



**OP** EDUCATIONAL  
EXPERIENCE

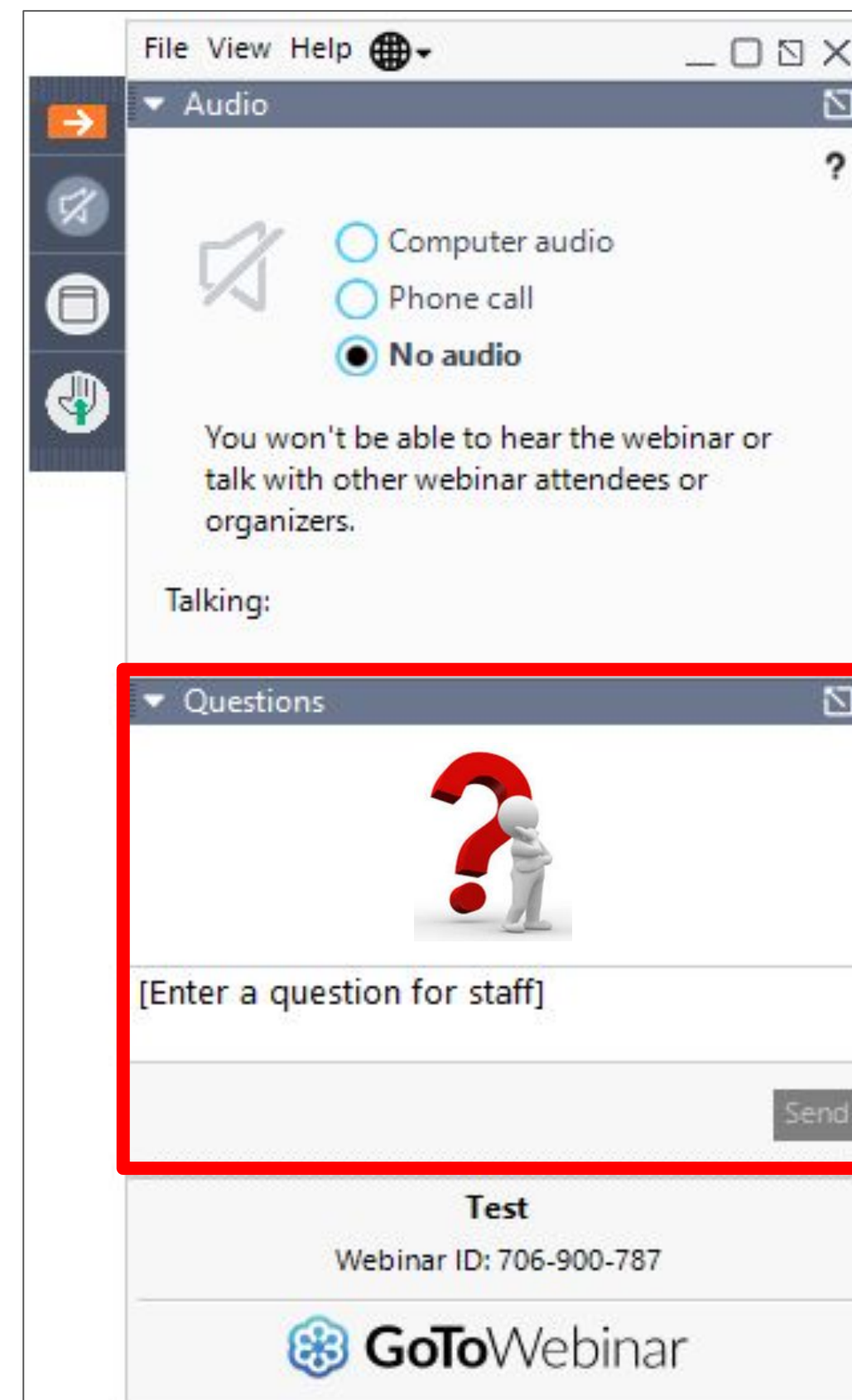
## **COVID-19 Survival Checklist Webinar Series**

OP Curbside

# Welcome to OP COVID-19 Survival Webinar Series | Curbside

Audience: All

- Attendees will be muted. If you have a question, enter it into the **Questions** box.
- Any unanswered question(s) will be communicated to the Webinar attendees via email.



# Objectives

In this webinar, we will:

- Prepare to use Curbside
- Create a Curbside appointment
- Resend a Curbside Notification
- Complete workflow for patient arrival



# Activity 1: Prepare to use Curbside



# Change or Assign Curbside Color

**Practice Management tab > Appointments > Patient Tracking Stages**

Click on the line item for curbside and click on either the drop down arrow or the ellipsis button to select a color. A color must be selected for curbside to work.

Curbside	Checked in	31	<input type="text"/>	Color nc	...	<input type="text"/>
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# Activity 1 Outcome

We have updated the Curbside visit status color so that when a parent/guardian sends a text message back the color and status show.

Curbside	Checked in	31		<input type="checkbox"/>
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## Activity 2: Curbside Scheduling



# Curbside Scheduling

- Schedule Appointment
- Verify Demographics, Contact name and cell phone number for contact
- Verify Insurance over the phone and validate
- Not using Merchant Services: Take co-pay over the phone or direct patient/guarantor to your payment link on your website



# Review Curbside Phone Number

If the Primary/Alternate phone number is not a cell phone, place a checkmark in the curbside box - a drop down list will appear and you may select a number from the contact or free text a cell phone number.

**TIP:** No hyphens will need to be entered, just verify you have typed in 10 digits.

The screenshot displays the 'Add/Edit Appointment' window for patient TEST, MADDISON 'MADDI' (ID: 7289, Sex: F, DoB: 12/23/2009, Age: 10 yrs. 3 mos.). The appointment is scheduled for Tuesday, March 31, 2020, at 11:00 AM, with a duration of 10 minutes, by staff member Albert Davis, MD. The appointment reason is 'Cold symptoms' and the type is 'EST SICK VISIT'. The location is 'Neighborhood Physician'. The primary insurance is Aetna HMO. The curbside phone number field is highlighted with a red box and contains the number 484-321-7890 with a checked 'Curbside' checkbox. A dialog box titled 'Curbside Phone Number' is open, showing a message 'A mobile phone number is required:' and a list of mobile numbers and contacts. The list includes 484-321-7890 (SARA TEST) and 484-222-2222 (BRYAN TEST). The dialog also shows a 'Last verified' status of 'Validate' and a table of financial information.

Mobile Number	Contact
484-321-7890	SARA TEST
484-222-2222	BRYAN TEST

Amount	Description	Amount
\$0.00	Fam balance:	\$0.00
\$0.00	Fam credit:	\$0.00
\$0.00	Fam ins bal:	\$0.00
\$0.00	Fam ins cred:	\$0.00



# Curbside Notification Requested

The screenshot shows the 'Tracking Schedule' window. At the top, there are tabs for 'My View', 'Complete', 'All Doctors', 'Nursing Only', and staff names 'Sue', 'Karen', and 'Sharon'. On the right, there are radio buttons for 'Calendar' and 'Tracking' (which is selected), and a 'Settings' dropdown set to 'OOO, Visit, Details'. Below these are various filters and checkboxes: 'Date: 3/31/2020', 'Show tasks: All', 'Expand grid', 'Auto refresh', 'Exclude checked out', 'Exclude not checked in', and 'Show billing panel'. There are also buttons for 'Print', 'Validate', 'Confirm', 'Send Message', and 'Statements'. The main area is a table with columns: Time, Patient, Reason, TOV, Arrival, Room, Visit Status, Min., Tasks, Billing Status, Ins. Valid, Check out, Pat Pay, Confirm Status, and Curbside Status. A red box highlights the 'Curbside Status' column. Below the table, there is a summary bar for 'Staff : Albert Davis, MD (COUNT=1)'. The table shows one entry at 11:00 for 'TEST, MADDI Cold symptoms EST SICK VI' with a status of 'Requested' in the 'Curbside Status' column.

Time	Patient	Reason	TOV	Arrival	Room	Visit Status	Min.	Tasks	Billing Status	Ins. Valid	Check out	Pat Pay	Confirm Status	Curbside Status
11:00	TEST, MADDI	Cold symptoms EST SICK VI						2				0.00	Confirmed	Requested

Once a Curbside notification is requested you will see this from Tracking in the Curbside Status column. **Requested** will remain until the message has been sent. **Sent** will be the next prompt that appears.

# Activity 2 Outcome

We made a new appointment for a patient on the schedule, verified demographics, insurance, co-pay information and contact information.

We verified on the curbside notification which number this is going to send the notification out to and how the curbside notification looks in the Tracking window.

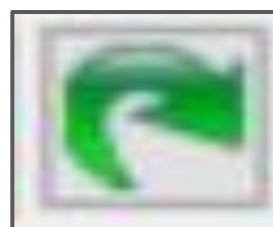
## Activity 3: Resend Curbside Notification





# Resend a Curbside Notification

1. Open the Add/Edit Appointment window.
2. Click the **Resend Curbside Message** icon.



Add/Edit Appointment

**TEST, MADDISON "MADDI"**  
7289 Sex: F DoB: 12/23/2009 Age on Appt Date: 10 yrs. 3 mos.

Tuesday, March 31, 2020

Search

Appt text: TEST, MADDISON "MADDI" [484-321-7890 ID:7289]  
~EST SICK VISIT: Cold symptoms -- AD

Appt reason: Cold symptoms

Appt type: EST SICK VISIT Start time: 11:00 AM

Location: Neighborhood Physician End time: 11:10 AM

Staff: Albert Davis, MD Duration: 10

Prim/alt phone: 484-321-7890 ☒ Curbside 4842223333

Move-up option:

Confirm status: Confirmed as of: 03/31/2020

Arrival time:

Presenter:

Visit status:

Room:

Payment rcvd: 0.00

Billing status:

PCP Visit \$35.00  
Well Visit  
After Hrs  
Specialist \$0.00  
+ Old Bal \$0.00  
- Credits \$0.00

Last encounter: 03/04/2020  
Last well visit: 03/04/2020  
Language(s):  
PCP: Albert Davis  
Immunization status on appointment date: working...

Primary Insurance  
AHN AETNA HMO  
Eff: Last verified: ☒ Validate  
Term:  
Copayments only, waived for preventive care

Pat balance:	\$0.00	Fam balance:	\$0.00
Pat credit:	\$0.00	Fam credit:	\$0.00
Pat ins bal:	\$0.00	Fam ins bal:	\$0.00
Pat ins cred:	\$0.00	Fam ins cred:	\$0.00

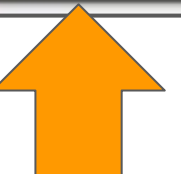
RER16961033120-10:31AM  
227871

Save Cancel



# Curbside Status Shows Updated with Sent

	Time	Patient	Reason	TOV	Arrival	Room	Visit Status	Tasks	Pat Pay	Confirm Status	Curbside Status
Staff : Albert Davis, MD (COUNT=1)											
▶	11:50 AM	TEST, JOEL	Urinary symptom EST SICK VISIT			▼	▼	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	0.00	Confirmed	▼ Sent



# Text messages on a cell phone

This is Horsham Pediatrics, your appointment is today at 8:00 AM. Reply 'Here' when you arrive at the practice.

This is Horsham Pediatrics, your appointment is today at 8:20 AM. Reply 'Here' when you arrive at the practice. Patient ID: 7376 has a copay of \$30.00 please pay here <https://pay.instamed.com/Form/PaymentPortal/Default?id=TEST.PEDS>

# Activity 3 Outcome

We have seen what the text message looks like going to the parent/guardian through curbside and how to add a cell phone number for a future appointment and send the request out.



## Activity 4: Workflow for Arrival



# Curbside Changes in Tracking

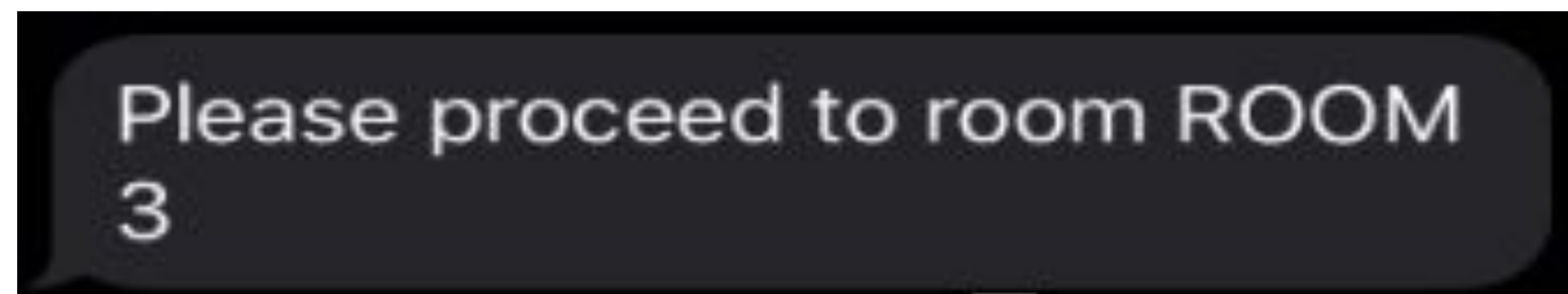
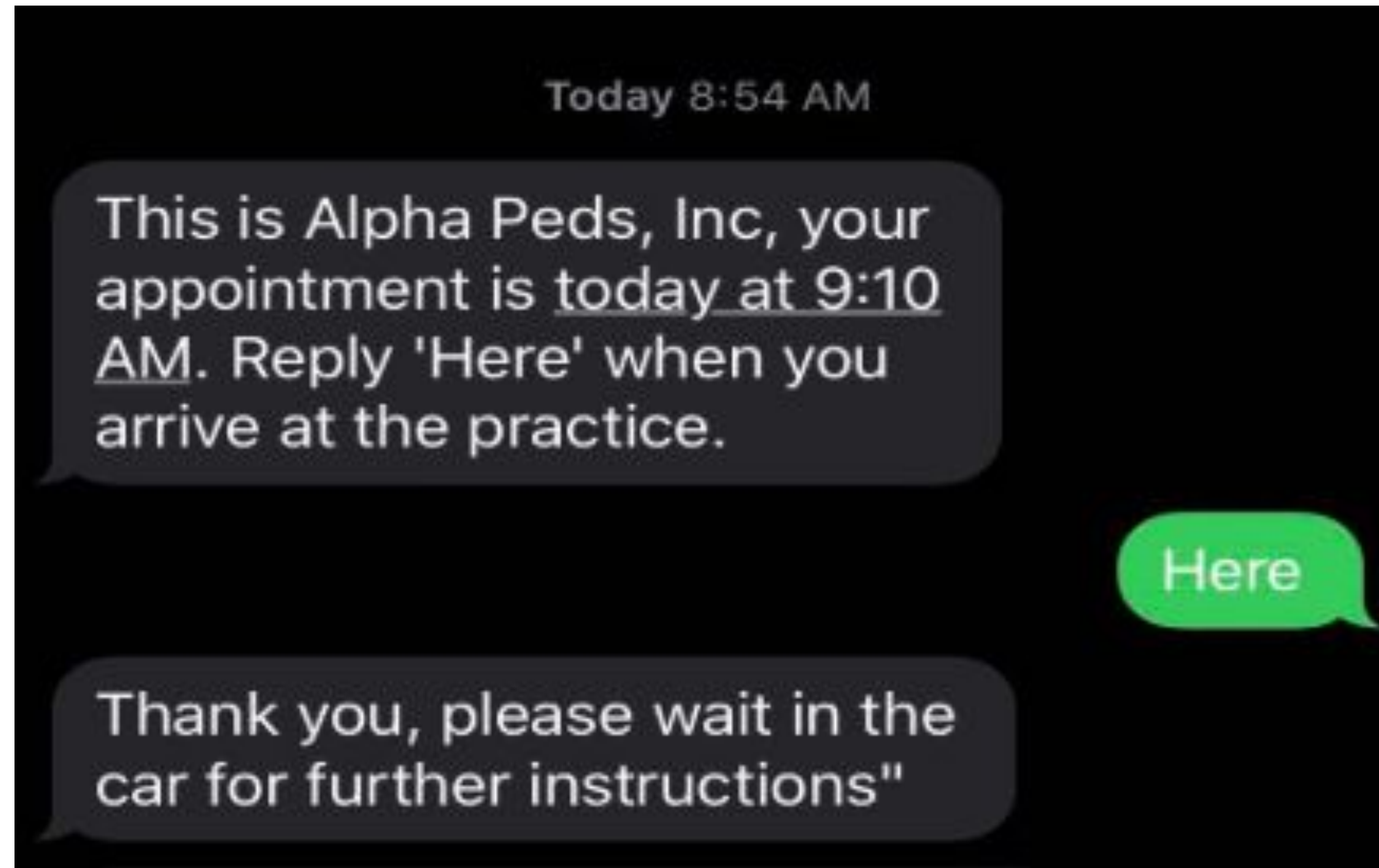
Staff <span>△</span>																
Time <span>△</span>	Patient	Reason	TOV	Arrival	Room	Visit Status	Mi n. <span>Σ</span>	Tasks	Billing Status	Ins. Valid	Checko ut	Pat Pay	Confirm Status	Curbside Status		
☐ Staff : REED FOWLER (COUNT=4)																
09:30	CHAN, JACKIE	Fever	EST SICK VI 09:07 AM		WAITING F	SQA in Te	29 <span>Σ</span>	22				0.00	Confirmed			
09:50	TEST, JOEL	ACNE	EST SICK VI 09:09 AM		WAITING RO(	Waiting Roo	289					0.00	Confirmed			
10:20	TEST, CHRIS	Fever	EST SICK VI 09:24 AM		WAITING RO(	Waiting Roo	274					0.00	Confirmed			
10:40	TEST, MARIAN	Cough	EST SICK VI 09:25 AM			In Progress	273					0.00	Confirmed			
☐ Staff : UMBER FROST (COUNT=2)																
11:00	TEST, MADDISON "I	Cough	EST SICK VI 12:13 PM		Curbside		105					0.00	Confirmed	Sent		
01:30	TEST, JIM	ACNE	EST SICK VI 12:16 PM		Curbside		102					0.00	Confirmed	Sent		

The two patients scheduled for 11am and 1:30pm have responded with “Here”

The office will see these updates and select an exam room when one is available.



# Text messages on a cell phone



# Activity 4 Outcome

We've seen where and how the visit status will update to curbside once the parent replies "Here" and how to inform the parent/guardian which exam room to proceed to.

Remember to continue to use your different visit statuses throughout the visit.

# Takeaway Action Plan

- ❑ Verify curbside has a designated color for Patient Tracking Stages
- ❑ Have a workflow in place to verify cell phone#, Validate Insurance and taking co-pays
- ❑ Once the parent/guardian replies “Here” from the text message OP will update the Patient Tracking Stage to curbside
- ❑ In OP once the staff select an Exam Room for the patient to proceed to a f/u text will appear for the parent/guardian

# Tips

- ❑ Remember that the text message will only go out if there is a cell phone number and if the appointment time is in the future. The message will go out approx 20 min from the appointment time.
- ❑ If using InstaMed Merchant Services the payment link will be included along with the chart #
- ❑ If you are currently using any other Merchant Service please direct your parent/guardian to your website, as a reminder verify your practice has either updated this link or adds it

# Resources

- [Curbside: Scheduling and Workflow](#)
- [Curbside FAQs](#)
  
- [Pediatric Practice Survival Checklist for COVID-19](#)
- [Responding after the scheduled appointment time](#)
- [InstaMed Merchant Services Taking Payments](#)



# Questions





## The OP Way

We are committed to providing the best **pediatric technology**, **resources**, and **community** to drive practice success and quality patient outcomes.

## *Our Mission: Improving Health Through Technology*

