

Optimising your appointment booking workflow

2022-08-19 Webinar transcript

[00:00:00] **Mike:** Hi everyone. My name's Mike. And I'll be your presenter during today's webinar. Along with my colleague Simone. We are both learning specialists here at TELUS Health with our main focus being implementing the CHR in various clinic settings and optimising workflows for the best patient outcomes. Simone will be assisting me with all your questions in the chat, which she'll be addressing at the end of the presentation.

[00:00:18] We encourage you to ask questions throughout the presentation. As Ingrid mentioned, by clicking on the chat bubble in the bottom, right hand corner of your screen. Today, we'll be explaining the relationship between your clinic's appointment types, presenting issues and individual provider schedules. Once you have a better understanding of how these configurations work together, it'll not only improve your clinic efficiencies, but also help keep your patients informed and engaged throughout their healthcare journey.

[00:00:42] We will demonstrate how connecting pre-visit Qnaires and changing appointment statuses can affect the type of notifications that are sent to your patients. And finally, we'll put all the pieces together by showing you how to configure the above features with confidence. At the end of this webinar, you'll have the knowledge and resources to streamline your appointment booking workflows and improve your patient's eBooking experience.

[00:01:04] So let me start you off with our first question of the webinar. How many of your current appointments are booked online by your

patients? Using the chat type an A for most of your appointments are booked online, a B for half or less are booked online or C none, we aren't currently using eBooking.

[00:01:21] **Simone:** Alright, I see lots of responses coming in, thanks everyone. I'm seeing a lot of B's and C's, I'm seeing a few A's Mike, but I think most of them are B's and C's

[00:01:32] **Mike:** Awesome. Thanks Simone, thanks everyone for participating

[00:01:37] Online booking. Your Collaborative Health Record (CHR) offers an intelligent integrated eBooking solution designed to accommodate both new and existing patients. It allows patients to register, update their profile information, define appointment location, indicate a reason for visit or what we call presenting issue, choose a corresponding appointment type, select an appointment, date and time from a list of available time slots and submit an appointment request.

[00:02:06] You can also give the patients the ability to change the date and time of their appointment or cancel the appointment altogether. Patients can also be prompted to complete pre-visit questionnaires associated with the reason or appointment type they requested.

[00:02:19] Let's take a few minutes to show you what an eBooking experience could look like for your patients. Here's a short video expanding on our patients from last webinar, demonstrating how two patients use their clinic's online booking platform to request an appointment. The video demonstrates our new patient, Sally requesting your very first appointment, followed by an existing patient Rudi.

[00:02:38] Take note of the differences between requesting an appointment online as a new patient versus requesting an appointment online as an existing patient. At the end of the video, you'll also see how front staff can easily confirm the two appointment requests from the scheduler and how that action automatically sends notifications to the two patients, keeping them informed along the way.

[00:02:57] Let's take a look together.

[00:03:03] **Taylor:** Let's see how our patient Sally Stomachache requests an appointment online from the comfort of her own home. She recently moved to Toronto and found a clinic online that accepts new patients. To start, she clicks on the clinic's online booking link from their website. The link directs her to the clinic's eBooking tool. On the first page.

[00:03:23] Sally selects no, since she has not been to the clinic before. Since the clinic Sally has chosen has more than one location, Sally selects Toronto. She now sees a list of the clinic's preconfigured reasons for visit, known in the CHR as presenting issues. Since she is experiencing a stomach ache, she selects nausea / vomiting.

[00:03:46] She's then asked to choose an appointment type. Since this clinic only offers one appointment type for new patients, Sally selects new patient consultation. She sees the clinic's preconfigured calendar. She chooses an available date marked with a gray circle and available time that suits her.

[00:04:09] Finally, Sally is requested to complete a basic demographic information form. She confirms her appointment details and demographic information. Since her clinic wants to control all online appointment requests, Sally must select the checkbox stating that she understands that

this is an appointment request that must be confirmed by the clinic. And she submits a request.

[00:04:34] Sally's new patient appointment request triggers a new patient intake questionnaire that she must complete before her appointment. Sally decides to skip it for now and she'll fill it out when she gets her appointment confirmation. Now, let's see how our patient Rudi Rash, who is known to his clinic, makes an online appointment from the comfort of his own home.

[00:04:56] He got out of his hot tub this morning and noticed a very itchy rash. So, rudi logs into the online booking site to make an appointment request. Rudi enters the details his clinic has on record. This allows him to access the eBooking site securely. The mobile number that he enters is used to send a one time passcode to his phone.

[00:05:20] Similar to Sally's example, Rudi has to select the clinic location and a reason for his visit. Now he has to select an appointment type. Since he is an existing patient there are more appointment types to choose from. He selects consultation with Dr. Medical. Next, Rudi selects an appointment date and time.

[00:05:41] Since he's seeing his primary provider, Dr. Medical, the calendar corresponds with Dr. Medical's configured clinic schedule. Rudi is now prompted to review the pre-filled basic demographic form. He must enter his phone number and email address again. And again, just like with Sally, Rudi confirms his appointment details and indicates that he understands that this is an appointment request.

[00:06:05] That must be confirmed by his clinic. Because Rudi selected the presenting issue rash, he's required to complete a rash history Qnaire prior to the appointment. This clinic also has a review and update your

information Qnaire associated to all appointment types that are offered to existing patients. Rudi, therefore has two Qnaires to complete.

[00:06:28] He completes both right away. Now let's briefly see how both requested appointments look from the perspective of front staff, looking at the schedule. Ronald receptionist from the Toronto clinic can easily see all the requested appointments in the left column. Ronald clicks Sally's request to view the details, including the date, time, appointment type and presenting issue.

[00:06:52] Notice the appointment status is requested. Ronald clicks confirm because the availability was correct, and this time still works for the provider. When Ronald confirmed Sally and Rudi's appointments, a window appears asking if he wants to send a confirmation email or SMS to them. If he clicks send, Sally will get a confirmation email and SMS that includes a link to her outstanding new patient intake Qnaire.

[00:07:18] Since Rudi completed the two pre-visit Qnaires associated to his presenting issue of rash, and appointment type of consultation, he just receives an appointment confirmation email, or SMS, without any links to the Qnaires. Notice that when he confirmed Sally's appointment, the appointment's status changed from requested, to action required. When he confirmed Rudi's appointment, the status changes to confirmed, since Rudi has no outstanding Qnaires to complete.

[00:07:51] **Mike:** Now that we've seen what it can look like for both your patients and staff, let's jump into all the configurations that make these scenarios possible. Starting off where it all begins, appointment types. Appointment types outline the services you offer. Think of them as ways to categorize administrative information or actions needed for different kinds of visits.

[00:08:09] You can create new appointment types or customize existing ones to match the way your clinic operates. Giving you control over your patient's eBooking experience. There's no limit to the number of appointment types you can have in the CHR. So create as many as you need to suit your clinical needs. Your appointment types can be accessed from your system settings under scheduling and the appointment types tab.

[00:08:28] Let's take a look together. Using your system navigation panel on the left and scrolling down to your system settings, then navigating over to scheduling and clicking on the appointment types tab. Looking for those extra eBooking controls? Those can also be found here, under the extras tab.

[00:08:53] Now let's take a look at those appointment type configurations and how they can affect your patient's eBooking experience.

[00:09:02] So let's compare the main configuration between Sally's Stomachache's, new patient consultation appointment type, and Rudi Rash's consultation appointment with Dr. Medical. You can customize each appointment type in terms of length, which is the default duration for this appointment type. But keep in mind that you can always make unique adjustments to the duration if needed, when booking or confirming the appointment.

[00:09:25] Minimum and maximum booking notice. Think of this as, how soon or how far in advance a patient can book this type of appointment. Something to consider would be to extend your maximum booking notice before any clinic vacations or holidays. This allows your patients to continue to book over the extended closures or unavailability.

[00:09:44] Online booking conditions. This controls the type of patient that can book this appointment online. New, existing, both, or neither. This also controls which provider the patient can book with. Offering the first provider available that offers this appointment or giving the patient the choice with a list of all providers that offer this appointment, with their profile picture and biographies for the patient to read. Or they can only book with the provider attached to their demographics as primary provider.

[00:10:12] Remember how during both Sally and Rudi's eBooking experience, their appointments were requested and still need to be confirmed by the clinic? That's controlled right here with defaulted status from patient. Therefore, all patients, all appointments will need to be confirmed by the clinic, maintaining complete control.

[00:10:30] In order to truly optimize the online booking tool, the next piece of the puzzle are reasons for visits or known in the CHR as presenting issues. Think of this as a primary reason why a patient is seeking care. Remember earlier during Sally and Rudi's eBooking experience before either of them were able to select a specific clinic service or appointment type, they had to select a reason for their visit.

[00:10:50] Most clinics have a handful of commonly seen medical conditions, and you can set these reasons for visits or presenting issues in the CHR, allowing you and your patients to select them when booking an appointment. When you create or modify your list of presenting issues, consider each appointment type you offer, and what sort of presenting issues are appropriate for that type of appointment. Presenting issues can enhance your patient's eBooking experience by making them easy to search, and then only presenting the appropriate corresponding appointment type.

[00:11:16] It can also improve your clinic efficiencies by allowing encounter templates to be linked, which would then be automatically applied once the encounter has started. Let's take a look at where presenting issues are configured in your CHR.

[00:11:29] Again, using your navigation panel on the left and scrolling down to system settings. Then navigating to the advanced section and selecting presenting issues. Let's take a look at one of these presenting issues and how they're configured.

[00:11:47] Starting off with issue name. Type the name of the issue that you'd like to appear on the reasons for visit page when booking online. Or that'll appear within the list of presenting issues when booking directly in the CHR scheduler. Internal name. For example, using URTI as the internal name for cold, flu, sore throat.

[00:12:06] This way, the patients will only see the issue name when booking online, but in your scheduler, the presenting issue will appear with both the issue name and the internal name in brackets. Linked encounter template. You can link any encounter template to the reason for visit. When a provider starts an encounter from an appointment with this associated presenting issue, the encounter template is automatically selected. Searchable phrases. To add additional search terms to the presenting issue, type each search term, followed by a comma.

[00:12:37] This is a great way to make it easier for your patients to sift through all those presenting issue options quickly, when booking online. Internal prep note. This will insert a 2-3 letter tag in the bottom, right hand corner of all appointments booked with this presenting issue. This is a big visual help reminding staff to do certain tasks.

[00:12:55] For example, every bladder infection requires a preparation of a urine dip. And last but not least services. To make this reason for visit available or active in eBooking, select the appointment type or service as applicable when a patient chooses this reason. Remember anytime you add a new appointment type or presenting issue, to reconfirm that the proper services are linked.

[00:13:17] For example, if a patient were to select this presenting issue, I would never want them to select our IV therapy appointment type. Don't forget to save your changes.

[00:13:30] Let me ask you another question. Do you use Qnaires to gather information before a patient's appointment? Using the chat, type an A for yes and they're sent out automatically or B for yes, but we send them out manually or C for no, or we only have patients fill them out in the waiting room.

[00:13:48] **Simone:** All right Mike, responses are coming in.

[00:13:50] I actually saw a few A's, which are great. Yeah. I'm actually seeing mostly A's or a few B's and C's some people say A and B, so yeah, those were our answers. Thanks everyone.

[00:14:02] **Mike:** Awesome. Seems like a lot of you're using our pre-visit Qnaires. So on that note, pre-visit Qnaires can be associated with both appointment types and or presenting issues.

[00:14:13] These are then sent out automatically, as soon as the appointment is booked in order to collect relevant information prior to the visit

[00:14:22] To add Qnaires to appointment types, simply navigate to the appointment type and add as many Qnaires as you'd like to the pre-visit Qnaire tab. The same goes for presenting issues, navigate to the presenting issue and add them to the pre-visit Qnaire tab. By using presenting issues in your CHR, it allows for a two-tiered approach when configuring your Qnaires.

[00:14:41] You may remember from Sally and Rudi's eBooking experience that each of them had a different number of Qnaires to complete. And that's because Sally's pre-visit intake Qnaire was only associated to the new patient appointment type consultation. Where Rudi had two to complete. The update your demographics Qnaire associated with his appointment type consultation and the rash history Qnaire associated with the reason for visit he had selected.

[00:15:06] But how are your patients know to complete these before their appointment? Notifications. Patients are kept informed about their appointment status with customized appointment notifications. These are communicated via email and or SMS. These can also be found in your system settings under notifications.

[00:15:25] Let's take a look in the CHR together. Again, using your system navigation panel on the left and scrolling down to system settings. Then navigating down to our advanced section and selecting notifications.

[00:15:46] We can see from the list of notifications that they're directly linked to those appointment statuses. Therefore, both staff and patient actions can automatically update appointment statuses. The interactive nature of the scheduler allows you to inform patients of changes made to their appointments by automatically sending them the notifications. Just like we saw in the video earlier when Ronald receptionist confirmed both Sally and Rudi's appointment requests.

[00:16:11] Therefore, when a patient has a booked appointment status, they'll get the appointment book notification. Or for you providers out there that might book a little more in advance, like two weeks, one month or even six months in advance. This is a great feature for your admin teams. Simply changing the appointment status from booked to confirmation required and saving your changes will automatically send out a notification to your patients, asking them to confirm their appointment. No phone calls needed.

[00:16:39] The same is true when the staff confirms appointment requests or has to cancel an appointment. Therefore again, no calls are needed throughout this process.

[00:16:49] Time to bring in all the pieces together. The last piece that has to be configured is the provider's schedule so that the online booking solution can run smoothly.

[00:16:57] This is also very important for optimising your overall clinic booking workflows. So even if you're not using eBooking, it is just important to have your providers schedule set up properly. Every provider using the CHR has their own unique schedule, specific appointment types, and clinic locations are associated to the provider schedule.

[00:17:15] You can configure their schedule so that multiple appointment types can be booked during the same time period and how many patients can be booked in a given time interval, single double or triple booked. Let's take a look at Dr. Medical's standard schedule.

[00:17:31] Here's an example of what your provider's standard schedule may look like. Starting off with location. If your clinic has multiple locations, select the clinic location in which you're available and would like

to configure. The start and until time. Select the start and until time the provider is seeing patients for the specified services.

[00:17:50] A great way to break out your morning and afternoon availability is by omitting your lunch hours from these configurations. For example, 9 to noon, and 1 to 5, instead of 9 to 5. Scheduler settings. Select the number of patients you'd like in the slot section to be booked in a single time period.

[00:18:11] This is where you control that single, double or triple book setting. Intervals. Select the defaulted start times of each appointment. This setting is most prevalent for when patients are booking online, as they will only see the selected time interval. For example, with a 30 minute interval, patients can now only book on 9:00, 9:30, 10:00, and so on. Stacking. This option pertains to only eBooking.

[00:18:36] If this option is set to on when patients select a date for the requested appointment, the CHR eBooking site only provides them the first available appointment on that day, without allowing patients to select the time. This is known as appointment stacking, because it fills up the provider's day from earliest to latest preventing any gaps between appointments.

[00:18:55] And of course last but not least, services. Select the appointment types you offer during these working hours or click all to select all appointment types your clinic offers. Now your CHR is configured and your patients are able to use the eBooking site. But before we open up to questions, let's take one last look at everything we've done here.

[00:19:17] Putting it all together. eBooking. Starting off with all those extras. Do you want your patients to be able to change or cancel their

appointment types? How much notice do they have to give you or allowing them to select their presenting issues? These are all found in your system settings, under scheduling and that extras tab.

[00:19:36] Next, if we think back to both Sally and Rudi's eBooking experience, if your clinic has more than one location, that'll be your patient's first selection. This is also where your address information is pulled for things like templates or forms.

[00:19:52] From there, your patients will select their reason for visit or presenting issues. Now, remember, depending on which appointment types these are linked to can change the list that's displayed for both your new or existing patients. Also, don't forget to include your searchable phrases to make this selection process easier for your patients when booking online.

[00:20:11] Appointment types. Since appointment types play such an integral role in your appointment booking workflows, and your patient's eBooking experience, it might be a good clinic practice to review them on a semi-regular basis. Especially before any extended holidays or time off.

[00:20:29] Locations, presenting issues and appointment types, all come together in your provider schedule. Properly configuring your provider schedule will ensure all eBooking and appointment workflows are as automated as it can be. Have you added a new appointment type recently? Don't forget to add it to all applicable provider schedules.

[00:20:48] And of course, keeping your patients informed and engaged along the way with notifications and pre-visit Qnaires. Depending on your clinic or provider needs, you can customize your notifications to be the same for all clinic appointments or create appointment specific ones when a different protocol is needed to be communicated.

[00:21:06] And finally pre-visit Qnaires. Having the ability to collect, confirm, trend relevant patient information, allows both providers and admin staff to work as efficiently as possible.

[00:21:21] With this, I'd like to conclude the presentation on optimising appointment booking workflows and hand it over to Simone to kick off our Q & A session.

[00:21:30] **Simone:** Thanks Mike, we had some really great participation in the questions. Thank you all. I'm trying to get to them as best I could everyone, but

[00:21:40] I do have one question on, or one question came in on aligning the intervals.

[00:21:46] You talked about intervals with the appointment type length when scheduling in the clinics.

[00:21:53] **Mike:** For sure, so hopping over to our system settings and looking at our appointment types.

[00:22:01] So looking at first, the length of the appointment is always controlled in our appointment type settings. So again, looking at that new patient consultation, this is where the length of the appointment is controlled. Now, if we're talking about intervals, which is controlled from your scheduling hours, I'll hop back over there.

[00:22:21] And if we were to look at Dr. Medical's standard schedule configurations. When we're looking at our intervals here, this is really controlling the start time options available online. If we remember back to both Sally and Rudi's eBooking experience, they were able to select start times at every 15 minute time intervals.

[00:22:40] So they can essentially select a time at 1:00, 1:15, 1:30, 1:45 and so on. Whereas if I were to change these intervals, that will directly impact the start time options that are presented to our patients on the online booking portal. And the additional difference that it'll provide is where the lines will start to show up on the scheduler from the internal booking perspective.

[00:23:01] So not necessarily do the intervals have to match the appointment length, but the intervals will dictate when that appointment can start from an online booking perspective. I hope that answered your question.

[00:23:12] **Simone:** Great. Thanks.

[00:23:13] Another question came in Mike about if you wouldn't mind going over again, the whole idea with the hold on.

[00:23:22] Let me get there. Make sure I am gonna, slots?

[00:23:25] **Mike:** Yeah. So slots are also managed in our scheduling hours. And if I open back up our standard schedule for Dr. Medical, these slots in your configuration will dictate within that start time. So for example, at a 12:30 appointment type, how many people can be booked in that time slot.

[00:23:43] So, for example, right now I'm only allowing single bookings. Therefore I can never be double booked. Whereas if I open up this slot configuration, I can now allow multiple patients to be booked within the same time period, allowing either a double, triple or quadruple booking configurations and so on, so forth.

[00:24:01] **Simone:** Great. Thanks. And I'm sorry, I'm looking through making sure 'cause we were covering them as we went through.

[00:24:11] And I guess there were a couple questions on a, like attaching to the, to the appointment type, as well as to the presenting issue. I guess, I wonder, you know, everyone's wondering if you could kind of expand on you know, you can do it to both, to one or either.

[00:24:32] **Mike:** And are we referring to pre-visit Qnaires?

[00:24:35] **Simone:** Yes.

[00:24:36] **Mike:** Perfect. So starting off with our appointment types. Any appointment type can have a preexisting Qnaire attached to it in the pre-visit Qnaires tab. As long as they're added here, anytime this appointment type is now booked, this Qnaire will automatically be sent out to the patient.

[00:24:51] And the answers will not only be sent to the provider in which it's booked with, but a copy will be managed in the patient's chart. As well as our presenting issue, so again, using my system settings and navigating down to presenting issues. By selecting any of our presenting issues, you'll have the same pre-visit Qnaire tab at the top. Clicking on the add Qnaire button will open up your Qnaire inventory for all published Qnaires and can be attached right here.

[00:25:21] And don't forget to save your changes.

[00:25:27] **Simone:** Great. Thanks for that, Mike. Yeah.

[00:25:33] And, and we have another great question. So is it still possible even like going back to the idea of slots, is it still possible, even if you set

one or two will you, will you get, perhaps, you know, that validation error, like if you try to book more than one person say you said it to one, and then you're trying to book two,

[00:25:53] **Mike:** Depending on who's doing the booking. So first and foremost, internal, if anybody within the CHR is booking, rules can always be broken, essentially, there'll be a prompt allowing saying that they're not normally available for this type of appointment, and you'll still be able to move forward, acknowledging that prompt, whereas eBooking can never break rules.

[00:26:12] Therefore a patient would never be able to book into a slot if it's already hit the slot number limit.

[00:26:20] **Simone:** Perfect. Um. And another question came in.

[00:26:28] If you've got the multiple Qnaires can you organize the order in which they go out?

[00:26:34] **Mike:** Yes. It's the order in which they're configured in both the appointment type and presenting issue. The first one in the list will be the appointment type that has to be completed.

[00:26:43] And then it'll be the order in which they're listed in your presenting issue. So for example, if there were multiples in here, for example, now the patient would have to first complete their appointment type Qnaires and then they will be filling these out in the order that they appear in the presenting issue.

[00:26:59] So appointment type first, then presenting issue. Great question.

[00:27:05] **Simone:** Yeah. And so Mike, again, sorry,

[00:27:08] going back to slots cause people have some really great questions. So if you are allowing multiple people in the same slot, patients via eBooking can do that. And this is not something we covered in this session, but someone's asking about group appointments.

[00:27:26] So that would be, that would be another appointment type that would be set that would allow multiple patients to book at the same time and know that they're doing it. Again, not being covered here, but I did wanna address the question that the person had.

[00:27:41] **Mike:** Exactly.

[00:27:45] So, yeah, with slots again an eBooking patient will never be able to exceed the number that's allocated here. So again, if you have two here, again, a patient can book two patients can book at 12:30, but once the third goes online, 12:30 will no longer be an option for them. Whereas our group bookings, as long as they're configured in your appointment types and set to be able to be booked online, it would have to be booked in a schedule first before availability is available online.

[00:28:11] So just to give you a little context to that, going back to our appointment types here, you do have your group templates down here. And once these are now booked internally on a provider's schedule, there is the option of allowing this to be able to be booked online and by whom.

[00:28:29] **Simone:** Okay. Thank you, Mike. I know we didn't go through that in the webinar, but I hope that helps the person who asked. Perfect. And sorry, I'm just going through, I'm making sure I'm, I've got another question for you.

[00:28:46] So we have a, you know, a clinic who they don't necessarily want the hassle of having to, to confirm all the appointments that come in, 'cause you did a really, you know, we talked about how, you know, the, the appointment requests come in and then you confirm them right in, in the schedule. But someone doesn't necessarily wanna have to do that just with the flow and the volume in their clinic.

[00:29:09] What might you recommend for a clinic like that in terms of settings?

[00:29:13] **Mike:** Love the question. So let's use the example of our same day appointment type here. Since this is typically always booked the same day that the patient's coming in, you may not have enough turnaround time to be able to confirm the appointment and notify the patient.

[00:29:26] So when we look at appointments status like this, we're now looking at potentially changing the defaulted status to these. So perhaps in this scenario, if a patient is now booking this online, we actually skip the requested section and it goes directly to confirmed. This way it'll actually appear directly in the scheduler and the admins won't have to confirm anything prior to the patient receiving their confirmed appointment status.

[00:29:49] **Simone:** Right. Thanks.

[00:29:51] **Mike:** And again, don't forget to save those changes.

[00:29:53] **Simone:** And also I think Mike, as well, sometimes a refresh of your browser would help too.

[00:30:01] **Mike:** That's a great point, Simone. So keep in mind that this is a browser, so, to enforce this change that I've just made throughout my

entire system, I do wanna refresh my browser so that it is now visible in all aspects of the CHR.

[00:30:18] **Simone:** Perfect.

[00:30:24] I'm looking through our, yeah.

[00:30:28] So I've got someone else who's asking, editing the wording of appointment reminders, so they, you know, if you're not allowing eBooking, for a clinic. So it, sorry, maybe it's two questions here, so I'll start with one. Is there a way to edit the wording of the appointment reminders?

[00:30:49] And then I guess this clinic also does not want patients making changes, confirming or canceling them online and they don't wanna allow eBooking in this case. So I'm wondering Mike, perhaps, if you could speak to that.

[00:31:02] **Mike:** For sure. So we'll first start off with appointment types. So again, if we're not allowing eBooking, it is all managed initially from your appointment type configurations by essentially deselecting, both appointment type, patients, or both types of patients to book allowed online, by deselecting both of these options, this appointment type is no longer visible on the eBooking page. So that's the first thing to deselect, would be not having any options for the online booking. The next option in terms of being able to modify, change times or cancel appointments again, are all managed in our extras tab.

[00:31:39] So when we look at our extras tab here, there's an option of first of all, do we, are we using presenting issues? So I know that was potentially a question, if we're gonna be enabling or disabling the presenting issues from eBooking. And the next is can our patients change

or modify their appointments by having the appointment change option disabled, as well as cancellations disabled.

[00:32:00] So those two can definitely be turned off right from there. And again, by not having the appointment types enabled and having these two turned off, patients can now no longer book online or modify their appointment types.

[00:32:13] **Simone:** Perfect. And Mike, I wonder if we could just reiterate,

[00:32:16] we've got someone who's just asking again about not having the option for new patients to book online.

[00:32:21] I wonder if you could just speak to that and so with eBooking, setting it up, so the new patients can't book.

[00:32:27] **Mike:** Yeah. So again, just whenever you're creating any of your appointment types, that your new patients are deselected in every single appointment type. Therefore now, when a patient arrives to the eBooking platform and they say that they have not yet been registered at your clinic, if no appointment types have this selected, then a patient will not be able to book online.

[00:32:47] **Simone:** Perfect. Okay. I think that answers that person's question I hope.

[00:32:54] And so I've got someone who's saying that, you know with their settings, with appointment types they, I guess, want maybe patient, like. So not being able to make those changes because this user is saying that they're getting, they're constantly getting requests for changes in appointment time.

[00:33:13] So, Mike, I guess if we could peek back in the extra tab, if you don't just mind showing again where that whole not being able to edit, maybe that might, that might address this question.

[00:33:25] **Mike:** So the patient change appointments, this is changing their appointment dates and time, so we can disable that all together.

[00:33:31] Same thing with patients can cancel appointments. We can definitely disable that as well. In addition to being able to turn on and off the features, you can also control how many days notice your patients are required to provide before that feature is removed from their capabilities. So for those appointments that are booked well in advance, you can give them a pretty significant advanced notice to cancel.

[00:33:49] But then after that, week's notice they no longer have that privilege. So again, you can completely control the feature and the timeframe in which they're allowed to do so.

[00:33:58] **Simone:** Okay, great.

[00:34:00] I do have someone asking, you know, they've got the disable on, but it seems like patients are still able to make the changes or perhaps that wording is in there, but maybe they just don't like, I guess will that also change the notifications?

[00:34:18] So if you've turned that off, then they won't have that option, that link within their notification to make changes. Do I have, do we have that right?

[00:34:28] **Mike:** Yeah, I think we could definitely take that away and see if there's something that we're missing in terms of the disabling here and how that's linked to the notification actions.

[00:34:37] **Simone:** Great.

[00:34:39] **Mike:** Now, in terms of notice, I did see something come up in the chat around timeframes allowing hours instead of days. So unfortunately the CHR is currently configured based on calendar dates. I do know that we potentially may be looking into timeframe indications there, but currently it is in calendar dates.

[00:35:05] **Simone:** Okay, great.

[00:35:07] And I've got someone else asking it's a really good question. So what does it look like if the patient missed that notice period? If they wanted to change their appointment you've got a certain amount of time in which they can do it and they've passed that. Do we know what it says like do they get, you know, maybe a different wording in the notification? If they try to make that change?

[00:35:30] **Mike:** It's a great question. Unfortunately, I won't be able to demonstrate that today during the session, but it is something we conclude in the resource documents after the session.

[00:35:38] **Simone:** Okay, great. And, and yeah, you mentioned the calendar thing, which addressed that question.

[00:35:45] Thank you so much, Mike. Perfect. I'm just going through making sure I'm getting everyone's questions. Thank you all so much. I hope I'm getting them all.

[00:35:58] Perfect. I'm just looking through.

[00:36:04] Okay. So you've set.

[00:36:06] So in the appointment types, we talked about you know, the amount of time, you know, building up your appointment types. So, you know, someone has asked, is it at all possible, even if you've set the appointment for 20 minutes or half an hour, if you needed to change it in a particular instance, is it still possible to make that change?

[00:36:26] **Mike:** Of course. Great question. So if we go back to our schedule right now and attempt to book an appointment when I click into my schedule and I initially have a duration here. However, we don't wanna change the duration until after we've selected the appointment type. Once I select an appointment type, if I need to one off adjust it, we'll notice here that it is auto populating, that 45 minute time period.

[00:36:47] However, by clicking into this, I can now manually adjust those times as needed, before I save the appointment. So, for example, if this was a slightly longer appointment and I now needed this to go to 2:00 PM instead of the 1:45, by making these my unique adjustments right now, prior to saving the appointment, it would now give me that additional length with this appointment type.

[00:37:07] However, again, moving forward, anytime the new patient consultation appointment is booked, it will still pull in that defaulted time. So this would be the great way of making that one off adjustment.

[00:37:20] **Simone:** Perfect. So you can still make one off adjustments, even though you've set your appointment types to a particular amount of time.

[00:37:26] **Mike:** Correct.

[00:37:31] **Simone:** Perfect. Great.

[00:37:39] Perfect.

[00:37:40] And we've got some questions that are, you know, a question about logging of notifications in the chart. And we are I think Mike, perhaps it might be best if we pass on more resources. I think that's a bit more, it's a bit of a deeper explanation. So maybe we can take that question away and we can provide the answer in the resources that we send out, that last question that just came in.

[00:38:05] **Mike:** For sure. I mean, I can hop into Rudi Rash's chart real quickly just to show you that in a patient's chart, there will always be a section in there for outbox, which will show you what the patient has had recently communicated to them. So if I were to hop into Rudi Rash's chart, and hop into the outbox. Patient outbox, will now show you all notifications that've been sent to a patient and when they were sent out, and where they were sent to.

[00:38:34] **Simone:** Perfect. I hope that answers that question. Thanks for that. Yeah.

[00:38:39] So I've got another question being able to kind of track and see cancellations and rescheduling.

[00:38:52] **Mike:** For sure. Great question. So we can even access all of that from the appointments card. So again, if I were to book an appointment here and I'm gonna select our Rudi Rash patient, just because we know he has quite a bit of activity in this CHR. And again, I'm just gonna select a random appointment here just as a training experience.

[00:39:09] So just something as a regular appointment type here, and we'll pretend it's still about his rash. The nice thing with the CHR and the

appointment card is that everything about this patient is managed within the same section. So if I were to pull up my Rudi Rash here, again.

[00:39:30] Get my regular visit and his rash appointment.

[00:39:36] In this appointment card, we can actually see all appointment history for this patient. So up in the top here amongst the tabs at the top, if we refer to the clock here with the counterclockwise arrow that will actually show all appointment history for this patient. I can now see dates, times, the status of that appointment, whether they're rejected, canceled, confirmed.

[00:39:57] And if I now needed to book this as a follow up appointment with the exact same appointment type and reason for visit. By selecting the last option in this appointment card allows me to copy this at any preset defaulted timeframe. So either a next week, two weeks, a specific timeframe, or I can select and customize one.

[00:40:14] And now the links below are gonna be directly linked to this provider's schedule and an open time slot availability. So it won't provide me any time slots in this list that have already hit the limit of slots.

[00:40:29] Great question.

[00:40:31] **Simone:** Great. And Mike, another question came in,

[00:40:34] I know that we didn't talk about this, this wasn't the focus of this webinar, but you did mention notifi-, we did talk about notifications. And I wonder if perhaps, you know, someone was asking about the wording in notifications. If you wouldn't, you know, perhaps we can take a quick peek in notifications to show the wording in them.

[00:40:56] **Mike:** Of course. I know we'll definitely have more

[00:40:59] resources available for you afterwards in regards to templates and variables and how they can be configured, but they do exist in your CHR under your system settings. Again, scrolling down to our advanced section and notifications. Any default or unmodified notifications will appear as a greyed out default in their description under both email or SMS.

[00:41:21] The moment you customize a notification it'll appear as customized and to revert back to the defaulted option, you would click on the circle with the line through. Now in terms of what can be modified naturally limits are almost endless depending on the type of variables you are using. But anytime you're seeing a blue bubble here, it is correlating to a patient or instant variable that is allowing information to prepopulate. Things like patient actions or location information.

[00:41:47] We'll also send links to your patients to either complete their Qnaires or to provide a Google Maps location for your clinic. In terms of modifying anything here, you have your normal word processing capabilities to align any type of format or structure you're looking to convey to your patients.

[00:42:02] Again,

[00:42:03] we'll have more information on the variables in which you can select from the notification section. Anytime you're looking to preview what this notification can look like in the top right hand corner, you have your preview button, which will get you a basic HTML version of this notification.

[00:42:20] **Simone:** Thanks so much for that, Mike.

[00:42:22] We have another question relating back to the slots. We wonder if you could touch really quickly on the difference between slots and group appointments.

[00:42:36] **Mike:** For sure. So in terms of slots, this is how many people can be booked in a specific time interval as individual patients. Therefore again, allowing either a single, double or triple booking, seeing one, two or three patients within that 15 minute interval. Whereas a group appointment would essentially be a booked appointment on a schedule, allowing a certain number of patients to then enroll for that group program.

[00:43:00] So, for example, if we were to bring this all together with a group appointment, which is again, completely separate from slots, I would now need to book a group appointment on a provider's schedule to essentially create that availability. So by using my add button here at the top, I will now select a group visit, which will now allow me to select my location. And pick one of those preconfigured appointment types that were configured under the group appointments.

[00:43:25] By now managing one of these appointment types and provisioning it in my schedule. And now allows me to confirm how many patients can now book within this group appointment that is an hour long. So slots here are specifically related to the group appointment, not to the slots in your scheduling configuration.

[00:43:49] **Simone:** Thank you. I hope that, I think that'll address that question. And then again, not, this is not related.

[00:43:59] This is not what we covered today, but a great question I think is making group appointments reoccurring.

[00:44:09] **Mike:** That's a great question. I think we'll need to include that in our resource documents at the end of this webinar.

[00:44:14] **Simone:** Perfect. Yeah. And I think, and thank you. You did answer that question that that person asked about between the slots and the appointment types, oh sorry, and the group appointments. So thank you so much for that. Looking through.

[00:44:30] Someone is also asking about, you know, what, if you want to have sort of a placeholder in the schedule, you don't want someone to book in there. You wanna keep that placeholder in. And, and then use it later to book someone in. How can we create a slot where we don't want people booking it.

[00:45:04] **Mike:** Great question. I love these little off times or, or blockage to, to maintain kind of same day availability. So in order to block out any time to prevent online booking, we're gonna be using our off time in our scheduler. By adding in any off time will prevent eBooking capabilities. So now I'd be able to select any type of color applicable and a duration.

[00:45:24] So if I'm gonna select this red color here, I can now pick, for example, an hour on my Friday afternoon, then I'm gonna reserve the same day appointments. So for example, I can now go to the middle part of my day, click in there and they'll put any memos that are needed. So for example, I can say blocked for same day appointments only.

[00:45:46] And by clicking save this now removes this availability from online booking. And now only allows internal bookings, or we can manually remove this blockage on the day of. To then open up that eBooking availability. Keep in mind on off time, internal bookings can still be managed over the off time if needed.

[00:46:05] So of course, if we still needed to book an appointment as an emergency visit, we can still do so without removing the off time, still preventing any online booking from taking place. Keep in mind to access the blocked time, you do need to click and hold in order to open up.

[00:46:21] **Simone:** Okay, great. So a couple follow ups to the off time.

[00:46:27] Someone's asking about a shorter time option for booking off time. I'm not sure if that means either number of steps or controlling the actual amount of time that you have, like the actual amount of time that's gonna take up in the schedule.

[00:46:53] **Mike:** Unfortunately, the only options that are present here are the ones that are depicted. So currently there is no option to be less than 30 minutes.

[00:47:01] **Simone:** OK. Alright. I hope that answers that question. Okay. I'm just looking for some others.

[00:47:19] So the requested appointments, we talked about requested appointments in the beginning. What order are those requested appointments in? Would they be the order, the alphabetical order of the providers, if I'm an MOA looking at my schedule?

[00:47:39] **Mike:** Great question. So the order in which your appointment types are gonna be displayed both online and when booking internally. So again, if we look at the way that our appointment types are depicted here. Are gonna directly match the order in which they're displayed in your system settings. So by navigating to your system settings, scheduling, and appointment types. Anytime you'd like to rearrange this order, you can simply click and drag and rearrange that order.

[00:48:04] And when you do let go and refresh your browser, that'll now be the new order from online booking as well as in your scheduler.

[00:48:15] **Simone:** Okay, great.

[00:48:16] We had another question about the Qnaires that we send out, so we send out a Qnaire and it's, it's great. We got that information before they come in. Could you talk about where, like, where I would see that information once a patient completes it.

[00:48:35] **Mike:** Yeah. So anytime that we have a completed Qnaire, it's gonna populate in multiple places.

[00:48:41] The first place that we're gonna see it naturally would be in the appointment type. So in the appointment under the appointment card, not only are the preconfigured Qnaires visible from here. But once the patient's responding to them, not only does the status automatically change from action required, to the defaulted status of this appointment, but we would now also be able to see the results in the results Q-, or the Qnaire responses tab in the appointment.

[00:49:04] Naturally, this is also gonna be pulled into the encounter when the provider goes to start the encounter from this appointment using the general tab and the encounter button.

[00:49:15] Great questions.

[00:49:17] **Simone:** Awesome. Great. Thanks. Um. Okay so, sorry. So perhaps I had misunderstood that person's question.

[00:49:33] So. On the left hand side per provider, we see those appointments. So if a provider has, so you've got, say two providers and

those two providers each have multiple requested appointments. Is that what you were talking about, what order those appointments within for each provider would be in?

[00:49:55] And I apologize. I hope I'm understanding this person's question correctly. And if I'm not, we can definitely send more resources with the webinar.

[00:50:06] **Mike:** Great question. If I'm understanding that correctly, as the request appointments, come in, for example, for Dr. Mike Medical, they're actually gonna come in here as a first come first serve basis.

[00:50:14] So as they're booked, they will now come in in the order in which they've been requested.

[00:50:20] **Simone:** Great. Perfect.

[00:50:32] And someone else is asking about information about the clinic in the calendar. Like internally, we wanna see information about, you know, maybe that this particular clinic is going to be assigned to a particular individual, like a note. For that day. How might we put that on? This person's currently using off time as a way of communicating those details is that what you would recommend Mike?

[00:50:59] **Mike:** Nailed it. Exactly. So if we're ever looking to include some type of day note or anything like that at the top of the schedule, the off time is your best option. So by using that off time, and you would include everything in your memo. So by now, for example, selecting my 30 minute time slot, I can even do it before my availability.

[00:51:15] So it's not impeding my actual schedule. And by putting in my off time here, I can say working out of downtown office. And that's exactly how you would do your day notes.

[00:51:33] **Simone:** Perfect.

[00:51:42] **Mike:** I think we have time for one more question, Simone.

[00:51:44] **Simone:** Yeah, I'm looking through I'm sorry. I think, you know, there are so many questions coming in. I'm hoping I'm not missing too many. But I'm just gonna keep going through. So in the calendar it's, I think this is meaning in the internal calendar itself, a quick view to see a person like a provider's availability.

[00:52:10] So just visually I look at, I open up my calendar. I look, how can I visually see a person's availability? A provider's availability?

[00:52:20] **Mike:** Excellent question. First and foremost, we can automatically see availability versus non-available time with just the different color scheme here between a greyed out section and the white section.

[00:52:30] So naturally the white section is deeming available, versus the gray being not available. Now that if we wanted to see what appointment types this provider is available for, the moment we open up our dropdown menu, it's only gonna show you the ones that are currently available, whereas the ones that are not will be greyed out.

[00:52:48] There are additional ways of changing. What type of clinic is being operated using that color scheme on the background of a provider schedule.

[00:52:55] But again, we'll include those resources and our handouts after the webinar.

[00:52:59] **Simone:** Perfect. And Ingrid, I think we're handing it back to you at this point? Time check.

[00:53:06] **Ingrid:** So, yeah, we've unfortunately run out of time to answer more questions or any of the other questions that Simone missed.

[00:53:14] Really, really great questions. And I really hope everyone benefited from each other. Then also, obviously from Mike's presentation. And again, if we didn't get your questions, we'll most definitely respond to them in our email.

[00:53:27] My colleague Taylor is about to post a quick survey about the session in the chat. And we really just wanna ask you to take a quick minute to complete it.

[00:53:37] Your answers are anonymous, so be as verbal as you want to be, we just really appreciate your feedback so we can keep improving these future events and just our educational content overall. As mentioned at the beginning of the webinar, I know a few of you came in a little bit later. The session was recorded.

[00:53:55] We'll be emailing you the recording as well as additional learning resources.

[00:53:59] We've got a new video. That's also gonna be included in there. So yeah. Keep an eye on the email that you'll get in the next couple of days.

[00:54:08] And then I just wanna say thank you again to our presenters, Mike and Simone. And to you, our CHR users, for joining this webinar today, have a lovely Friday. Bye.