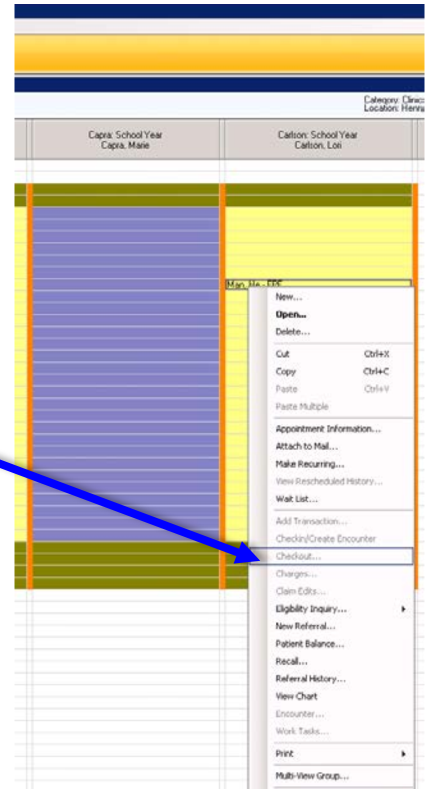
This guide will help checkout a patient appointment and schedule a follow-up appointment.

I. Checkout an Appointment

When "checking-out" a patient in the Appointment Book, you are simply indicating that the patient's appointment is over and you have completed the necessary next steps for future appointments. Be assured that completing the following steps will not send a bill or close an account.

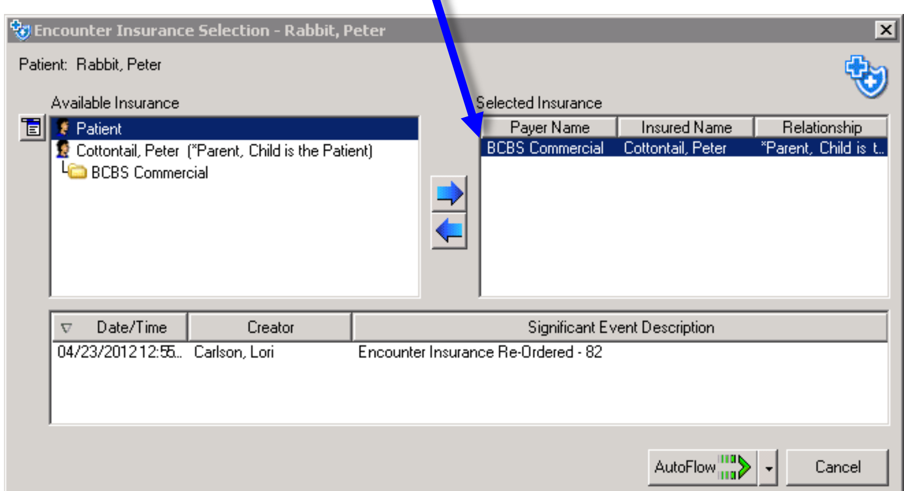


A. Starting the AutoFlow

1. Select the appointment in the Appointment Book by left-clicking on it.
2. Now right-click on the appointment and select *Checkout*.

B. Verifying Insurance

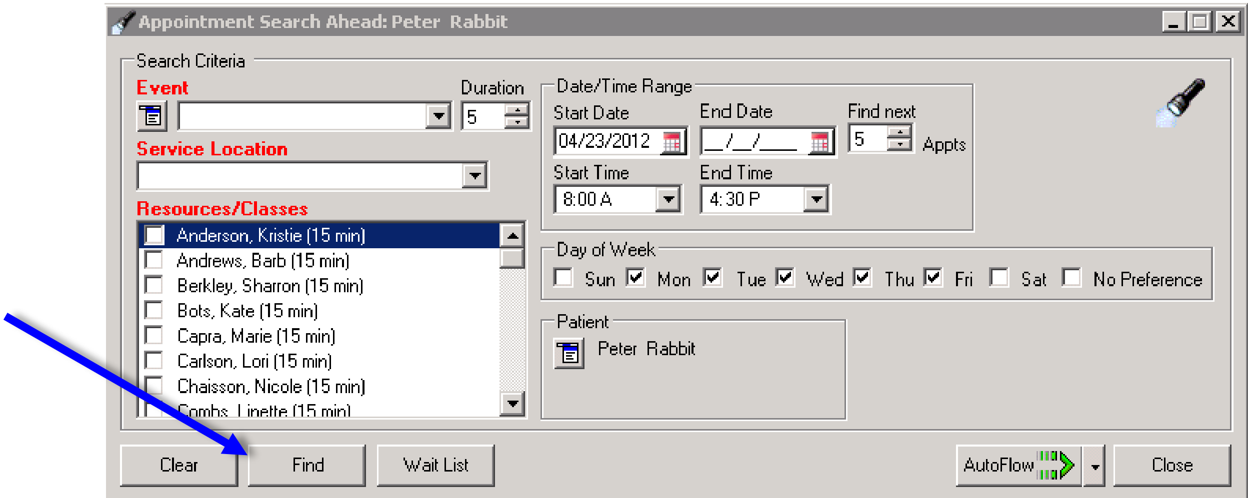
1. Verify once more the insurance is correct.
2. If the patient had confidential services, change the insurance to *Confidential Insurance*.
   a. Highlight the insurance payer under *Selected Insurance* and click on the left blue arrow.
   b. Select *Patient* and right-click.
   c. Select *New Insurance*.
   d. Choose *Confidential Insurance*



3. If the patient had an SSI visit or pre-diagnosis mental health services, make sure *Not Eligible Insurance* is selected.
4. Click on *AutoFlow*

C. Appointment Search Ahead

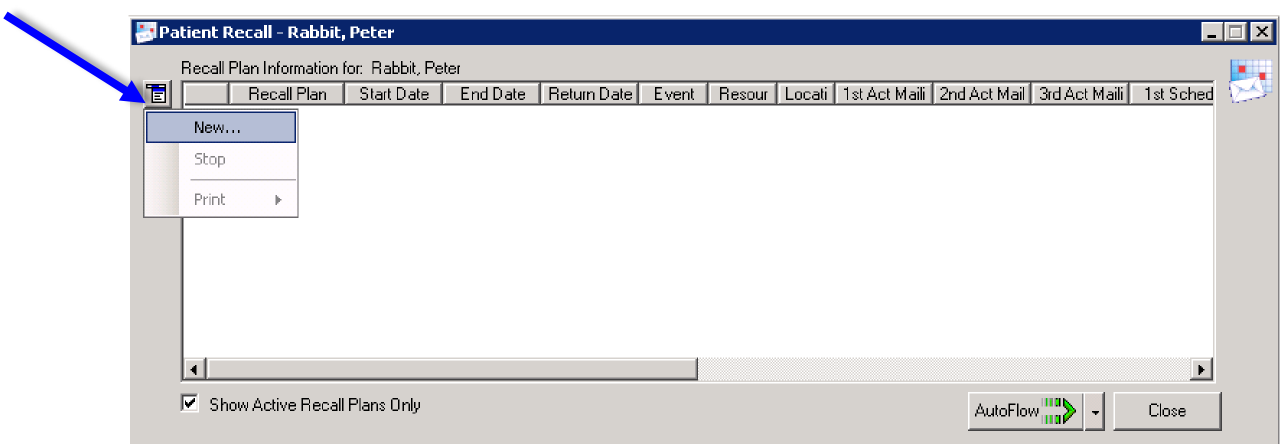
1. If the patient needs a follow-up appointment, you can schedule it now. Once you make your selections, click on *Find* and select a time that works.



2. Click on *AutoFlow.*

D. Recall Plan

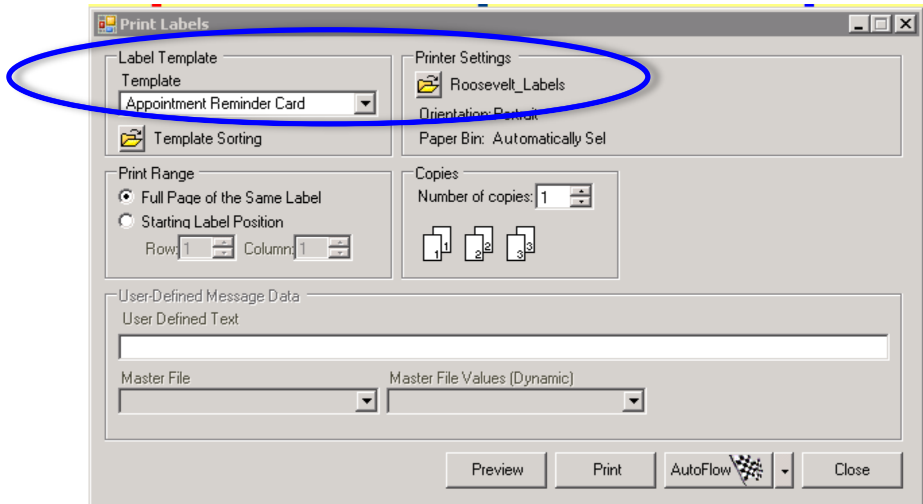
1. If you would like to make an alert reminder in the system for a service or appointment for the patient, click on the *Norton* button and select *New*.



2. Click on *AutoFlow*.

E. Print Labels

1. From the *Template* field, select *Appointment Reminder* if you booked a follow-up appointment.
2. Double-check that the correct label printer for your clinic is selected and click on the *Print* button.



3. Click on *AutoFlow*

Congrats! You are now done with this How-to Guide.