OP Practice Portal:
Setting Up Scheduling QRG
(Live & Appointment Requests)

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The instructions in this document are designed to be completed in OP and on the Practice Portal by an Administrator. The information below will allow a Practice to customize the scheduling feature on the OP Patient Portal and the parent/guardian/patient experience.

Setting up OP for Scheduling

Setup in OP, for Live Scheduling and Appointment Requests, is only completed for any encounters the Practice wishes to display in the Patient Portal. It is recommended, if any Encounters are to be visible for scheduling, the Practice considers carefully and selects Symptom vs. Diagnosis templates. Well Visits are enabled in the Practice Portal.

Encounter Templates

1. Navigate to the Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Select the template to allow live schedules and select the **Edit** button. The Encounter Template Editor window displays.
3. Click the **Edit** button.
4. Confirm the Encounter Template has an **Appt type** selected. If there is no Appt type, follow the below instructions.
    a. Click the **ellipses** button.
    b. Select an **Appt type** and click the red arrow .
5. Select the **Allow Patient Scheduling** checkbox.
   Note: When selecting the Allow Patient Scheduling checkbox, the **Appt type** must be populated for the template. In addition, the Appt type must be available on the Practice Portal. The Appt types can be confirmed on the Practice Portal by navigating to **Portal Management > Code Management > Appointment Types**.
6. Click the **Save** button.

Appointment Zones: Protection Status

The Protection Status determines if the slots associated with a zone should display on the Patient Portal. Review each Appointment Zone and make changes dependent on the below definitions.

- **Not Protected or Blank**: The time slots will be available on the Patient Portal to request or schedule an appointment.
- **Owner Protected**: The time slots will *not* be available on the Patient Portal to request or schedule an appointment.
- **Staff Protected**: The time slots will *not* be available on the Patient Portal to request or schedule an appointment. These are time slots that the Practice has determined should only be available to the staff.

Setting up the Practice Portal for Scheduling

Enable a Provider for Scheduling

1. Navigate to the Provider list: **Navigation Panel > User Administration > Providers**.
2. Select a Provider to display the provider details.
3. Navigate to Appointment Resources and select the **Live Scheduling** checkbox.
   Note: If a provider is not going to use Live Scheduling, verify that the checkbox is deselected.
4. Click the **Save** button.

Complete the Scheduling Settings

1. Navigate to Scheduling: **Navigation Panel > Portal Management > Patient Interface > Scheduling tab**.
2. Complete the fields below:
   - Confirm the message group selection for new insurance notifications.
   - *(Optional)* Click the checkbox to display the photo saved on the provider user account.
     Note: All fields below are required to be complete to use Live Scheduling or Appointment Request feature on the Patient Portal. A value of zero in any field is not permitted and Live Scheduling or Appointment Requests will not be active. By default, this section will contain zeros, it is the Practice responsibility to complete.
   - **Limit scheduling to a maximum of day(s) in advance**: Enter the number of days, from the current day, you will allow a parent to schedule an appointment.
     Note: The Practice will need to consider how far in advance a calendar is available in OP when making a decision on the number of days to enter in this field.
   - **Limit scheduling to a minimum of hour(s) or day(s)**: Enter the number of hours or days prior to the appointment slot the Practice will use to prohibit a patient from scheduling an appointment.
   - **Prohibit live scheduling if patient has _ or more open appointments**: Enter the number of open appointments the Practice will use to prohibit a patient from scheduling an appointment.

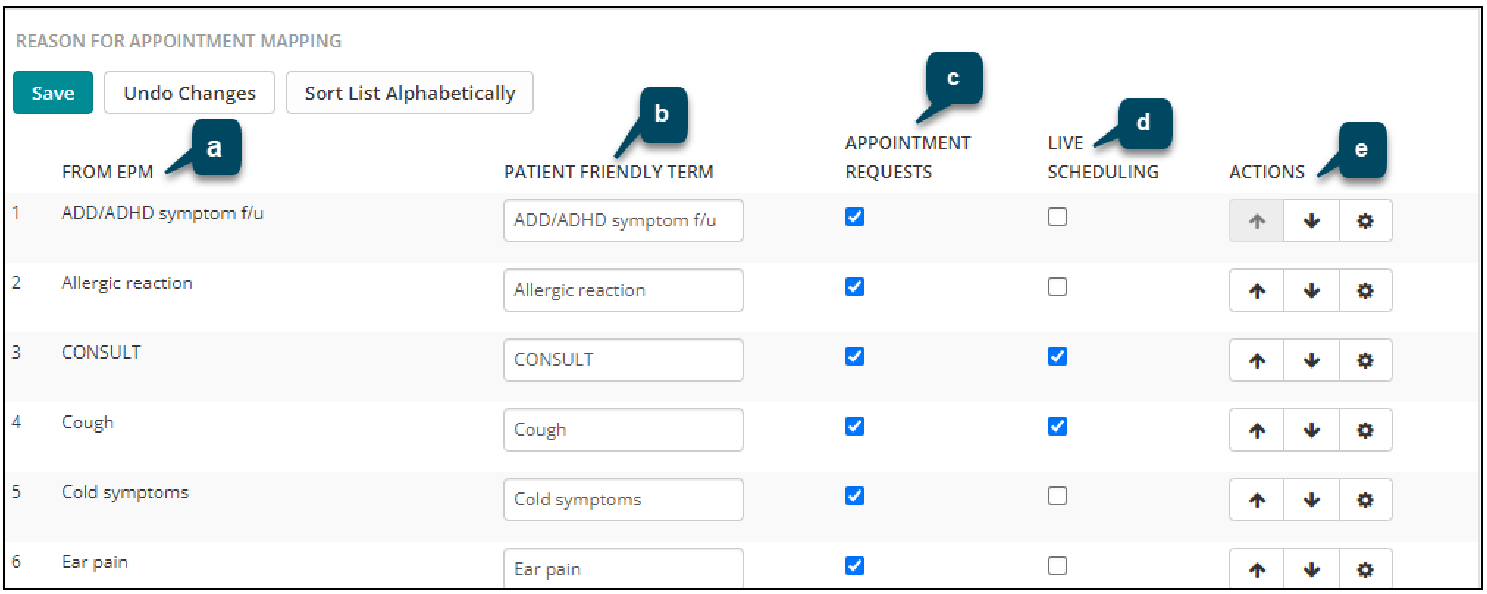
- **Prohibit live scheduling if patient has _ or more open appointments for the same reason**: Enter the number of open same Appointment Types the Practice will use to prohibit a patient from scheduling an appointment.
- **Enable live scheduling for patients without insurance**: Select the checkbox to allow an appointment to be scheduled for patients that do not have insurance.

3. Click the **Save Settings** button.

Complete Reason for Appointment Mapping

In this section, the Practice will decide which appointments are requests for an appointment and which appointments may be selected by the parent/guardian/patient for Live Scheduling.

1. Navigate to Scheduling: **Navigation Panel > Portal Management > Patient Interface > Scheduling tab**.



a. **From EPM**: This column displays the Appointment Types from OP.
b. **Patient Friendly Term**: The From EPM information populates this field. The Practice can change the information to a more friendly term, for example, EST WELL can be changed to read Well Visit.
c. **Appointment Requests**: Select the **checkbox** if the Appointment Type will be available for the parent/guardian/patient to request an appointment. The selection of this Appointment Type will not permit a parent/guardian/patient to live schedule, this is used for requesting an appointment only. Appointment Types selected will be displayed in the drop-down list on the Patient Portal.
d. **Live Scheduling**: Select the **checkbox** if the Appointment Type will be used to create an appointment on the

schedule in OP. When selecting from the Live Scheduling list, you must additionally select the *Appointment Requests* checkbox for the Appointment Type to display in the drop-down list on the Patient Portal
Note: It is recommended that one Well Visit be designated for Live Scheduling. Once that appointment request is made the age-appropriate template will be used to schedule the appointment in OP. In addition, any Encounter Template in OP where the checkbox was selected for Allow Patient Scheduling will display in the list. By default, no selections will be made, it is the Practice's responsibility to decide which appointments are available for Live Scheduling and schedule requests.

e. **Actions:**
   - **Reorder arrows**: The up and down arrows allow you to reorder the list of appointments. Organizing the most scheduled appointments at the top of the list can reduce scrolling for the parent/patient.
   - **Rules button:** Allows you to add scheduling rules per Appointment Type for Age range and/or Sex.
     - To set an **Age** rule:
       1. Use the first drop-down to choose your filter for age.
       2. In the blank field, enter the age of the patients for which this Rule should apply.
       3. Use the last drop-down to select the age interval.
     - To set an **Sex** rule:
       1. Use the drop-down to choose from the sex options.

     The Rule(s) must be enabled by selecting the checkbox in the **Enabled?** Column and saving.
     Note: It is **not** recommended to enable scheduling rules for Well Visit Appointment Types.

2. Click the **Save** button.
3. All setup in OP and the InteliChart Practice Portal must be completed prior to selecting Enable Live Scheduling. Once all information has been complete, navigate to the top of the window and select the **Enable Live Scheduling** radio button.

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Set Upcoming Appointment Types to Display in Patient Portal

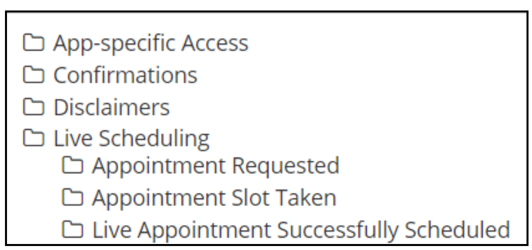
1. Access Page Templates: **Navigation Panel > Portal Management > Code Management > Appointment Types**.
2. Select the checkbox for the Appointment Types to display in the Patient Portal for upcoming appointments.
   Note: It is recommended that all checkboxes in the column be selected. If an Appointment Type is excluded, the appointment is not visible on the Patient Portal.

Managing Communication Templates for Scheduling

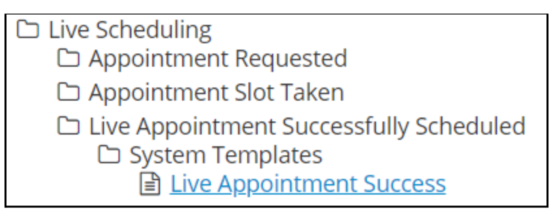
Page Templates are used to customize the Practice's notifications, reminders, disclaimers, etc. The portal is delivered with a collection of System Templates that may be used as a starting point for Practices to create their own Practice Templates. All System Templates are available in an English and Spanish version. When a Practice creates their own Practice Template in English, the Spanish translation must be entered manually for that template.

Below you will find instructions on reviewing the Page Templates associated with Scheduling. The Page Templates are used to communicate with the parent the status of an appointment when using Scheduling. If the Practice will use a combination of Live Scheduling and Appointment Requests, review the Page Templates for Appointment Requested and Live Appointment Successfully Scheduled.

1. Access Page Templates: **Navigation Panel > Portal Management > Patient Interface > Page Templates**.
2. To modify templates for Live Scheduling:
   a. Locate the folder for **Live Scheduling** and expand the folder.



   b. Click to expand the **System Templates** folder.



   c. Click the **Template link** to open the Template.

   d. Click the **Copy Template** button.
   e. Complete the **Copy Template** window:
      i. **Name** (required): Enter the new **Template Name**.
      Note: It is recommended any template copied by the Practice contain the Practice name or identifying information, for example, ABC Peds-Live Appointment Success.
      ii. (*Optional*) **Description**: May leave the original template Description or modify it to match the Template Name.
      iii. Select the **Practice Default** checkbox.
      iv. Click the **Create New Template** button.
3. Edit the Subject line, as needed.
4. Edit the Text, as needed.
   Note: If applicable, click the **Spanish** tab, and edit the text to reflect the Spanish version of the text entered in the English tab.
5. Click the **Save** button.