

The Active Patient List (APL)

Learn how to manage your personal finances with this easy-to-follow guide on using Google Sheets. This tutorial will walk you through the essential steps to track your income, expenses, and budget effectively. Take control of your financial future today!

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The APL is divided into four sections. The top section is shared/priority. These are patients that are shared with Synapse or have other scheduling restrictions. They are the most difficult to schedule, and therefore get scheduled first.

Patient	Shared	Location	POT/Extensi on?	Billing Code	Last Scheduled Appt	Scheduling Notes		
Shared/Priority								
Jay R. Smith	<input checked="" type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	04/27 03/26	continue once a week through April, former sci
Braxton Carter	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April
Dove Johnson	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x8	92507 & 9...	04/10/2026	nothing else needed
Ed Dobbs	<input checked="" type="checkbox"/>		Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April
Bruce Weinstein	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now
Gary Unkefer	<input checked="" type="checkbox"/>			Sandy...	2x8		04/29	holding 2x4 to match PT; add once a week thru
Thomas Affleck	<input checked="" type="checkbox"/>		Bi-month...	Sandy...	soon will transition	92507 & 9...	4/24	EOWIA S scheduled through april
Ronnie Stroud	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will
George Simmons	<input type="checkbox"/>		Once a w...	Sandy...	ongoing,	92507 & 9...		Monday Wednesday or Friday around 12/1 - seems
Carolyn Schiffman	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x8	92507 & 9...	3/26	extend 1x8
Faith Burke	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put
Robert Negri	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	Leanni's sch for 2 of 3
William Merritt	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS redid scch on 02/16; extend thru April with PT
SS Flexible								
Paul Anderson	<input checked="" type="checkbox"/>		Twice a w...	Combo	2x10	92507 & 9...		currently doing one virtual and one home visit on T
Linda Rosskopf	<input type="checkbox"/>	yes	PRN	Sandy...	2x8	92507	4/2	afternoons; as completed schedule thru 4/2, will lik
Aiden Sheridan	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	ongoing weekly maintenance prefers mid day; no action needed cont Feb and march; add thru april

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The second section is SS Flexible. These are patients are seen in the Sandy Springs office and are scheduled after priority scheduled patients.

3	Jay R. Smith	<input checked="" type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	04/27	continue once a week through April, former sol 03/26
4	Braxton Carter	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April
5	Dove Johnson	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed
6	Ed Dobbs	<input checked="" type="checkbox"/>		Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April
7	Bruce Weinstein	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now
8	Gary Unkefer	<input checked="" type="checkbox"/>		Once a w...	Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru
9	Thomas Affleck	<input checked="" type="checkbox"/>		Bi-monthl...	Sandy...	soon will transition	92507 & 9...	4/24	EOW/AS scheduled through april
10	Ronnie Stroud	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will Monday Wednesday or Friday around 12/1 -seems Monday at 12:45; continue thru April
11	George Simmons	<input type="checkbox"/>		Once a w...	Sandy...	ongoing	92507 & 9...		
12	Carolyn Schiffman	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x8	92507 & 9...	3/26	extend 1x8
13	Faith Burke	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put Leann's sch for 2 of 3
14	Robert Negri	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT
15	William Merritt	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on t
16		<input type="checkbox"/>							
17	SS Flexible								
18	Paul Anderson	<input checked="" type="checkbox"/>		Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on T afternoons, as completed schedule thru 4/2, will lik ongoing weekly maintenance
19	Linda Rosskopf	<input type="checkbox"/>	yes	PRN	Sandy...	2x6	92507		prefers mid day; no action needed
20	Aiden Sheridan	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april
21	Philip Flores	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	92507	03/30/2026	Mondays at 2ish; continue throughFeb/March; exts May
22	Suzanne Wright	<input type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	03/25/2026	Wed at 1; Extend thru April
23	Alex Katz	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 45 min...	3/27/2026	Recurring Fridays at 10:45; coninue through foorrreeevvvvrrrr; extend thru May
24	Rich Grady	<input type="checkbox"/>		Bi-monthl...	Sandy...	2x6	PP 45 min...	01/15/2026	OON, ST not covered. will see PRN for swallow ur insurance change next year / PRN after 1 appt let
25	Ed Gerber	<input type="checkbox"/>	yes	Once a w...	Sandy...	1x8	92507	3/27	EOW x4 visits AS added 1x8 visits total
26	Michael (Mickey) Ross	<input type="checkbox"/>		Once a w...	Sandy...			04/09	eval is 02/18, AS did sch, POC - 1x12; no action
27	Scott Karlin	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x8	92507	4/10	does boxing; AS added 1x8
28	Jim Bing	<input type="checkbox"/>		Once a w...	Sandy...				
29	Woodstock/Mobile								
30	Tora Pollard	<input type="checkbox"/>		Once a w...	Woods...	ongoing	PP 30 min...	3/31	Tuesdays at 4:30; extend thru May
31	Andrew Askew	<input type="checkbox"/>		Weekly M...	Woods...	ongoing	PP 30 min...	3/31/2026	Recurring Tuesdays at 3:15; extend thru May
32	Amelia Sewell	<input type="checkbox"/>		Bi-monthl...	Woods...	ongoing	PP 30 min...	3/24	just reduced to every other week ; continue thru M
33	Michael Greenbaum	<input checked="" type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 60 min...	04/24/2026	Recurring Fridays EOD (4 but flexible); extend thru May in memory care, will see at facility Tues around 1n

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Woodstock/Mobile are patients that are seen on Tuesdays by Amanda only. This caseload is limited.

12	Carolyn Schiffman	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x8	92507 & 9...	3/26	extend 1x8
13	Faith Burke	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put
14	Robert Negri	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT
15	William Merritt	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on t
16		<input type="checkbox"/>							
17	SS Flexible								
18	Paul Anderson	<input checked="" type="checkbox"/>		Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on T afternoons, as completed schedule thru 4/2, will lik ongoing weekly maintenance
19	Linda Rosskopf	<input type="checkbox"/>	yes	PRN	Sandy...	2x6	92507		prefers mid day; no action needed
20	Aiden Sheridan	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april
21	Philip Flores	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	92507	03/30/2026	Mondays at 2ish; continue throughFeb/March; exts May
22	Suzanne Wright	<input type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	03/25/2026	Wed at 1; Extend thru April
23	Alex Katz	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 45 min...	3/27/2026	Recurring Fridays at 10:45; coninue through foorrreeevvvvrrrr; extend thru May
24	Rich Grady	<input type="checkbox"/>		Bi-monthl...	Sandy...	2x6	PP 45 min...	01/15/2026	OON, ST not covered. will see PRN for swallow ur insurance change next year / PRN after 1 appt let
25	Ed Gerber	<input type="checkbox"/>	yes	Once a w...	Sandy...	1x8	92507	3/27	AS added 1x8 visits total
26	Michael (Mickey) Ross	<input type="checkbox"/>		Once a w...	Sandy...			04/09	eval is 02/18, AS did sch, POC - 1x12; no action
27	Scott Karlin	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x8	92507	4/10	does boxing; AS added 1x8
28	Jim Bing	<input type="checkbox"/>		Once a w...	Sandy...				
29	Woodstock/Mobile								
30	Tora Pollard	<input type="checkbox"/>		Once a w...	Woods...	ongoing	PP 30 min...	3/31	Tuesdays at 4:30; extend thru May
31	Andrew Askew	<input type="checkbox"/>		Weekly M...	Woods...	ongoing	PP 30 min...	3/31/2026	Recurring Tuesdays at 3:15; extend thru May
32	Amelia Sewell	<input type="checkbox"/>		Bi-monthl...	Woods...	ongoing	PP 30 min...	3/24	just reduced to every other week ; continue thru M
33	Michael Greenbaum	<input checked="" type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 60 min...	04/24/2026	Recurring Fridays EOD (4 but flexible); extend thru May in memory care, will see at facility Tues around 1n

4

Patient's that are finishing up with therapy and will not need any further appointments scheduled will get put in the No Action Needed Section.

25	Ed Gerber	<input type="checkbox"/>	yes	Once a w...	Sandy ...	1x8	92507	3/27	AS added 1x8 visits total
26	Michael (Mickey) Ross	<input type="checkbox"/>		Once a w...	Sandy ...			04/09	eval is 02/18, AS did sch, POC - 1x12; no action
27	Scott Karlin	<input checked="" type="checkbox"/>		Once a w...	Sandy ...	1x6	92507	4/10	does boxing; AS added 1x6
28	Jim Bing	<input type="checkbox"/>							
29	Woodstock/Mobile								
30	Cora Pollard	<input type="checkbox"/>		Once a w...	Woods...	ongoing	PP 30 min...	3/31	Tuesdays at 4:30; extend thru May
31	Andrew Askew	<input type="checkbox"/>		Weekly M...	Woods...	ongoing	PP 30 min...	3/31/2026	Recurring Tuesdays at 3:15; extend thru May
32	Amelia Sewell	<input type="checkbox"/>		Bi-monthl...	Woods...	ongoing	PP 30 min...	3/24	just reduced to every other week ; continue thru M
33	Michael Greenbaum	<input checked="" type="checkbox"/>		Weekly M...	Sandy ...	ongoing	PP 60 min...	04/24/2026	Recurring Fridays EOD (4 but flexible); extend thru May
34	Agnes Brandt	<input type="checkbox"/>		Prospective	Woods...	1x12	92507	3/3	in memory care, will see at facility, Tues around 1p action needed
35	Andrew Goodwin	<input type="checkbox"/>		Weekly M...	Sandy ...	ongoing	92507 & 9...	03/25/2026	Wednesdays EOD, time flexible as needed; extend thru May
36	Joe Galami	<input type="checkbox"/>		Weekly M...	Woods...	ongoing	92507	03/31/2026	continue weekly through Feb/March / Seems to be 12; extend thru May time flexible if later than 12
37	Marc Hicks	<input type="checkbox"/>		Bi-monthl...	Woods...	ongoing	92507	3/24	continue through Feb and march, Tues 1pm EOW thru May
38	Sheryl kay Lear	<input type="checkbox"/>		Weekly ...	Wood...	ongoing, as able		11/4/2025	- email probono neighbor
39		<input type="checkbox"/>							
40		<input type="checkbox"/>							
41	No Action Needed								
42		<input type="checkbox"/>							
43	Lloyd Span	<input checked="" type="checkbox"/>		Once a w...	Combo	1x8	92507 & 9...	1/20	nothing needed
44	Joe Kolshak	<input type="checkbox"/>		PRN	Sandy ...	1x6	92507 & 9...	12/19/2025	AS will schedule as needed
45	Jim Heiskell	<input checked="" type="checkbox"/>		Once a w...	Sandy ...	1x12	92507	1/19	was sick last two visits, need to get it reschedule-a 1-2 more
46		<input type="checkbox"/>							
47		<input type="checkbox"/>							

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Column B indicates if they are shared with Synapse. If they are, a Synapse schedule will be needed to schedule them.

Client	Shared	ok for LeAnn to see	Scheduled	Location	POT/Extensi on?	Billing Code	Last Scheduled Appt	Scheduling Notes
Shared/Priority								
Jay R. Smith	<input checked="" type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	04/27	03/26 continue once a week through April, former sch
Braxton Carter	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April
Dove Johnson	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed
Ed Dobbs	<input checked="" type="checkbox"/>		Weekly M...	Sandy ...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April
Bruce Weinstein	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now
Gary Unkefer	<input checked="" type="checkbox"/>			Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru
Thomas Affleck	<input checked="" type="checkbox"/>		Bi-monthl...	Sandy...	soon will transition	92507 & 9...	4/24	EOW/AS scheduled through april
Ronnie Stroud	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will Monday Wednesday or Friday around 12/1 - seems
George Simmons	<input type="checkbox"/>		Once a w...	Sandy ...	ongoing,	92507 & 9...		Monday at 12:45; continue thru April
Carolyn Schiffman	<input checked="" type="checkbox"/>		Once a w...	Sandy ...	1x6	92507 & 9...	3/26	extend 1x6
Faith Burke	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put Leann's sch for 2 of 3
Robert Negri	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid sch on 02/16; extend thru April with PT
William Merritt	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on tr
SS Flexible								
Paul Anderson	<input checked="" type="checkbox"/>		Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on T afternoons; as completed schedule thru 4/2, will lik ongoing weekly maintenance
Linda Rosskopf	<input type="checkbox"/>	yes	PRN	Sandy ...	2x6	92507		prefers mid day; no action needed
Aiden Sheridan	<input type="checkbox"/>		Weekly M...	Sandy ...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april

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This is an example of the Synapse schedule. Speech will be scheduled as closely as possible to PT appointments. 15-45 minute gaps are acceptable before or after PT.

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Date	Case	Time	Therapist	Reminder
Monday, March 16th, 2026	PD	03:00 pm	CD	Scheduled
Monday, March 23rd, 2026	PD	03:00 pm	CD	Scheduled
Monday, March 30th, 2026	PD	03:00 pm	CD	Scheduled
Monday, April 6th, 2026	PD	03:00 pm	CD	Scheduled
Monday, April 13th, 2026	PD	03:00 pm	CD	Scheduled
Monday, April 20th, 2026	PD	03:00 pm	CD	Scheduled
Monday, April 27th, 2026	PD	03:00 pm	CD	Scheduled
Monday, May 4th, 2026	PD	03:00 pm	AM	Scheduled
Monday, May 11th, 2026	PD	03:00 pm	AM	Scheduled
Monday, May 18th, 2026	PD	12:00 pm	CD	Scheduled
Monday, May 25th, 2026	PD	03:00 pm	AM	Scheduled
Monday, June 1st, 2026	PD	03:00 pm	CD	Scheduled
Monday, June 8th, 2026	PD	03:00 pm	CD	Scheduled
Monday, June 15th, 2026	PD	03:00 pm	CD	Scheduled
Monday, June 22nd, 2026	PD	03:00 pm	CD	Scheduled
Monday, June 29th, 2026	PD	03:00 pm	CD	Scheduled

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The Scheduled column indicates their status/frequency. Options are

--Twice a week

--Once a week

--Bi-monthly

--PRN (these patients will schedule visit to visit with Amanda/LeAnn)

Client	Shared	ok for LeAnn to see	Scheduled	Location	POT/Extensi on?	Billing Code	Last Scheduled Appt	Scheduling Notes
Shared/Priority								
Jay R. Smith	<input checked="" type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	04/27	03/26 continue once a week through April, former sci
Braxton Carter	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April
Dove Johnson	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed
Ed Dobbs	<input checked="" type="checkbox"/>		Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April
Bruce Weinstein	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now
Gary Unkefer	<input checked="" type="checkbox"/>			Sandy...	2x6		04/29	holding 2x4 to match PT;add once a week thru
Thomas Affleck	<input checked="" type="checkbox"/>		Bi-month...	Sandy...	soon will transition	92507 & 9...	4/24	EOW/AS scheduled thorough april
Ronnie Stroud	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will
George Simmons	<input type="checkbox"/>		Once a w...	Sandy ...	ongoing,	92507 & 9...		Monday Wednesday or Friday around 12/1 -seems
Carolyn Schiffman	<input checked="" type="checkbox"/>		Once a w...	Sandy ...	1x6	92507 & 9...	3/26	extend 1x6
Faith Burke	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x6	92507	03/12	eval on 2/5, add three more once a week - nbb put
Robert Negri	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT
William Merritt	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on tr
SS Flexible								
Paul Anderson	<input checked="" type="checkbox"/>		Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on T
Linda Rosskopf	<input type="checkbox"/>	yes	PRN	Sandy ...	2x6	92507		ongoing weekly maintenance
Aiden Sheridan	<input type="checkbox"/>		Weekly M...	Sandy ...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april

8 This indicates the office that the patient is scheduled in.

Client	Shared	ok for LeAnn to see	Scheduled	Location	POT/Extension?	Billing Code	Last Scheduled Appt	Scheduling Notes
Shared/Priority								
Jay R. Smith	<input checked="" type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	04/27	continue once a week through April, former sch 03/26
Braxton Carter	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April
Dove Johnson	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed
Ed Dobbs	<input checked="" type="checkbox"/>		Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April
Bruce Weinstein	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now
Gary Unkefer	<input checked="" type="checkbox"/>			Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru april
Thomas Affleck	<input checked="" type="checkbox"/>		Bi-month...	Sandy...	soon will transition	92507 & 9...	4/24	EOW/A/S scheduled through april
Ronnie Stroud	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will then d/c
George Simmons	<input type="checkbox"/>		Once a w...	Sandy...	ongoing,	92507 & 9...		Monday Wednesday or Friday around 12/1 - seems to be Monday at 12:45; continue thru April
Carolyn Schiffman	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x6	92507 & 9...	3/28	extend 1x6
Faith Burke	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put on Leann's sch for 2 of 3
Robert Negri	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid sch on 02/16; extend thru April with PT
William Merritt	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on the 25th
SS Flexible								
Paul Anderson	<input checked="" type="checkbox"/>		Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on Thursdays afternoons; as completed schedule thru 4/2, will like add ongoing weekly maintenance
Linda Rosskopf	<input type="checkbox"/>	yes	PRN	Sandy...	2x6	92507		prefers mid day; no action needed
Aiden Sheridan	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april

9 This column indicates the number of visits recommended. When a patient is evaluated, visit number is determined. For example, 2x12 indicates that the patient needs to be scheduled two times a week for 12 weeks. When those appointments expire, additional appointments will be added in the following format "add 1x6." For patients on maintenance, the POT will state "ongoing."

Client	Shared	ok for LeAnn to see	Scheduled	Location	POT/Extension?	Billing Code	Last Scheduled Appt	Scheduling Notes
Shared/Priority								
Jay R. Smith	<input checked="" type="checkbox"/>	yes	Once a w...	Sandy...	ongoing	92507	04/27	continue once a week through April, former sch thru 03/26
Braxton Carter	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April
Dove Johnson	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed
Ed Dobbs	<input checked="" type="checkbox"/>		Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April
Bruce Weinstein	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now
Gary Unkefer	<input checked="" type="checkbox"/>			Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru april
Thomas Affleck	<input checked="" type="checkbox"/>		Bi-month...	Sandy...	soon will transition	92507 & 9...	4/24	EOW/A/S scheduled through april
Ronnie Stroud	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will then d/c
George Simmons	<input type="checkbox"/>		Once a w...	Sandy...	ongoing,	92507 & 9...		Monday Wednesday or Friday around 12/1 - seems to be Monday at 12:45; continue thru April
Carolyn Schiffman	<input checked="" type="checkbox"/>		Once a w...	Sandy...	1x6	92507 & 9...	3/28	extend 1x6
Faith Burke	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put on Leann's sch for 2 of 3
Robert Negri	<input checked="" type="checkbox"/>	yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid sch on 02/16; extend thru April with PT
William Merritt	<input checked="" type="checkbox"/>		Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on the 25th
SS Flexible								
Paul Anderson	<input checked="" type="checkbox"/>		Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on Thursdays afternoons; as completed schedule thru 4/2, will like add ongoing weekly maintenance
Linda Rosskopf	<input type="checkbox"/>	yes	PRN	Sandy...	2x6	92507		prefers mid day; no action needed
Aiden Sheridan	<input type="checkbox"/>		Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april

10

Billing Code indicates the services that are billed for the patient. PP indicates private pay.

ok for LeAnn to see

100% | \$ % 0.00 123 | Arial | 10 | B I A

	B	C	D	E	F	G	H	I	J
	Shared	ok for LeAnn to see	Scheduled	Location	POT/Extensi on?	Billing Code	Last Scheduled Appt	Scheduling Notes	Scheduled completed through
<input checked="" type="checkbox"/>		yes	Once a w...	Sandy...	ongoing	92507	04/27	continue once a week through April, former sch thru 03/26	<input type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed	<input type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now	<input type="checkbox"/>
<input checked="" type="checkbox"/>				Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru april	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>			Bi-month...	Sandy...	soon will transition	92507 & 9...	4/24	EOW/AS scheduled through april	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>			Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will then d/c	<input checked="" type="checkbox"/>
<input type="checkbox"/>			Once a w...	Sandy...	ongoing	92507 & 9...		Monday Wednesday or Friday around 12/1 -seems to be Monday at 12:45; continue thru April	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>			Once a w...	Sandy...	1x6	92507 & 9...	3/26	extend 1x6	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x6	92507	03/12	eval on 2/5, add three more once a week - nbb put on Leann's sch for 2 of 3	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>			Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on the 25th	<input type="checkbox"/>
<input type="checkbox"/>									
<input checked="" type="checkbox"/>			Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on Thursday afternoons; as completed schedule thru 4/2, will like add ongoing weekly maintenance	<input checked="" type="checkbox"/>
<input type="checkbox"/>		yes	PRN	Sandy...	2x6	92507		prefers mid day; no action needed	<input type="checkbox"/>
<input type="checkbox"/>			Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april	<input checked="" type="checkbox"/>

11

Last Appointment Scheduled is the last date the patient will be seen based on current schedule.

Tools Gemini Extensions Help

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	B	C	D	E	F	G	H	I	J	K
	Shared	ok for LeAnn to see	Scheduled	Location	POT/Extensi on?	Billing Code	Last Scheduled Appt	Scheduling Notes	Scheduled completed through	Schedule for March sent & uploaded
<input checked="" type="checkbox"/>		yes	Once a w...	Sandy...	ongoing	92507	04/27	continue once a week through April, former sch thru 03/26	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>				Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru april	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>			Bi-month...	Sandy...	soon will transition	92507 & 9...	4/24	EOW/AS scheduled through april	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>			Twice a ...	Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will then d/c	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Once a w...	Sandy...	ongoing	92507 & 9...		Monday Wednesday or Friday around 12/1 -seems to be Monday at 12:45; continue thru April	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>			Once a w...	Sandy...	1x6	92507 & 9...	3/26	extend 1x6	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x6	92507	03/12	eval on 2/5, add three more once a week - nbb put on Leann's sch for 2 of 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		yes	Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>			Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on the 25th	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>										
<input checked="" type="checkbox"/>			Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on Thursday afternoons; as completed schedule thru 4/2, will like add ongoing weekly maintenance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		yes	PRN	Sandy...	2x6	92507		prefers mid day; no action needed	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april	<input type="checkbox"/>	<input type="checkbox"/>

12

Scheduling Notes. Therapist will make note of any specific restrictions or scheduling preferences.

Scheduled	Location	POT/Extension?	Billing Code	Last Scheduled Appt	Scheduling Notes	Scheduled completed through	Schedule for March sent & uploaded	Email
Once a w...	Sandy...	ongoing	92507	04/27	continue once a week through April, former sch thru 03/26	<input type="checkbox"/>	<input type="checkbox"/>	jayridgelysmith
Once a w...	Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Twice a ...	Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Weekly M...	Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Twice a ...	Sandy...	2x10	92507 & 9...	03/27	nothing needed for now	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Twice a ...	Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru april	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Bi-month...	Sandy...	soon will transition	92507 & 9...	4/24	EOWIA S scheduled through april	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Twice a ...	Sandy...	2x8	92626	02/26/2026	AS scheduled 1x week through march and will then d/c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	delorislocke@n
Once a w...	Sandy...	ongoing	92507 & 9...		Monday Wednesday or Friday around 12/1 - seems to be Monday at 12:45; continue thru April	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Once a w...	Sandy...	1x6	92507 & 9...	3/26	extend 1x6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Twice a ...	Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put on Leann's sch for 2 of 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Twice a ...	Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Twice a ...	Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on the 25th	<input type="checkbox"/>	<input type="checkbox"/>	
Twice a w...	Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on Thursday afternoons; as completed schedule thru 4/2, will like add ongoing weekly maintenance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
PRN	Sandy...	2x6	92507		prefers mid day; no action needed	<input type="checkbox"/>	<input type="checkbox"/>	
Weekly M...	Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april	<input checked="" type="checkbox"/>	<input type="checkbox"/>	null@gmail.com

13

Column J is utilized to indicate whether the schedule has been updated. The goal of scheduling is 1-2 months in advance. For example, if the spreadsheet currently reads April, this box will be checked for patient who have appointments through the end of April.

Location	POT/Extension?	Billing Code	Last Scheduled Appt	Scheduling Notes	Scheduled completed through	Schedule for March sent & uploaded	Email	Phone number
Sandy...	ongoing	92507	04/27	continue once a week through April, former sch thru 03/26	<input type="checkbox"/>	<input type="checkbox"/>	jayridgelysmith (404) 245-0046	
Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Sandy...	2x10	92507 & 9...	03/27	nothing needed for now	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Sandy...	2x6		04/29	holding 2x4 to match PT; add once a week thru april	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Sandy...	soon will transition	92507 & 9...	4/24	EOWIA S scheduled through april	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x8	92626	02/26/2026	AS scheduled 1x week through march and will then d/c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	delorislocke@n (404) 317-1886	
Sandy...	ongoing	92507 & 9...		Monday Wednesday or Friday around 12/1 - seems to be Monday at 12:45; continue thru April	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	1x6	92507 & 9...	3/26	extend 1x6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put on Leann's sch for 2 of 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on the 25th	<input type="checkbox"/>	<input type="checkbox"/>		
Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on Thursday afternoons; as completed schedule thru 4/2, will like add ongoing weekly maintenance	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x6	92507		prefers mid day; no action needed	<input type="checkbox"/>	<input type="checkbox"/>		
Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april	<input checked="" type="checkbox"/>	<input type="checkbox"/>	null@gmail.com (404) 906-5878	

14

Return to Simple Practice. In the patient's profile on the right hand column, scroll to the Upcoming Appointments and select Print. Save the PDF in the following format "FiLa Schedule date". Add the date that the schedule was saved and sent.

The screenshot displays a patient profile interface. On the left, a table lists various uploads and their completion status:

File Name	Type	Status	Category	Date	More
Practice upload	Uploaded	EL		12/4/25	...
ts_Rost_NovDec2025_EST.pdf	Practice upload	Uploaded	NB	11/1/25	...
df	Practice upload	Uploaded	EL	9/8/25	...
	Practice upload	Uploaded	EL	7/29/25	...
s.pdf	Practice upload	Uploaded	EL	6/24/25	...
	Practice upload	Uploaded	EL	6/7/25	...
	Credit card info	Completed	RS	5/16/25	...
	Demographics	Completed	RS	5/16/25	...
s.pdf	Shared upload	Completed	RS	5/16/25	...
	Consent	Completed	RS	5/16/25	...
ces	Consent	Completed	RS	5/16/25	...
peech-Language Therapy	Consent	Completed	RS	5/16/25	...

The right-hand sidebar contains several sections:

- Add insurance payment** (button)
- Client info** (Edit, expand): Sex: Male, Phone: (404) 317-1886, Mobile: [icon], Email: delorislocke@me.com, Home: [icon], Addr.: 1820 Peachtree St NW, Atlanta, GA 30309-1864
- Contacts** (Edit, expand): Deloris Locke Partner
- Upcoming appointments** (Print, expand): 03/12/2026 9:45 AM, 03/18/2026 10:45 AM, 03/26/2026 9:45 AM. The 'Print' button is circled in red.
- Communication settings** (collapse)
- Invoices** (collapse)
- Billing documents** (collapse)

15

Upload to patient's chart as an indicator of that the schedule was saved and sent to the patient with the following wording:

Hello,

Please find your upcoming speech therapy schedule attached.

As a reminder, our cancellation policy requires at least 24 hours' notice to avoid a \$50 late cancellation fee.

If you notice any scheduling conflicts, please reply to [schedule@lastinglanguage.net] so we can assist with adjustments.

For last minute changes/cancellation, please text Amanda directly at 470-851-4988.

Thank you, and we look forward to seeing you at your upcoming appointments!

Mar income \$4,989.97 + Messages Get \$200 in account credit

ie Stroud's profile

(Ronald Stroud)
1947 (78 y/o) | Next Appt: 03/12/2026 (3 left) | Edit

Share Upload

Client's request: Emailed 01/19 offering 02/04 or 02/06.

Measures Files

All files Actions

Type	Status	Updated
ch_Therapy_Appointments_R...	Practice upload	Uploaded NB 3/7/26
	Practice upload	Uploaded AS 2/19/26
h_Therapy_Appointments_R...	Practice upload	Uploaded NB 1/26/26
h_Therapy_Appointments_R...	Practice upload	Uploaded NB 1/19/26
ts_RoST_Jan2026_EST.pdf	Practice upload	Uploaded AS 12/31/25

Client billing

Client balance \$67.56

Unallocated (25) @ \$479.31

Unpaid invoices (27) \$546.87

Appointment Status Report

Add Payment

Insurance Edit

Primary

MEDICARE GEORGIA PART B (GAMCR)

Member ID 9V3N01RY14

Request insurance status check

Last updated on 05/02/2025

Secondary

AARP

Member ID 31372375711

Request insurance status check

Last updated on 08/13/2025

16

Once the schedule has been uploaded and emailed, check the box in column K.

Location	POT/Extensi on?	Billing Code	Last Scheduled Appt	Scheduling Notes	Scheduled completed through	Schedule for March sent & uploaded	Email	Phone number
Sandy...	ongoing	92507	04/27	03/26 continue once a week through April, former sch thru		<input type="checkbox"/>		
Sandy...	1x10	PP 45 min...	4/20	AS scheduled out through April	<input checked="" type="checkbox"/>	<input type="checkbox"/>		jayridgelysmith (404) 245-0046
Sandy...	2x6	92507 & 9...	04/10/2026	nothing else needed				
Sandy...	ongoing	92507 & 9...	04/29/2026	FIRM 2:30 wednesdays, continue through April	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Sandy...	2x10	92507 & 9...	03/27	nothing needed for now				
Sandy...	2x6		04/29	holding 2x4 to match PT;add once a week thru april	<input checked="" type="checkbox"/>			
Sandy...	soon will transition	92507 & 9...	4/24	EOW/A S scheduled thourh april	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x8	92526	02/26/2026	AS scheduled 1x week through march and will then d/c	<input checked="" type="checkbox"/>	<input type="checkbox"/>		delorislooke@n (404) 317-1886
Sandy...	ongoing.	92507 & 9...		Monday Wednesday or Friday around 12/1 -seems to be Monday at 12:45; continue thru April	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	1x8	92507 & 9...	3/26	extend 1x8	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x8	92507	03/12	eval on 2/5, add three more once a week - nbb put on Leann's sch for 2 of 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x12	92507 & 9...	04/09	AS redid soch on 02/16; extend thru April with PT	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x12	92507 & 9...	5/20	AS scheduled with synapse, will start speech on the 25th	<input type="checkbox"/>	<input type="checkbox"/>		
Combo	2x10	92507 & 9...	4/2	currently doing one virtual and one home visit on Thursday afternoons; as completed schedule thru 4/2, will like add ongoing weekly maintenance	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sandy...	2x6	92507		prefers mid day; no action needed	<input type="checkbox"/>	<input type="checkbox"/>		
Sandy...	ongoing	PP 30 min...	03/27/2026	cont Feb and march; add thru april	<input checked="" type="checkbox"/>	<input type="checkbox"/>		null@gmail.com (404) 906-5878