

Welcome to the Setting Up Scheduler, Appointment & Online Booking

Presented by Jennica Grenier and Patti Scott



Disclaimer

- Jennica Grenier is an employee of the Chilliwack Division of Family Practice and has worked with the Oscar EMR and many others for 19 years. She has no disclaimers to make.
- Patti Scott is an employee of the Chilliwack Division of Family Practice and has worked with the Oscar EMR and many others for 24 years and has worked in healthcare in medical office settings for over 30 years. She has no disclaimers to make.

These are tips and tricks and in no way replaces the knowledge that is obtained from the MSP preamble which is the responsibility of the billing person.



Agenda

- Ask for questions from the group.
- Scheduler set up
- Online Booking set up (Checklist)



Scheduler Setup

Things to consider:

- What days and times is the clinic open
- What days and times does each practitioner work
- Do they take lunch and when
- What type of appointments does each provider have. (Length, #/Day)
- Do they have same day appointments
- Do they do virtual and phone calls
- Out of office visits (hospital, residential, home)



Steps in OSCAR

- Administration
- Scheduler
- Set up
- Set up Clinic Hours and days
- Schedule for each Provider
- Save it



Administration Panel — Mozilla Firefox

https://vcc-oscar.kai-oscar.com/oscar_1/administration/ Restore Down

Help About

Administration Panel

- User Management >
- Billing >
- Labs/Inbox >
- Forms/eForms >
- Reports >
- eChart >
- Schedule Management >**
 - Schedule Setting
 - Appointment Status Setting
 - Appointment Type List
 - Add a Group
 - Search/Edit/Delete Groups
 - Access Control
 - Add/Edit Group Preferences
 - Prevention Notification Settings
- System Management >
- Faxes >
- System Reports >

SCHEDULE TEMPLATE SETTING

1. Use the current R Schedule or select a different one from the select field.

2. Type in the start date and end date for this R Schedule.

3. Check the day of week which is AVAILABLE.

4. Click the 'next' button.

* Select R Schedule from the drop-down list. Don't change the start date to update the R Sch.

Doe MSP 44555, Jane 2021-12-13 ~ 2021-12-17 Save

Date from: - - (yyyy-mm-dd) to: - -

is available EVERY (Day of Week): Alternating Week Setting

<input checked="" type="checkbox"/> Sun	<input type="text" value="P:10-min-default"/>	<input type="text" value="xx"/>
<input checked="" type="checkbox"/> Mon	<input type="text" value="P:10-min-default"/>	<input type="text" value="xx"/>
<input checked="" type="checkbox"/> Tue	<input type="text" value="P:10-min-default"/>	<input type="text" value="xx"/>
<input checked="" type="checkbox"/> Wed	<input type="text" value="P:10-min-default"/>	<input type="text" value="xx"/>
<input checked="" type="checkbox"/> Thu	<input type="text" value="P:10-min-default"/>	<input type="text" value="xx"/>
<input checked="" type="checkbox"/> Fri	<input type="text" value="P:10-min-default"/>	<input type="text" value="xx"/>
<input checked="" type="checkbox"/> Sat	<input type="text" value="P:10-min-default"/>	<input type="text" value="xx"/>

P:10-min-default |
P:15-min-default |
P:OnCallClinic |Weekends/Holidays

Next

Type here to search

22°C 11:58 AM 2022-06-25



- Administration Panel
- User Management >
- Billing >
- Labs/Inbox >
- Forms/eForms >
- Reports >
- eChart >
- Schedule Management >
 - Schedule Setting
 - Appointment Status Setting
 - Appointment Type List
 - Add a Group
 - Search/Edit/Delete Groups
 - Access Control
 - Add/Edit Group Preferences
 - Prevention Notification Settings
- System Management >
- Faxes >
- System Reports >
- Integration >
- Data Management >

Appointment Types

EDIT APPOINTMENT TYPE

Name: Duration:

Reason: Notes:

Location: Resources:

Save

Name	Duration	Reason	Notes	Location	Resources	
Claudia Quintero	5 min	test				edit delete
CPX	30 min	Complete Physical				edit delete
Lesion Removal	20 min	Biopsy				edit delete



Online Booking Software

Not all online booking software is the same. You need to ensure that the software you choose is the right one for you and your practice.

We have provided a checklist for you to look at but I can't stress enough that different companies have different features that may be what you need.

Just because your EMR has an online scheduler doesn't mean it is the best for your practice style.



Checklist of Things to Consider

A triage protocol to screen patients for online booking virtual services is recommended to prevent underestimation of severity of illness, risks to patient safety and support, patients requiring rebooking for in person assessments, avoid patient booking in for administrative duties pending (i.e following up on pending specialists' appointments, Lost lab Requisition)

A standard approach to triage may minimize the appropriate use online booking for your office is recommended

Things to Think About.....

1. What service does your clinic want to offer with an online booking system for patients.

- Can patients book virtual care visits? and in person visits?
- How will you ensure they are booking appropriately?
- Is there triage process every morning/afternoon?
- System/vs staff/RN/GP/NP/LPN?
- (Expect patients to book improperly telehealth, not understanding what should be deemed in person/virtually and how it can potentially prolong direct access to care without having to be rebooked to follow up in clinic. To prevent GP and patient frustration this is how we as MOA's can keep a efficient and effective schedule daily)



To determine appropriateness for telehealth, vs in person when offering online booking

- Acute Medication (existing on patient file)
- Chronic Meds (one telehealth, next visit in person, how to manage?)
- Review Specialist consult
- Post hospital discharge Check in
- Check in follow up for new medications –
 - Depression/Anxiety (crisis situations not included)



To determine appropriateness for in-person vs telehealth when offering in-person online booking

- Co-Morbidity Patients, (Regular meds in person xx amount of times per/year)
- New Injuries (not requiring urgent visit)
- - In person as a follow-up—post hospital discharge follows up
- - WCB/ICBC Assessments
- - follow up for new medications
- - specialty consultation requests
- - post hospital discharge follow up



Online Booking Flow Checklist/for online virtual care bookings

Considerations:

- Does the patient have access to smart phone, computer w/webcam, or phone? (If video call requested)
- Patient access to strong secured Wi-Fi (If video call requested)
- Telephone Appointments (is patient contact info up to date)
- Communication of Online Booking for your patients to your patients

- Choose a date to start using online booking tool care in your clinic.
- Social Media (if applicable).
- Let patients know that the service will be available by providing information on your website, via email, via posters in your clinic and by telling them in person, when booking in near future.
- Consider outlining the process of signing up for online on your website/displayed in wait room/front desk, along with a list of the conditions that are eligible and excluded.
- Email your patients when applicable about this change in service to your office.



Online booking schedule

- How will this work with existing schedules?
- length required per/physician for online booking?
- Consider how patients can book in person?
- Consider how patients can book virtual visits (platform based)?
- Consider staff triaging the online booking of patients for virtual care to in person visits?
- Consider assigning one MOA to this project for office efficiency during this transition period.
- How will this workflow changing, allow MOA's to tend to other duties?
- Always test run an online booking process to ensure its 100% efficient before going live
- Anticipate patients with technical difficulties



Thank you for your time.

- We are happy to be of assistance in the future.
- Please contact us at:

Jennica Grenier at jgrenier@chilliwackdivision.ca

Patti Scott at pscott@chilliwackdivision.ca

Resources

- OSCAR BC Website: oscarbc.ca/resources
- YouTube – [OSCAR BC Channel](#)

