

USER GUIDE

Online Booking & Notifications

with Medeo



 accuroemr.com

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WELCOME TO ONLINE BOOKING

Online Booking for Accuro is a convenient and innovative way for patients to book appointments online. Clinics save time usually spent answering phones and scheduling patients, yet they maintain full control over the clinic schedule.

Your patients can request bookings, accept appointments, and view their upcoming appointments through the Medeo virtual care platform.

You can respond to Online Booking requests and manage your bookings in the Scheduler.

This user guide shows you how to configure your clinic and get started with Medeo Online Booking. To use Online Booking in Accuro:

- **Create appointment types** that are shown to patients as options when they book online.
- **Create availability** for Online Booking in the Provider's schedule.
- **Invite patients** to Online Booking in Medeo.
- **Respond** to Appointment Requests

CLINIC CONFIGURATION

There are 3 steps to allow patients to book appointments with your clinic using Medeo:

1. Create **Medeo Booking Request Types** that patients choose from when requesting appointments online in Medeo (e.g. New Patient, Follow up, Prescription Renewal, Flu Shot).

Medeo Booking Request Types link with your Accuro **Appointment Types** and their corresponding billing codes.

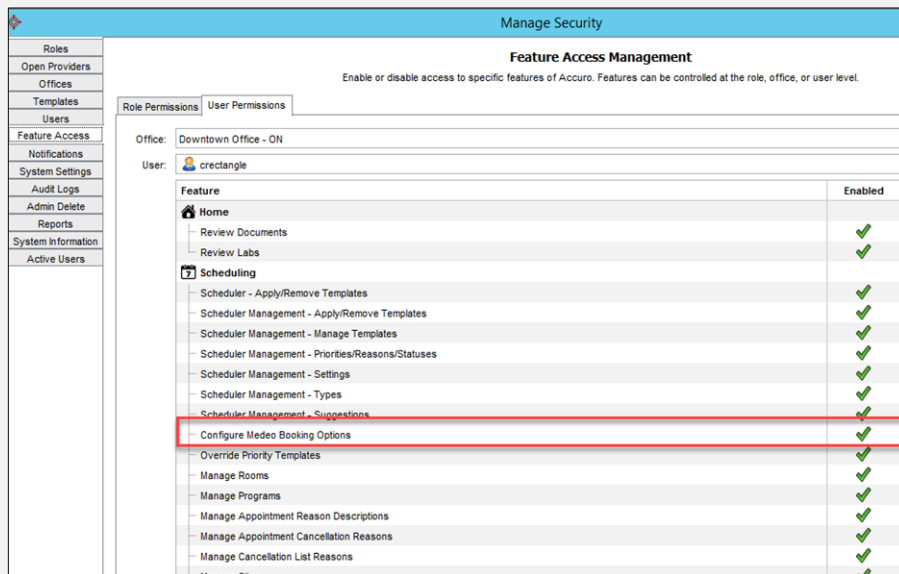
2. Associate **Medeo Booking Request Types** with **Appointment Suggestions** that designate when a Provider is available for booking through the day.
3. Create and apply **Scheduler Templates** by day, week, month, or year to indicate when appointments can be booked online.

Medeo Booking Request Types

When patients book online with Medeo, they select an **Appointment Type** before submitting their appointment request. Your clinic can customize the Appointment Types available to patients by creating **Medeo Booking Request Types** in **Scheduler Management**.

Note: Accuro users require permission to create Medeo booking request types. To enable permission, complete the following steps as a System Administrator:

1. Open the **Accuro Start Menu > Users > Manage Security**.
2. In **Feature Access >** open the 'Role Permissions' tab or 'User Permissions' tab,
3. Under **Scheduling > Configure Medeo Booking Options >** select a row inside the enable column to enable permission. A green check mark indicates that permission is enabled.




Manage Security	
Feature Access Management	
Enable or disable access to specific features of Accuro. Features can be controlled at the role, office, or user level.	
Role Permissions	User Permissions
Office: Downtown Office - ON	
User: crectangle	
Feature	Enabled
Home	
Review Documents	✓
Review Labs	✓
Scheduling	
Scheduler - Apply/Remove Templates	✓
Scheduler Management - Apply/Remove Templates	✓
Scheduler Management - Manage Templates	✓
Scheduler Management - Priorities/Reasons/Statuses	✓
Scheduler Management - Settings	✓
Scheduler Management - Types	✓
Scheduler Management - Suggestions	✓
Configure Medeo Booking Options	✓
Override Priority Templates	✓
Manage Rooms	✓
Manage Programs	✓
Manage Appointment Reason Descriptions	✓
Manage Appointment Cancellation Reasons	✓
Manage Cancellation List Reasons	✓

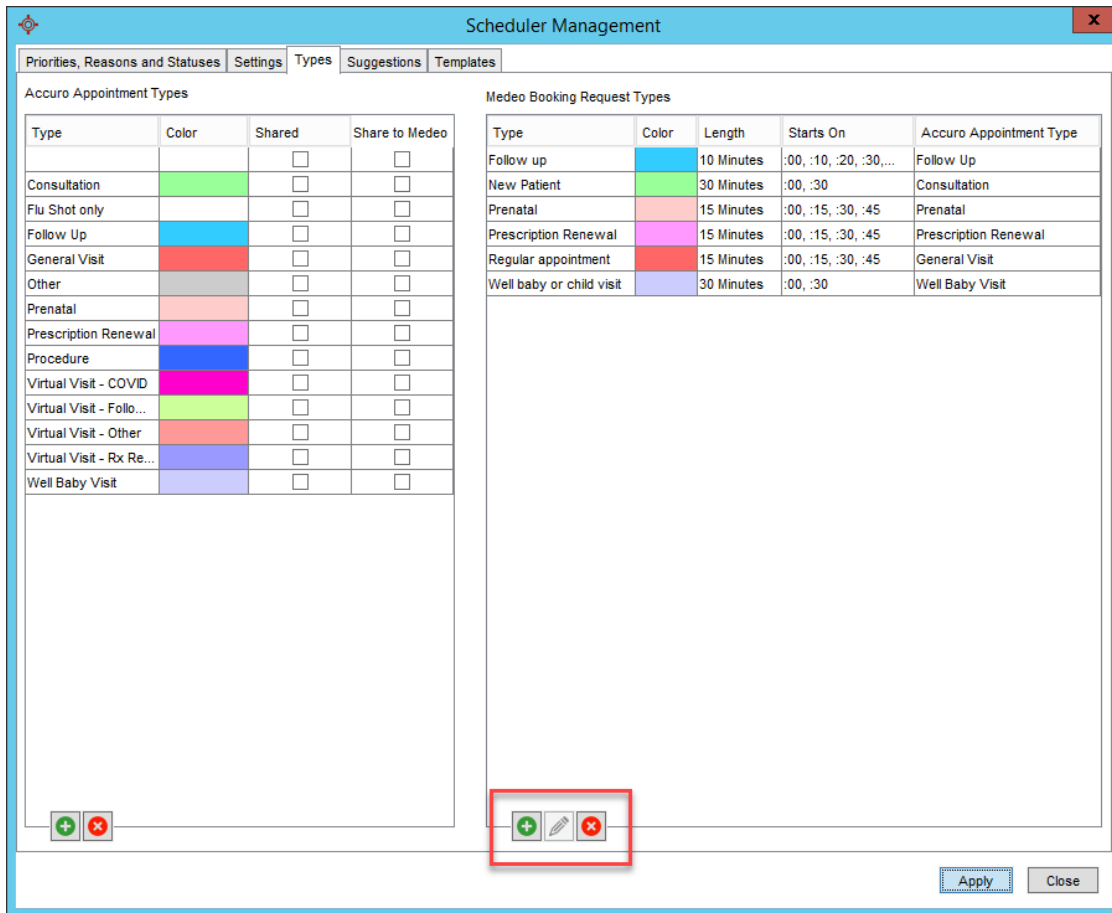
4. Select **Close** to save your changes.

Note: For the permission change to take effect, users may need to relog into Accuro.

Managing Booking Request Types

To add, edit, or delete Booking Request Types:

1. Open the **Accuro Start Menu > Scheduler > Scheduler Management**.
2. In the **Types** tab, click the  **Add** button, or select an appointment type to **Edit** or **Delete**.



The screenshot shows the 'Scheduler Management' window with the 'Types' tab selected. It contains two tables: 'Accuro Appointment Types' and 'Medeo Booking Request Types'. The 'Medeo Booking Request Types' table is highlighted with a red box around its bottom controls.

Type	Color	Shared	Share to Medeo
		<input type="checkbox"/>	<input type="checkbox"/>
Consultation	Green	<input type="checkbox"/>	<input type="checkbox"/>
Flu Shot only		<input type="checkbox"/>	<input type="checkbox"/>
Follow Up	Blue	<input type="checkbox"/>	<input type="checkbox"/>
General Visit	Red	<input type="checkbox"/>	<input type="checkbox"/>
Other	Grey	<input type="checkbox"/>	<input type="checkbox"/>
Prenatal	Pink	<input type="checkbox"/>	<input type="checkbox"/>
Prescription Renewal	Magenta	<input type="checkbox"/>	<input type="checkbox"/>
Procedure	Blue	<input type="checkbox"/>	<input type="checkbox"/>
Virtual Visit - COVID	Magenta	<input type="checkbox"/>	<input type="checkbox"/>
Virtual Visit - Follo...	Green	<input type="checkbox"/>	<input type="checkbox"/>
Virtual Visit - Other	Red	<input type="checkbox"/>	<input type="checkbox"/>
Virtual Visit - Rx Re...	Blue	<input type="checkbox"/>	<input type="checkbox"/>
Well Baby Visit	Blue	<input type="checkbox"/>	<input type="checkbox"/>

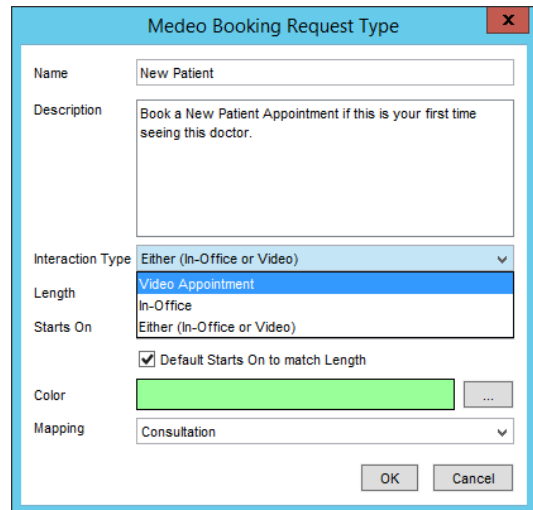
Type	Color	Length	Starts On	Accuro Appointment Type
Follow up	Blue	10 Minutes	:00, :10, :20, :30,...	Follow Up
New Patient	Green	30 Minutes	:00, :30	Consultation
Prenatal	Pink	15 Minutes	:00, :15, :30, :45	Prenatal
Prescription Renewal	Magenta	15 Minutes	:00, :15, :30, :45	Prescription Renewal
Regular appointment	Red	15 Minutes	:00, :15, :30, :45	General Visit
Well baby or child visit	Blue	30 Minutes	:00, :30	Well Baby Visit

3. Complete the details in the Medeo Booking Request Type window:

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The Booking Request Type Window


- Name:** The type of appointment your patients select when booking online. *E.g: New Patient, Regular Visit, Follow up, Prescription Renewal, Flu Shot, or Vaccination.*
- Description:** Provide a brief description to help patients select the correct request type when booking in Medeo.
- Interaction Type:** Select which category the appointment type appears under during Online Booking: **In-Office, Video Appointment, or Either (In-Office or Video)**. The default selection is 'In-Office.'
- Length:** The duration of the appointment. Patients will only see time slots that can accommodate the duration of their chosen appointment type.
- Starts On:** This is the number of minutes past the hour that appointments may be scheduled on (e.g. ":10" is 10 minutes past the hour).
- Default Starts On to match Length:** This option defaults the Starts On minutes to match the length of appointments. When turned off, you can choose the number of minutes past the hour that appointments may be scheduled on, regardless of the length of appointment. The default for this setting is on.
- Color:** The color that appears in the Medeo Booking Requests column in the Scheduler when a patient requests an appointment.
- Mapping:** Associate the Medeo Booking Request Type with the appropriate Accuro Appointment Type. When a patient books online, an Appointment is created with the Accuro Appointment Type prepopulated based on this mapping.



Appointment Suggestions

Appointment Suggestions are used to mark the appointment time slots in your Scheduler that are available for patients in Medeo Online Booking.

To set up Online Appointment Suggestions:

1. Select the **Accuro Start Menu > Scheduler > Scheduler Management**.
2. Click the **Suggestions** tab.
3. Under **Appointment Suggestions**, click  **Add** to create a new suggestion.
4. Complete the following fields:

Name: What to call the Appointment Suggestion in Accuro.

Label: The text shown in the Scheduler after you apply the Suggestion.

Color: The color shown in the Scheduler.

Display: Displays a solid color or a gradient in the Scheduler.

Appointment Type: The default appointment type when an appointment is scheduled on top of an Appointment Suggestion. (e.g. Flu Shot, Consultation, Prenatal etc.).

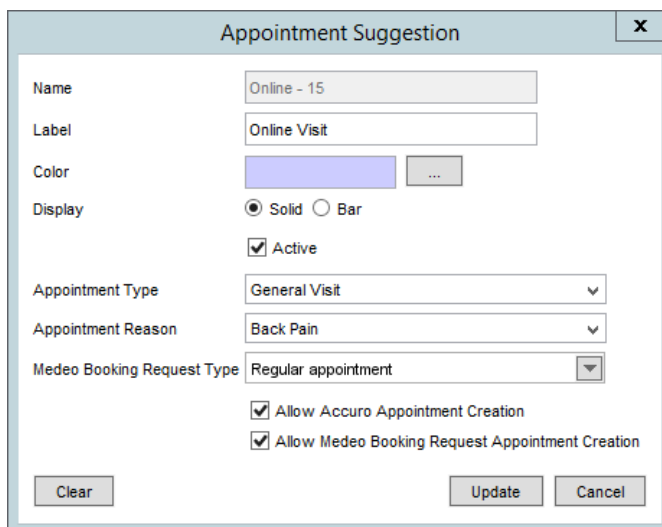
Appointment Reason: The default reason a patient makes an appointment (e.g. prescription refill, cough, pain).

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Medeo Booking Request Type: Maps Medeo Booking Request Types to the Appointment Suggestion. When you apply a suggestion to time intervals in the Scheduler, the selected Medeo Booking Request Types will be available to patients for Online Booking in Medeo. You can select one or multiple Medeo Booking Request Types. *E.g. Flu Shot, General Visit, Follow up.*

Allow Accuro Appointment Creation: Enable this checkbox to let Accuro users book appointments in time intervals with this suggestion type.

Allow Medeo Booking Request Appointment Creation: Enable this option to make your Appointment Suggestion available to patients for Medeo Online Booking. Uncheck this option if you'd like to configure your clinic's schedule for Online Booking, but not yet allow patients to book appointments. When you are ready to let patients book online, edit your suggestion and enable this checkbox.



The screenshot shows a window titled "Appointment Suggestion" with a close button (X) in the top right corner. The window contains the following fields and options:

- Name:** Text input field containing "Online - 15".
- Label:** Text input field containing "Online Visit".
- Color:** A color selection box showing a light blue color and a small square with three dots to the right.
- Display:** Radio buttons for "Solid" (selected) and "Bar".
- Active:** A checked checkbox.
- Appointment Type:** A dropdown menu showing "General Visit".
- Appointment Reason:** A dropdown menu showing "Back Pain".
- Medeo Booking Request Type:** A dropdown menu showing "Regular appointment".
- Allow Accuro Appointment Creation:** A checked checkbox.
- Allow Medeo Booking Request Appointment Creation:** A checked checkbox.

At the bottom of the window are three buttons: "Clear", "Update", and "Cancel".

Applying Suggestions

There are several ways to apply Appointment Suggestions for Online Booking to your Scheduler:

1. To **specific time intervals** in the Scheduler using ad-hoc Appointment Suggestions.
2. To **entire days** in the Scheduler using Suggestion Templates.
3. To **sequences of future days** using 'Apply Templates' in Scheduler Management.

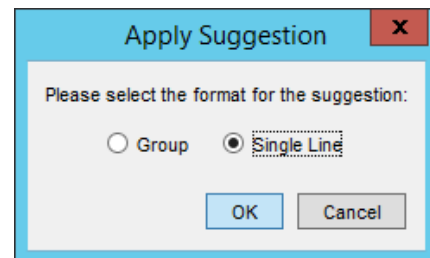
Applying Suggestions to Scheduler Time Intervals

To apply Appointment Suggestions to specific dates and times:

1. In the **Scheduler**, use **SHIFT+click**, or click and drag your mouse cursor to select the time intervals you'd like to make available for online booking.
2. Right click your selection, then hover your mouse over '**Apply Appointment Suggestions**,' then select an Appointment Type.
3. At the prompt, select either '**Group**' or '**Single Line**,' then click **OK**.

Group: applies the suggestion to the entire selected area of time.

Single Line: applies the suggestion to each individual time interval.



Note: To remove a suggestion from the Scheduler:

1. Right click the time interval in the Scheduler.
2. Hover your mouse over '**Suggestion Templates**'
3. Select **Remove Suggestion**.


Managing Suggestion Templates

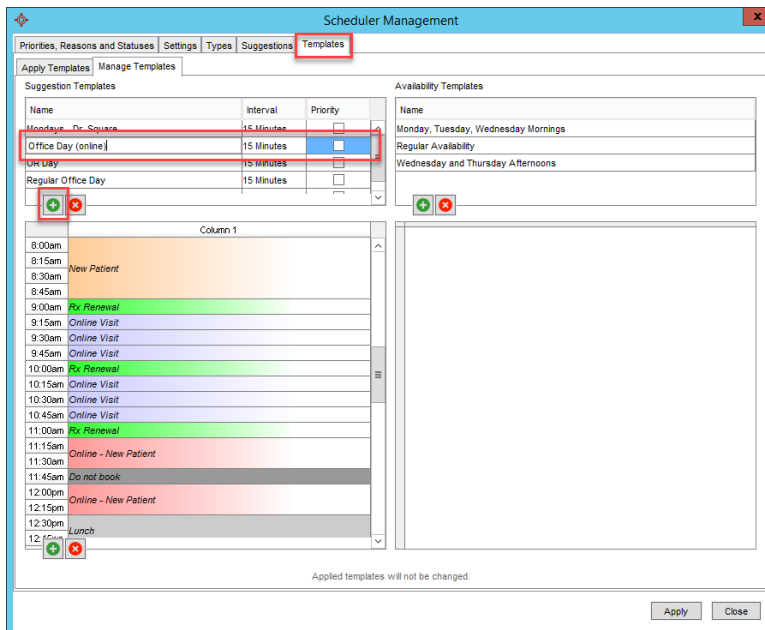
Suggestion Templates let you plan out the types of appointments available for booking over an entire day, or part of the day.

To Manage your Appointment Suggestions:

1. Search for **“Manage Templates”** in the Start Menu.

Alternatively, open the Accuro **Start Menu > Scheduler > Scheduler Management**. Under the **Templates** tab > select the **Manage Templates** tab.

2. In the Suggestion Templates section, click the  **Add** button to create a new template.



3. Enter a **Name** for your Suggestion Template.
4. Select a time **Interval**, either 5, 10, 15, 20, or 30 minutes. We suggest making this time interval the same as your Scheduler time interval and Provider time intervals.

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5. Select the **Priority** checkbox if you do not want anyone to override the template. Once it is applied, only users with specific permissions can remove the template.

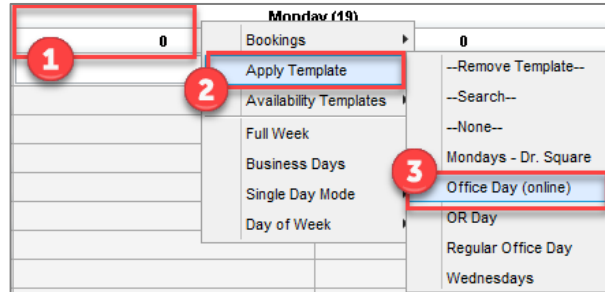
Trainer Tip: *This feature helps when you're blocking days off for Statutory Holidays!*


6. Next, select time intervals inside Column1 by either clicking and dragging or using **SHIFT+click**.
7. Right click your selected intervals, then choose an Appointment Suggestion to apply to your template.
8. At the prompt, select either '**Group**' or '**Single Line,**' then click **OK**.
9. Repeat steps 7 and 8 to complete your Suggestion Template.
10. Select **Apply** in the bottom right corner to save your Suggestion Template.

Applying Suggestion Templates to Specific Days

To apply ad-hoc Suggestion Templates to specific days:

1. In the **Scheduler**, right click the day (e.g. Monday) or the Provider's name at the top of a day column.
2. Hover your mouse over **'Apply Template'**
3. Select your suggestion template from the dropdown menu.
4. Your suggestions are then displayed inside the day column of the Scheduler.




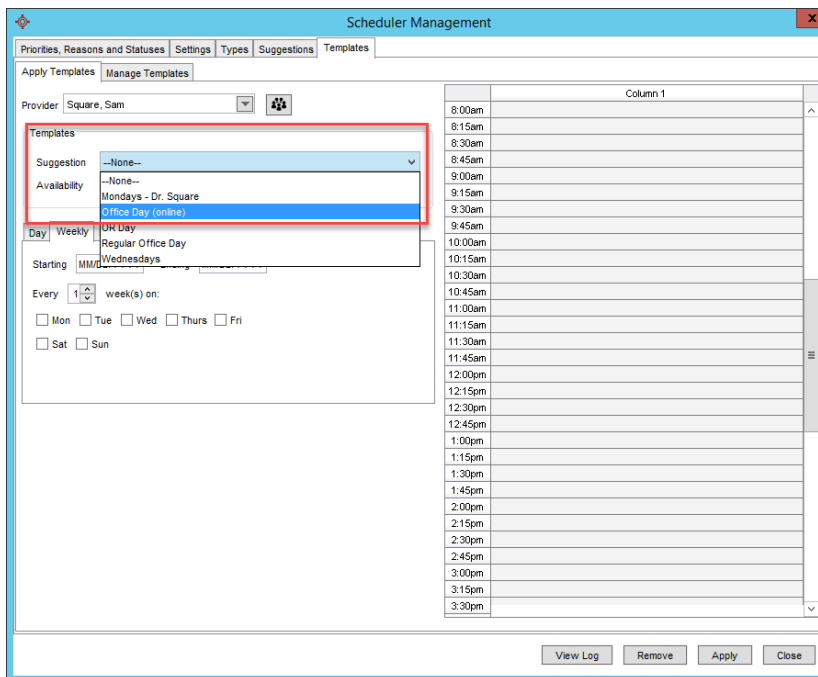
Monday (19)	
	0
8:00am	
8:15am	
8:30am	New Patient 
8:45am	
9:00am	Rx Renewal (1-1) 
9:15am	Online Visit (1-1) 
9:30am	Online Visit (1-1) 
9:45am	Online Visit (1-1) 
10:00am	Rx Renewal (1-1) 
10:15am	Online Visit (1-1) 
10:30am	Online Visit (1-1) 
10:45am	Online Visit (1-1) 
11:00am	Rx Renewal (1-1) 
11:15am	Online - New Patient (1-1) 
11:30am	
11:45am	Do not book
12:00pm	Online - New Patient (1-1) 
12:15pm	

Applying Suggestions to Sequences of Days

You can apply Suggestion Templates into the future based on: **Days**, **Days of the Week**, **Days of the Month**, or **Days of the Year**.

To Apply Suggestion Templates to future time periods:

1. Search for “**Apply Templates**” in the Start Menu.
2. Alternatively, open the Accuro Start Menu > Scheduler > Scheduler Management. Under the Templates tab > select the ‘Apply Templates’ tab.
3. Using the dropdown, select a **Provider**. To apply templates to multiple physicians, select the  **Multiple Providers** button, then use the dropdown to select the appropriate checkboxes.
4. Choose your template from the Templates Suggestion dropdown.



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- Select either the Day, Weekly, Monthly, or Yearly tab to choose the length of time you would like to apply the template over, then enter the desired details.

Day: This applies a template to a specific day in the future. E.g. The provider decides to take a Friday off in two weeks.

Enter your **On** date, then click **Apply**.

Weekly: This applies templates on a weekly basis. E.g. The provider books the same schedule of appointments on Mondays, Wednesdays and Fridays.

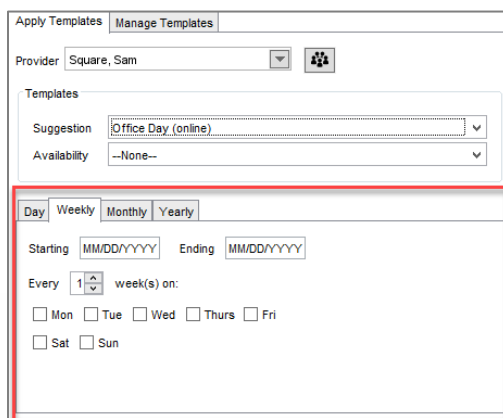
Enter **Starting** and **Ending** dates, then select the days of the week to apply the template over. Click **Apply** to save.

Monthly: Applies templates monthly. E.g. The provider takes the second Monday of the month off every 2 months.

Enter **Starting** and **Ending** dates, then use the dropdown lists to select the occurrences. Click **Apply**.

Yearly: This is used to apply templates annually. E.g. Every year, the provider has a holiday on their birthday and Christmas.

Select a date range, select the occurrences, then click **Apply**.




Appointment Suggestion Icons








When an appointment suggestion is added to the Scheduler, an icon representing the type of appointment is shown inside the booked time interval.

In-Office: No icon

Video Appointment: Webcam icon 

Either (In-Office or Video): Webcam/House icon 

The  icon indicates that an appointment is available for online booking.

In-Office Visit ((•))
In-Office Visit ((•))
Online Visit ((•)) 
Online Visit ((•)) 
Video Visit ((•)) 
Online Visit ((•)) 
Online Visit ((•)) 
Online Visit ((•)) 
Rx Renewal ((•)) 

There are several warning icons that may appear when applying Appointment Suggestions:

For instance, you'll see a warning icon if an Appointment Suggestion is applied to a Scheduler time interval that is shorter than the associated Medeo Booking Request Type.



is displayed if at least one of the Medeo Booking Request Types matches the length of the applied Appointment Suggestion, but there are other Medeo Booking Request Types connected to the same Appointment Suggestion that do not match the length of the applied suggestion.



is displayed if none of the Medeo Booking Request Types match the length of the applied Appointment Suggestion.



is displayed when there is no default office associated to the Provider or if availability has not been set for the selected area. Set the default office Provider via configuration details (F2), or right click inside the Scheduler, then select the correct office under 'Availability.'

Note: To configure Online Booking for multiple clinics, please see [Apply Multi-Office Availability](#).

WORKFLOW

Inviting Patients to Medeo

Now that your schedule is set up for your patients to book appointments online, ask your patients to create Medeo accounts for Online Booking by sending out email invitations from Accuro. You can send invitations to patients individually, or in groups of patients using the Query Builder.

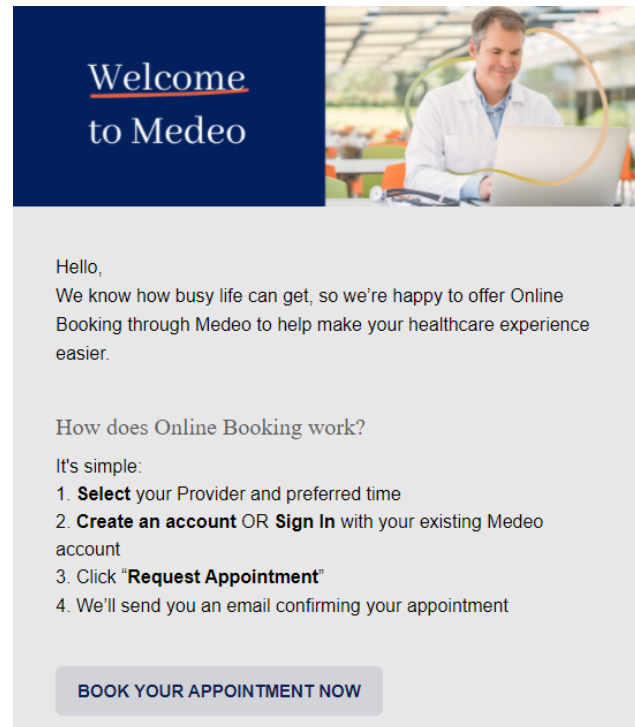
Note: Every Medeo Online Booking account requires a unique email address. For those without email addresses, please refer to the section on [Dependent Booking](#).

Inviting Individual Patients

To send a Medeo Online Booking invitation to a specific patient:

1. Search for and select your Patient.
2. Ensure the patient has an email address.
3. Press ALT on your keyboard, then in the Search field type "Send Medeo Invitation."
4. Select **Send Medeo Invitation**.
5. Invitations are then sent by email with the subject line: "Medeo Online Schedule Invite."


Trainer Tip: Create a Quick Action Button to send Medeo Invitations with one click! See [Quick Action Buttons](#).

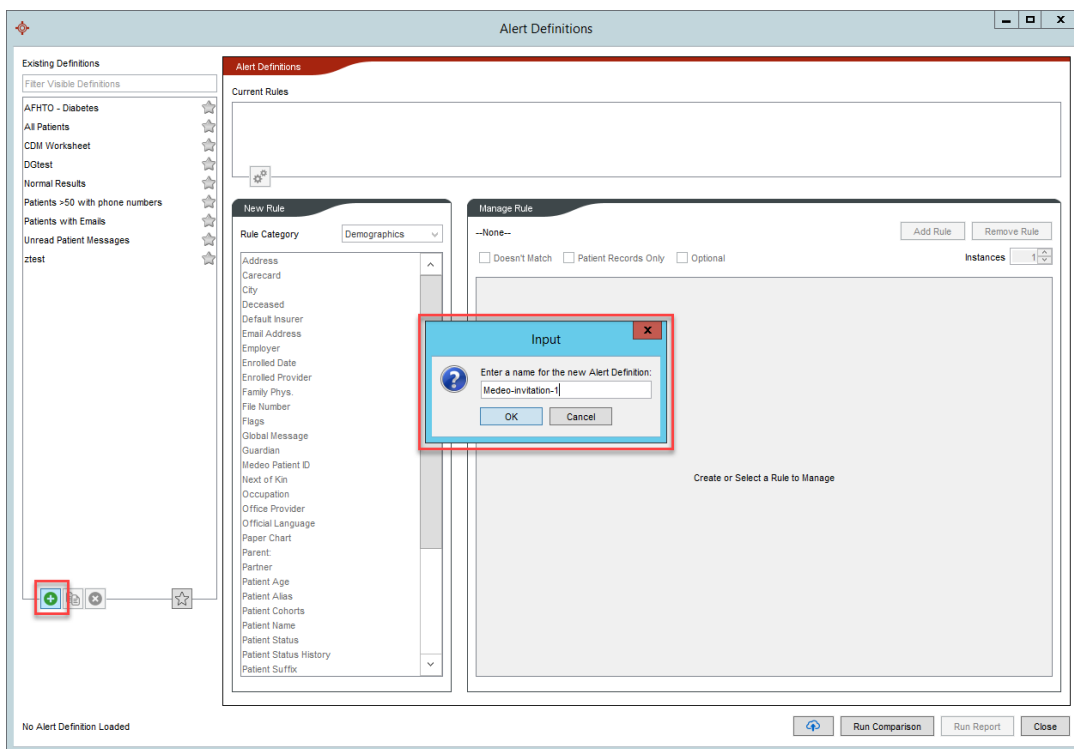


Inviting Groups of Patients

You can invite more than one patient to Online Booking at the same time using the Query Builder. In the Query Builder you can generate lists of patients by defining filters and logic to your patient database, then send Medeo invitations to those patients.

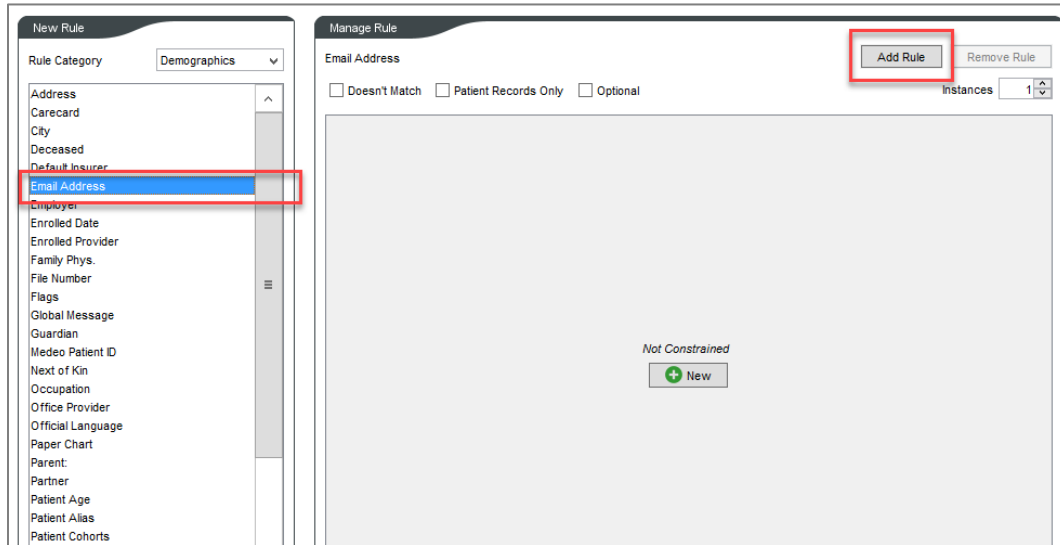
To invite groups of patients using the Query Builder:

1. From the **Start Menu**, select **Reports > Query Builder (Alerts)**.
2. Click the  **Add** button to create a new **Alert Definition**, then enter a name and click **OK**.

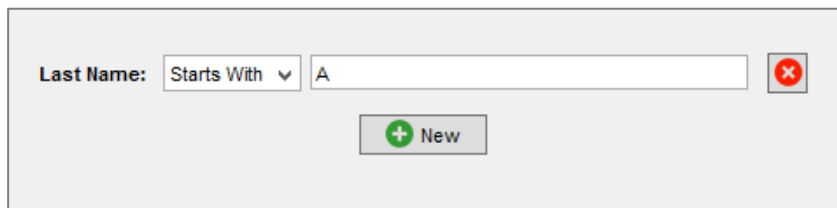


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3. Select **'Demographics'** as the Rule Category, then select **Email Address** and click **Add Rule**.
4. Create a second rule to filter your patients. In this example, we filter by **Patient Name**. Select **Patient Name**, then click **New**, and select **Last Name**.

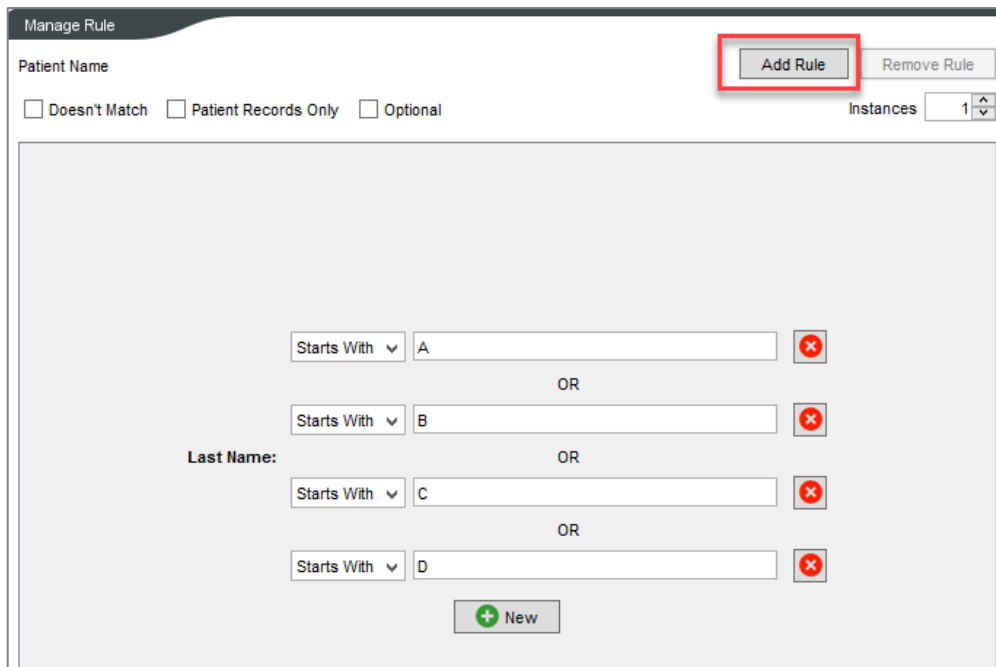


5. Next in our example, we generate a query for all last names beginning with A, B, C, or D. Select **"Starts With"** from the drop down menu, then enter **"A."**



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6. Select the **New** button, then select **Last Name**, and enter “B.” Repeat this step for letters “C” and “D,” then click **Add Rule**.



7. At the bottom of the window, click **Run Report**.
8. In the **Alert Matches** window, select which Provider's patients to apply the rule against (or leave All Patients selected), then click **Run**.

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- Your query matches are displayed in a new window. Highlight your matching patients by shift-clicking or with **CTRL+A** on your keyboard.

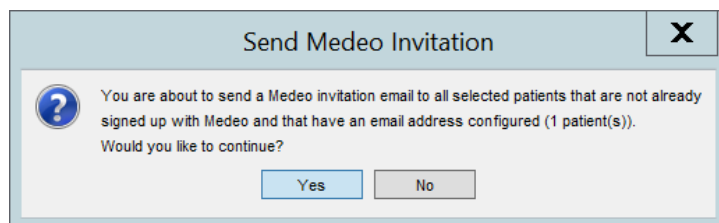
Medeo-invitation-1									
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Last Name	Patient First Name	
Angle	Jonathan	99999999999	02/08/2019	M	(000) 000-0000	Unassigned	Angle	Jonathan	
Angle	Simon	55555555555	04/15/1988	M	(905) 555-6814	Unassigned	Angle	Simon	
Cross	Andrew	99999999999WD	02/04/1993	M	(416) 555-8633	Unassigned	Cross	Andrew	
Cross	Michael	999999999921	05/01/1981	M	(416) 555-8633	Unassigned	Cross	Michael	
Cube	Martin	222222594	06/18/1943	M	(905) 555-4567	Unassigned	Cube	Martin	
Decahedron	Darryl		01/01/1982	M	(000) 000-0000	Unassigned	Decahedron	Darryl	
Diamond	Bob	555555555666	03/15/1975	M	(647) 555-9563	Unassigned	Diamond	Bob	
Diamond	Janet	121256475586	07/05/1988	F	() - - -	Unassigned	Diamond	Janet	

iii

8 Matches - Select Action - Completed Rerun Print All Export Close

- Set Patient Status
- Assign Flag
- Remove Flag
- Assign to Patient Cohort
- Create Patient Cohort
- Send Medeo Invitation
- Send Secure Message
- Add to Private Online Booking

- Use the drop down menu to select “Send Medeo Invitation.”
- Send your mass invitation by selecting **Yes** at the ‘Send Medeo Invitation’ prompt, then close the Query Builder window.




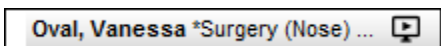
Trainer Tip: Many clinics use the Rule Category ‘Appointments’ to filter patients by their last visit. For example, **Appointment > In the Last 2 Years**.

The Medeo Booking Requests Column

When a patient books an appointment online in Medeo, the Booking Request is displayed in the **Medeo Booking Requests** column on the right-hand side of the Scheduler.

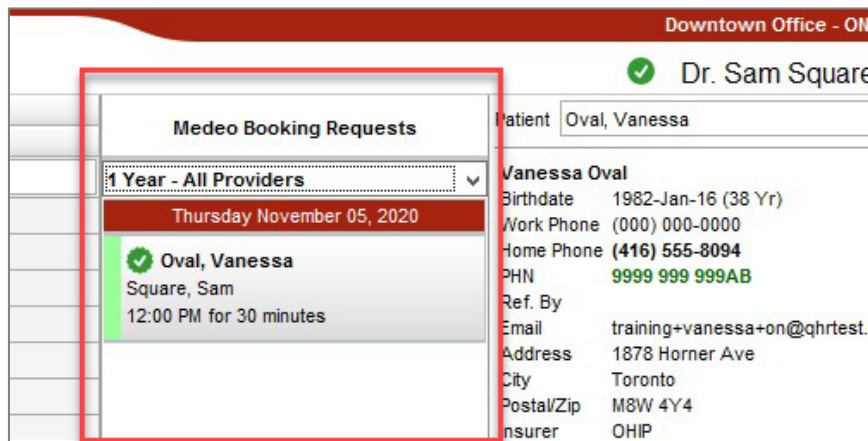
Each booking request displays the patient name, date & time, and appointment length. The color on the left-hand side of each booking request (green in the screenshot below) corresponds to its preconfigured Booking Request Type Color.

If the patient requests a Video Visit, a  video icon is displayed on the Booking Request and the appointment in the Scheduler.



Note: You can show or hide the Medeo Booking Requests column by opening the **Start Menu** and searching for “Medeo,” then choosing ‘**Show/Hide Medeo Booking Request Column.**’

Trainer Tip: You can create a Quick Action Button to show and hide the Medeo Booking Requests column with one click. Review the section below on [Quick Action Buttons](#).



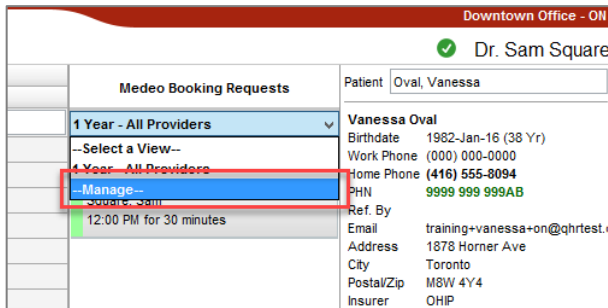
Booking Request Filters

When you first open the Medeo Booking Requests Column, it will appear blank until you configure a View. You can create Views to only show requests for specific Providers, Date Fields, or Request Types. Alternatively, create a catch-all view that only filters by Date.

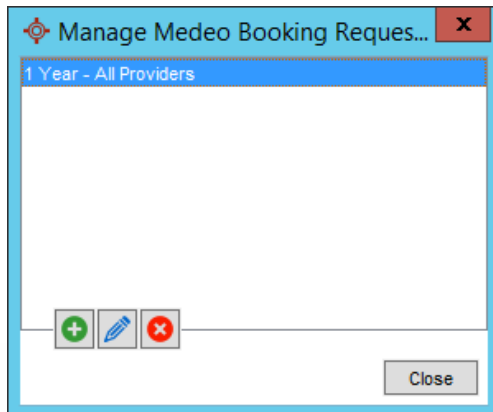
Note: A commonly used View is, “1 Year - All Providers.”

To Create a Booking Request View:

1. In the **Scheduler**, select **--Manage--** from the Medeo Booking Requests dropdown to display the Manage Medeo Booking request window.



2. Click  **Add** to open the **Edit Request View** window.



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3. Complete the fields:

View Name: Enter a short name for the view that you are creating that will help you distinguish it between other views.

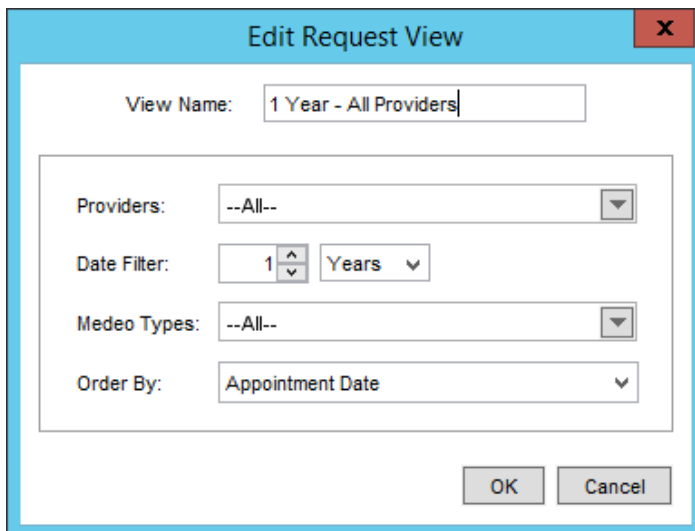
Providers: Show the Online Booking requests of specific Providers or select “All” to display all the requests at your clinic.

Date Filter: Enter a value and select either days, weeks, months, or years to show appointment requests from now until the end of the date filter. The date filter uses the Appointment Date and not the Received Date.

Medeo Types: Select the Medeo Booking Request Types you wish to view requests for, otherwise leave blank for all requested Medeo appointment types.

Order By: Choose how you would like the booking requests to be chronologically displayed in your list of requests. Select either **Appointment Date** (the date the patient wants to see the Provider) or **Received Date** (the date the patient completed the online appointment booking request).

4. Click **OK** to save the new filter view.



Edit Request View

View Name: 1 Year - All Providers

Providers: --All--

Date Filter: 1 Years

Medeo Types: --All--


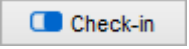
Order By: Appointment Date

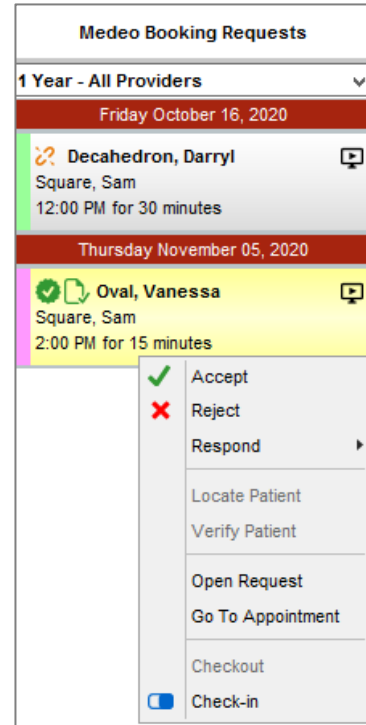
OK Cancel

Checkout / Check-in Button

The Checkout button lets Accuro users take ownership of an appointment request while they are working with it and indicate to other users that the request is already being actioned. When an Accuro user checks out an appointment request, other Accuro users should not process it.


To checkout an appointment request:

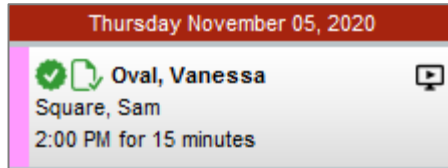
1. Right click a request in the **Medeo Booking Requests** Column and select the  **Checkout** button.
2. Selecting the  **Check-in** button lets other Accuro users check out and process an appointment request.



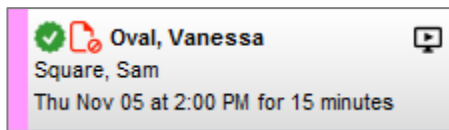
The screenshot displays the 'Medeo Booking Requests' interface. It shows a list of requests for 'Friday October 16, 2020' and 'Thursday November 05, 2020'. The selected request is for 'Oval, Vanessa' on Thursday, November 05, 2020, at 2:00 PM for 15 minutes. A context menu is open over this request, showing options: 'Accept' (with a green checkmark), 'Reject' (with a red X), 'Respond' (with a right-pointing arrow), 'Locate Patient', 'Verify Patient', 'Open Request', 'Go To Appointment', 'Checkout', and 'Check-in' (with a blue checkmark).

Checkout Status Icons

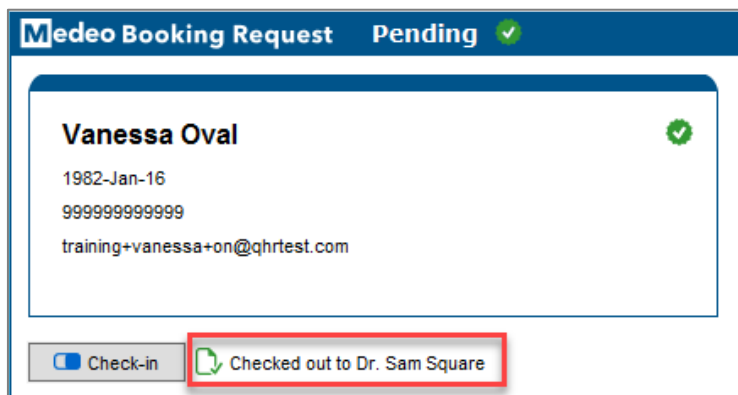
When an appointment request is checked out to an Accuro user, they see a green  Checked Out icon in both the Booking Request Column and the Appointment Details window.



Other Accuro users at the same clinic see a red  Checked out status indicating the appointment is unavailable to them.



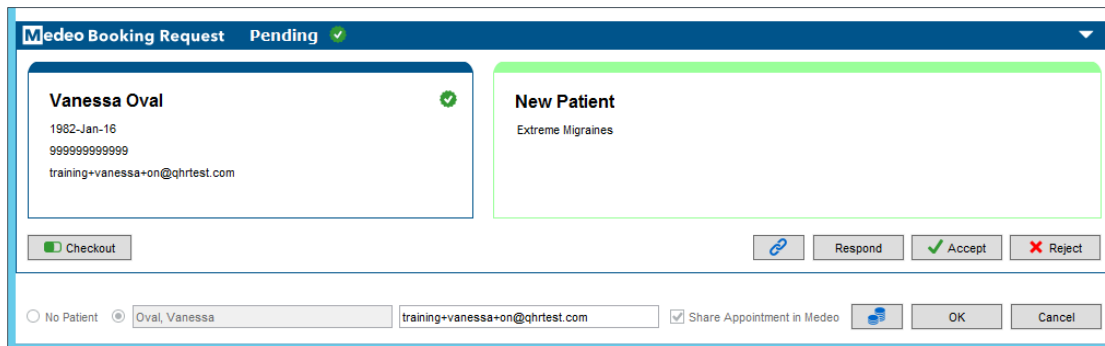
The Checked In/Out status is also displayed in the Medeo Booking Request section of the Appointment Details window.



Viewing the Appointment Reason

When managing incoming Appointment Requests, it is helpful to view the **Medeo Appointment Type** and **Appointment Reason** submitted by patients. This is displayed in the bottom right of the Appointment Details window.

To view the Appointment Reason, double-click the booking request, or select **Open Request** from the right-click menu. The Medeo Booking Request information displays at the bottom of the Appointment Details window.



The screenshot displays a 'Medeo Booking Request' window with a 'Pending' status. The patient information is as follows:

Medeo Booking Request	Pending
Vanessa Oval	✓
1982-Jan-16	
999999999999	
training+vanessa+on@qhrtest.com	

Below the patient information, there is a 'Checkout' button and a 'Link' icon. The appointment details are shown in a separate box:


New Patient
Extreme Migraines

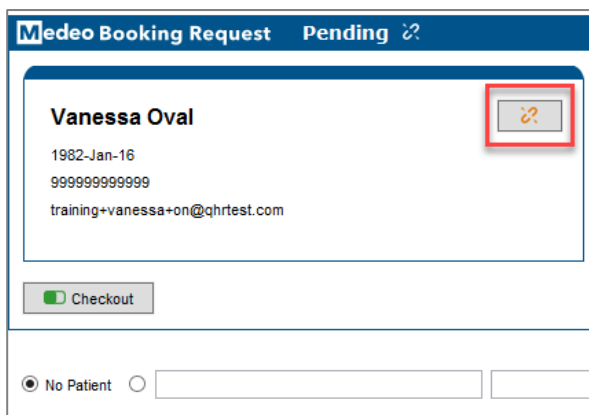
At the bottom of the window, there are buttons for 'Respond', 'Accept', and 'Reject'. A search bar at the bottom left shows 'No Patient' selected, with 'Oval, Vanessa' and 'training+vanessa+on@qhrtest.com' entered. There is also a 'Share Appointment in Medeo' checkbox and 'OK' and 'Cancel' buttons.

Linking Patients

The first time a patient books an appointment using Medeo Online Booking, you will need to link the Medeo Account the patient created to the patient in Accuro. Subsequent appointment requests from the same Medeo Patient Account will automatically be linked to the Accuro patient.

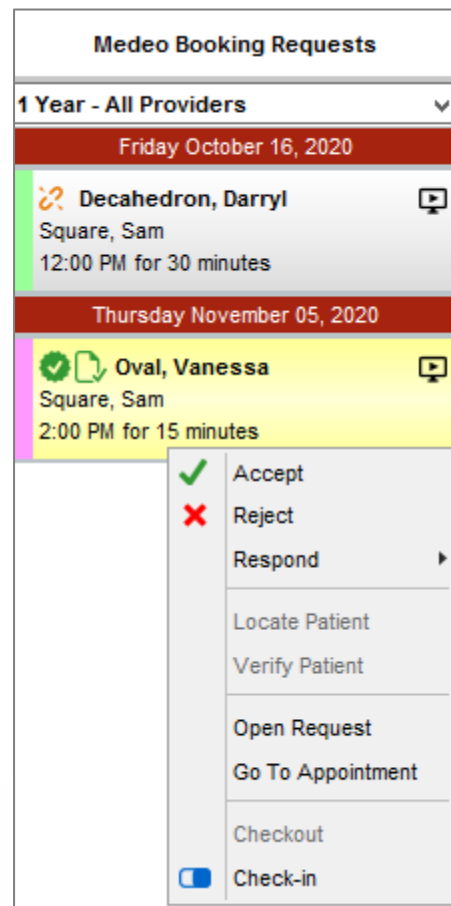
To link Medeo and Accuro Patients:

1. Double click a booking request in the Medeo Booking Request column to open the **Appointment Details** window, then select the  **Link** button in the **Medeo Booking Request** section.

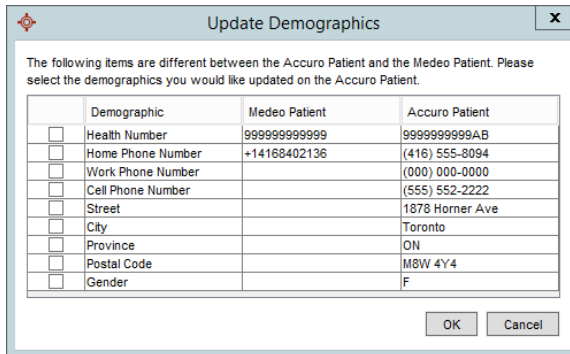


Alternatively, right click a booking request, then select **Locate Patient**.

(Continued on next page)



- The **Match Medeo Patient to Accuro Patient** window displays a list of possible matches. Select a patient from the **Possible Matches** section, then select **OK**. You can manually search for patients in Patient Search.
- If any of the information supplied by the Medeo patient does not match with the Accuro Patient record, you will be prompted with the Update Demographics window. Use the checkboxes to select any demographic details you'd like to update in Accuro, then click **OK**.

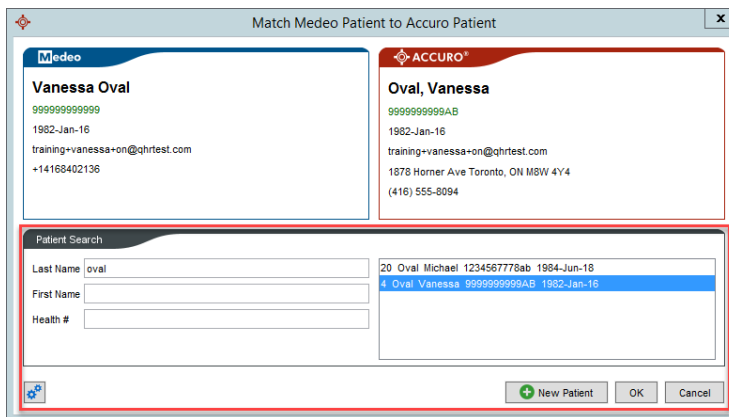


The following items are different between the Accuro Patient and the Medeo Patient. Please select the demographics you would like updated on the Accuro Patient.

Demographic	Medeo Patient	Accuro Patient
<input type="checkbox"/> Health Number	999999999999	9999999999AB
<input type="checkbox"/> Home Phone Number	+14168402136	(416) 555-8094
<input type="checkbox"/> Work Phone Number		(000) 000-0000
<input type="checkbox"/> Cell Phone Number		(555) 552-2222
<input type="checkbox"/> Street		1878 Horner Ave
<input type="checkbox"/> City		Toronto
<input type="checkbox"/> Province		ON
<input type="checkbox"/> Postal Code		M8W 4Y4
<input type="checkbox"/> Gender		F

OK Cancel

- If a Medeo patient does not exist in Accuro, select **New Patient** to create a matching Accuro patient record.



Match Medeo Patient to Accuro Patient

Medeo

Vanessa Oval

999999999999

1982-Jan-16

training+vanessa-on@qhrtest.com

+14168402136

ACCURO®

Oval, Vanessa

9999999999AB

1982-Jan-16

training+vanessa-on@qhrtest.com

1878 Horner Ave Toronto, ON M8W 4Y4

(416) 555-8094

Patient Search

Last Name: oval

First Name:

Health #:

20 Oval Michael 123456778ab 1984-Jun-18

4 Oval Vanessa 9999999999AB 1982-Jan-16

Note: Patients that are linked to a Medeo Online Booking account cannot be merged in Accuro.

Unlinking Patients

To unlink Accuro and Medeo patients as a System Administrator:

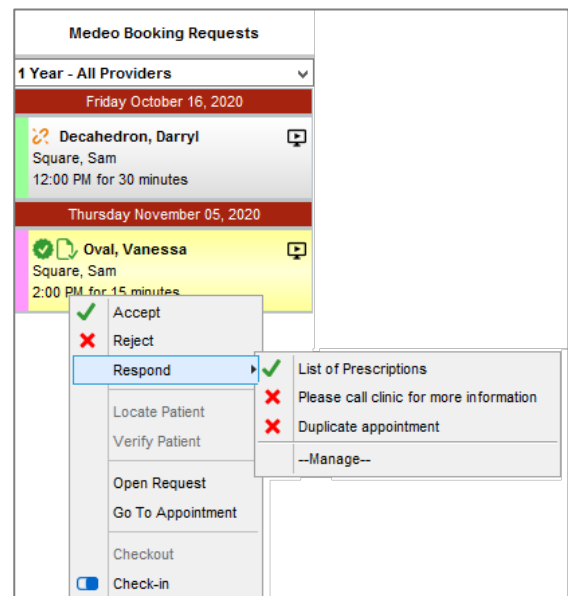
1. Accuro **Start Menu** > search for **Audit Logs**.
2. Clear the **Date Range** so the fields show 'MM/DD/YY.'
3. From the **Activity** drop down menu, select **Manual Medeo Patient Match**.
4. Select the **Patient** checkbox, type in your patient's name, then click **List Results**.
5. Double click on an event log to confirm the linked email address. Click **Close**.
6. Right click on the event log, then click **Restore** to unlink the Medeo patient.

Responding to Medeo Booking Requests

After receiving a booking request and linking the patient, you can respond to the request by selecting either **Accept**, **Reject**, or **Respond** in the Appointment Details window or by right clicking the request.

To respond to a booking request:

1. Right click a request in the Medeo Booking Requests column.
2. Select either **Accept**, **Reject**, or select a custom response from the **Respond** dropdown menu.
 - **Accept:** Accepts the request, adds the appointment to your Scheduler, and sends the patient a confirmation email.
 - **Reject:** Denies the request, removes the appointment from Booking Requests, and sends the patient a notification email.
 - **Respond:** Lets you select a customized Accept or Reject response.



Note: After accepting an Appointment, it must be cancelled via the Scheduler. It's not possible to undo appointment acceptances. Please see the section below on [Cancelling Appointments](#).

Managing Booking Responses

When you respond to a booking request with either **Accept** or **Reject**, or **Respond**, patients receive a secure message to their Medeo Inbox and an email notification instructing them to log in and view the message. You can customize these messages as Medeo Responses.

Note: Accuro users require permission to manage Medeo response types. To enable permission, complete the following steps as a System Administrator:

1. Open the **Start Menu > Users > Manage Security**.
2. In **Feature Access >** open the **Role Permissions** tab or **User Permissions** tab.
3. Under **Medeo Booking > Configure Medeo Booking Requests Responses >** select the **Enabled** column. The green check mark indicates that permission is enabled.
4. Select **Close** to save your changes.

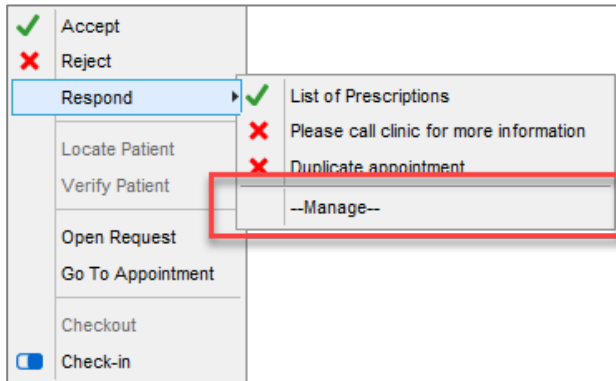
For the permission change to take effect, users may need to log out then back in to Accuro.




(Continued on next page)

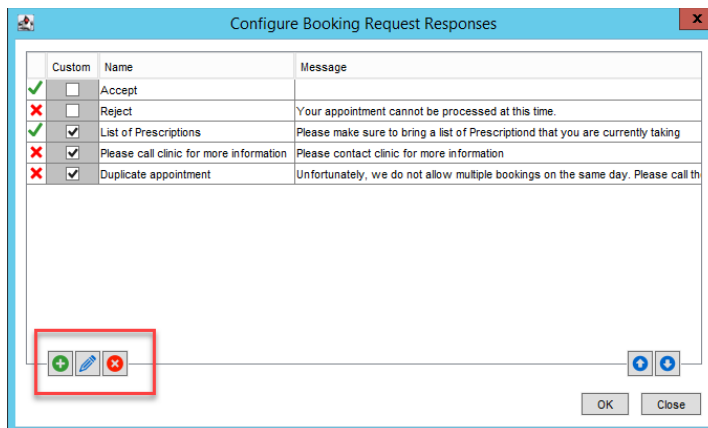
To manage Booking Request Responses:

1. In the Accuro **Start Menu**, search for **Manage Medeo Responses**.

Alternatively, in a booking request window, select **--Manage--** from the **Respond** drop down menu in the Booking Requests Column, or the **Appointment Details** window.



2. In the **Configure Booking Request Responses** window, you can  **Add**,  **Edit**, or  **Delete** responses using the action buttons.



3. Enter the **Name** for the response. This will be seen by other Accuro users.

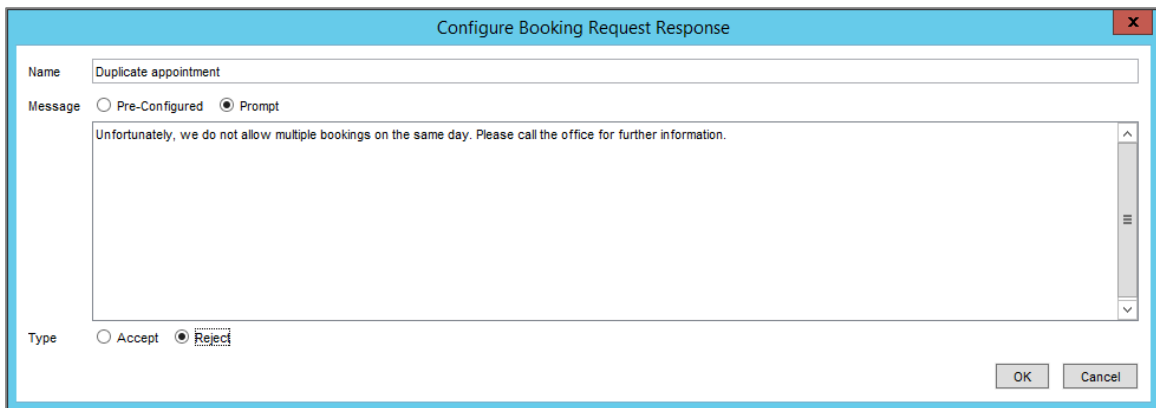
(Continued on next page)

4. Select **'Pre-Configured'** or **'Prompt'**:

Pre-Configured: sends your pre-configured message response to the patient and automatically updates the Scheduler.

Prompt: opens a window containing the pre-configured message with an option to edit and personalize the message before sending the response.

5. Enter the **Message** you'd like patients to see with this response.
6. Select the **Type:** either **Accept** or **Reject**.
7. Click **OK** to save the changes.



Note: The **'Accept'** and **'Reject'** response types at the top of the list can be edited, but not deleted.

Trainer Tip: We recommend starting your Response Names with "Accept" Or "Reject" so you can easily distinguish your responses in the drop down menu.

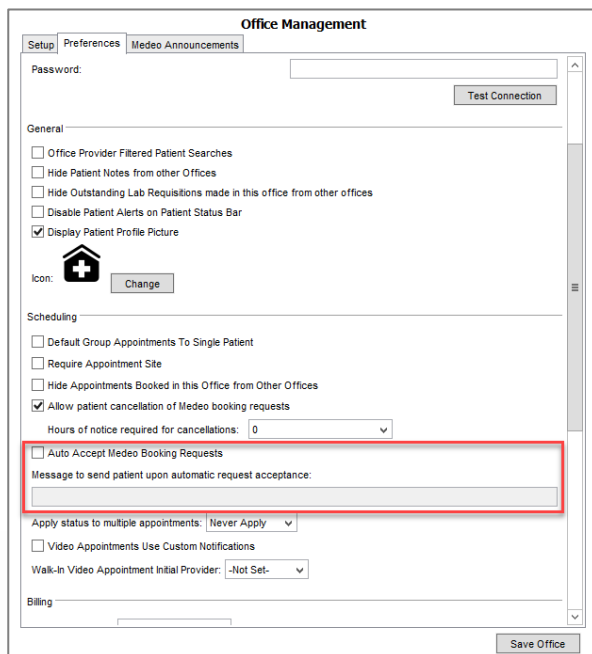
Automatically Accept Online Booking Requests

You can configure Accuro to automatically accept Online Booking requests and send patients a confirmation message.

Note: Automatic acceptance only applies to patients who are linked in Accuro. If a patient is not yet linked, responses must be managed manually.

To enable automatic acceptance for Online Booking requests:

1. In the Start Menu, search for “**Office Management.**”
2. Open the **Preferences** tab.
3. Under **Scheduling**, check the box ‘**Auto Accept Medeo Booking Requests.**’
4. Enter a message to send to patients upon the automatic acceptance in the field below.
5. Click **Save Office**, then **Close.**



Office Management

Setup | Preferences | Medeo Announcements

Password:

General


Office Provider Filtered Patient Searches

Hide Patient Notes from other Offices

Hide Outstanding Lab Requisitions made in this office from other offices

Disable Patient Alerts on Patient Status Bar

Display Patient Profile Picture

Icon: 

Scheduling

Default Group Appointments To Single Patient

Require Appointment Site

Hide Appointments Booked in this Office from Other Offices

Allow patient cancellation of Medeo booking requests

Hours of notice required for cancellations: 0

Auto Accept Medeo Booking Requests

Message to send patient upon automatic request acceptance:

Apply status to multiple appointments: Never Apply

Video Appointments Use Custom Notifications

Walk-In Video Appointment Initial Provider: -Not Set-

Billing

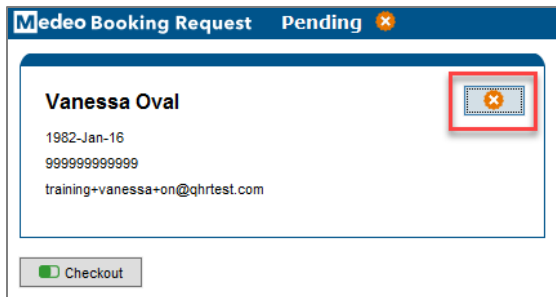
Verifying Patients

The first time a patient who used Online Booking arrives at your clinic, their identity must be verified. Verification gives your clinic certainty that any patient information that gets pushed to the Medeo user account belongs to the correct patient.

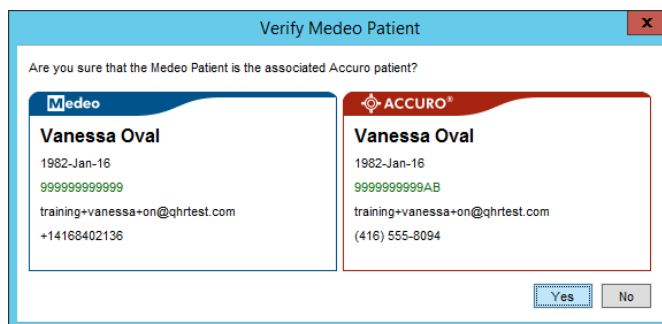
If a patient is not verified when you mark them as Arrived in the Scheduler, a prompt appears asking you to verify the patient.

To verify a patient:

1. Double-click an appointment in the **Scheduler** to open the **Appointment Details**.
2. In the Medeo Booking Request section, click the Verification button to open the **Verify Medeo Patient** window.



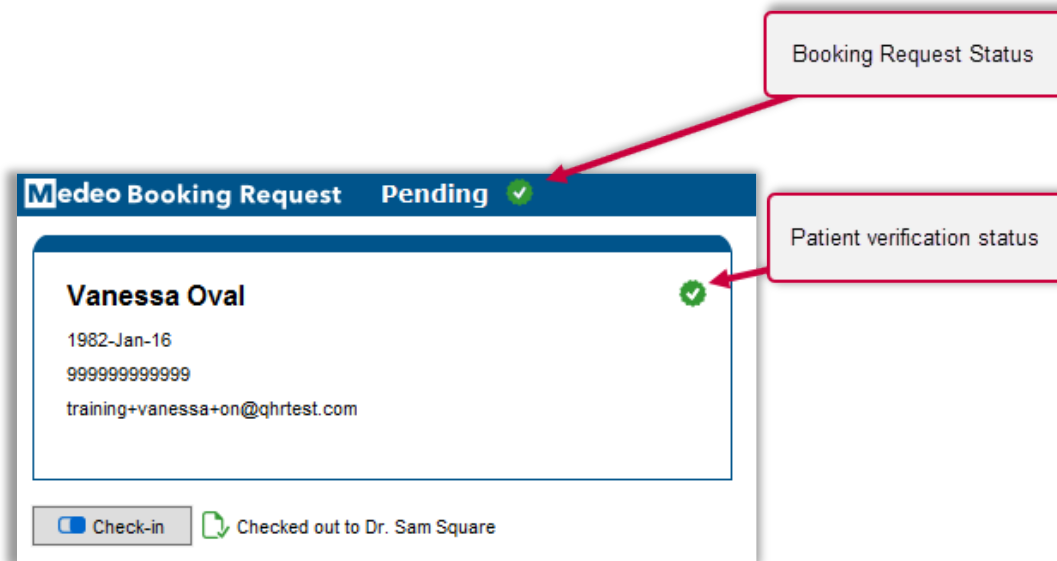
Confirm that the patient's identification matches with the Accuro and Medeo Patient details displayed in the **Verify Medeo Patient** window. Click **Yes** to complete verification.



(Continued on next page)

Notes on Patient Verification:

- You can verify patients by right clicking an appointment request then selecting **verify patient**.
- If a patient was verified in error, a System Administrator can undo the verification of the patient through the **Accuro Audit Logs**. Follow the same workflow outlined in [Unlinking Patients](#).
- The word “Pending” next to the green check mark in **Appointment Details** refers to the booking request, and not the verification status.



Cancelling Appointments

To cancel appointments from Online Booking, follow the same workflow for cancelling regular appointments using the Accuro Scheduler.

Note: Accuro users require permission to create Cancellation Reasons.

To enable permission, complete the following steps as a System Administrator:

1. Open the Accuro **Start Menu > Users > Manage Security**.
2. In **Feature Access >** open the '**Role Permissions**' tab or '**User Permissions**' tab.
3. Under **Scheduling > 'Configure Cancelled Medeo Booking Request Reasons'** > select a row in the enable column to enable permission. A green check mark indicates that permission is enabled.
4. Select **Close** to save your changes.

For the permission change to take effect, users may need to log out then back in to Accuro.

To cancel an appointment from Online Booking:

1. Right-click the **Appointment** in the **Scheduler**.
2. Select **Cancel Appointment** to open the '**Cancel or Delete Appointment?**' window.
3. Using the first dropdown, select a Cancellation Reason for your clinic records.
4. Using the second drop down menu, select a **Cancellation Reason** to be sent to your patient, then click **OK**.

Patient Cancellation

Clinics can allow patients to cancel appointments from their Medeo accounts within a specified time frame.

To enable patient cancellation in Medeo:

1. Open the Accuro **Start Menu** > **Users** > **Manage Security**.
2. Select **Offices** > **'Preferences'** tab
3. Under **Scheduling**, enable the checkbox: **'Allow patient cancellation of Medeo booking requests'**
4. Using the dropdown menu, select the **'Hours of notice required for cancellations'**, either 0, 24, 48, or 72 hours, then click **Save Office**.

Dependent Bookings

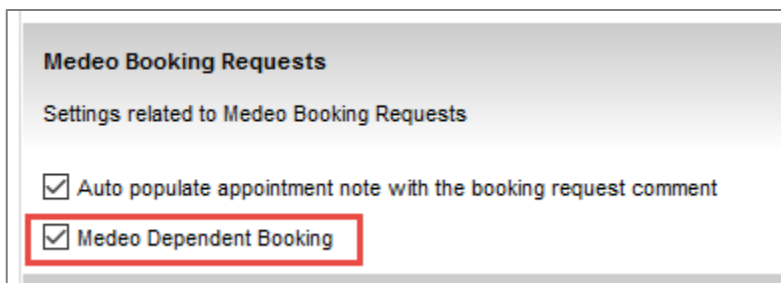
Caregivers can use Medeo to request appointments on behalf of dependents. First, Dependent Booking must be enabled by an Accuro user via System Settings. Second, Patient Relationships must be created between caregivers and dependent Patient records. Lastly, new Appointment Requests from caregivers can be modified to properly indicate the dependent patient receiving care.

Note: Caregivers should indicate their relationship to a dependent patient in the notes of each booking request.

Enabling Dependent Booking

To enable Medeo Dependent Booking as a System Administrator:

1. Open the Accuro **Start Menu > Users > Manage Security**.
2. Select **System Settings > General tab >** then scroll to **Medeo Booking Requests**.
3. Enable the **Medeo Dependent Booking** checkbox.




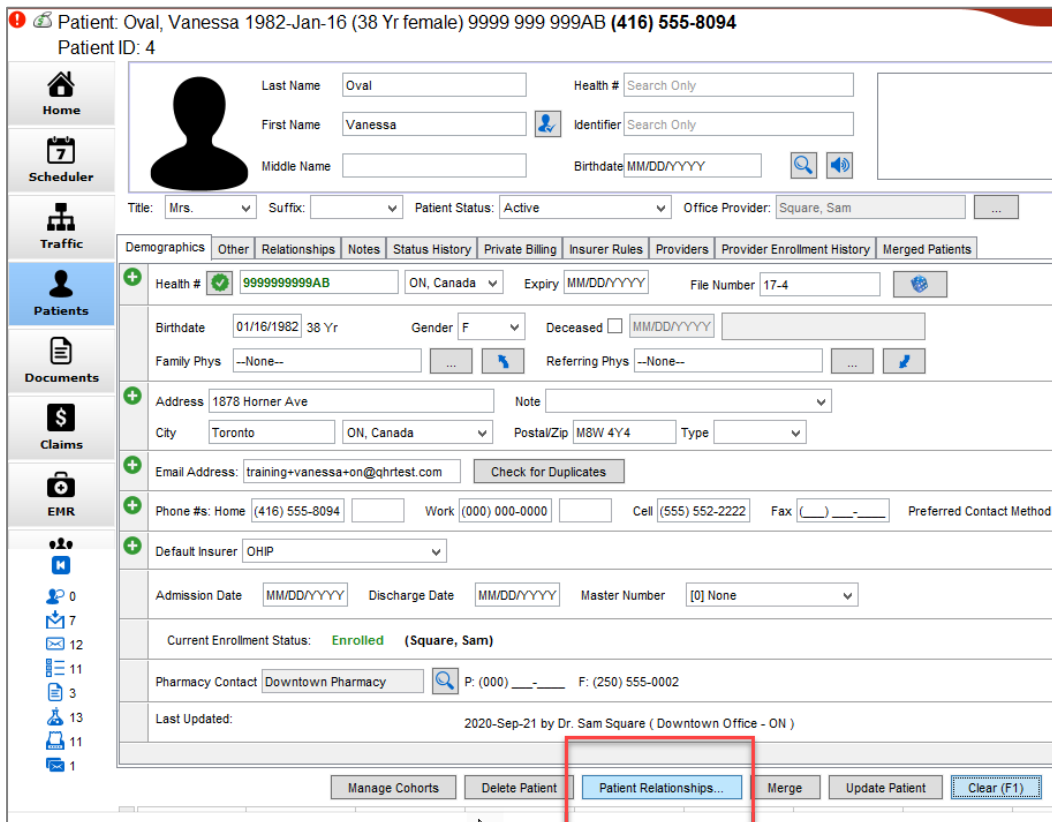
4. Click **Save Settings**, then **Close**.

Creating Dependent Relationships

To manage dependent bookings, Patient Relationships must be created between patients.

To create a Patient Relationship between a caregiver and a dependent:

1. Navigate to the **Patients** section of Accuro and select either the dependent or caregiver patient.
2. Click the '**Patient Relationships...**' button, then select  **Add**.



Patient: Oval, Vanessa 1982-Jan-16 (38 Yr female) 9999 999 999AB (416) 555-8094
Patient ID: 4

Home Scheduler Traffic Patients Documents Claims EMR

Last Name: Oval Health #: Search Only
First Name: Vanessa Identifier: Search Only
Middle Name: Birthdate: MM/DD/YYYY

Title: Mrs. Suffix: Patient Status: Active Office Provider: Square, Sam

Demographics Other Relationships Notes Status History Private Billing Insurer Rules Providers Provider Enrollment History Merged Patients

Health #: 9999999999AB ON, Canada Expiry: MM/DD/YYYY File Number: 17-4

Birthdate: 01/16/1982 38 Yr Gender: F Deceased: MM/DD/YYYY
Family Phys: --None-- Referring Phys: --None--

Address: 1878 Horner Ave Note: [dropdown]
City: Toronto ON, Canada Postal/Zip: M8W 4Y4 Type: [dropdown]

Email Address: training+vanessa-on@qhrtest.com Check for Duplicates

Phone #s: Home: (416) 555-8094 Work: (000) 000-0000 Cell: (555) 552-2222 Fax: () - - Preferred Contact Method: [dropdown]

Default Insurer: OHP

Admission Date: MM/DD/YYYY Discharge Date: MM/DD/YYYY Master Number: [0] None

Current Enrollment Status: Enrolled (Square, Sam)

Pharmacy Contact: Downtown Pharmacy P: (000) - - F: (250) 555-0002

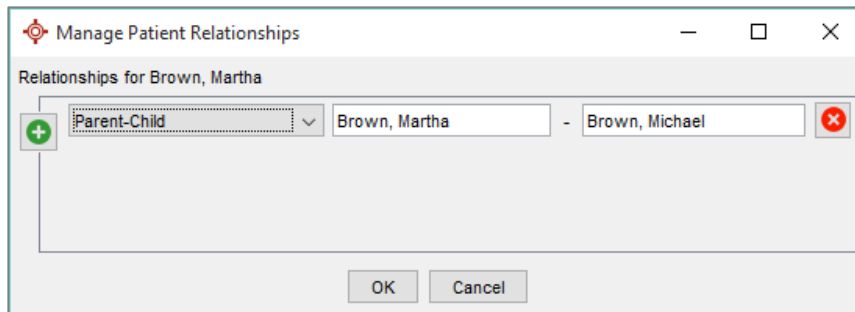
Last Updated: 2020-Sep-21 by Dr. Sam Square (Downtown Office - ON)

Manage Cohorts Delete Patient **Patient Relationships...** Merge Update Patient Clear (F1)

3. In the **Manage Patient Relationships** window, the middle field is populated with your globally selected patient. Select the right-hand field, then search for the related patient.

(Continued on next page)


- Using the drop down menu, indicate the relationship between the two patients. In the example, Martha is the parent (caregiver) and Michael is the child (dependent).

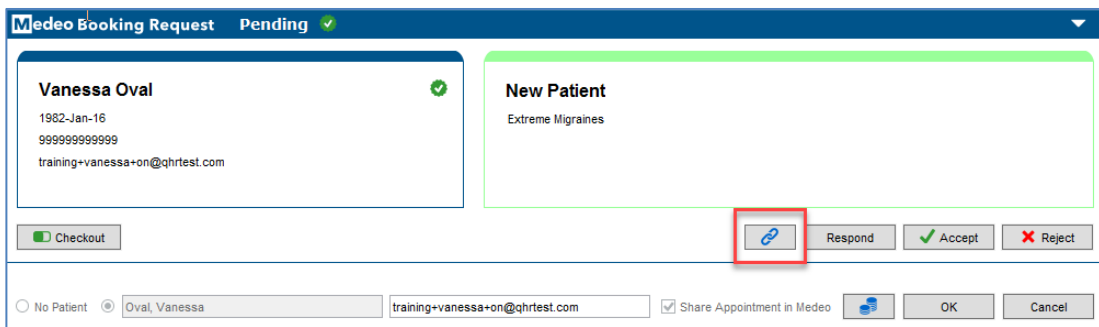


Linking Dependent Booking Requests

When a caregiver books an appointment for a dependent in Medeo, their request can be modified to correctly link to the dependent patient.

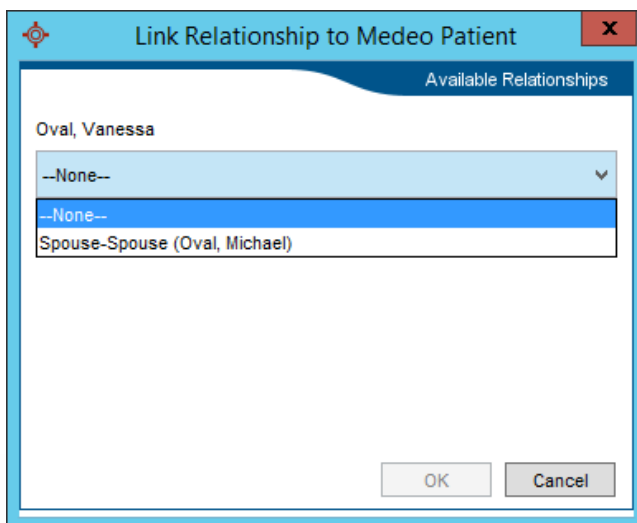
To assign a caregiver's booking request to a dependent patient:

1. Open either the dependent or caregiver as a patient in Accuro.
2. Open a booking request, then select the  **Link Dependency** button.



The screenshot shows a 'Medeo Booking Request' window with a 'Pending' status. On the left, there is a patient card for 'Vanessa Oval' with details: 1982-Jan-16, 9999999999999, and email training+vanessa+on@qhrtest.com. On the right, there is a 'New Patient' card for 'Extreme Migraines'. At the bottom right, there is a row of buttons: 'Link Dependency' (highlighted with a red box), 'Respond', 'Accept', and 'Reject'. Below this, there are radio buttons for 'No Patient' and 'Oval, Vanessa', a text field with the email address, a checked 'Share Appointment in Medeo' box, and 'OK' and 'Cancel' buttons.

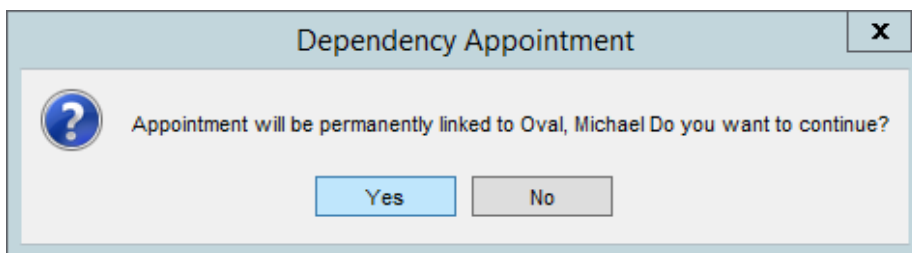
3. In the **Link Relationship to Medeo Patient** window, select the dependent patient, then click **OK**.



The screenshot shows a 'Link Relationship to Medeo Patient' window. The title bar includes the Accuro logo and a close button. The main area is titled 'Available Relationships' and shows 'Oval, Vanessa' at the top. Below this is a dropdown menu with '--None--' selected. A list of relationships is shown below the dropdown, with 'Spouse-Spouse (Oval, Michael)' highlighted. At the bottom, there are 'OK' and 'Cancel' buttons.

(Continued on next page)

4. Select **Yes** at the prompt to confirm the one-time change of the **Dependency Appointment**.



Note: To modify appointment requests for dependent patients, a link must be created between the caregiver and dependent. See the section in this guide on [Linking Patients](#).

Note: New Appointment links must be completed for each appointment booked by a dependent.

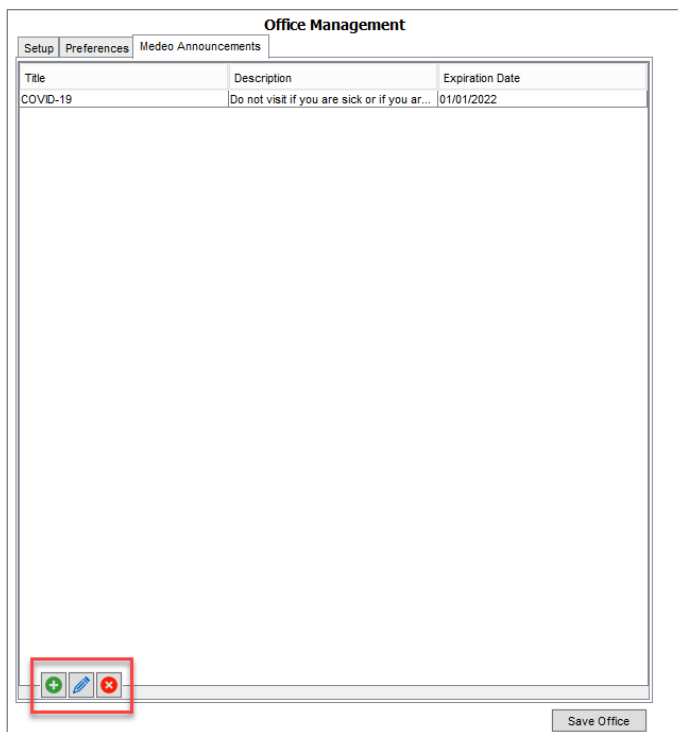
Medeo Announcements

With Medeo Announcements you can show customized messages to the patients at your clinic using Online Booking. Medeo Announcements are displayed at the top of the Online Booking interface until the message's Expiration Date.

Note: Medeo Announcements can only be managed by a System Administrator.

To create a Medeo Announcement:

1. In the Accuro Start Menu, search for “**Office Management.**”
2. Select the **Medeo Announcements** tab.



3. Use the action buttons to **Add**, **Edit**, or **Delete** Medeo Announcements.

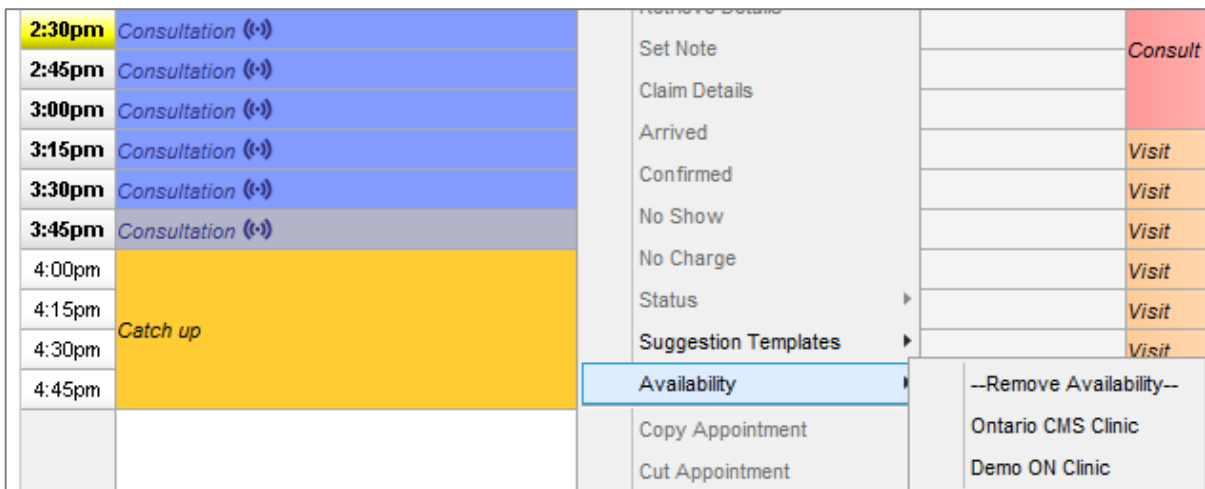
APPLY MULTI-OFFICE AVAILABILITY

If Providers work from multiple offices, use Availability to indicate when and where those Providers are available for Online Booking with patients.

Availability can be applied to the Scheduler ad-hoc, or using customized Availability Templates that cover specific dates, Days of the Week, Days of the Month, or Days of the Year.

Applying Availability Ad-hoc

1. Click and drag your mouse to select time intervals that a Provider is available for at a certain clinic.
2. Right click your selection, then hover your mouse over 'Availability.'



The screenshot shows a scheduler interface with a grid of time slots. The time slots from 2:30pm to 4:45pm are highlighted in yellow. A context menu is open over the 2:30pm to 4:45pm interval, listing various actions. The 'Availability' option is highlighted in blue. A sub-menu is open for 'Availability', showing 'Ontario CMS Clinic' and 'Demo ON Clinic' as options.

Time	Activity	Availability
2:30pm	Consultation (i)	Consult
2:45pm	Consultation (i)	Consult
3:00pm	Consultation (i)	Consult
3:15pm	Consultation (i)	Visit
3:30pm	Consultation (i)	Visit
3:45pm	Consultation (i)	Visit
4:00pm	Catch up	Visit
4:15pm		Visit
4:30pm		Visit
4:45pm		Visit

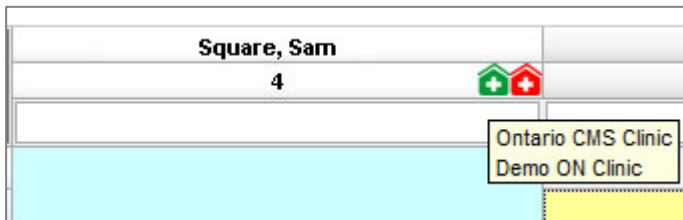
3. Select the Provider's office. In the example below, the Provider will be at Ontario CMS Clinic between 2:30pm and 4pm.

(Continued on next page)

- A vertical stripe matching the color of the Accuro Office's Icon is then applied on the right-hand side of the chosen time intervals. This is indicated with the green stripe in the below screenshot.

2:30pm	Consultation (📞)	
2:45pm	Consultation (📞)	
3:00pm	Consultation (📞)	
3:15pm	Consultation (📞)	
3:30pm	Consultation (📞)	
3:45pm	Consultation (📞)	

Note: The office icons at the top of each day column in the Scheduler indicate the office locations where a Provider is working on that day. Hovering your mouse over the office icon shows the name of each Office.




Note: To configure Office Icon colors: **Start Menu** > search “Office Management,” ‘Preferences’ tab > **General** > **Icon**: select **Change**.

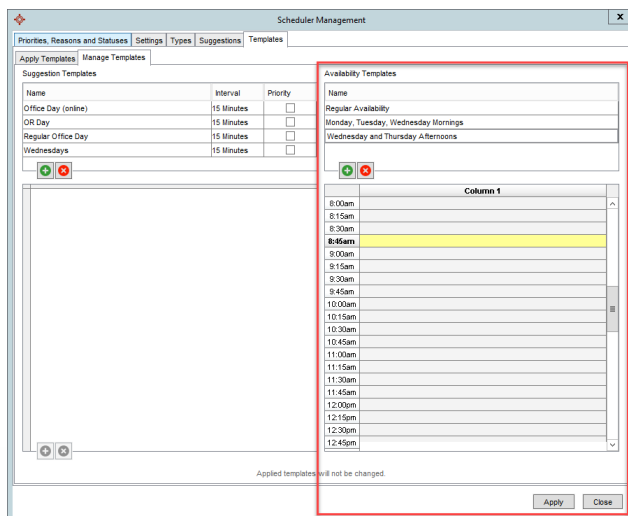
Managing Availability Templates

For Providers working in multiple offices on pre-determined schedules, Availability Templates save time by applying a range of availabilities as bookable time intervals in the Scheduler. For example, a Provider might work Monday, Tuesday, and Wednesday mornings at the Ontario CMS Clinic, and work Wednesday and Thursday afternoons at the Specialist Clinic. Availability templates ensure your patients can book Providers during their correct availabilities.

To create an Availability Template:

1. Open the Accuro **Start Menu** > **Scheduler** > **Scheduler Management**.
2. Open the **Templates** tab, then choose the **Manage Templates** tab.
3. Press the  **Add** button under the Availability Templates section.
4. Enter a **Name** for the template.

In **Column 1** beneath the **Availability Templates** Names, click and drag to select the time intervals that a Provider is available for at a certain office. Hold down CTRL to select more than one non-consecutive time interval.



(Continued on next page)

5. Right click your highlighted time intervals, then select the relevant office. A colored stripe corresponding to the relevant office appears to the right of the chosen time intervals in Column 1.
6. Click **Apply** to save your changes, then click **Close**.

	Column 1	
7:30am		^
7:45am		
8:00am		
8:15am		
8:30am		
8:45am		
9:00am		
9:15am		
9:30am		
9:45am		
10:00am		
10:15am		
10:30am		
10:45am		
11:00am		
11:15am		
11:30am		
11:45am		
12:00pm		
12:15pm		
12:30pm		v

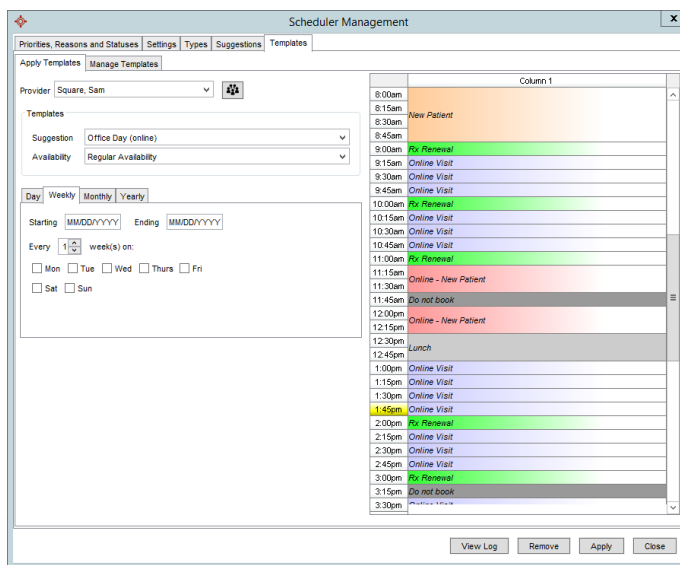
Note: To remove time intervals from an Availability Template, right click the time interval, then select **Remove Availability**.

Applying Availability Templates

Availability Templates let you apply a Providers availability by clinic on a single day or over a range of future of dates. The workflow for applying Availability Templates is the same as for applying Suggestion Templates.

To apply Availability Templates:

1. In the Start Menu, search for **Scheduler Management**.
2. In **Templates**, select the **Apply Templates** tab.
3. Select a **Provider** from the drop down menu.
4. Select a **Suggestion Template** and an **Availability Template**.
5. Choose the calendar frequency: **Day**, **Weekly**, **Monthly**, or **Yearly**.
6. Complete the relevant details.
7. Click the **Apply** button.



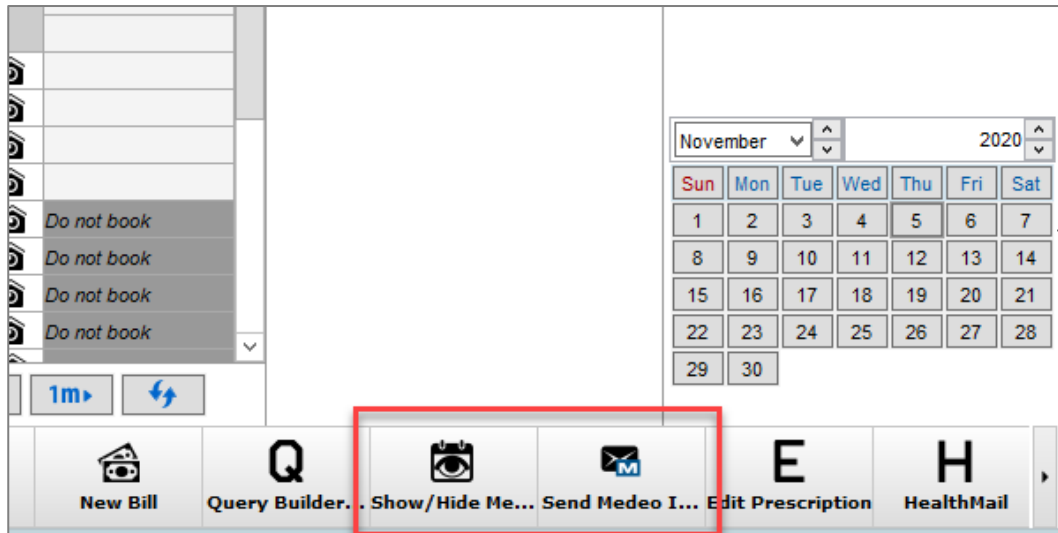
For more details, please review the section in this guide on [Applying Suggestions](#).

FAQS AND KEY INFORMATION


Question	Answer
Does Online Booking work at Walk-in clinics?	Yes. If your patients do not book appointments with specific Providers, but rather book with the next available Provider, a setting can be enabled to show “Any Available Provider” as an option in Online Booking. Please contact QHR Support to enable this setting.
Can I double-book using Online Booking?	No, double booking columns are not supported in Online Booking. Only the first booking column of a Provider’s schedule is available for Online Booking. Additional booking columns can still be used to add manually booked appointments.
What happens when I transfer an appointment made through Online Booking to another Provider?	If an appointment created through Online Booking is transferred to another healthcare Provider, or if the date and time are changed, the patient will receive an email with up-to-date information.

Quick Action Buttons

If you're using a Custom Action Bar, you can use two new buttons for Online Booking: **Send Medeo Invitations**, and **Show/Hide Booking Requests Column**.



To enable Medeo quick action buttons:

1. In the Accuro Start Menu, type “configure,” then select **Configure Actions**.
2. Select a Medeo action button from the left-hand column, then click  **Add** to move the button into your Selections.
3. Click **Apply**, then **OK**.

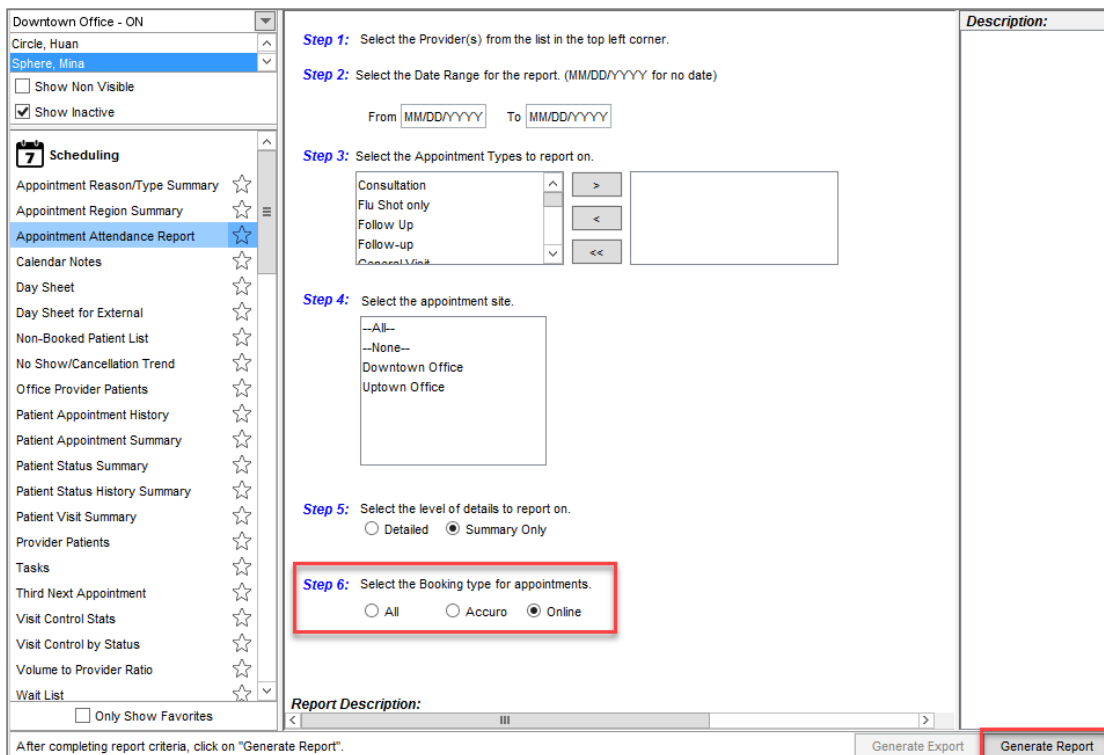
Note: For more details on quick action buttons, search for Configure Actions Overview in the Accuro User Guide (**Start Menu > Help > Accuro User Guide**.)

Online Booking Reports

You can review how many appointments have been scheduled through Online Booking by running a report.

To access Reports:

1. In Accuro, press CTRL+R on your keyboard to open reports, then select the “**Appointment Attendance Report.**”
2. In **Step 6** choose “**Online**” to report on online booked appointments or choose “**All**” to report on both online and Accuro scheduled appointments.
3. Complete the remaining steps, then click **Generate Report.**



Step 1: Select the Provider(s) from the list in the top left corner.

Step 2: Select the Date Range for the report. (MM/DD/YYYY for no date)

From To

Step 3: Select the Appointment Types to report on.

Consultation Flu Shot only
 Follow Up Follow-up
 General Visit

Step 4: Select the appointment site.

--All--
 --None--
 Downtown Office
 Uptown Office

Step 5: Select the level of details to report on.

Detailed Summary Only

Step 6: Select the Booking type for appointments.

All Accuro Online

Report Description:

After completing report criteria, click on "Generate Report".

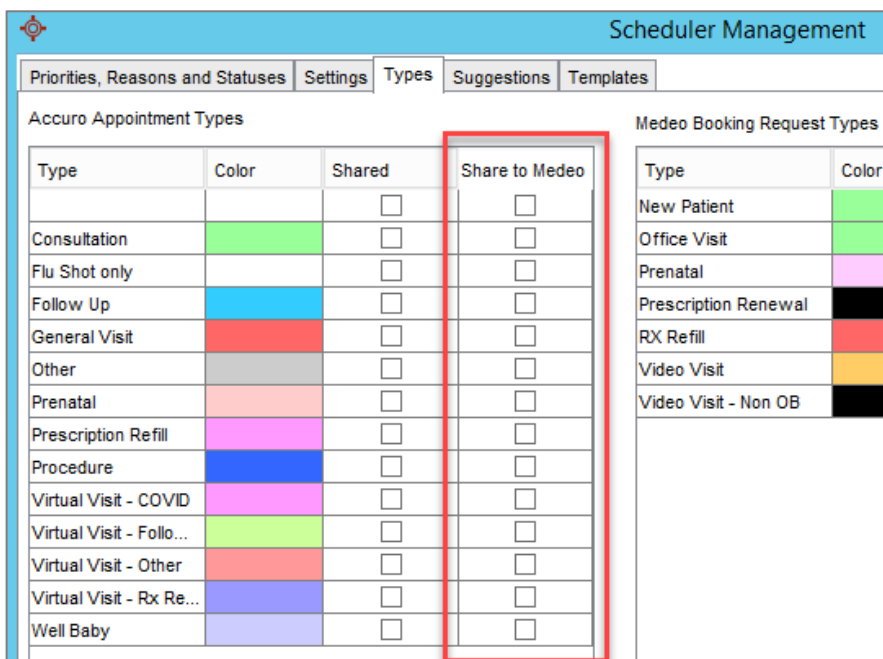
Generate Export **Generate Report**

In-Office Appointments Visible in Medeo

If your clinic has Patient Messaging, Online Booking, or Video Visits enabled, you can show upcoming appointments that were booked manually (via the Scheduler) to patients when they log in to Medeo.

To make in-office appointments visible to patients in Medeo:

1. Open the **Accuro Start Menu > Scheduler > Scheduler Management**.
2. In the **Types** tab, select **“Share to Medeo”** using the checkboxes in the list of Accuro Appointment Types.



Scheduler Management					
Priorities, Reasons and Statuses		Settings	Types	Suggestions	Templates
Accuro Appointment Types			Medeo Booking Request Types		
Type	Color	Shared	Share to Medeo	Type	Color
		<input type="checkbox"/>	<input type="checkbox"/>	New Patient	
Consultation		<input type="checkbox"/>	<input type="checkbox"/>	Office Visit	
Flu Shot only		<input type="checkbox"/>	<input type="checkbox"/>	Prenatal	
Follow Up		<input type="checkbox"/>	<input type="checkbox"/>	Prescription Renewal	
General Visit		<input type="checkbox"/>	<input type="checkbox"/>	RX Refill	
Other		<input type="checkbox"/>	<input type="checkbox"/>	Video Visit	
Prenatal		<input type="checkbox"/>	<input type="checkbox"/>	Video Visit - Non OB	
Prescription Refill		<input type="checkbox"/>	<input type="checkbox"/>		
Procedure		<input type="checkbox"/>	<input type="checkbox"/>		
Virtual Visit - COVID		<input type="checkbox"/>	<input type="checkbox"/>		
Virtual Visit - Follo...		<input type="checkbox"/>	<input type="checkbox"/>		
Virtual Visit - Other		<input type="checkbox"/>	<input type="checkbox"/>		
Virtual Visit - Rx Re...		<input type="checkbox"/>	<input type="checkbox"/>		
Well Baby		<input type="checkbox"/>	<input type="checkbox"/>		

Note: If you create an appointment using an Appointment Type with “Share to Medeo” enabled, it will select “Share Appointment in Medeo” as a default.

Appointment Notifications

Notifications are reminder emails that automatically get sent to patients 24 hours in advance of their booked appointment times. Notification emails include the details of the upcoming appointment along with a generic reminder message.

Note: Appointment Notifications are enabled by default with the Online Booking module. To disable notifications, please contact [QHR Clinic Support](#).

Notification Prerequisites

- The relevant Appointment Type must have 'Share to Medeo' enabled (please see [In-Office Appointments Visible in Medeo](#)).
- Patients must have a Medeo account.

In-Office Notifications

If a patient books an appointment via Medeo Online Booking, they will automatically receive an In-Office Notification prior to their appointment.

Ad-hoc Notifications

Notifications can also be sent manually for any appointments booked in-person or via phone.

To send Ad-hoc Notifications:

1. In the **Scheduler**, open the **Appointment Details** window.
2. Select the box "**Share Appointment in Medeo**," then click **OK**.

Video Visit Notifications

If a patient books a Video Visit with your clinic, they will automatically receive Video Visit Notification 24 hours before their appointment. Video Visit Notifications are only available for clinics with the Video Visits module.



 1.866.729.8889

 www.AccuroEMR.com

TRAINING AND SUPPORT

Clinic Support

QHR Technologies can provide your clinic with support and user training. User training may be subject to a service fee.

QHR Technologies Inc. Client Services

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Email: accuro@QHRTech.com

Content Disclaimer

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