

USER GUIDE

Online Booking & Notifications

with Medeo





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FRAINING AND SUPPORT	
Clinic Support	

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.

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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,
- 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						
Roles	Eastura Accors Managama	nt					
Open Providers	Feature Access Management Enable or disable access to specific features of Accuro. Features can be controlled at the role, office, or user level						
Offices	Enable or disable access to specific features of Accuro. Features can be c	ontrolled at the role, office, or user level.					
Templates	Role Permissions User Permissions						
Users							
Feature Access	Office: Downtown Office - ON						
Notifications	User: 🧟 crectangle						
System Settings							
Audit Logs	Feature	Enabled					
Admin Delete	Home						
Reports System Information	- Review Documents	✓					
Active Users	- Review Labs	✓					
Adare bacia	7 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	J					
	Configure Medeo Booking Options	×					
	Override Priority Templates	✓					
	- Manage Rooms	✓					
	- Manage Programs	✓					
	- Manage Appointment Reason Descriptions	✓					
	 Manage Appointment Cancellation Reasons 	✓					
	- Manage Cancellation List Reasons	✓					
	Hanasa Citan						

4. Select Close to save your changes.

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

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 **O** Add button, or select an appointment type to **Edit** or **Delete**.

riorities, Reasons an	d Statuses S	ettings Types	Suggestions Temp	lates				
Accuro Appointment Types Medeo Booking Request Types								
Туре	Color	Shared	Share to Medeo	Туре	Color	Length	Starts On	Accuro Appointment Type
				Follow up		10 Minutes	:00, :10, :20, :30,	Follow Up
onsultation				New Patient		30 Minutes	:00, :30	Consultation
lu Shot only				Prenatal		15 Minutes	:00, :15, :30, :45	Prenatal
ollow Up				Prescription Renewal		15 Minutes	:00, :15, :30, :45	Prescription Renewal
eneral Visit				Regular appointment		15 Minutes	:00, :15, :30, :45	General Visit
ther				Well baby or child visit		30 Minutes	:00, :30	Well Baby Visit
renatal								
Prescription Renewal								
rocedure								
/irtual Visit - COVID								
/irtual Visit - Follo								
′irtual Visit - Other								
/irtual Visit - Rx Re								
Vell Baby Visit								
- 3 8								

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.'

	Medeo Booking Request Type
Name	New Patient
Description	Book a New Patient Appointment if this is your first time seeing this doctor.
Interaction Type	Either (In-Office or Video)
Length	Video Appointment In-Office
Starts On	Either (In-Office or Video)
	✓ Default Starts On to match Length
Color	
Mapping	Consultation V
	OK Cancel

- 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.

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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 **O** 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.

Ap	ppointment Suggestion
Name	Online - 15
Label	Online Visit
Color	
Display	● Solid ○ Bar
	Active
Appointment Type	General Visit 🗸
Appointment Reason	Back Pain 🗸
Medeo Booking Request Type	Regular appointment
	Allow Accuro Appointment Creation
	Allow Medeo Booking Request Appointment Creation
Clear	Update 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.

Apply Suggestion	x
Please select the format for the sugges	stion:
O Group Single Line	
OK	el

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.

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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.

¢		Schedul	er Management	x
Priorities, Reasons and Statuses Settings Types	Suggestions	Templates		
Apply Templates Manage Templates				
Suggestion Templates			Availability Templates	
Suggestion remplates			Availability remplates	_
Name	Interval	Priority	Name	
Mondaye Dr. Square	15 Minutee		Monday, Tuesday, Wednesday Mornings	
Office Day (online)	15 Minutes		Regular Availability	٦.
UR Day	15 Minutes		Wednesday and Thursday Afternoons	
Regular Office Day	15 Minutes			
				_
Column 1				7
8:00am			^	
8:15am New Patient				
8:30am				
8:45am				
9:00am Rx Renewal				
9:15am Online Visit				
9:30am Online Visit				
9:45am Online Visit				
10:00am Rx Renewal			=	
10:15am Online Visit				
10:30am Online Visit 10:45am Online Visit				
11:00am Rx Renewal				
11:15am				
11:30am Online - New Patient				
11:45am Do not book				
1200m				
12.15pm Online - New Patient				
1230pm				
12 fCum Lunch			▼	
- C (8)				_
		Applied templ	tes will not be changed.	
				-
			Apply Clos	e
				_

- 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.

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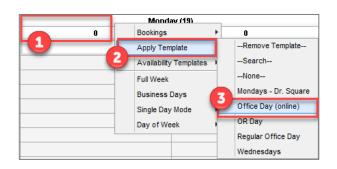


Applying Suggestion Templates to Specific Days

To apply ad-hoc Suggestion Templates to specific days:

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



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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.
- 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.

Scheduler Ma	inagement	×
Priorities, Reasons and Statuses Settings Types Suggestions Templates		
Apply Templates Manage Templates		
	Column 1	
Provider Square, Sam	8:00am	
	8:15an	
Templates	8:30am	
SuggestionNone V	8:45am	
	9:00am	
AvailabilityNone Mondays - Dr. Square	9:15am	
Office Day (online)	9:30am	
Day Weekly OR Day	9:45am	
Regular Office Day	10:00am	
Starting MM/I Wednesdays	10:15am	
	10:30am	
Every 1 week(s) on:	10:45am	
	11:00am	
Mon Tue Wed Thurs Fri	11:15am	
Sat Sun	11:30am	
	11:45am	=
	12:00pm	
	12:15pm	
	12:30pm	
	12:45pm	
	1:00pm	
	1:15pm	
	1:30pm	
	1:45pm	
	2:00pm	
	2:15pm	
	2:30pm	
	2:45pm	
	3:00pm	
	3:15pm	
	3:30pm	~
	View Log Remove Apply	Close



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5. 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.

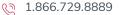
Monthly: Applies templates monthly. E.g. The provider takes the second Monday of the month off every 2 months.

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.

Apply Templates	Manage Templates
Provider Square,	Sam 💌 🗱
Templates	
	Office Day (online)
Availability -	None V
Starting MM/DI Every 1	ionthy Yearly DYYYY Ending MM/DD/YYYY week(s) on: ie Wed Thurs Fri n





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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 🕪 ô
Video Visit (••) 🧕
Online Visit (••) 🙆
Online Visit 🕪 ô
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.

3

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 <u>Dependent Booking</u>.

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 <u>Quick Action Buttons</u>.





Hello,

We know how busy life can get, so we're happy to offer Online Booking through Medeo to help make your healthcare experience easier.

How does Online Booking work?

It's simple:

- 1. Select your Provider and preferred time
- 2. Create an account OR Sign In with your existing Medeo account
- 3. Click "Request Appointment"
- 4. We'll send you an email confirming your appointment

BOOK YOUR APPOINTMENT NOW

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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 O Add button to create a new Alert Definition, then enter a name and click OK.

	Alert Definitions
Existing Definitions	Alert Definitions
Fiter Visible Definitions	Current Rules
AFHTO - Diabetes	
All Patients (CDM Vorkaheet CDM Vorkaheet) Octest (CDM Vorkaheet) Normal Results (CDM Vorkaheet) Patients >50 with phone numbers (CDM Vorkaheet) Patients with Emails (CDM Vorkaheet) Unrread Patient Messages (CDM Vorkaheet)	
CDM Worksheet	
DGtest	de la constanción de
Normal Results	
Patients >50 with phone numbers	New Rule Manage Rule
Patients with Emails Unread Patient Messages	Rule Category Demographics VNone Add Rule Remove Rule
ztest	Address Doesn't Match Patient Records Only Optional Instances
Loos M	Address A Desit inauli _ ratent records Only _ Optional
	City
	Decessed Default Insurer
	Email Address
	Employer
	Errolled Date Errolled Provider Errolled Provider Errolled Provider Errolled Provider Errolled Provider Errolled Provider Errolled Errolled
	Enniver Hover
	File Number
	Flags Global Message
	Guardian
	Medeo Patient ID
	Next of Kin Create or Select a Rule to Manage Occupation
	Office Provider 0
	Official Language
	Paper Chart Parent
	Partner Partner
	Patient Age
	Patient Allas Patient Cohorts
	Patient Conorts Patient Name Patient Name
	Patient Status
	Patient Status History
	Patient Suffix
No Alert Definition Loaded	Pair Comparison Run Report Close

(Continued on next page)





- 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**.

New Rule Rule Category	Demographics		Manage Rule Email Address Add Rule Remove Rule
Address	^		Doesn't Match Patient Records Only Optional
Carecard		-11-	
City			
Deceased			
Default Insurer			
Email Address		п.	
Employer			
Enrolled Date			
Enrolled Provider			
Family Phys.			
File Number	=		
Flags			
Global Message			
Guardian			
Medeo Patient ID			Not Constrained
Next of Kin			S New
Occupation			
Office Provider			
Official Language			
Paper Chart			
Parent:			
Partner			
Patient Age			
Patient Alias			
Patient Cohorts			

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."

Last Name:	Starts With V	8
	• New	





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

Manage Rule		
Patient Name		Add Rule Remove Rule
Doesn't Match Deatient Record	s Only 🗌 Optional	Instances 1
		8
	Starts With V A	
	OR	
	Starts With V	8
Last Name:	OR	
	Starts With 🗸 C	8
	OR	
	Starts With v D	8
	• New	

- 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**.





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

			I	Nede	o-invitation-1			
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Last Name	Patient First Name
Angle	Jonathan	999999999999	02/08/2019	М	(000) 000-0000	Unassigned	Angle	Jonathan
Angle	Simon	5555555555555	04/15/1988	М	(905) 555-6814	Unassigned	Angle	Simon
Cross	Andrew	99999999999WD	02/04/1993	М	(416) 555-8633	Unassigned	Cross	Andrew
Cross	Michael	999999999921	05/01/1981	М	(416) 555-8633	Unassigned	Cross	Michael
Cube	Martin	222222594	06/18/1943	М	(905) 555-4567	Unassigned	Cube	Martin
Decahedron	Darryl		01/01/1982	М	(000) 000-0000	Unassigned	Decahedron	Darryl
Diamond	Bob	55555555666	03/15/1975	М	(647) 555-9563	Unassigned	Diamond	Bob
Diamond	Janet	121256475586	07/05/1988	F	()	Unassigned	Diamond	Janet
<					Ш			
	atches - Se	lect Action -	~	Com	III pleted Reru	un Print A	All Export	Close
		lect Action - Patient Status	v	Com		un Print A	All Export	
	Set			Com		un Print A	All Export	
	Set	Patient Status		Com		un Print A	All Export	
	Set I Ass Rem	Patient Status ign Flag	^	Com		un Print A	All Export	
	Set Ass Rem Ass	Patient Status ign Flag ove Flag ign to Patient Coho te Patient Cohort	rt	Com		un Print A	All Export	
	Set I Ass Rem Ass Gree Sen	Patient Status ign Flag ove Flag ign to Patient Coho te Patient Schort d Medeo Invitation	rt 📃	Com		un Print A	All Export	Close
	Set Ass Rem Ass Croc Sen Sen	Patient Status ign Flag ove Flag ign to Patient Coho te Patient Cohort	rt =	Com		un Print A	LI Export	

- 10. Use the drop down menu to select "Send Medeo Invitation."
- 11. Send your mass invitation by selecting **Yes** at the '**Send Medeo Invitation**' prompt, then close the Query Builder window.

Send Medeo Invitation					
?	You are about to send a Medeo invitation email to all selected patients that are not already signed up with Medeo and that have an email address configured (1 patient(s)). Would you like to continue?				

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.

Oval, Vanessa *Surgery (Nose) ... 💽

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 <u>Quick Action Buttons</u>.

	Downtown Office - ON
	🔮 Dr. Sam Square
Medeo Booking Requests	l'atient Oval, Vanessa
1 Year - All Providers 🗸 🗸	Vanessa Oval
Thursday November 05, 2020	Birthdate 1982-Jan-16 (38 Yr) Work Phone (000) 000-0000
Oval, Vanessa Square, Sam	Home Phone (416) 555-8094 PHN 9999 999 999AB Ref. By
12:00 PM for 30 minutes	Email training+vanessa+on@qhrtest Address 1878 Horner Ave
	City Toronto
	Postal/Zip M8W 4Y4
	nsurer OHIP

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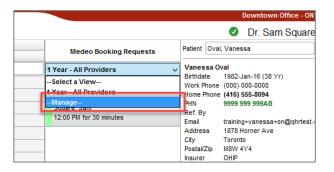
Booking Request Filters

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.

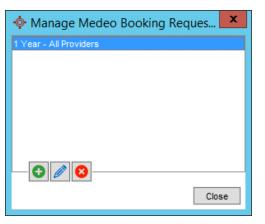
Note: A commonly used View is, "1 Year - All Providers."

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.





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.

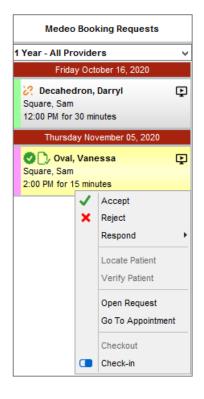
To checkout an appointment request:

1. Right click a request in the Medeo Booking Requests

Column and select the Checkout

Checkout button.

2. Selecting the **Check-in Check-in** button lets other Accuro users check out and process an appointment request.



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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.

📀 💪 Oval, Vanessa	Ŀ
Square, Sam	
Thu Nov 05 at 2:00 PM for 15 minutes	

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

Medeo Booking Request	Pending	
Vanessa Oval		•
1982-Jan-16		
999999999999		
training+vanessa+on@qhrtest.com		
Check-in Checked out to [Dr. Sam Square	





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.

Medeo Booking Request 🛛 Pending 👻			~
Vanessa Oval 1982-Jan-16 99999999999 training+vanessa+on@qhrtest.com	0	New Patient Extreme Migraines	
Checkout			Respond 🗸 Accept 🗙 Reject
🔿 No Patient 🔘 Oval, Vanessa	training+vaness	a+on@qhrtest.com	Share Appointment in Medeo OK Cancel

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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:

 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.

Medeo Booking Request Pending දි		Mede
Vanessa Oval		1 Year - All F
1982-Jan-16		Fri
999999999999		
training+vanessa+on@qhrtest.com		C Decah
		Square, Sa
	'	12:00 PM fo
Checkout		Thurs
		🔿 🗋, Ova
No Patient		Square, Sa
		2:00 PM for
Alternatively, right click a booking request, then		-
select Locate Patient.		
elect Locate Fatient .		
(Continued on next page)		
		1

Medeo	Bool	king Requests	
1 Year - All Pro	ovide	rs	~
Frida	y Octo	ober 16, 2020	
Decahed Square, Sam 12:00 PM for		-	Ç
Thursda	ay Nov	vember 05, 2020	
Square, Sam 2:00 PM for 1			Ç
	~	Accept	
	×	Reject	
		Respond	×
		Locate Patient	
		Verify Patient	
		Open Request	
		Go To Appointmen	nt
		Checkout	
		Check-in	

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- 2. 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.
- 3. 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**.

	he demographics you would		t and the Medeo Patient. Please iro Patient.
	Demographic	Medeo Patient	Accuro Patient
	Health Number	9999999999999	9999999999AB
	Home Phone Number	+14168402136	(416) 555-8094
	Work Phone Number		(000) 000-0000
	Cell Phone Number		(555) 552-2222
	Street		1878 Horner Ave
	City		Toronto
	Province		ON
	Postal Code		M8W 4Y4
$\overline{\Box}$	Gender		F

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

🔶 Match Medeo Patie	ent to Accuro Patient X
Medeo	∲ ACCURO [®]
Vanessa Oval 99999999999 1982-Jan-16 training+vanessa+on@qhrtest.com +14168402136	Oval, Vanessa 99999999998 1982-Jan-16 training-vanessa+on@qhrtest.com 1878 Horner Ave Toronto, ON MBW 4Y4 (416) 555-8094
Patient Search Last Name oval First Name Health #	20 Oval Michael 1234567778ab 1984-Jun-18 4 Oval Vanessa 999999999AB 1982-Jan-16
8	New Patient OK Cancel

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.

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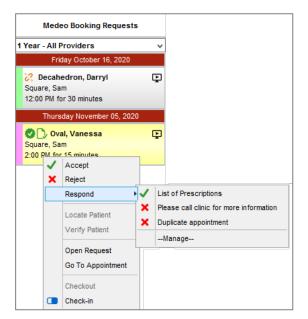
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Responding to Medeo Booking Requests

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 <u>Cancelling Appointments</u>.

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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.



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, C Edit, or Edit, or Delete responses using the action buttons.

<u>گ</u> ا		Configure	e Booking Request Responses 🛛 🗙
	Custom	Name	Message
~		Accept	
×		Reject	Your appointment cannot be processed at this time.
~	~	List of Prescriptions	Please make sure to bring a list of Prescriptiond that you are currently taking
×	✓	Please call clinic for more information	Please contact clinic for more information
×	✓	Duplicate appointment	Unfortunately, we do not allow multiple bookings on the same day. Please call the
ſ	0 🧪	0	00
L			OK Close

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



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.

	Configure Booking Request Response	x
Name	Duplicate appointment	
Message	O Pre-Configured Prompt	
	Unfortunately, we do not allow multiple bookings on the same day. Please call the office for further information.	^
		=
		~
Туре	○ Accept ● Reject	
	OK Can	cel

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.

Off	fice Management	
Setup Preferences Medeo Announcements		
Password:		^
	Test Connection	
Seneral		
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		
Change		≣
Scheduling		
Default Group Appointments To Single Patient		
Require Appointment Site		
Hide Appointments Booked in this Office from O	Other Offices	
Allow patient cancellation of Medeo booking re	equests	
Hours of notice required for cancellations: 0		
Auto Accept Medeo Booking Requests		
Message to send patient upon automatic request a	acceptance:	
Apply status to multiple appointments: Never App	she u	
Video Appointments Use Custom Notifications		
Walk-In Video Appointment Initial Provider: -Not Se	et- ∨	
Billing		
-		v
	Save Office	٦

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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.

edeo Booking Request	Pending	8	
Vanessa Oval			8
1982-Jan-16			
9999999999999			
training+vanessa+on@qhrtest.com			
Checkout			

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.

Verif	fy Medeo Patient
Are you sure that the Medeo Patient is the asso	ciated Accuro patient?
Medeo	-∲-ACCURO®
Vanessa Oval	Vanessa Oval
1982-Jan-16	1982-Jan-16
9999999999999	9999999999AB
training+vanessa+on@qhrtest.com	training+vanessa+on@qhrtest.com
+14168402136	(416) 555-8094
	Yes No



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 <u>Unlinking Patients</u>.
- The word "Pending" next to the green check mark in **Appointment Details** refers to the booking request, and not the verification status.

	Booking Request Status
edeo Booking Request 🛛 Pending 🔗	
	Patient verification status
Vanessa Oval	•
1982-Jan-16	
999999999999	
training+vanessa+on@qhrtest.com	
Check-in Checked out to Dr. Sam Square	

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.
- 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

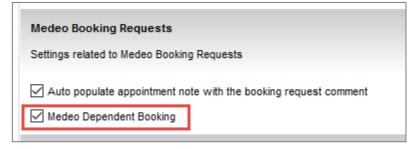
Caregivers can use Medeo to request appointments on behalf of dependents. First, Dependent Booking must be enabled by an Accuro user via System Settings. Second, Patient Relationships must be created between caregivers and dependent Patient records. Lastly, new Appointment Requests from caregivers can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

8		Last Name Oval Health # Search Only
Home		First Name Vanessa & Identifier Search Only
7		Prinst Name Vanessa
heduler		Middle Name Birthdate MM/DD/YYYY
÷.	Title	: Mrs. v Suffix: v Patient Status: Active v Office Provider: Square, Sam
Traffic	Dem	ographics Other Relationships Notes Status History Private Billing Insurer Rules Providers Provider Enrollment History Merged Patients
•	Đ	Health # 🚫 9999999999AB ON, Canada 🗸 Expiry MM/DD/YYYY File Number 17-4
atients		
0		Birthdate 01/16/1982 38 Yr Gender F Y Deceased MM/DD/YYYY
E		Family PhysNone
	0	Address 1878 Horner Ave Note 🗸
\$ Claims		City Toronto ON, Canada v Postal/Zip M8W 4Y4 Type v
-	0	Email Address: training+vanessa+on@qhrtest.com Check for Duplicates
E MR	0	Phone #s: Home (416) 555-8094 Work (000) 000-0000 Cell (555) 552-2222 Fax (Preferred Contact Me
•1•	0	Default Insurer OHIP v
<u> </u>		Admission Date MM/DD/YYYY Discharge Date MM/DD/YYYY Master Number [0] None V
7		
I2 I2 I1		Current Enrollment Status: Enrolled (Square, Sam)
E 11		Pharmacy Contact Downtown Pharmacy
<u>Å</u> 13		Last Updated: 2020-Sep-21 by Dr. Sam Square (Downtown Office - ON)
🛺 11		

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.



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- 4. 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).

💠 Manage Patient Relationships		_	×
Relationships for Brown, Martha			
Parent-Child V Brown, Martha	-	Brown, Michael	8
ОК С	incel		



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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 *Ink* **Dependency** button.

Medeo Booking Request 🛛 Pending 🔮			•
Vanessa Oval 1982-Jan-16 99999999999 training+vanessa+on@qhrtest.com	0	New Patient Extreme Migraines	
Checkout		Res	spond 🗸 Accept 🗙 Reject
No Patient Oval, Vanessa	training+vaness	+on@qhrtest.com	OK Cancel

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

Link Relationship to Med	deo Patient 🛛 🗙
	Available Relationships
Oval, Vanessa	
None	~
None	
Spouse-Spouse (Oval, Michael)	
	OK Cancel



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

	Dependency Appointment	x			
?	Appointment will be permanently linked to Oval, Michael Do you want to continue?				
	Yes No				

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 <u>Linking Patients</u>.

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

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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.

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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.'

2:30pm	Consultation (!·)		Set Note			Consult
2:45pm	Consultation (•) Consultation (•)					Consult
3:00pm			Claim Details			
3:15pm	Consultation (••)		Arrived			Visit
3:30pm	Consultation (••)		Confirmed			Visit
3:45pm	Consultation (••)		No Show			Visit
4:00pm			No Charge			Visit
4:15pm	Catabula		Status			Visit
4:30pm	Catch up		Suggestion Templates	•		Visit
4:45pm			Availability 0		Remove Availa	ability
			Copy Appointment		Ontario CMS Clir	nic
			Cut Appointment		Demo ON Clinic	

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



4. A vertical stripe matching the color of the Accuro Office's lcon 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.

Square, Sam	
4	<u>00</u>
	Ontario CMS Clin
	Demo ON Clinic

Note: To configure Office Icon colors: Start Menu > search "Office Management," 'Preferences' tab > General > Icon: select Change.



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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.

Parties. Reason and Statuse: Stepsy: Templates Adpy Templates Interval Porty Suppartion Templates Interval Porty Office Day (soline) 05 Minutes Interval Regular Office Day 05 Minutes Interval Verbreadary 10 Minutes Interval Verbreadary	3
Suggestion Templates Availability Templates Name bland Office Day (minity) 15 Minudes Office Day (minity) 16 Minutes Office Day (minity) 16 Minutes 15 Minutes 10 Minutes 10 Minutes 10 Minutes 10 Minutes 11 Minutes 11 Minutes 11 Minutes 11 Minutes 11 Minutes 11 Minutes 11 Minutes	
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- 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.
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6. Click **Apply** to save your changes, then click **Close**.

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



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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.

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For more details, please review the section in this guide on <u>Applying Suggestions</u>.





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FAQS AND KEY INFORMATION

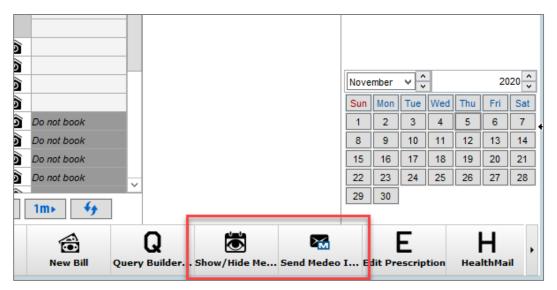
Question	Answer
Does Online Booking work at Walk-in clinics?	Yes. If your patients do not book appointments with specific Providers, but rather book with the next available Provider, a setting can be enabled to show "Any Available Provider" as an option in Online Booking. Please contact QHR Support to 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.

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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 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.

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In-Office Appointments Visible in Medeo

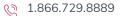
If your clinic has Patient Messaging, Online Booking, or Video Visits enabled, you can show upcoming appointments that were booked manually (via the Scheduler) to patients when they log in to Medeo.

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.

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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.





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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 <u>QHR Clinic Support</u>.

Notification Prerequisites

- The relevant Appointment Type must have 'Share to Medeo' enabled (please see <u>In-Office Appointments Visible in Medeo</u>).
- 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.





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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 Phone: 866.729.8889 Email: <u>accuro@QHRTech.com</u>

Content Disclaimer

All content in this User Guide is valid and deemed correct as of the date of publishing. The images and content are subject to change as the product develops and evolves. To view the most current version, please refer to the Accuro User Guide accessed from within Accuro (Accuro Start Menu > Help > Accuro User Guide).