MyPatientScheduler Asynchronous™

Frontdesk User Manual

Medicus Software LLC

Introduction

MyPatientScheduler Asynchronous is a web-based application that allows your Patients to register and request on-line appointments. MyPatientScheduler has three types of users; Patients, Administrator, and Frontdesk. This document outlines the major system operations for Frontdesk users.

Frontdesk

The Frontdesk user account allows a front desk person to manage all aspects of the Patient Registration, Appointment Request, and Appointment Confirmation process.

Patients will register for User accounts in order to use the system. Once a Patient is registered, a Frontdesk user will review the Patient information to determine if it is a new patient or an existing patient of the practice. Existing patients of the practice will be updated with their unique front office Practice Management identifier. New patients will be created in the front office Practice Management system.

Once registered, Patients can request appointments. A Frontdesk user will review each appointment requests and update it with an actual appointment date after review of availability with the front office Practice Management System.

Some time prior to a Patient's appointment, the system will queue up appointment confirmation request notices. A Frontdesk user reviews and sends the confirmation request notices.

This section outlines how to conduct the above business processes and many others.

Navigation

The Frontdesk user account allows the user to move about the application via primary navigation items located at the top of each page. These menu items are available on every page and indicate the major system activities that can take place.

Secondary navigation takes place within the context of a specific page or action. Many pages will contain secondary links that allow you perform specific actions within a menu item.

Home Page

The Frontdesk user's home page contains an important section labeled "Required Actions". This section lists any pending actions the system needs the

Frontdesk user to complete. For example, if a new Patient registers for a user account, this section will show a link that will take you to a report showing the list of users needing account verification. From there you carry out the action of verifying the Patient.

My Frontdesk Profile

Your Frontdesk user account contains a username and other information that allows the system to identify you. You may change any of this information with the exception of your username.

How do I get a Frontdesk User Account?

Frontdesk user accounts are created by the Administrative user.

How do I update my Account Profile?

1. Click the My FrontDesk Profile menu item.
2. Update the information you wish and click the Save button.

How do I reset my Password?

1. Click the My FrontDesk Profile menu item.
2. Click the Reset Password link near the bottom of the page.
3. Enter the required information and click the Update Password button.
4. If this process does not work for you, your password can be reset by the Administrator.

What if I forget my Password?

1. Navigate to the main login page.
2. Click the I forgot my Password link.
3. Enter your username and tab to the next field. The system will lookup your secret question prompt you for it.
4. Enter the security code, your secret question, and press Submit.
5. The system will reset your password to some random set of letters and numbers and email it to you. Check your email for your new password.
6. Login with your new password and immediately change it to something you can remember.

What if I forget my Username?

1. Navigate to the main login page.
2. Click the I forgot my Username link.
3. Enter your email address and tab to the next field. The system will lookup your secret question and prompt you for it.
4. Enter the security code, your secret question, and press Submit.
5. The system will email your Username to the email address registered with your account.

Patient and User Account Management

When a Patient registers for a user account, they will be considered "unverified" until the Frontdesk user performs Patient Verify process. Unverified Patients may have limited appointment types they can request compared to verified Patients.

It is important to understand the difference between a Patient and a User account. A User is allowed to login to the MyPatientScheduler application – much like a Frontdesk user. A Patient is acted upon by a User account. When a person (Patient) registers for an account, they are actually creating a new User account *and* a new Patient record. The Patient record is automatically associated to the User account as the primary member. See the "What is the difference between a User and a Patient?" section below.

A User account may have many Patients associated to it – a family group. A parent may register for an account and then associate all their children to the same user account – thereby allowing a single user account to manage appointments for multiple patients.

What is an Unverified Patient?

Unverified Patients are those patients which have not been verified to exist in the front office Practice Management System. Any time a user registers Patient information in the MyPatientScheduler system, that patient information is considered unverified until the Front desk user performs the verification process. This confirms that the patient information exists in the front office Practice Management System.

How do I "Verify" a Patient user?

1. Using the Patient List report available from the home page (Unverified Patients), click the edit link associated with the Patient you wish to verify.
2. Find the corresponding Patient record in the front office Practice Management System and note their unique Patient ID number.
3. Record this unique Patient ID number in the Front Office ID field and click save.

How do I create a User Account?

1. Follow the steps to create a patient record (see How do I create a new Patient record?).
2. From the Patients list report, click the create link in the "User" column corresponding to the Patient you created in step one.
3. Update any of the default information as necessary and click the Save button.

How do I reset a User's Password?

1. Click the Users menu item.

2. Filter the report to find the User needing the password reset.
3. Click the Edit link corresponding to the User needing the password reset.
4. Click the Reset User Password link near the bottom of the page.
5. Enter the required information and click the Update Password button.

How do I create a new Patient record?

Use this option to create a new Patient record. Note that this patient will not be automatically associated to any User account. You will need to do that manually. Use this process to create a new Patient record and associate it to an existing User account. For example, create a child patient that you plan to associate with that child's existing parent user account.

1. Click the Patients menu option. A report of existing Patient records will be presented. Use the filter options to verify that the Patient you intend to create does not already exist.
2. Click the Create a New Patient link at the bottom of the report.
3. Enter the required information and press the Save button.

How do I update Patient Information?

1. Select the Patients menu option.
2. Use the filter criteria to locate the Patient needing the updates.
3. Select the Edit link of the Patient you which to update.
4. Update the Patient information and press the Save button.

How do I associate a Patient record with an existing User Account?

Sometimes you may wish to add an existing Patient to an existing User account. Doing so will add the Patient to the User's family group.

1. Click the Patients menu option.
2. Use the Patient list report filter options to locate the Patient you want to add as a family member to an existing User account.
3. Select the Edit link corresponding to the Patient.
4. Select the View Family Groups link near the bottom of the page. This will present you with a report showing all the family groups (user accounts) the patient is associated with.
5. Click the Add Patient to another Family Group link at the bottom of the report.
6. Select the User account you want to associate the Patient with and press the Save button. You will redirected back to the Patient Family Groups report showing the updated list of user accounts the Patient is associated with.

How do I view Family Member Groups a Patient belongs to?

1. Click the Patients menu option.
2. Use the Patient list report filter options to locate the Patient you want to view the family members report for.
3. Select the Edit link corresponding of the Patient.
4. Select the View Family Groups link near the bottom of the page. This will

present you with a report showing all the family groups (user accounts) the patient is associated with.

Appointment Management

A core value of the MyPatientScheduler application is that it allows Patients to request appointments without calling the office during normal business hours. A User will request an appointment, which will then require a Frontdesk user to "book" the appointment through to the front office Practice Management System.

What is a Pending Appointment?

When your Patients make on-line appointments with MyPatientScheduler in Asynchronous mode, they are actually making a request for an appointment. These appointment requests are queued up in the system until you process or Book them. If your system has Pending Appointments, you will see a link on your Home page telling you how many are in need of processing.

How do I process a Pending Appointment?

1. From the Home page, click the Pending Appointment Requests link. Note this link will only be available if there are Pending Appointments needing to be processed.
2. Review the Patient's Appointment Request information and find an available timeslot for this appointment in the Front office Practice Management System as close to the requested information as possible. You can click the information icon to see appointment details.
3. Record the appointment in the Front office Practice Management System.
4. Click the edit link corresponding to the appointment you are processing.
5. Update the MyPatientScheduler Appointment Status to "Booked", enter the Appointment Date and time to what you recorded in the Front office Practice Management System, and record any message you want to accompany the automatic email notification sent to the user.
6. Click the Save button. The MyPatientScheduler system will send an email to the requestor indicating the date and time of the appointment.

How do I Acknowledge a Cancelled Appointment?

When a Patient cancels an on-line appointment, you must cancel the corresponding front office Practice Management System's appointment manually. The MyPatientScheduler application provides you with a link on your home page to indicate which users have recently cancelled appointments.

1. Click the Pending Appointment Cancellations link on the home page. Note, this link will only be available if there are cancellations needing action.
2. Review the cancelled appointment information and cancel the corresponding appointment in the front office Practice Management System.

3. Click the Acknowledge icon corresponding to the on-line appointment you want to acknowledge. A pop-up message will appear to verify your request. Click OK to complete the process.

How do I Acknowledge a Confirmed Appointment?

When a Patient confirms an on-line appointment, you must also confirm the corresponding front office Practice Management System's appointment manually.

1. Click the Pending Appointment Confirmations link on the home page. Note, this link will only be available if there are confirmations needing action.
2. Review the confirmed appointment information and confirm the corresponding appointment in the front office Practice Management System.
3. Click the Acknowledge icon corresponding to the on-line appointment you want to acknowledge. A pop-up message will appear to verify your request. Click OK to complete the process.

How do I send Confirmation Notices?

At a pre-configured number of days prior to an appointment, each Patient will receive an automated email confirmation request. This email will contain a link the user (patient) can click on to confirm their appointment. These confirmation request emails will be sent to users each day until they confirm their appointment. Note that the emails are actually sent to the Users associated to the Patient that has the appointment. If a patient record is associated with two User accounts, both User accounts will receive email notices.

1. From the Home page, click the Send Confirmation Reminder Notices link.
2. Review the notices that are queued.
3. Click the Send Notices button at the bottom of the report.

Other

What is a Report Filter?

Most reports have filter options near the top of the page. You can use these filter boxes to search for specific records

How do I filter a report?

Most screens of MyPatientScheduler application present data in the form of a report. In many cases, the report contains filter criteria at the top of the page. Enter or select your filter criteria and press the Enter key or the Filter Report button. The report will then filter the data presented to you based on the criteria you entered.

How do I sort the data in a report?

Many reports allow the user to re-sort the data presented. Simply click on the column heading you wish to sort by. Your first click will sort the report in ascending order, a second click on the same column will sort in descending order.

What is the difference between a User and a Patient?

In order to use the MyPatientScheduler application, you must have a user account. A user account consists of a user or login name, email address, secret question and password information. There are three types of user accounts; Patient, Frontdesk, and Administrator.

A Patient type user account is special, in that it has one or more Patient *records* associated with it. Frontdesk and Administrator accounts do not have Patient records associated with them. When a Patient registers to use the MyPatientScheduler application, the system collects both User account and Patient information from them. The patient's User account is directly associated to their Patient record.

A MyPatientScheduler Patient record is synonymous with a Patient record in the front office Practice Management System. A Patient has a name, address, and birth date information. Appointments are always for a Patient and not a User. A User requests appointments for a specific Patient.

A User account may have many Patients associated with it. And a Patient record may be associated with multiple User accounts. When many Patient records are associated with the same User account, it is know as a Family Group. This allows a single User to maintain appointments for their entire family. .

