Learn More: New Dashboard and Scheduling Workflow

Kareo is simplifying the patient check-in and scheduling workflows to help customers follow streamlined steps and save time. The newly re-designed Dashboard will allow users to easily check-in incoming patients, schedule and edit appointments, and has new features for users that improve day-to-day processes in the practice.

The Dashboard will make life easy for practice managers, front office staff, and providers since the workflows are more streamlined and built keeping in mind how these users work in the office. This will ultimately create a much more optimized “Cloud-based” user experience that will further enhance the scheduler and calendar functionality.

Learn more about the Dashboard features through instructional videos, help articles, and FAQs below.

What's New

**Patient Contact Information and Record**

Hover over the patient's name on the Dashboard, Appointment Card, or the New/Edit Appointment page to view the patient's date of birth, alert, primary phone number, email, and address.

Click on the patient's name or the launch icon on the top right of the patient card to open their patient record.
**Custom Reoccurrence**

Watch the video to the right to view how recurring appointments are scheduled.

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**Change Status on Appointment Card**

Click on the appointment to view the appointment card. Then, Click the drop-down arrow to change the status of the appointment.
Color Coded Appointment Status

Watch the video to the right to view how a front office staff member can seamlessly change an appointment status and quickly determine the status of the appointment based on the following:

- On the Scheduled tab, late Scheduled or Confirmed appointments are shown in yellow.
- On the In Office tab, Roomed appointments are shown in blue.
- On the Finished tab, the following statuses are shown in red: No Show, Rescheduled, and Cancelled.

Assigned Room and Equipment(s)

The room and equipment(s) associated with the appointment will be displayed in the appointment details.

Create Clinical Note

Click on the appointment to view the appointment card. Then, click Create Clinical Note to begin a note using the provider's default note type (Clinical subscribers only).

Or click the drop-down arrow to select a different note type for this appointment.
Schedule Follow-Up Appointment

Once a patient has been checked out, a follow-up visit is easily scheduled from the Appointment Card.

Click on the appointment to view the appointment card. Then, click on More Options > Schedule Follow-Up.

Patient Alert on New/Edit Appointment

If the option to show a patient alert when scheduling an appointment is enable in the patient's account, the front office will see the alert under the patient's name in the New/Edit Appointment page.
Balance Collected Today

The Appointment Card shows the patient balance collected today.

Additional Enhancements

• The selected Service Location, Provider, Staff, Room, and Equipment filter will persist in the browser to save time and eliminate repetitive work
• Navigating back to the Dashboard will show the last tab viewed
• Direct Inbox access for providers under Outstanding Items
• Responsive to screen resolution for easy viewing

Features Coming Soon

• Display the service location name on the Dashboard for each appointment
• Provider/Staff/Room/Equipment filters will be alphabetized
• Schedule monthly and yearly recurrences

Resolved Issues

• Fixed an issue where incorrect appointment times were displayed
  Note: On the webapp, the appointment time will display based on the selected Time Zone in Calendar Settings
• Fixed an issue where all appointments were not showing on the dashboard
• Fixed an issue where creating a new patient from the appointment screen redirects the user to the old workflow
• Fixed an issue where appointments were not showing correctly on the dashboard
• Fixed an issue where deleted service locations were shown
• Fixed an issue where “Unknown” patient gender was shown as “Transgender”
• Fixed an issue where the providers and resources availability incorrectly indicated they were Available
Help Articles

- Navigate the Dashboard
- New Patient Appointment
- Schedule Custom Recurring Appointment

Video

Watch the video below to learn how to navigate the Dashboard.

Dashboard FAQs

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<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>What is the Dashboard?</td>
<td>Kareo is simplifying the patient check-in and scheduling workflows to help customers follow streamlined steps and save time. The newly re-designed Dashboard will allow users to easily check-in incoming patients, schedule and edit appointments and has new features for users that improve day-to-day processes in the practice.</td>
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<td>Why are we doing this?</td>
<td>This is part of a larger effort to build an integrated platform where core features along with Billing and Clinical workflows will be integrated within one seamless system. These efforts will ensure all jobs performed at the practice are in the web application and the user is not required to switch between the web application and the practice management system, hence saving time and avoiding human errors. New features like flexible filter selections, multiple resource selections and recurring appointments will also allow users to be better at running their practice efficiently.</td>
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| What are the new features? | • Easily change an appointment status from the Dashboard  
• Flexible recurring appointments with smart default options  
• View Note Status on the Dashboard (Clinical Subscribers)  
• Ability to schedule an appointment with multiple resources and rooms  
• Ability to filter appointments by any combination of:  
  ▪ Providers  
  ▪ Staff  
  ▪ Rooms  
  ▪ Equipment  
  ▪ Service Locations |
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<td>Is there an additional fee for this feature enhancement?</td>
<td>No.</td>
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| What will the Dashboard specifically do? | When you log into Kareo, the Dashboard provides an efficient interface to manage daily patient appointments, access high-priority tasks, and navigate to other sections in the system.  
The Dashboard displays patient appointments for the day and allows you to manage the entire appointment workflow — from check-in to check-out — including running insurance eligibility checks, creating notes, collecting patient payments and creating electronic charges. |
| How do I go to a patient’s chart? | Click on the patient’s name to go to the patient’s chart.  
When you hover over the patient’s name, you will see a card showing patient information like phone and email. The icon on the right hand side of the card will also take you to the patient’s chart. |
| What will the New Patient Appointment functionality do? | This enhanced feature will allow customers to schedule patient appointments in Kareo and better manage and organize the practice’s daily agenda. |
| Will I lose any old functionality from the old views? | You will not lose any functionality from the old views. While we will transition away from the old view, the idea is to provide a better experience and help you improve the way you work and save time. Things will look different and may be at different places, but overall functionality is not hampered in any way. |
| Which browsers should I use to get the best experience? | We recommend you use Chrome for the best experience on the new Dashboard. Other supported browser versions can be found [here](https://helpme.kareo.com/Platform/01_Agenda/Learn_More%3A_New_Dashboard_and_Scheduling_Workflow). |