Appointment Schedule User Guide

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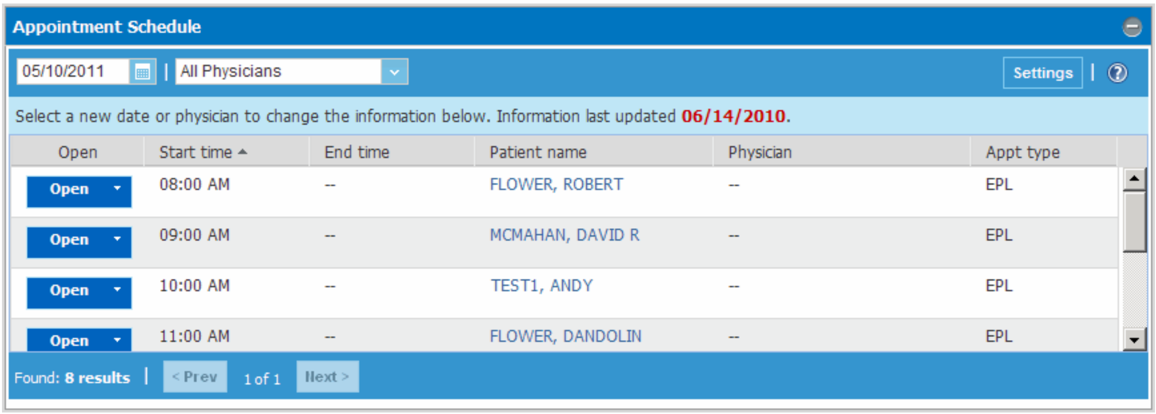
USING THE APPOINTMENT SCHEDULE PORTLET

The Appointment Schedule portlet is an optional service package of your Covisint portal. The portlet provides a snapshot view of scheduled patient appointments for a physician's office.



The appointment information is retrieved from, and maintained with, your Practice Management System (PMS). The service allows practice users to:

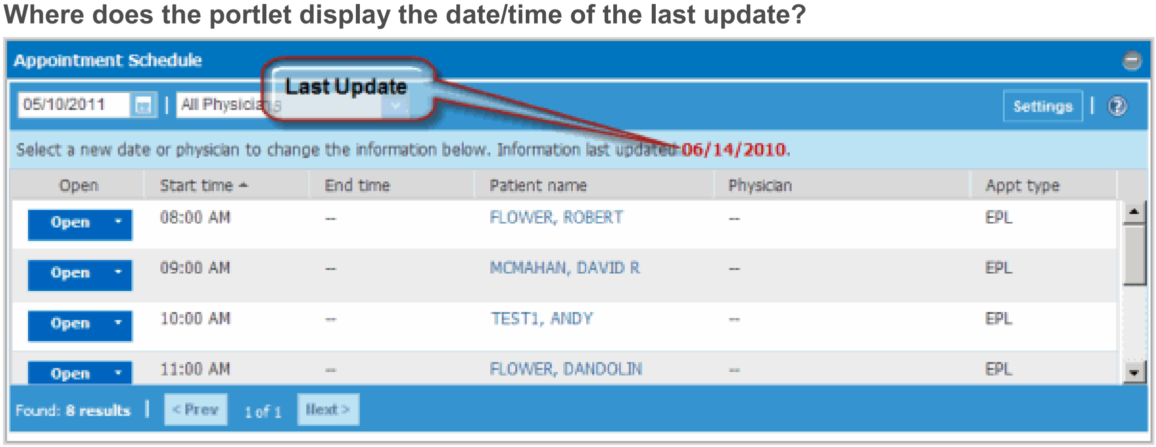
- View patient appointment schedules.
- View patient data in the Patient Dashboard.
- Access integrated portal services, such as single sign on to patient within participating third-party applications.

Before you can use the Appointment Schedule portlet, the following conditions must be met:

1. Your practice has signed up and been approved for the Appointments Schedule service package.
2. Your practice's PMS system has been integrated into the Covisint Portal.
3. Your practice's PMS system has an appointment schedule functionality/module installed.

The information displayed in the Appointment Schedule portlet is retrieved from your PMS throughout the day. The portlet also displays the last date/time the information was updated.

Where does the portlet display the date/time of the last update?



Patient data is updated in near real time.

Near real time - The time interval between updates can vary. Covisint recommends that updates are scheduled to occur within 15 minute intervals — if your PMS system can support 15 minute time intervals.

Get started by:

- Configuring the Appointment Schedule Portlet
- Viewing the Appointment Schedule

The procedures in this user guide assume you have accessed your portal and navigated to the Appointment Schedule portlet.

Configuring Your Appointment Schedule Portlet View

Configuring Your Appointment Schedule View

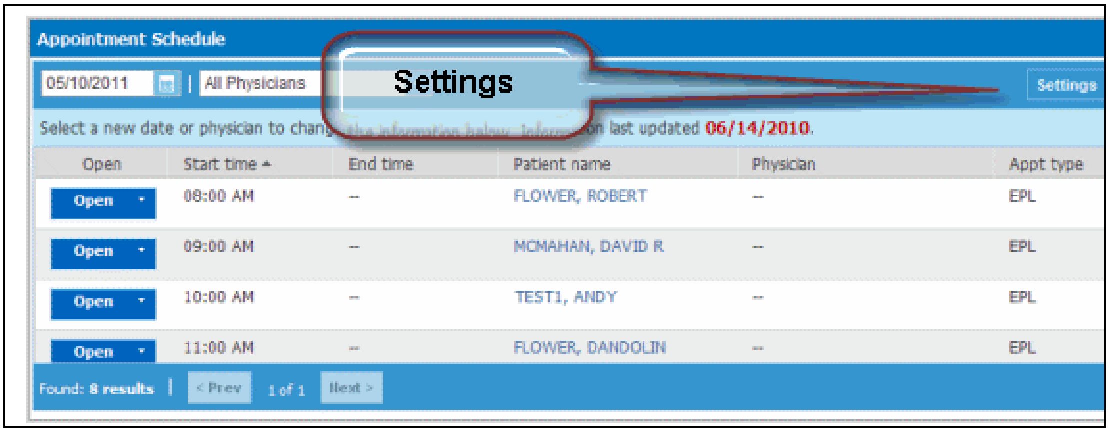
You can customize your Appointment Schedule default view by modifying the:

- Doctor for whom you want to view appointments
- Column display

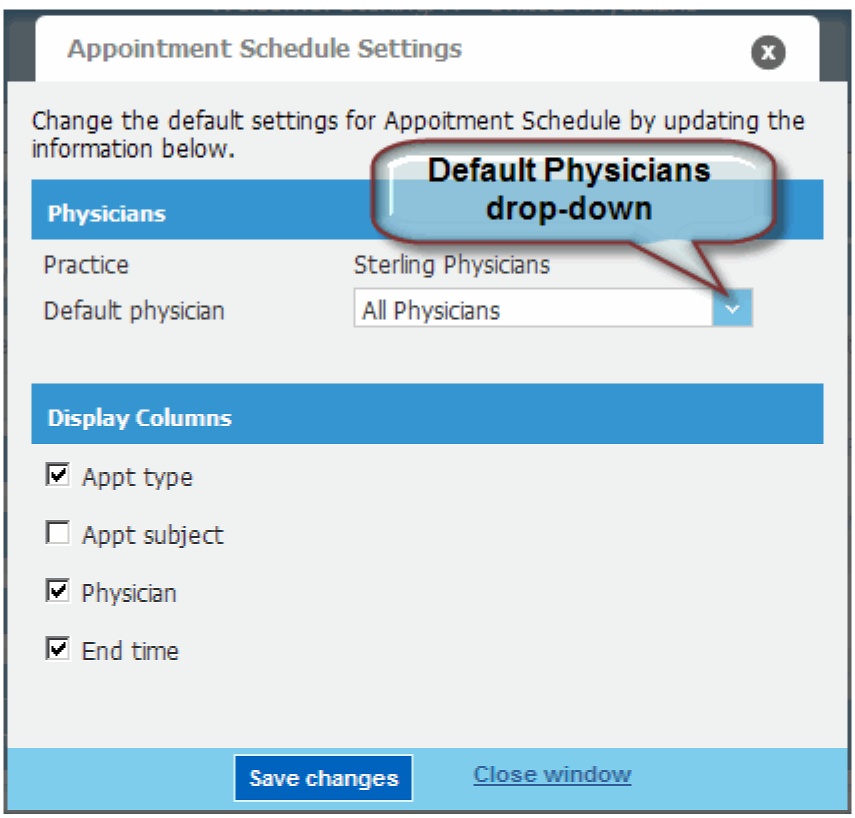
Setting the Default Physician View

Complete the steps below to configure your Appointment Schedule default view of the physicians for which you want to view appointments.

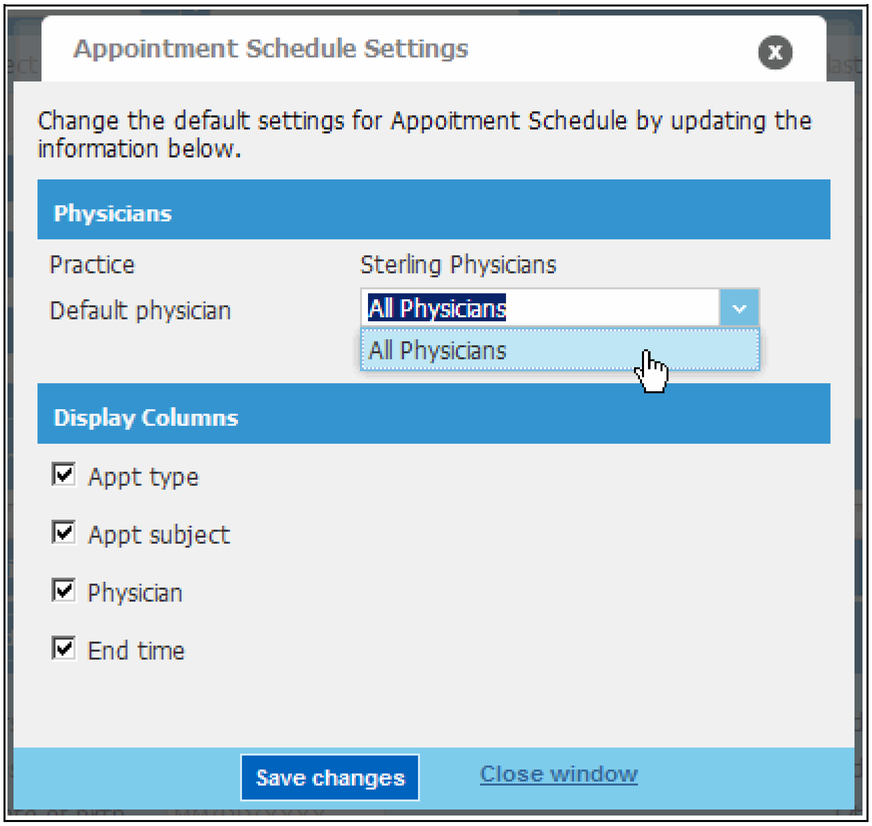
1. Click **Settings** in the Appointment Schedule toolbar. The Appointment Schedule Settings window displays.



2. In the Appointment Schedule Settings window, click the **Default Physician** drop-down. The list of available practices displays.

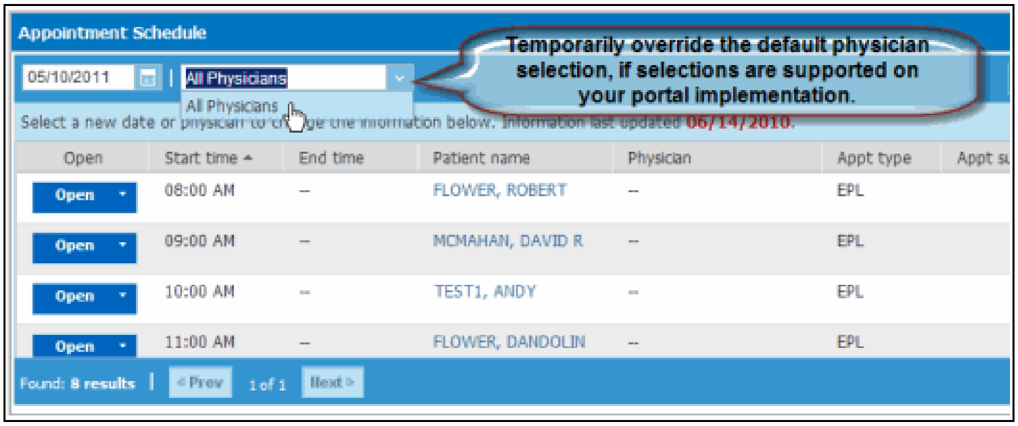


If your portal does not support multiple practices, only one name displays in the drop-down list. In that case, you cannot modify the Default Physician setting.



3. In the Default Physician drop-down list, click the *name of the physician* to set as the default on the Appointment Schedule portlet. You can select:
   - All Physicians, to set the default view to display appointment schedules for all the available physicians.
   - One physician, to set the default view to display only that physician's appointments.
4. Click **Save changes** The Appointment Schedule Settings window closes, and the default view is updated.

Hint: When you are viewing the Appointment Schedule later, you can temporarily override the default physician setting - if your portal supports multiple practices



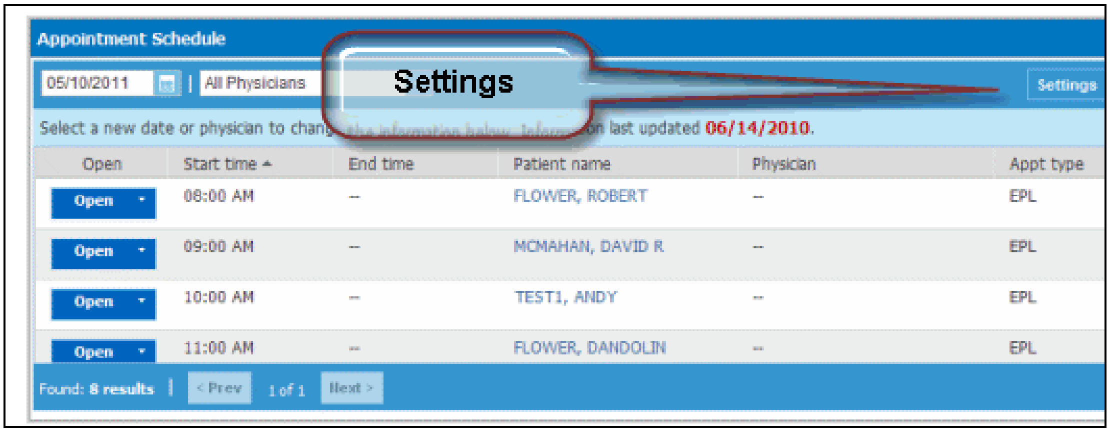
RESULT:

You have successfully modified the Default Physician setting.

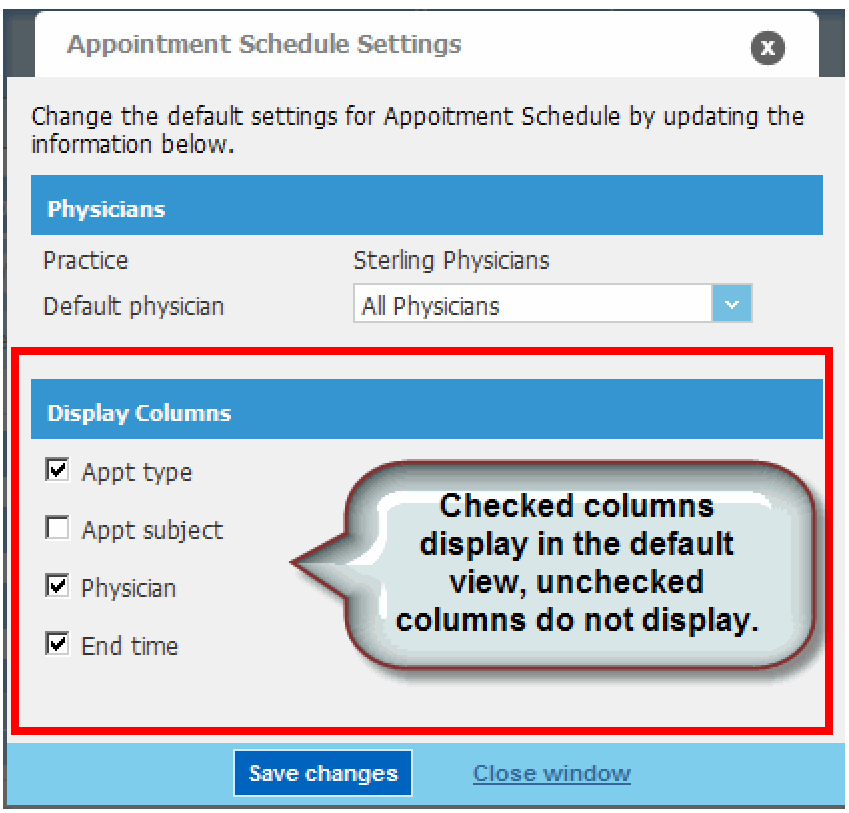
Configuring the Column Display

Complete the following steps to configure the columns you want to display in your Appointment Schedule portlet.

1. Click **Settings** in the Appointment Schedule toolbar. The Appointment Schedule Settings window displays.



2. In the Appointment Schedule Settings window *Display Columns* section, select or clear the column check boxes to configure your default column view.



3. Click **Save changes** The Appointment Schedule Settings window closes, and the default view is updated with your column selections.

RESULT:

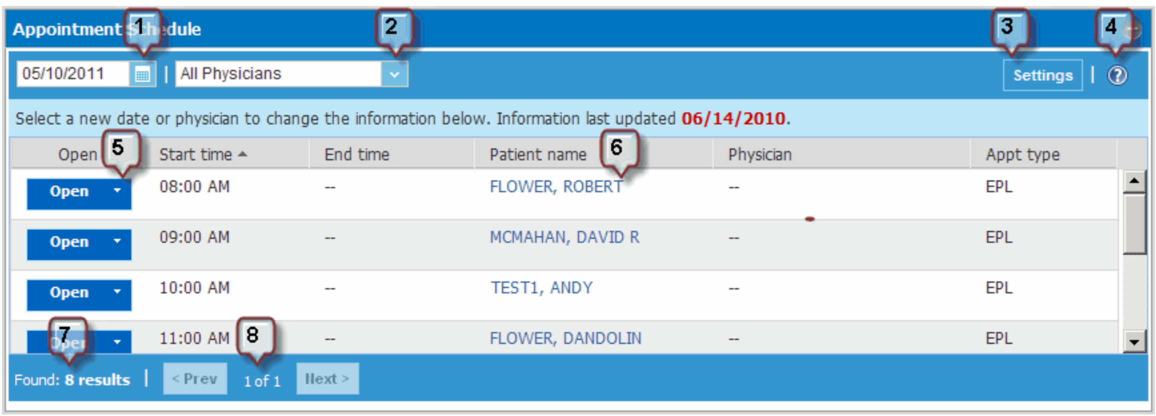
You have successfully configured your Appointment Schedule default column display.

VIEWING THE APPOINTMENT SCHEDULE

The Appointment Schedule portlet provides a view-only window into appointments managed with your appointment scheduling application.

> You cannot create, delete, or modify appointments with the Appointment Schedule portlet. Manage appointments in your appointment scheduling application.

View a description of how to use each labeled item in the table below.



Label	Description
1	Click the *calendar icon* to select the date for which you want to view appointments. The default display date is "today." In general, the Appointment Schedule allows you to view: • Today's schedule (the default view) • Past days schedules (up to a maximum of 10 days in the past) • Future days schedules (up to a maximum of 10 days in the future) The maximum number of past or future days that can be viewed is dependent upon your PMS system, and may be less than 10. The maximum number supported by the Appointment Schedule portlet is 10 days. For example, if today is August 15, this Appointment Schedule is able to display appointments that occurred or will occur between August 5 and August 25.
2	Select the *physician* for which you want to view appointments, if your portal supports multiple practices. If your portal does not support multiple practices, there are no alternate selection options in the drop-down list. For more information, refer to Setting the Default Physician View.
3	Click *Settings* to modify the default display for your Appointment Schedule portal. For more information, refer to Configuring Your Appointment Schedule View.
4	Click the *question mark icon* to view user help in a new window.
5	Click a patient's *Open* drop-down to perform additional operations with the patient's data. The operations vary according to your system implementation, and can include

functions such as:

- Viewing a Patient Record in a Third Party Application
- Viewing the Patient Dashboard
- Printing a PDF of Patient Information
- Editing Patient Information

6	Click a *patent name* to view the patient's data in the dashboard.
7	View the total number of appointments retrieved for the selected date.
8	If multiple pages of appointments are retrieved, navigate through the results using the *Prev* (previous) and *Next* buttons.

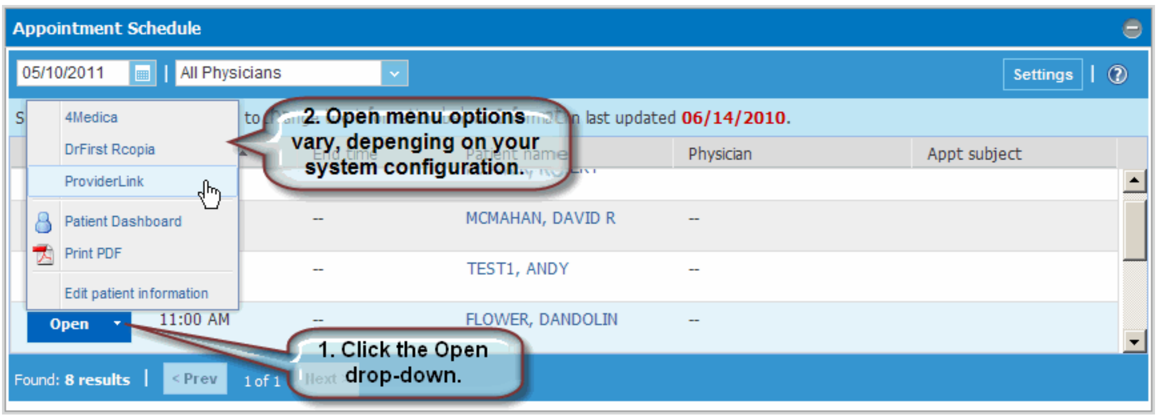
RESULT:

You have successfully viewed the Appointment Schedule.

VIEWING A PATIENT RECORD IN A THIRD PARTY APPLICATION

From the Appointment Schedule view, you can launch a patient's record in a third party application.

Your systems must be pre-configured to allow this functionality.



1. Click the **Open** drop-down arrow of the patient whose data you want to view in a third party application. The Open menu options display.

The menu options shown in the screen shot are for example only. The available options are dependent on your system configuration.

2. Click *the application* in which you want to view patient details. A new window opens to display patient data in the application.

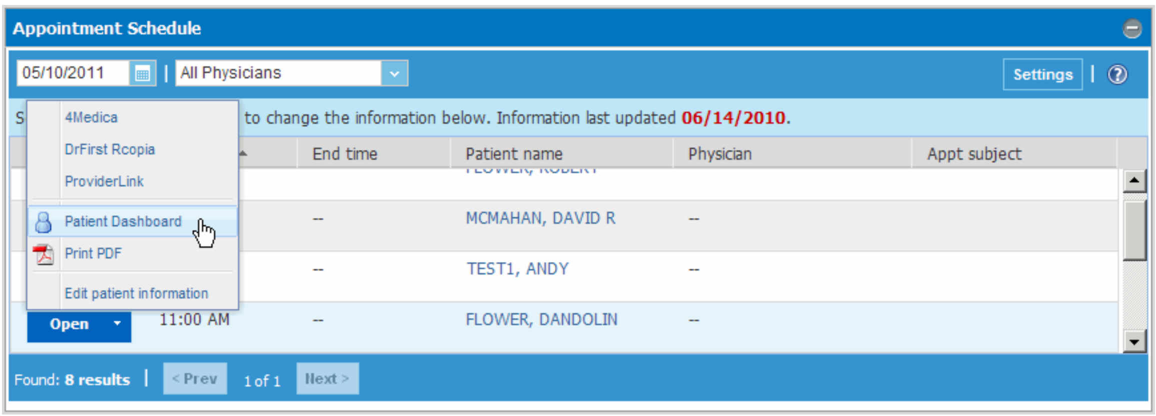
RESULTS:

You have successfully viewed a patient's record in a third party application.

Viewing the Patient Dashboard from the Appointment Schedule

From the Appointment Schedule view, you can launch a patient's record in the Patient Dashboard. You can launch the Patient Dashboard in two ways:

- Click the *Patient name* in the Appointment Schedule view.
- Follow the steps below to launch the dashboard from the patient's Open menu.



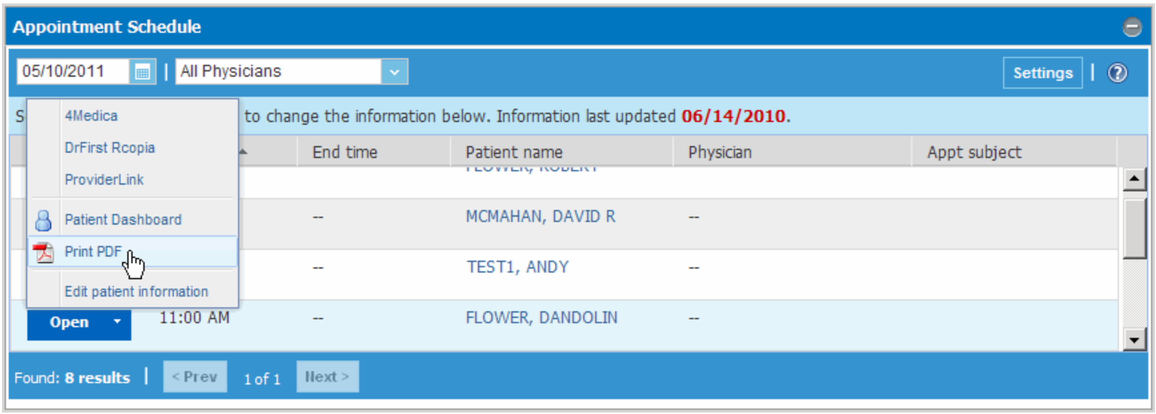
1. Click the **Open** drop-down arrow of the patient whose data you want to view in the Patient Dashboard. The Open menu options display.

> The menu options shown in the screen shot are for example only. The available options are dependent on your system configuration.

2. Click **Patient Dashboard**. The Patient Dashboard portlet displays the patient's data.
3. When you are finished using the Patient Dashboard, click your browser's back button, or use portal navigation, to return to the Appointment Schedule portlet.

Printing a PDF of Patient Information

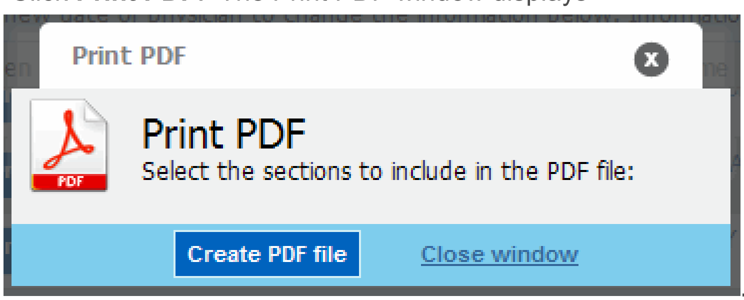
Complete the following steps to create and print a PDF of patient demographic information.



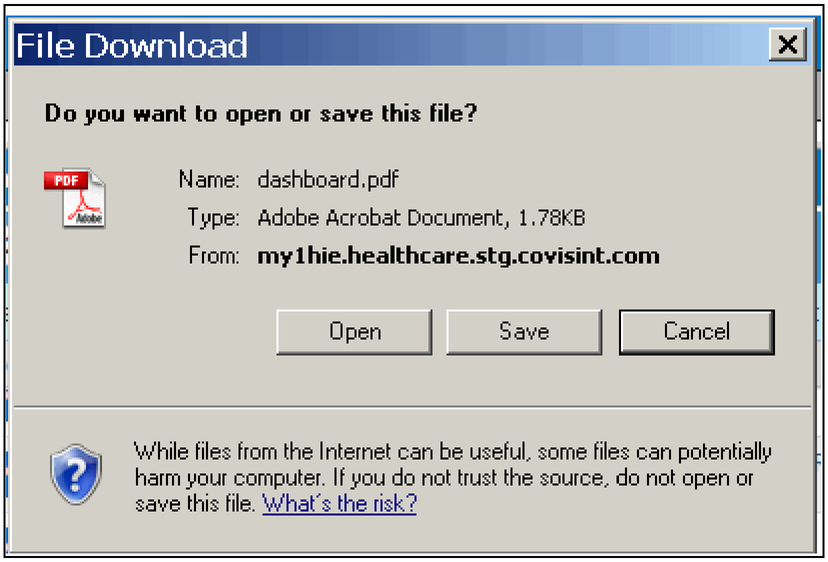
1. Click the **Open** drop-down arrow of the patient whose data you want to view or print in a PDF file. The Open menu options display.

The menu options shown in the screen shot are for example only. The available options are dependent on your system configuration.

2. Click **Print PDF**. The Print PDF window displays



3. Click **Create PDF file**. The File Download dialog displays.



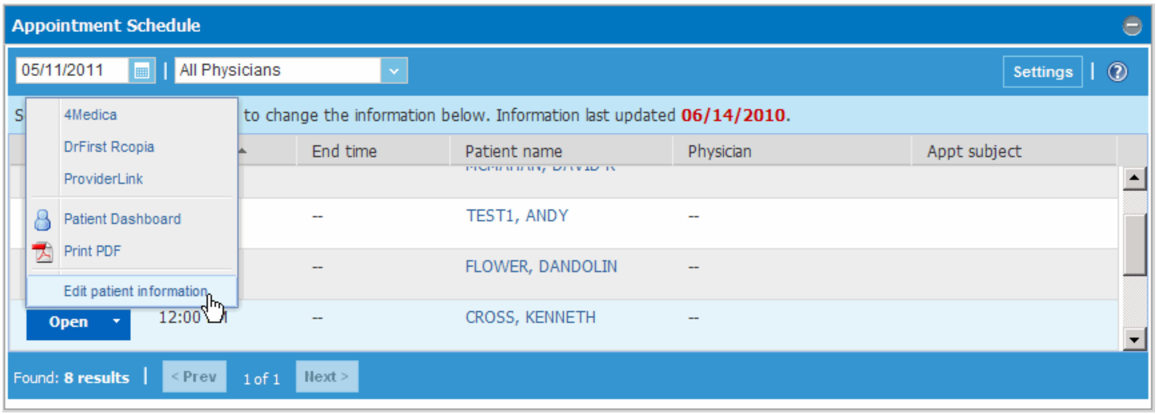
4. In the File Download dialog, click **Open**. The system generates the PDF and it opens in your default PDF reader.
5. Use the options available in your PDF reader to view, save, or print the PDF.

RESULT:

You have successfully created and printed a patient information PDF file.

EDITING PATIENT INFORMATION

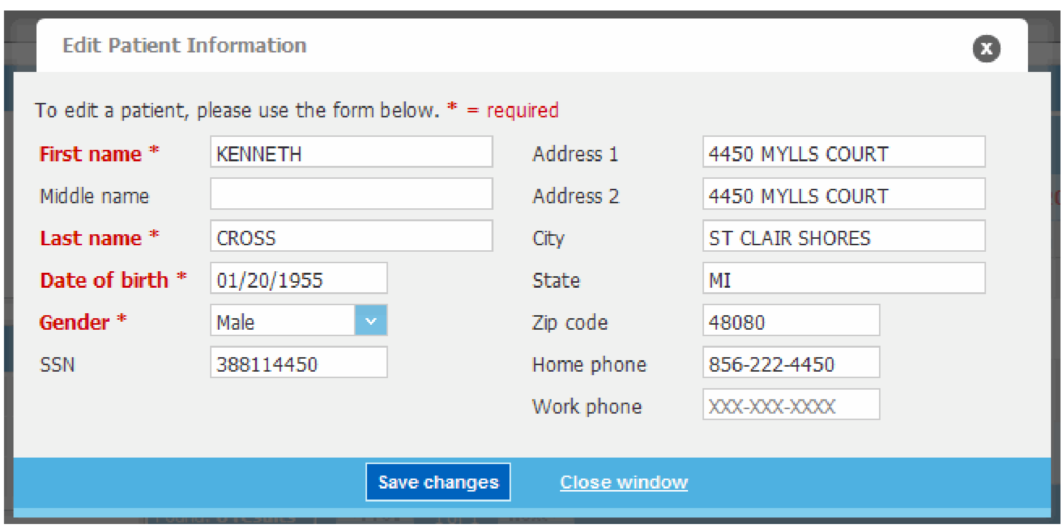
Complete the following steps to edit patient demographic information.



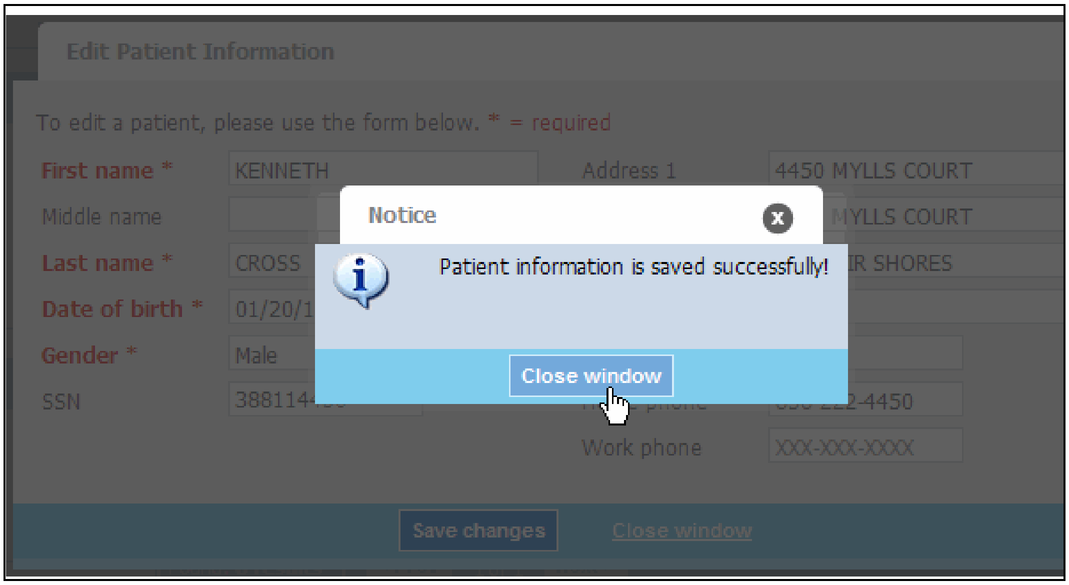
1. Click the **Open** drop-down arrow of the patient whose information you want to edit. The Open menu options display.

> The menu options shown in the screen shot are for example only. The available options are dependent on your system configuration.

2. Click **Edit patient Information**. The Edit Patient Information window displays.



3. Edit the fields as required.
4. Click **Save changes**. A Notice window displays to indicate the information was saved.



5. In the Notice window, click **Close window** to dismiss the Notice and Edit Patient Information windows. The Appointment Schedule window displays.

RESULT:

You have successfully edited patient information.