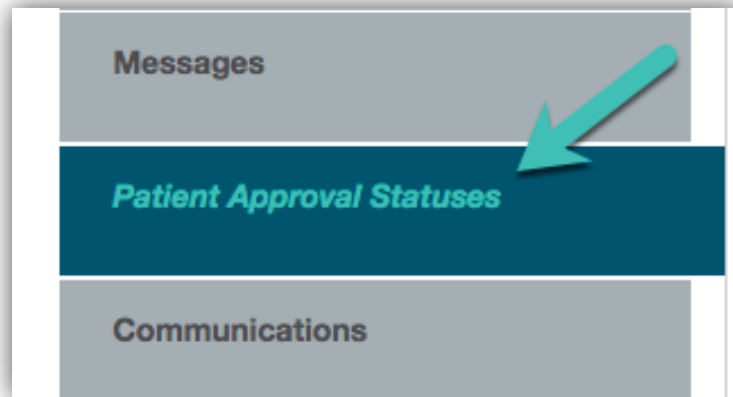
A screenshot of the 'Patient Approval Statuses' page, showing the 'Confirm All Requests Automatically' section. The checkbox 'Automatically confirm all appointment requests.' is now checked. A teal arrow points to the 'Save' button, which is located to the left of the checkbox.

Step 4 – If you wish to turn off automatic confirmation, uncheck the checkbox and click ‘Save.’



Directions for Pre-Approving a Patient:

Step 1 – Navigate to the ‘Patient Approval Statuses’ tab and select the ‘Pre-approved’ page.



Step 2 – At the bottom of the page, you will have two options for adding pre-approved patients to your list: upload a CSV file or add patients via their name and date of birth.



Patient Approval Statuses

Pre-Approved | **Pre-Denied**

Confirm All Requests Automatically

If checked, there's no need to input pre-approved patients.

Automatically confirm all appointment requests.

Upload a CSV

Add Patients Override Patients

No file chosen

CSV columns should be "First name,Last name,DOB". DOB format: 'YYYY-MM-DD'.

New Pre-Approved Patient


First Name Last Name Date of Birth


Name	Date of Birth
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Step 3 – Once patients have been added to your pre-approval list, they will appear at the bottom of the page. You can use this menu to remove pre-approved patients by clicking the ‘Remove’ button next to their information.

New Pre-Approved Patient

First Name Last Name Date of Birth

Name	Date of Birth
Example Patient 	1990-04-12 <input type="button" value="Remove"/>

Name	Date of Birth
Example Patient	1990-01-01  <input type="button" value="Remove"/>



Pre-Denied

Purpose:

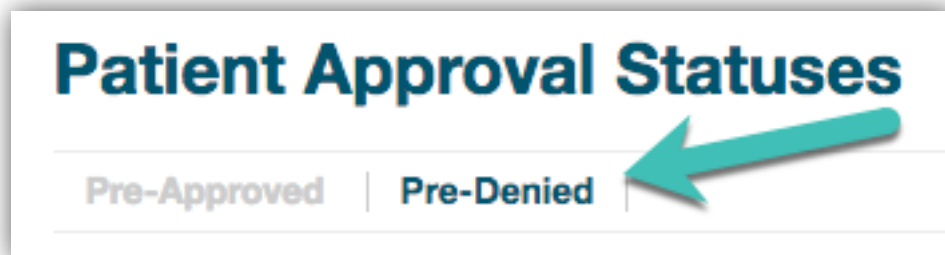
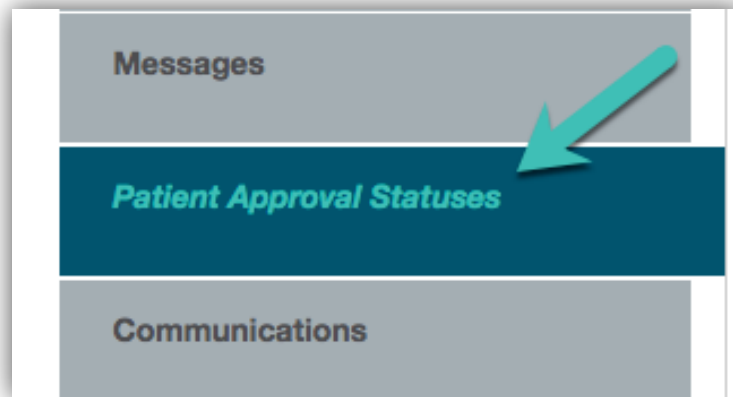
The Pre-Denied page allows practices to set up certain patients for automatic pre-denial.

Best Practices and Examples:

- Practices would use this feature to automatically deny appointments requested by a specific patient.
- Practices can deny patients who have been dismissed from the practice or who they do not want to be able to schedule online.

Directions for Pre-Denying a Patient:

Step 1 – Navigate to the ‘Patient Approval Statuses’ tab and select the ‘Pre-Denied’ page.





Step 2 – At the bottom of the page, you will have two options for adding pre-denied patients to your list: upload a CSV file or add patients via their name and date of birth.

Upload a CSV **Option 1**

Add Patients Override Patients

No file chosen

CSV columns should be "First name, Last name, DOB". DOB format: "YYYY-MM-DD".

New Pre-Denied Patient **Option 2**

First Name Last Name Date of Birth

Name	Date of Birth
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Step 3 – Once patients have been added to your pre-denied list, they will appear at the bottom of the page. You can use this menu to remove pre-denied patients by clicking the 'Remove' button next to their information.

New Pre-Denied Patient

First Name Last Name Date of Birth

Name	Date of Birth
Example Patient	1990-01-01

Name	Date of Birth
Example Patient	1990-01-01