

Confirming a New Patient

1. Once a patient has signed up with your practice, let's walk through how to confirm them. Start on the dashboard.

The dashboard shows a 'New Patients (2)' section with the following data:

Name	Created	Confirmation Status
Phoebe Bufat	2/20/2022	Confirmed (checkmark)
Chandler Bing	2/20/2022	Confirmed (checkmark)

2. Find your “New Patients” section.

The 'New Patients (2)' section is highlighted with a red box. It contains the following data:

Name	Created	Confirmation Status
Phoebe Bufat	2/20/2022	Confirmed (checkmark)
Chandler Bing	2/20/2022	Confirmed (checkmark)

3. Click on the patient's name that you would like to confirm.

The screenshot shows the AEROPC dashboard for user ABC 123. The 'New Patients (2)' table is visible, with the following data:

Name	Created	Actions
Therese Buffat	2/20/2022	[Checkmark] [Trash]
Chandler Bing	2/20/2022	[Checkmark] [Trash]

The 'Chandler Bing' row is highlighted with a red box. Other dashboard elements include 'Patient Snapshot', 'Today's Tasks', 'Pending Tasks', 'My Recent Activity', and a calendar for Sun Feb 20 2022.

4. Here you are able to review the patient's information that was entered. Once you have reviewed, click on the "Review Confirmation."

The screenshot shows the 'Patient Review' form for Chandler Bing. The form contains the following information:

- Patient Information:** First Name: Chandler, Middle Name: -, Last Name: Bing
- Preferred Name:** -
- Date of Birth:** 06/07/1982
- Phone Number:** 878-454-9456
- Email:** chandler@friends.com
- Is this person the primary owner of this phone number?** No Yes
- Is this person the primary owner of this email?** No Yes
- Gender:** Male Female Other
- Pronouns:** [Empty field]
- Profile Picture:** [Select files...]

At the top of the form, there are two buttons: 'Discard' (red) and 'Review Confirmation' (blue), with the latter highlighted by a red box.

5. Here is where you are able to customize the billing for this patient. Let's give an overview of each section first.

- A. Shows patient information, including what type of billing information they signed up with.
- B. Shows total monthly subscription charge based on practice billing tier assigned by age.
- C. Gives you the option to add additional, one-time charges to the first bill. Example: Enrollment Fee, Home Visit, Initial labs, etc.
- D. Here is where you can override the normal subscription price to give a discount, family discount, referral discount, etc.
- E. By clicking yes here, you can delay the subscription billing date to a later day in the month.
- F. Shows you the total \$ the patient will be charged now when you click "Accept Patient"

Who you are confirming

First	Middle	Last	DOB	Billing Status	Date Created
Chandler		Brigg	6/5/1952	ACH	2/20/2022 2:39 PM

Configuration

B Paying MONTHLY - \$85 (total cost for 1 subscription)

Tier	\$ / Person	Count
19 - 45	85	1

This is the recurring subscription cost for this patient(s).

C Add Additional Charges

Add one time charges that will be added as part of the initial amount the patient is charged after you confirm them. Click on a row to edit. Negative charges are not allowed.

Charge Name	Amount	Quantity	Total
Enrollment Fee	25	1	25

+ Add Charge

Do you want to set a maximum subscription price? **D** No Yes

Do you want to override the billing date? **E** No Yes

F Total First Bill \$110

Cancel Accept patient(s)

6. To edit the one-time "Enrollment Fee" charge, click anywhere on the line item to update. Also click "+ Add Charge" to add a new line item and edit.

Add Additional Charges

Add one time charges that will be added as part of the initial amount the patient is charged after you confirm them. Click on a row to edit. Negative charges are not allowed.

Charge Name	Amount	Quantity	Total
Enrollment Fee	25	1	25
New Charge	0	1	0

+ Add Charge

7. The additional one-time charges have been added. This patient's total for today is \$85 (monthly) + \$25 (enrollment) + \$50 (Initial Labs) = \$160. That is correct. Now click "Accept Patient"

Who you are confirming

First	Middle	Last	DOB	Billing Status	Date Created
Chandler		Bing	6/5/1982	ACH	2/20/2022 2:39 PM

Configuration

Paying MONTHLY - \$85
(total cost for 1 subscription)

Tier	\$ / Person	Count
19 - 45	85	1

This is the recurring subscription cost for this patient(s).

Add Additional Charges
Add one time charges that will be added as part of the initial amount the patient is charged after you confirm them. Click on a row to edit. Negative charges are not allowed.

Charge Name	Amount	Quantity	Total
Enrollment Fee	25	1	25
Initial Labs	50	1	50

+ Add Charge

Do you want to set a maximum subscription price? No Yes

Do you want to override the billing date?
"No" means the subscription price will be charged when you click "Accept patient(s)".
"Yes" means the subscription price will not be charged when you click "Accept patient(s)". No Yes

Total First Bill \$160

Cancel Accept patient(s)

8. This patient has now been accepted into your practice as a patient. You will be able to search for them in the patients list. They have been charged \$160 which you can see in the billing history section.

AEROPC ABC 123

Quick Search + New Interaction Kyle Brown Sign Out Help

Chandler Bing (39)
 (878) 454-3456 chandler@friends.com
 6/8/1982
 1234 New York Way New York, NY 90505
 No allergies found

Demographic (Profile)
 Household
 Allergies/Meds
 Medical History
 Family History
 Social History
 Files

Interactions
 Back to all Patients Collapse SMS All Type to narrow results... Refresh Interaction

There is no data available

Billing

Outstanding Balance \$0.00 Charge Patient

Subscription Details \$85.00 Monthly Add Discount Next billing date 3/20/2022 Edit Billing Date

STRIPE TEST BANK
 ROUTING NUMBER 1100000000
 ACCOUNT HOLDER ACCOUNT ENDING 6789

Billing History View Payments

Amount	Date	Status	Method
+ \$85.00		Drph	
+ \$160.00	February 20, 2022	Paid Refund	STRIPE TEST BANK6789 View

9. By clicking the “+” button you are able to see the details of the invoice.

Billing History View Payments

Amount	Date	Status	Method
+ \$85.00		Draft	
- \$160.00	February 20, 2022	Paid Refund	STRIPE TEST BANK6789 View

Amount	Description	Date
\$25.00	Enrollment Fee	February 20, 2022
\$50.00	Initial Labs	February 20, 2022
\$85.00	1 x Ages 19 - 45 (at \$85.00 / month)	February 20, 2022

1 items per page 1 - 2 of 2 items

10. You can also check to make sure that the ongoing subscription price and next billing date is what you expect.

AERODPC ABC 123

Chandler Bing (39)
1234 New York Way New York, NY 90505

Outstanding Balance: \$0.00

Subscription Details: \$85.00 Monthly, Next billing date 3/20/2022

STRIPE TEST BANK

Billing History

Amount	Date	Status	Method
+ \$85.00		Draft	

11. This patient is now active and ready! Well done!

For more options on confirming patients - see our [Resources page](#).

Other options:

- **Partial month for new patient**
- **Delay billing date for new patient**
- **Adding payment method to new patient**
- **Confirm a family**
- **Etc.**