VertexDr

Patient Portal

APPLICATION MANUAL

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Patient Portal

Overview

The Patient Portal is an automated appointment request system which works in conjunction with web-based Medfusion software by Intuit. The feature allows your existing patients to update their demographics before arriving for their appointments and to request appointments online. It also allows for new patients to request appointments with your practice through the practice's website.

The following information will help you to:

1. Access the Patient Portal Feature.
2. Update patient demographics and register new patients via the Patient Portal.
3. Schedule requested appointments, and
4. Send patients appointment confirmations via the Patient Portal.

Accessing the Patient Portal

The Patient Portal can be accessed from the *Office* Section of the Navigation Pane.

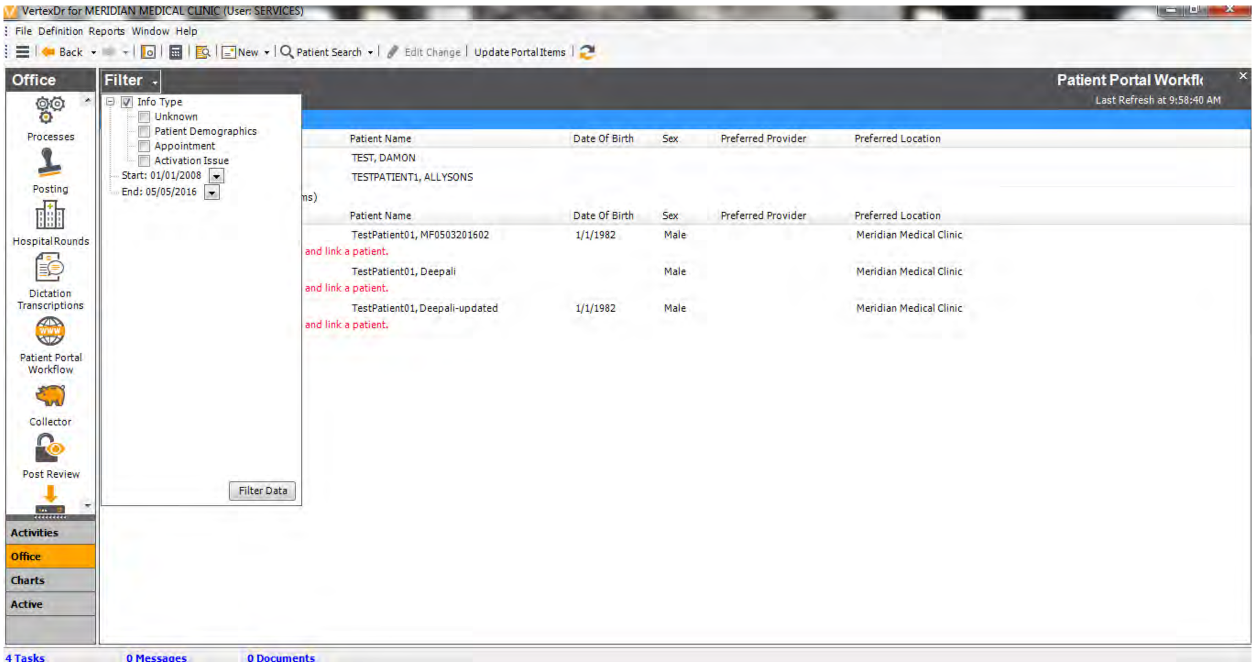
Note: Whether or not a user can access the Patient Portal is a user security setting.

Click the **Patient Portal Workflow** Icon.

The *Patient Portal Workflow* Window opens.

Navigating the Patient Portal

The Patient Portal is separated into three queues. To access these queues, click the **Filter** Button in the upper, left-hand corner of the *Patient Portal Workflow* Window.



5. **Patient Demographics** – Patients who have submitted demographic information via your practice's customized website. Both solicited and unsolicited patients will display in the *Patient Demographics* Queue. Once **Patient Demographics** is selected, the table will display the patient's date of birth, sex, preferred provider and preferred location, if selected by the patient.

6. **Appointments –** Linked patients who have submitted appointment requests via your practice's customized website.

Portal requests can also be filtered by a specific date range u*sing the Start* and *End* Fields. Once you have selected the queue and date range you would like to see, click the **Filter Data** Button.

Inviting Patients to Join the Patient Portal

Existing patients in your practice who have an e-mail address referenced on the *Personal* Section of the Patient Definition and are linked to a portal account can be invited to create a Patient Portal account.

Portal Invitations

When the Patient Portal is implemented into your practice, you will have two options for inviting your existing patients to join the portal:

1. A mass e-mail invitation.

2. Individual e-mail invitations to each patient.

Note: The Patient Portal does not notify the practice if the e-mail address is invalid.

If you choose to invite your existing patients via a mass e-mail, each patient who has an e-mail address on file will receive this invitation.

For patients whose accounts are entered into the system after the initial mass e-mail invitations are sent out, an individual invitation to create a portal account will be sent after an e-mail address is entered in the *E-Mail Address* Field on the *Personal* Section of Patient Definition.

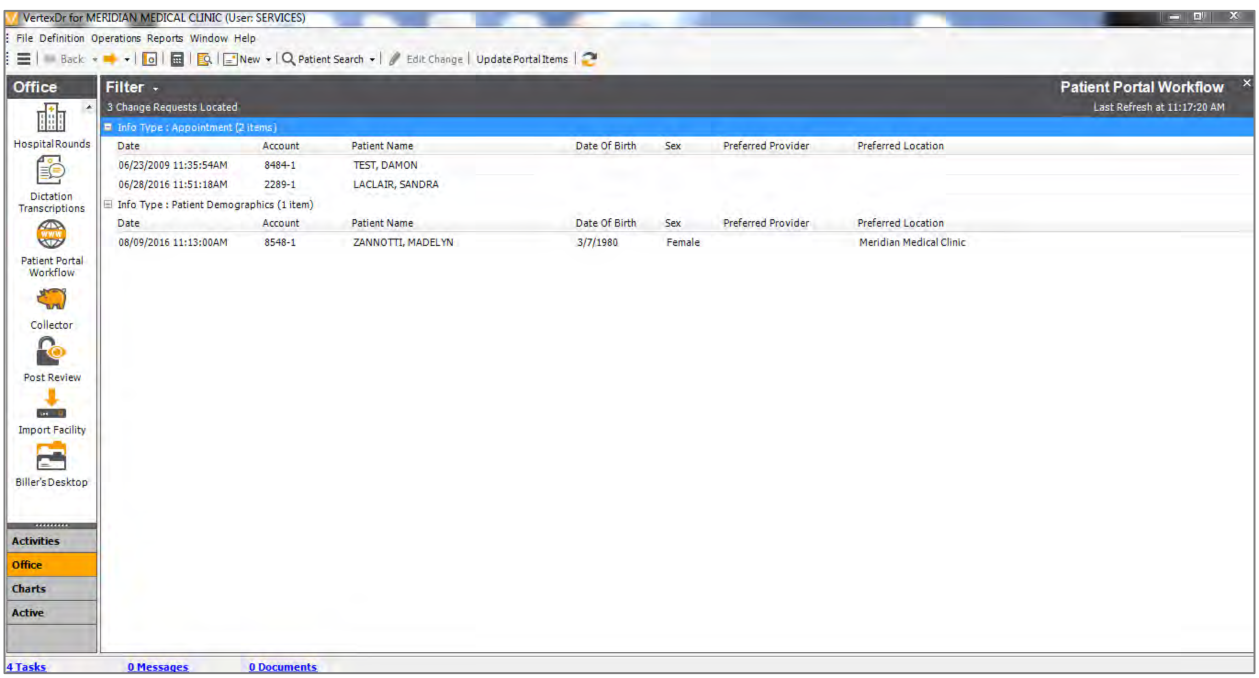
Note: If you have duplicate patient accounts in your database, every account that has an e-mail address on the *Personal* Section of Patient Definition will receive an e-mail invitation. It is recommended that patients with multiple accounts share an MRN Number.

Once the patients receive the portal invitation, they will then be able to create an account on your practice's customized website. Through this account they can then access demographics, request appointments, and update medical forms.

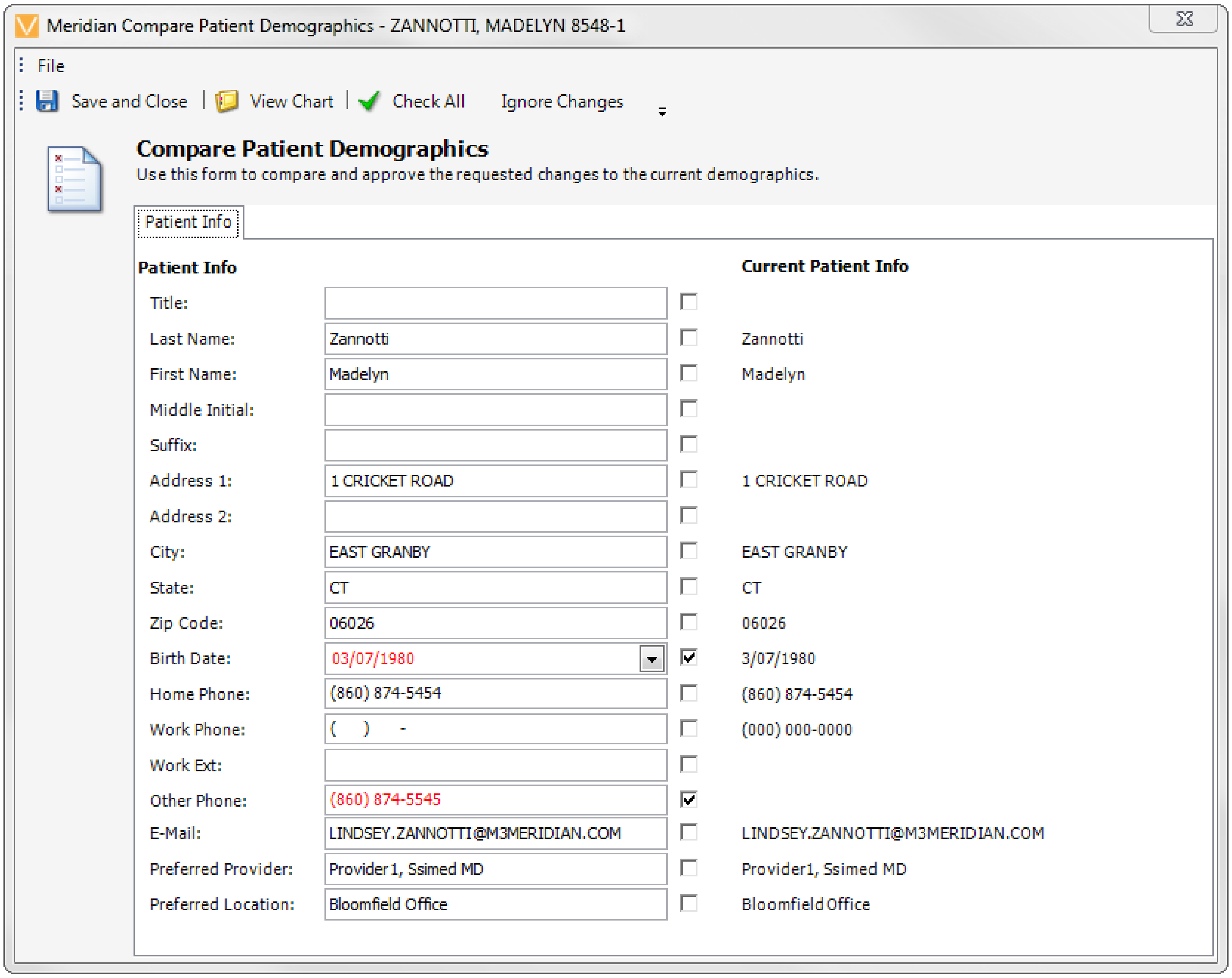
Linking Patient Demographics

Patients can request that changes be made to their existing demographics via the Patient Portal. These requests are visible under the *Patient Demographics* Queue in the Patient Portal Workflow.

As a visual identifier that the system has located a matching patient in your database, the patient's name is displayed in capital letters and the appropriate account number is attached.



1. To view the requested changes, double-click on the patient. The *Compare Patient Demographics* Window opens.



The *Compare Patient Demographics* Window is divided into two (2) columns:

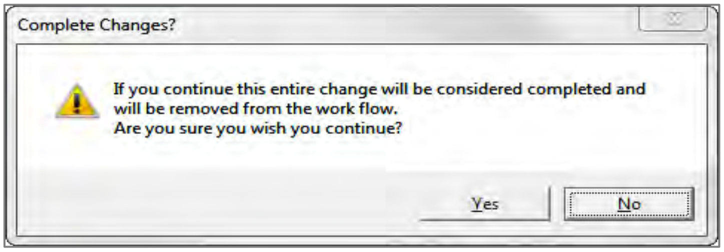
2. The *Patient Info* Section displays the data that came from the Patient Portal. Demographic information entered by the patient through the Patient Portal that the system was able to match to the information on file will display in black. New or updated information will be check marked and display in red.

3. The *Current Patient Info* Section displays the patient information which is currently listed on Patient Definition.

4. If necessary, uncheck the checkboxes to unselect a requested change. If the record is invalid, the entire demographic change request can be ignored by selecting the **Ignore Changes** Button.

5. To review the patient's demographics before saving the changes, select the **View Chart** Button.

6. To save the changes, click the **Save and Close** Button. The *Complete Changes?* Window opens.

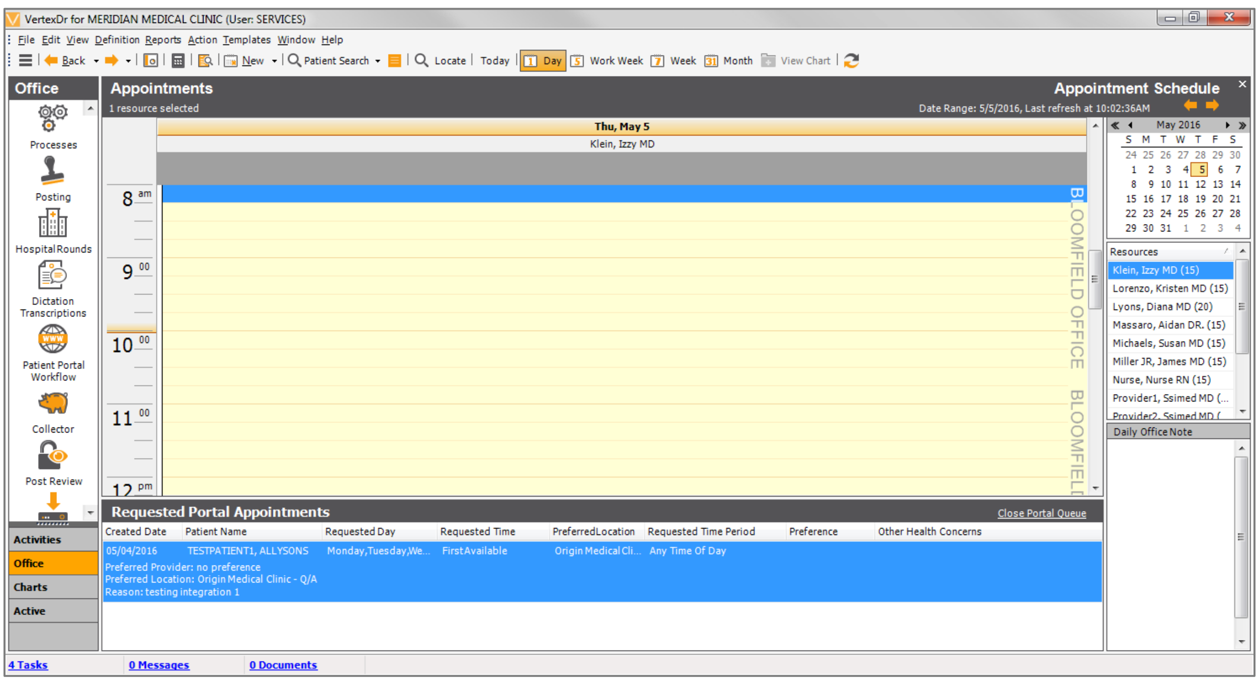


7. Click the **Yes** Button to save the changes and remove the patient request from the Patient Portal Workflow. Click the **No** Button to return to the *Compare Patient Demographics* Window.

Appointment Requests

Patients who are linked to a portal account can request appointments through your practice's customized website. Those requests are sent to the *Appointments* Queue in the Patient Portal Workflow.

Double-click on the patient in the *Appointments* Queue. Scheduler opens and the appointment request(s) is displayed in a Preview Pane at the bottom of the window.



Requested Portal Appointments Preview Pane

The Requested Portal Appointment Preview Pane, located below the *Appointment Schedule* Window, displays any special requests made by the patient, such as:

- *Requested Day*

- *Requested Time*
- *Requested Time Period* – Morning, Afternoon, Evening
- *Preferences* – a specific provider, location, or a specific day of the week

The Requested Portal Appointments Preview Pane also displays a *Preferred Provider* (if the patient requested one) and/or a *Reason*, if the patient specified why they would like to be seen, in *red* lettering below the Appointment Request.

Scheduling a Requested Appointment

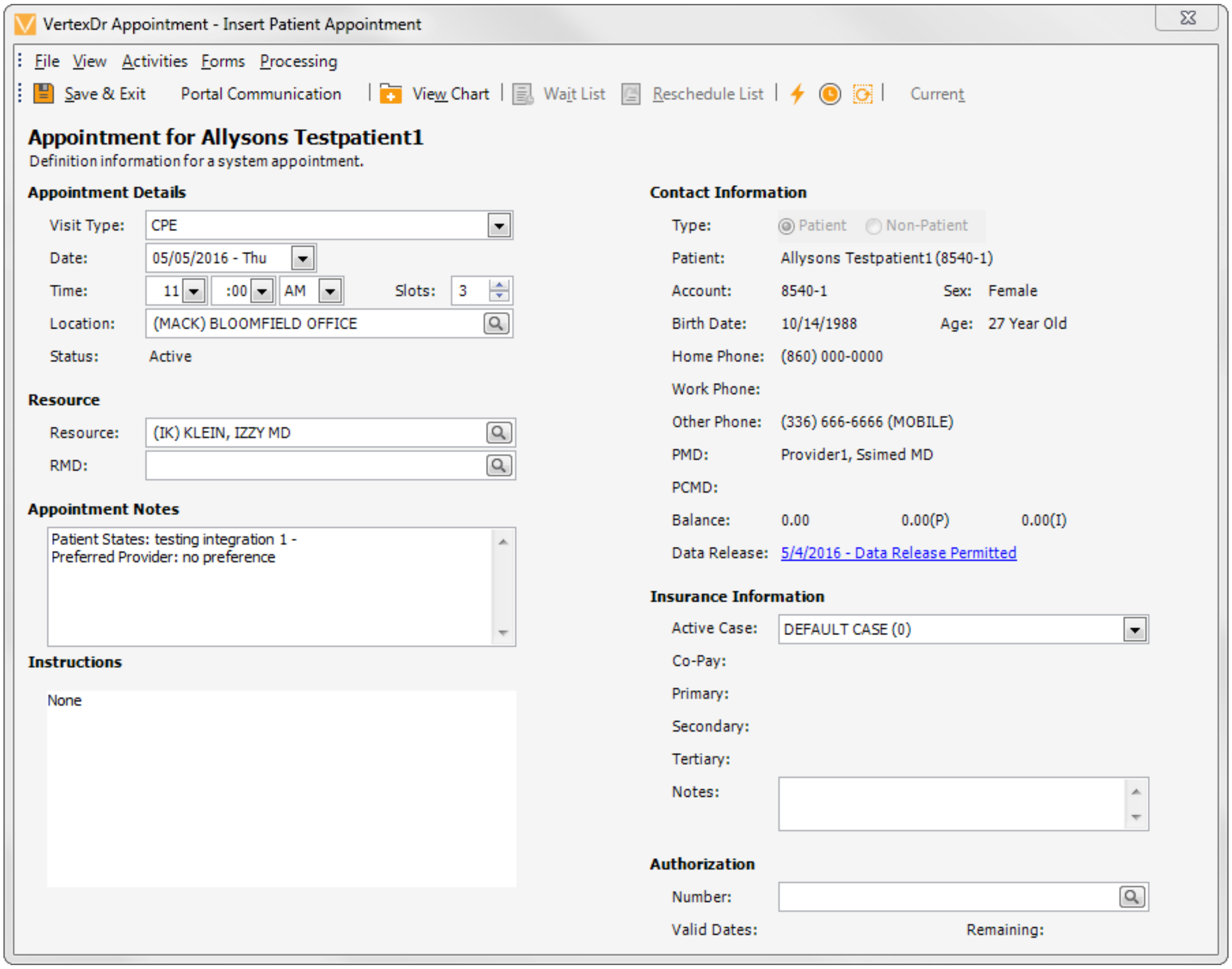
If the patient requested a specific provider, Scheduler immediately opens to the requested provider's schedule.

To schedule the appointment, just as you would for a patient in your office that needs an appointment, search through the schedule to find a timeslot that is suitable for the submitted request. Once you have found a timeslot, open a new *Patient Appointment* Window.

To do so:

1. Double-click in the desired timeslot.

2. Right-click and select *Insert Appointment*, or click the **New** Button. The *Patient Appointment* Window opens.



The portal patient's information is filled in for you along with any notes that the patient may have entered.

Reason for Visit comments from the portal will populate in the *Appointment Notes* Text Box in the *Patient Appointment* Window.

Note: The *Appointment Notes* Text Box has a maximum of 200 words.

Save a Scheduled Appointment Request

To save the scheduled appointment, click the **Save & Exit** Button. An appointment confirmation is automatically sent to the patient's portal account.

Note: Before clicking the **Save & Exit** Button, you may wish to send the patient a more detailed message regarding their scheduled appointment. The *Confirming Appointments* Section of this manual will explain this process.

The next patient in the *Appointment Request* Queue in the Patient Portal Workflow will automatically load to the Preview Pane so that the next appointment can be scheduled.

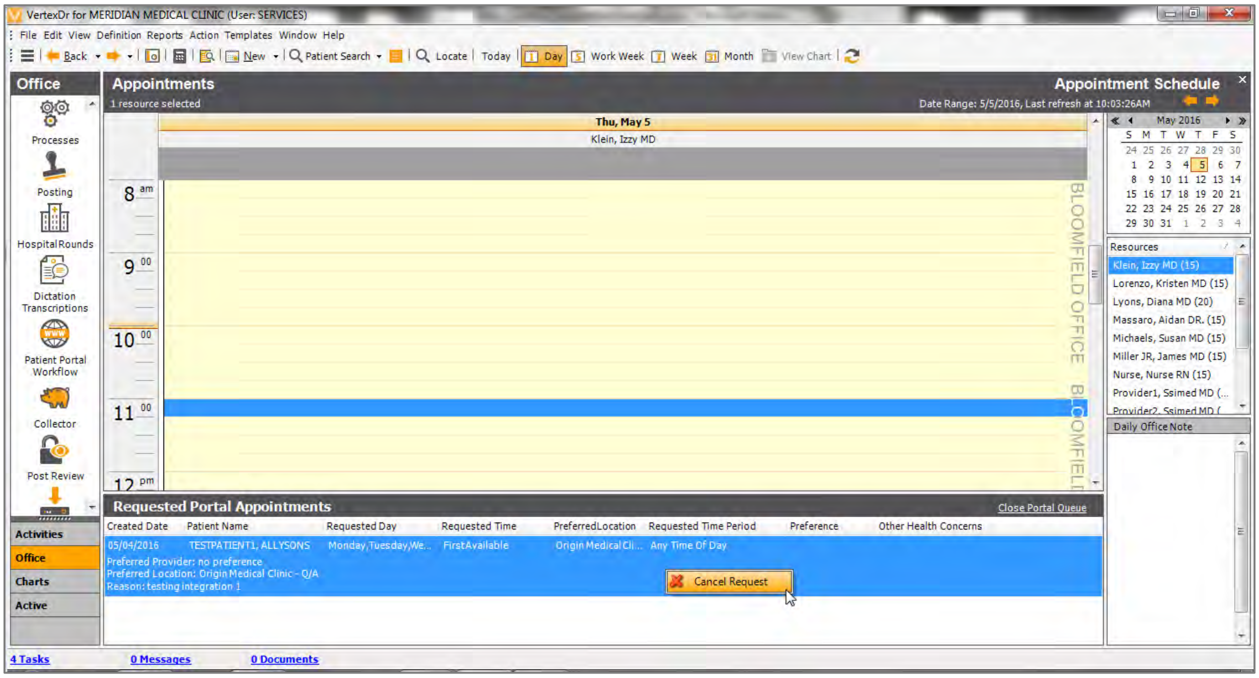
To exit the Appointment Request Queue without scheduling the next patient, click the **Close Portal Queue** Link.

Cancelling an Appointment Request

If an appointment cannot be scheduled for the patient, it is possible to cancel the Appointment Request.

To cancel the patient's Appointment Request:

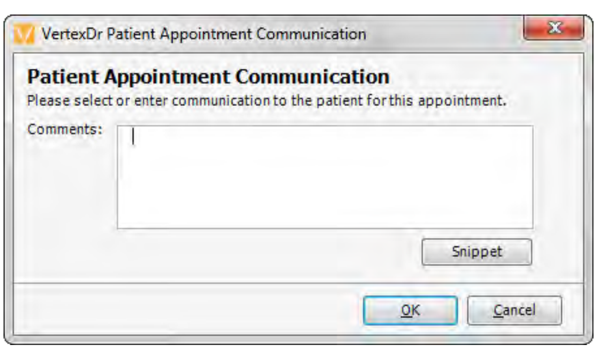
1. Right-click on the request in the Preview Pane and click **Cancel Request**.



2. The Patient Appointment Communication Window opens.

   From the **Reason** Dropdown Arrow, you can select a predefined reason. If none of these options are suitable, select the *(Define other reason…)* option. This allows you to type a specific message to this patient in the *Comments* Area.

   If the practice has defined Messaging Snippets as additional message options, they can be selected by clicking the **Snippets** Button.



3. When finished, click the **OK** Button. A secure message is sent to the patient notifying them that a message has arrived on their online portal account. The patient will then have to log into their portal account in order to view the content of the message.

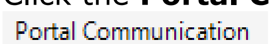
Note: If you need to schedule to a different time, location or resource, you will need to cancel the Appointment Request and call the patient to create a new appointment through Scheduler. The Suite will not notify the patient that changes have been made through the Appointment Request Area. It will look to the patient as if the appointment was confirmed.

Confirming Appointments

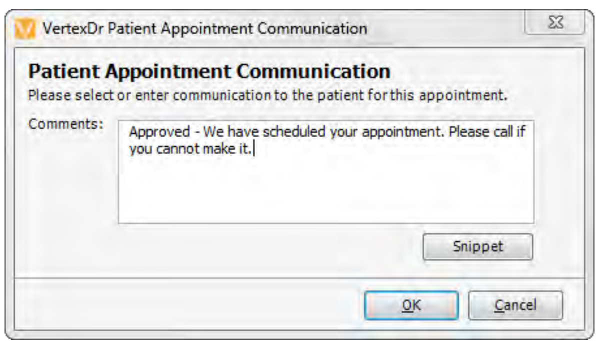
Once the appointment has been scheduled, the Patient Portal Workflow will automatically send the patient a secure message notifying him/her that there's a message waiting on his/her online portal account. The patient will then have to log into his/her portal account to view the appointment confirmation.

Portal Communication

If a more specific message about the scheduled appointment needs to be sent to the patient:

1. Click the **Portal Communication** Button in the *blue* Toolbar 

in the Appointment Book. The *Portal Message* Window opens.



2. Type your message, or click the Snippet Button to select predefined messages.

Note: Snippets are defined by the practice.

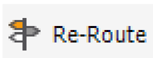
3. Click the **OK** Button to save the message.

4. Click the **Save & Exit** Button to save the scheduled appointment. The system automatically sends a secure message to the patient that a message is waiting on their portal account. The patient will then have to log in to his/her portal account in order to view the content of your message.

Routing Documents via the Processes Area

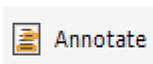
Documents that have been completed on the Portal are downloaded to the *Processes* Area. Incoming Portal documents that display in the *Processes* Section must be routed to the Patient Chart.

Overview of Toolbar Buttons



The **Re-Route** Button on the Toolbar is used to route a document to a patient's chart, an individual or a role.

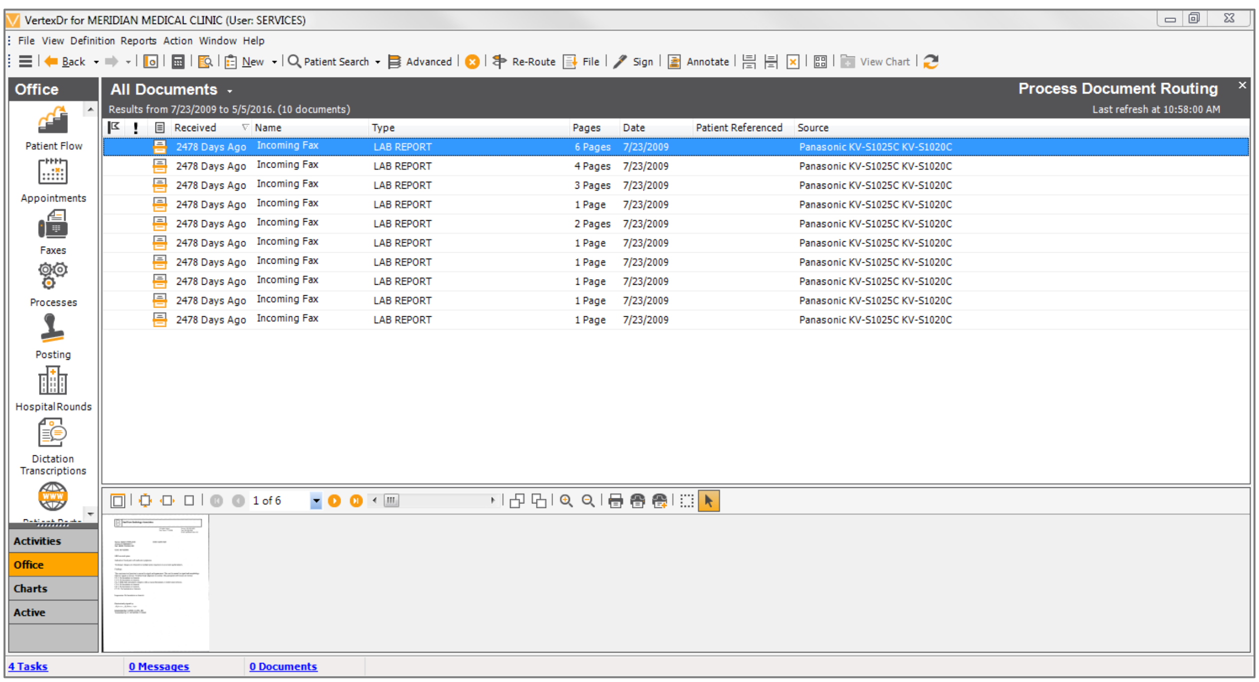
The **Sign** Button on the Toolbar is used to sign the document. Once a document is signed no further changes can be made.



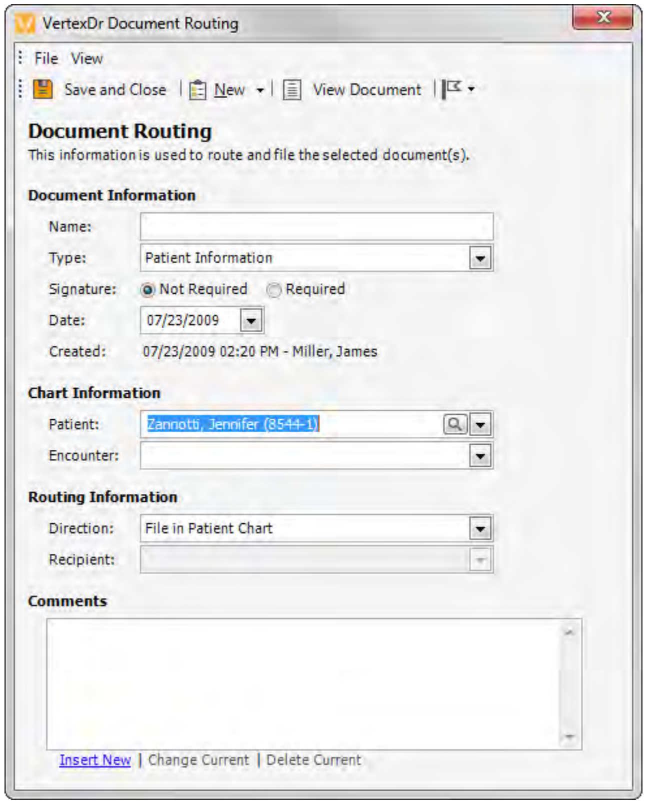
The **Annotate** Button on the Toolbar is used to write on the document if you are using a tablet PC and Citrix connection.

Routing a Document

1. To access the *Processes* Section, click the *Office* Section on the Navigation Pane and then click the **Processes** Icon.



2. Highlight a document and click the **Re-Route** Button on the Toolbar. The *Document Routing* Window opens.



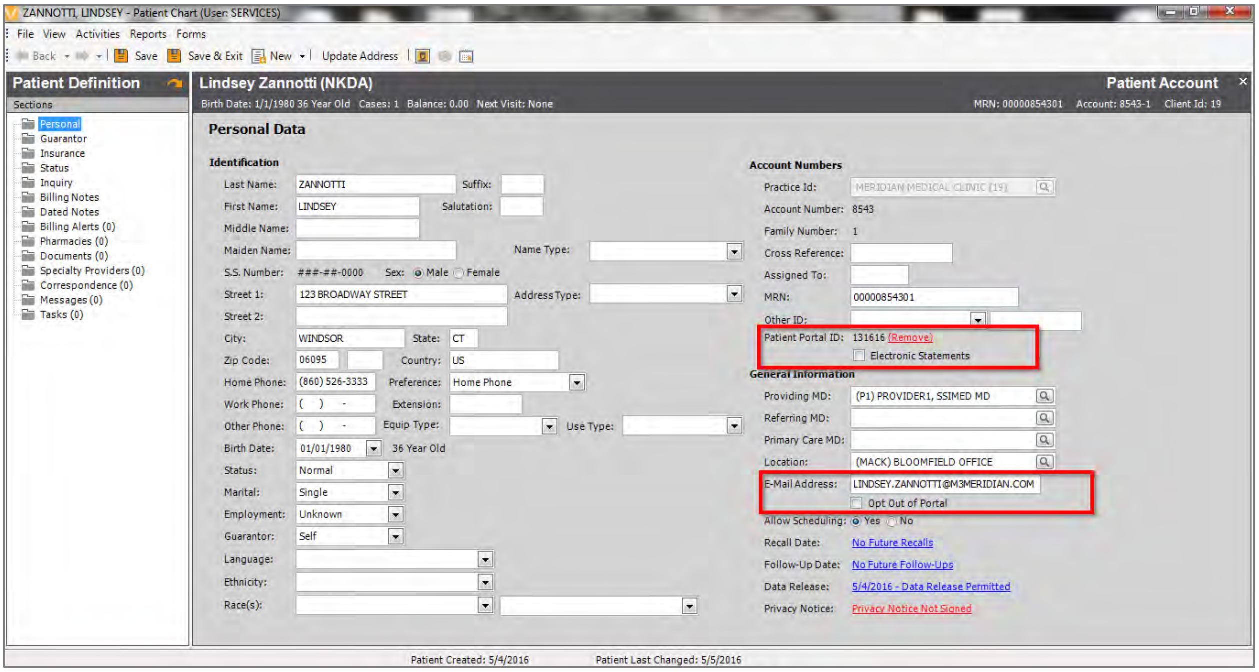
3. Click the **Type** Dropdown and select the document type. One will be defaulted, but it can be changed if need be.
4. Click the **Required** or **Not Required** Radio Button to indicate if a provider's signature is needed.
5. Click the **Date** Dropdown to reference a date relative to the document, if applicable. The date the document was imported will display in the *Created* field.
6. Click the **Magnifying Glass** Icon in the *Patient* field to search and select the patient. Use the dropdown to select from the Patient History List.
7. Click the **Direction** Dropdown to select whether the document is to be routed to the Patient Chart, an individual, or a role.
8. Click the **Save and Close** Button to route the document.

Note: To filter the *Processes* Area to only items which have come in via the Patient Portal, select the **All Documents** Filter and then select the Patient **Portal Radio** Button.

Patient Definition

Personal Section

- The *Patient Portal ID* Field, located on the *Personal* Section of Patient Definition, indicates the patient's Portal account status.



Values include:

  - *None* – This value indicates that the patient does not have a Portal account nor has the patient been sent a portal invite.
  - *Pending* – This value indicates that the patient does not have a Portal account, but an invitation has been sent.
  - *Deactivated* – This values indicates a patient's Portal account has been deactivated.

- When a patient completes the Portal Registration process, the *Portal ID* Field automatically fills in with the patient's Portal ID number.
- The *E-Mail Address* Field is where a valid e-mail address should be entered for the patient. The Portal will use this e-mail address for the initial Patient Portal Invitation as well as Broadcast Messages.
- Patients with the **Opt Out of Portal** Checkbox checked on the *Personal* Section of Patient Definition will numerate *Core Measure 7-1* on the *Meaningful Use (Stage II)* Report.

- Click the **Portal Re-Invite** Link on the **Personal** Section of Patient Definition to re-invite a patient to join the Portal. The new invitation will be sent the next time the Portal process runs.

Forms Menu

To send an on-demand statement to the patient:

1. Select **Statements** from the **Forms** Menu.
2. Enter the appropriate criteria for the statement.
3. Click the **Send to Portal** Button.

Activities Menu

Statements sent to the patient's Portal account display in Correspondence History.

Patient Chart

File Menu

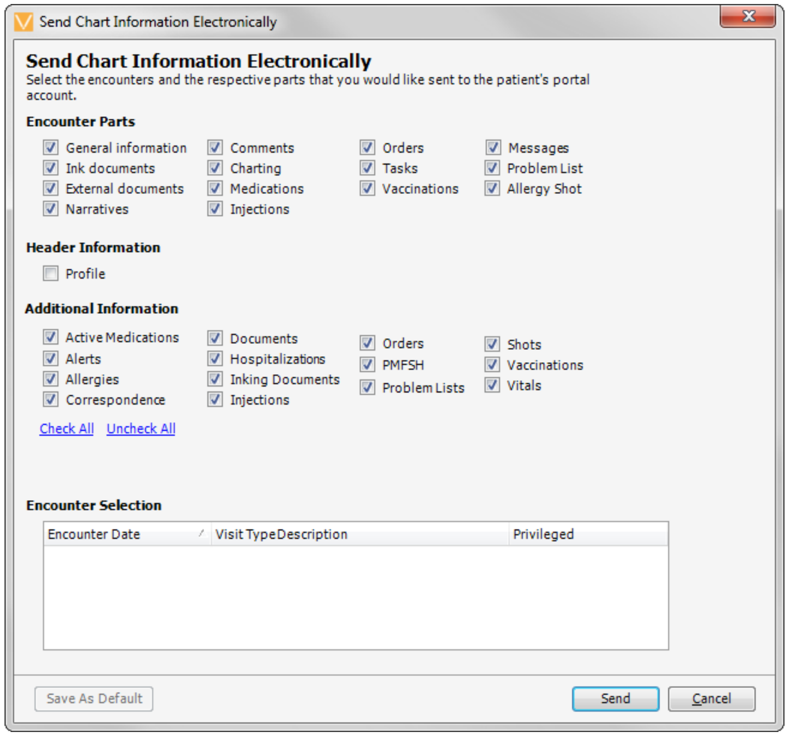
From the Patient Chart, send a message directly to the patient's Portal account by clicking **Send Patient Message** from the **File** Menu. Compose the message and then click the **Send** Button.

Note: A different user within the practice can be selected from the **From** Dropdown if necessary.

Send Chart to Patient

This feature will allow the practice to send the patient a copy of their chart electronically.

1. From the **File** Menu in the Patient Chart, select **Send Chart to Patient**. From the *Send Chart Information Electronically* Window, select the areas of the chart to be sent.

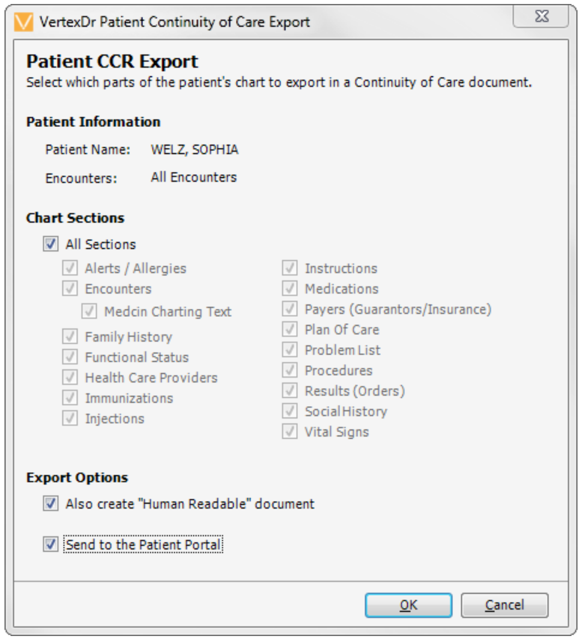


2. Enter a message subject in the *Subject* Field.
3. Select the sending provider's name from the **Default Staff** Dropdown and then click the **Send** Button. The copy of the chart will be sent to the patient's Portal account in a .pdf format. The patient must log into their Portal account in order to retrieve the electronic copy.

Send Encounter to Patient

A Continuity of Care Report can be exported for a specific date of service or encounter.

1. Highlight the desired encounter.
2. Select the **File** Menu and then select **Export CCR for Current Encounter**. The Patient Continuity of Care Record Export Window will open.



3. Select the areas of the encounter you wish to generate the CCR for or check off the **All Sections** Checkbox.
4. Select the **Human Readable** Checkbox in order to generate a printable version of the CCR.
5. Select the **Send to Patient Portal** Checkbox to upload the file to the patient's Portal account.
6. When finished, click the **OK** Button to generate the report and upload the .html file.

Note: If you wish to send multiple encounters, use the **CTRL** Feature to highlight multiple encounters in the *Encounters* Section then select the **File** Menu and then select **Export CCR for Selected Encounters**.

When a CCDA is sent to a patient's Portal account and fails, the message sent to the user displays the patient's name and account number as well as:

- *Regen ID* – the ID number for the message that needs to be resent.
- *Encounter ID* – the ID number associated with the selected encounter if the CCDA was generated from an encounter.

If a CCDA is sent to a patient's Portal account and fails, the user who sent the CCDA can resend the CCDA from the Portal Error Message he/she receives. Click the **Regenerate CCDA** Link to resend the CCDA.

Correspondence Section

A copy of all Portal messages, including the initial invitation to join the Patient Portal, are added to the *Correspondence* Section as an electronic log that a communication was made with the patient.

From here, the messages can be re-printed if necessary.

Continuity of Care Records

The Practice Suite provides practices with the capability to exchange clinical information between providers and authorized entities electronically by creating a Continuity of Care Record (CCR) and having the ability to import and export these files.

Importing CCD

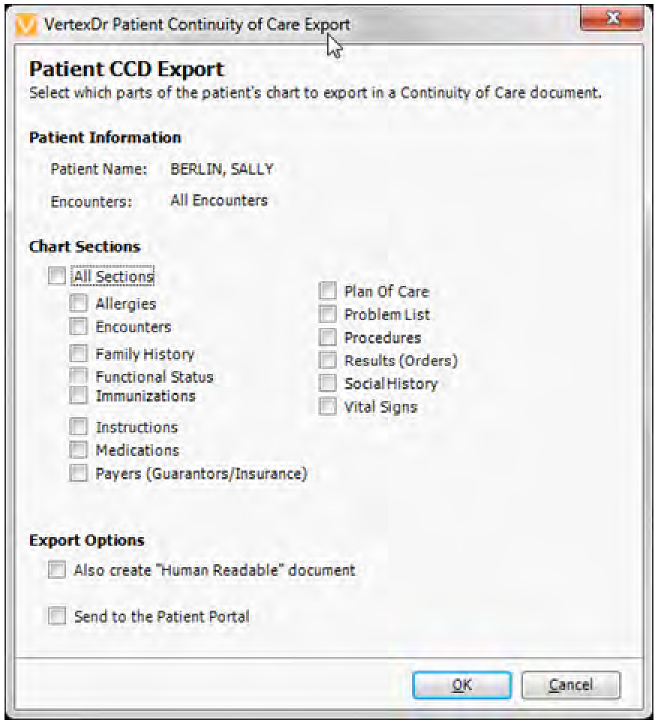
If a patient is referred from another practice utilizing an EMR/EHR, a CCD record can be imported of the patient's previous chart information. To import the CCD file, from the *Documents* Section of Patient Definition:

1. Select the **New** Dropdown Arrow and then click **CCD Import**. The *CCD Document Import* Window will display.
2. Click the **Select CCD document** Link to access your local computer or server. Search for the document and then select the **Open** Button.
3. Enter a name for the document in the *Name* Field.
4. Select a Document Type from the **Type** Dropdown.
5. If this document needs to be routed for signature, select the **Required** Radio Button. If routing for signature, remember to select either an individual or a role from the **Direction** Dropdown and then select the appropriate recipient from the **Recipient** Dropdown.
6. When finished, click the **Save and Close** Button. The document will be routed appropriately and a copy will be saved in Patient Definition.

Exporting CCD

The **Export CCD** Option allows the practice to create an .html file of the Patient Chart. The Continuity of Care Report can be imported into another EMR/EHR by a participating provider or it can be faxed out of the Practice Suite.

1. From the *Chart Summary* Section of the Patient's Chart, go to the **File** Menu and select **Export CCD** Select the areas of the Patient Chart you wish to generate the CCD for.



2. Select the **Human Readable** Checkbox in order to generate a printable/readable version of the CCD.
3. Select the **Send to Patient Portal** Checkbox to upload the file to the patient's Portal account.

Note: An Intuit Patient Portal contract is required in order to use this feature.

4. When finished, click the **OK** Button to generate the report and upload the .html file.

Medcin Integration

The Patient Portal can have Custom Portal Forms integrated with Medcin. Staff will work directly with your practice and Medfusion to integrate the Portal Custom Forms with Medcin.

Portal Encounters

Medcin integration allows individual items on a Portal form to be associated with specific Medcin findings. Once the mapping process is complete, items documented by a patient on the Portal Custom Form will populate into a *Portal Encounter.*

The information documented in the *Portal Encounter* can be pulled forward into a visit encounter using the **Scroll** Button. Items such as *PMFSH*, *Chief Complaint* and *Review of Systems* can be pulled forward into the patient's office visit encounter.

Note: The practice can assign Portal encounters to a specific Encounter Type. Also, once a patient completes a Portal Custom Form, a physical copy of the form is sent to the *Processes* Area where it can be routed to the Patient Chart as a document if necessary.

Patient Medications & Allergies

Medcin integration also allows medications and allergies listed by a patient on a Custom Portal Form to be sent to the Patient Chart.

When a patient fills out this information and submits the form, the medications and allergies are filtered into the **Unmapped Portal Medications** Tab and the **Unmapped Portal Allergens** Tab on the *Medications* Section of the Patient Chart.

They can be added as pre-existing medications and allergies.

Adding Unmapped Medications as Pre-Existing Medications

1. From the **Unmapped Portal Medications** Tab, double-click the medication.
2. Select the appropriate medication from the *Drug Detail Table* Window. Once the drug is selected the *Pre-Existing Drugs* Window opens.
3. Enter any additional information needed to complete the pre-existing medication entry. Once the drug is entered as a pre-existing medication, the record is removed from the **Unmapped Portal Medications** Tab.

Note: The text *Imported from Portal* is added to the *Medication Detail Notes* Section. It displays in *red* below the medication in the *Medications* Section of the Patient Chart.

Ignore Portal Medication Entries

Medication additions can also be ignored. To do so:

1. Select the **Ignore Request** Button in the Toolbar, or right-click on the request.
2. Select Ignore Request.

Adding Unmapped Portal Allergens to the Allergies Section:

1. From the **Unmapped Portal Allergens** Tab, double-click the allergy.
2. Select the appropriate allergy from the *Allergy Table* Window. Once the allergy is selected the *Patient Allergy Information* Window opens.
3. Enter additional information, as needed to complete the allergy entry. Once the allergy is added to the Patient Chart, the record is removed from the **Unmapped Portal Allergens** Tab.

Note: The text *Imported from Portal* displays in the *Reaction* Column in the *Allergies* Section of the Patient Chart once the allergy is mapped.

Ignore Portal Allergy Entries

Allergy additions can also be ignored. To do so:

1. Select the **Ignore Request** Button in the Toolbar, or right-click on the request.

2. Select Ignore Request.

Virtual Swipe – Patient Portal Payments

Activating Virtual Swipe

Parameters

On the **Portal Settings** Tab, enable the **Move Virtual Card Swipe Payments to Copay Work List** checkbox to move all electronic portal payments to the copay worklist during the closing process.

If the payment is not posted to a specific charge within the time designated by **the Days to Move from Copay Suspense to Unassigned** parameter, at the next closing, the payment will be posted to the oldest balance set to *Patient* responsibility.

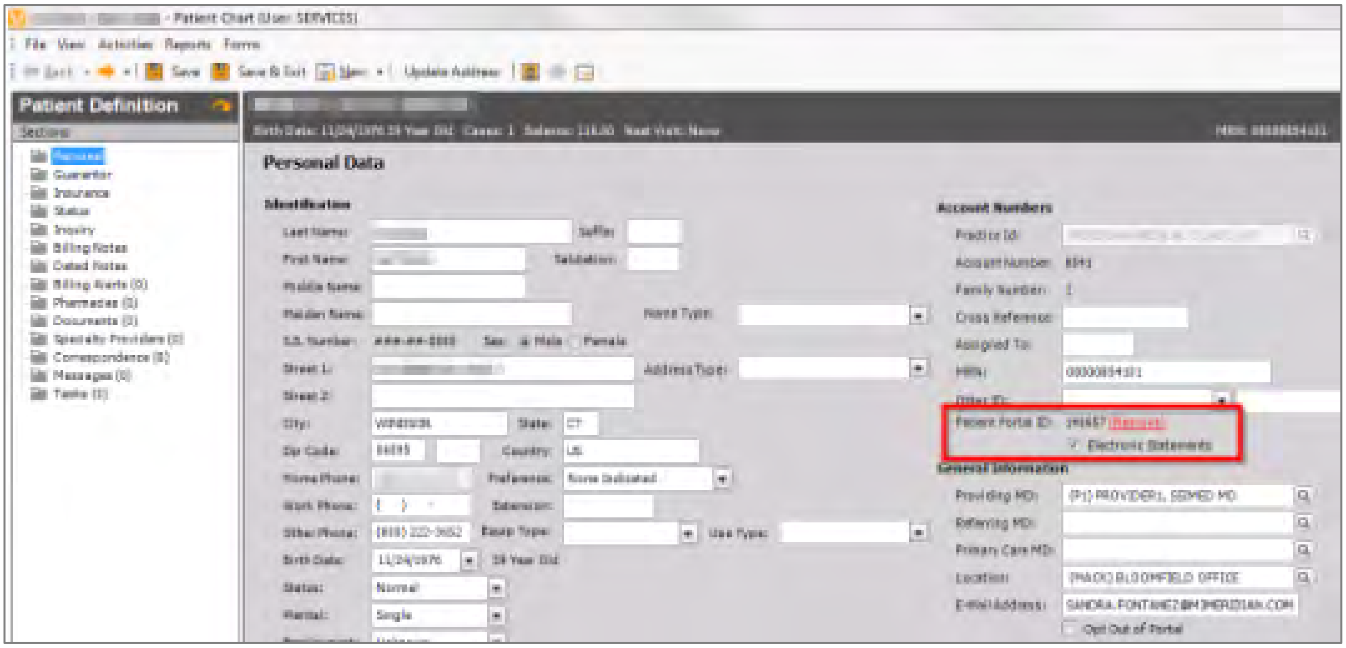
Note: This parameter works in conjunction with **Days to Move from Copay Suspense to Unassigned** setting in Suspense Posting Parameters under System Wide Default parameters.

If this setting is enabled, all electronic portal payments will be placed in a Portal Payments batch.

Patient Definition

Patient Section

When a Portal Account is mapped to a patient from the Patient Portal Workflow and the **Enable Electronic Statements Upon Activation** Parameter on Portal Parameters is activate, the **Electronic Statements** Checkbox on the *Personal* Section of Patient Definition is automatically enabled.



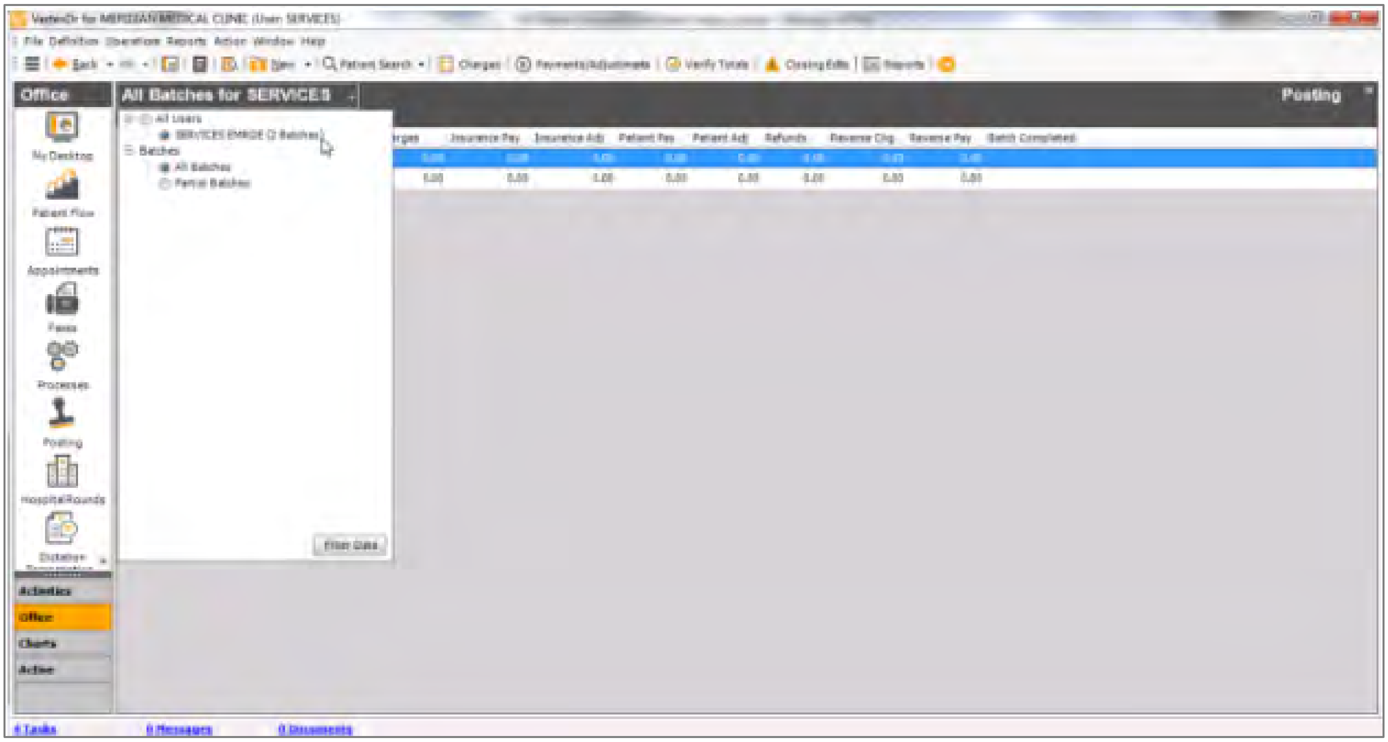
Inquiry Section

Virtual Swipe payments display in *yellow* in the *Inquiry* Section of Patient Definition.

Posting Virtual Swipe Payments

Payments collected with Virtual Swipe are sent to a batch suspended payment batch.

To view the batch in order to post the payments, filter the Posting Area to batches created by Services.



Virtual Swipe Reports

Financial

Card Payment Errors

The *Card Payment Errors* report displays credit card payments that did not successfully process by date range.

Broadcast Messaging

The Patient Portal allows the practice to send Broadcast e-mail messages to a list of patients.

Two types of broadcast messages can be sent:

- *E-mail* Broadcast Messages can be received by any patient that has an e-mail address listed in Patient Definition. <u>These messages are unsecured (standard e-mail).</u>

Note: It is important not to send any clinical data via the e-mail broadcast.

- Secure *Communication* Broadcast Messages can only be received by patients with Patient Portal Accounts. <u>These are secured e-mails.</u> Patient who receive the *Secure Communication* Broadcast Message receive an e-mail stating that they have a message waiting on their Patient Portal Account. The patient must then log into his/her Patient Portal to view the Broadcast MessageSet-Up

In order to utilize the Broadcast Messaging Facility, Message Templates must be created on the practice's customized Portal website. These templates contain the contents (body) of the e-mail.

Once created on the practice's Portal website, the Message Templates are available for selection when sending a Broadcast Message through the Meridian Broadcast Message Facility.

Note: Message Templates should not contain any *Variables* that are available on practice's Portal website.

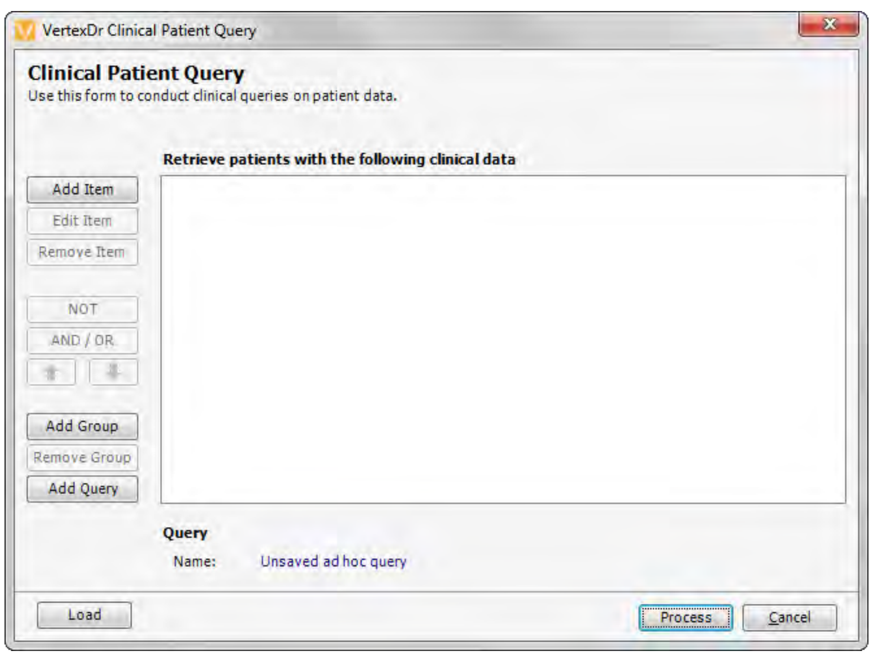
Generating the Broadcast Message Recipient List

To begin the Broadcast Message process, a list of patients to send the message to must be generated by creating a query.

To access the Broadcast Messaging Facility, select the **Broadcast Messaging** Icon from the *Activities* Section of the Navigation Pane. The *Broadcast Messaging* Area opens.

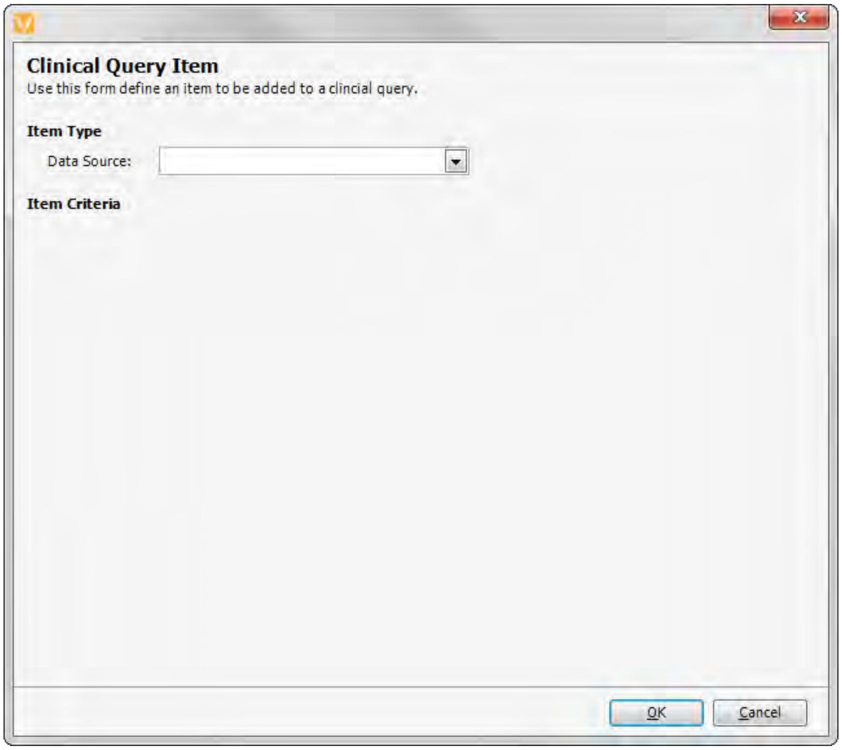
Accessing the Query Facility

To begin creating the list of patients, select the **Patient Query** Button in the Toolbar. The *Clinical Patient Query* Window opens.



Generate a Query

1. Select the **Add Item** Button. The *Clinical Query Item* Window opens.



2. Select an item from the **Data Source** Dropdown.
3. Select the information in the *Item Criteria* Section you wish to query by selecting the checkboxes.

3. When finished, click the **OK** Button to return to the *Clinical Patient Query* Window.
4. To run the defined query, select the **Process** Button. The *Patient Query List* Window will display with the qualifying patients listed.

Editing a Query

Edit an Item – Highlight the item in the *Retrieve patients with the following clinical data* List Box and then select the **Edit Item** Button.

Remove an Item – Highlight the item in the *Retrieve patients with the following clinical data* List Box and then select the **Remove Item** Button.

Exclude an Item – To exclude a selected item from the query, highlight the item in the *Retrieve patients with the following clinical data* List Box and then select the **Not** Button.

Combine Items – To combine items when searching, highlight the item in the *Retrieve patients with the following clinical data* List Box and then select the **AND / OR** Button.

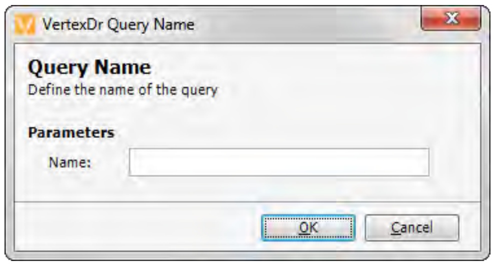
Group Items - If you would like to manually add a group before adding an item, select the **Add Group** Button.

- To remove a group from the query, highlight the group in the *Retrieve patients with the following clinical data* List Box and then select the **Remove Group** Button.

Save a New Query

To save a new query:

1. Select the **Save As** Button. The *Query Name* Window opens.

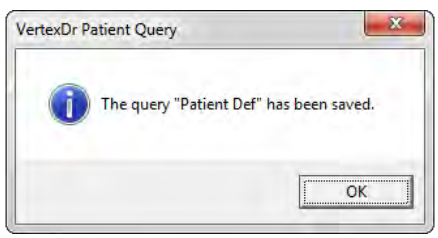


2. Enter a name for the query and then click the **OK** Button.

Save an Existing Query

To save any changes you've made to an existing query:

1. Select the **Save** Button. The *Patient Query Message* Window displays notifying you that your changes have been saved.

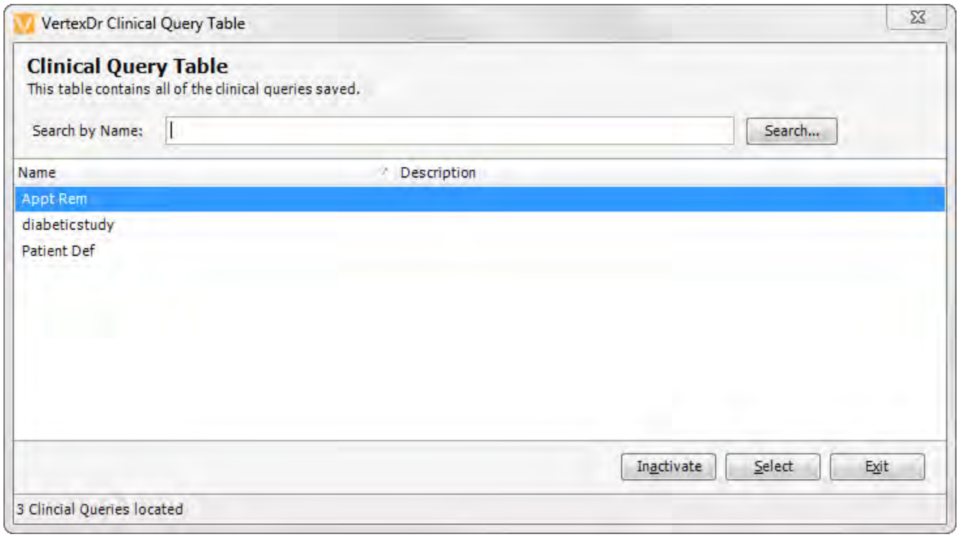


2. Click the **OK** Button to exit the *Patient Query* Window.

Load a Saved Query

To open a saved query:

1. Select the **Load** Button. The *Research Query Table* Window opens.

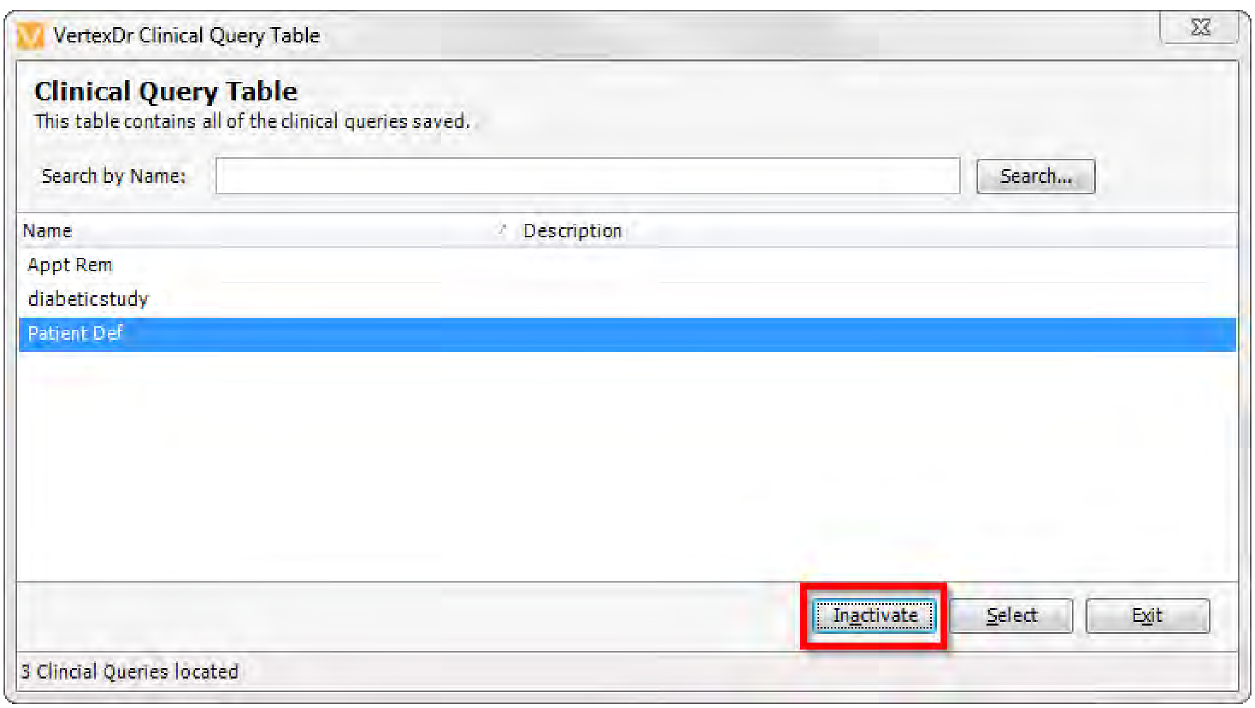


2. Highlight the desired query and click the **Select** Button. The defined query will populate in the *Retrieve patients with the following clinical data* List Box.

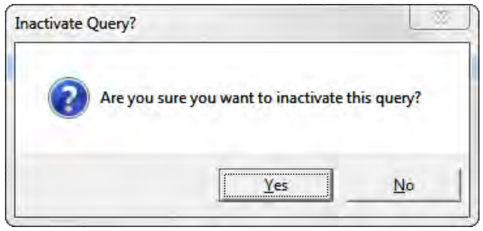
Inactivate a Saved Query

To Inactivate a saved query:

1. Select the **Load** Button. The *Research Query Table* Window opens.



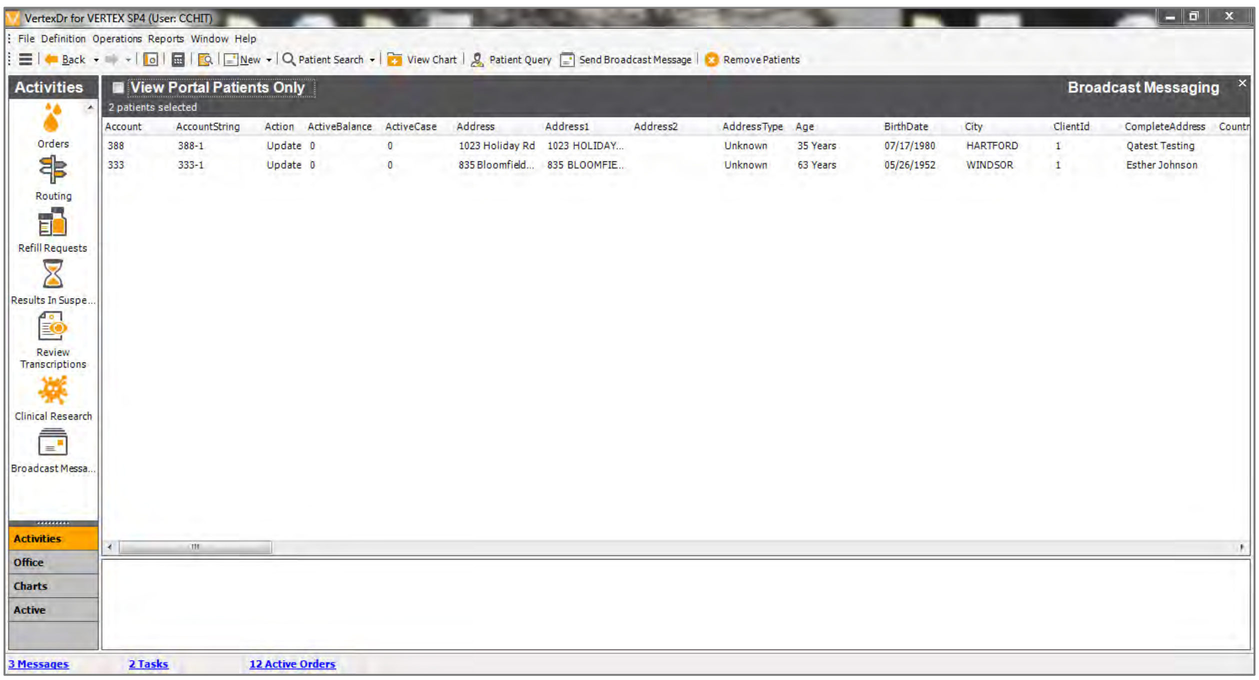
2. Highlight the desired query and then click the **Inactivate** Button. The *Inactivate Query* Window opens.



3. Select the **Yes** Button to confirm the deletion, select the **No** Button to cancel the delete request or select the **Cancel** Button.

Sending the Broadcast Message

After generating the query, the Recipient List populates in the *Broadcast Messaging* Window.



The Recipient List contains all patients that met the selected criteria AND have an e-mail address listed on the *Personal* Section of Patient Definition.

Editing the Recipient List

Depending on the nature of the Broadcast Message, the list may need to be further refined to only include patients with Portal IDs. To do this, select the **View Portal Patients Only** Checkbox.

To select the patients to receive the Broadcast Message:

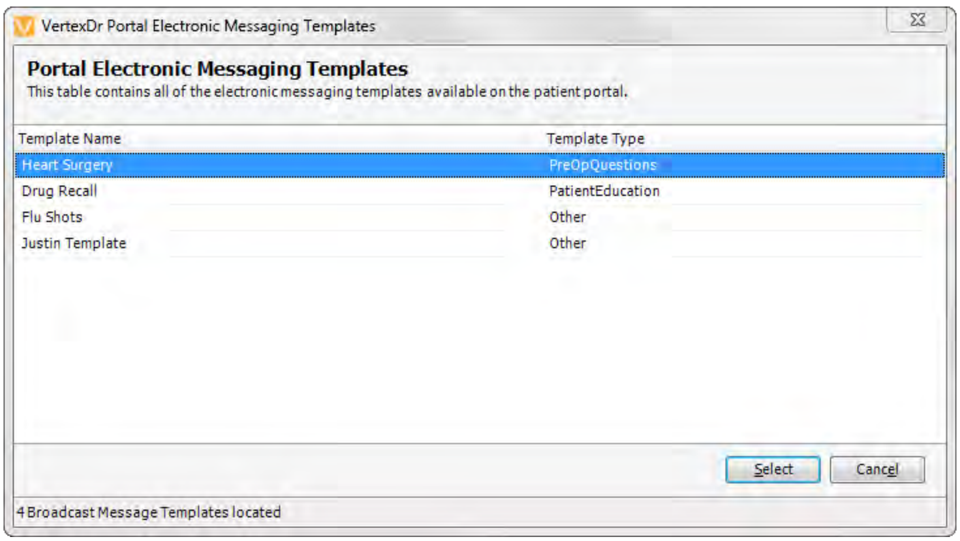
1. Hold down the **Ctrl** Key.

2. While holding down the **Ctrl** Key, click on each patient to be sent a message; or click on the first patient, then hold down the **Shift** Key and click on the last patient. All patients in between the first and last patients clicked will highlight.

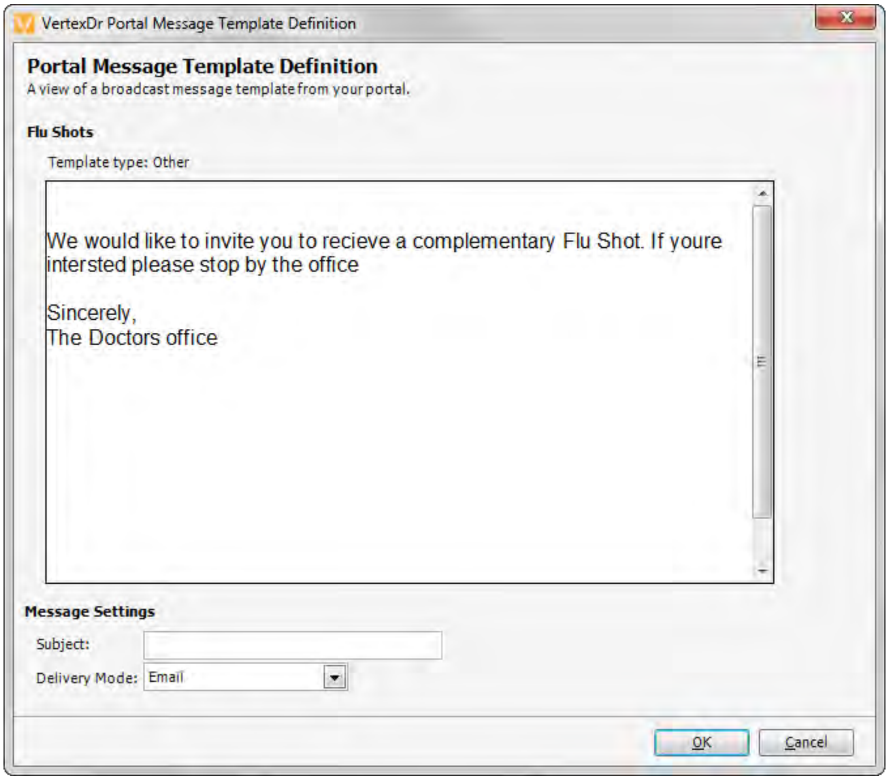
3. If certain patients should not be sent the Broadcast Message, select those patients using either the **Ctrl** Key or the **Shift** Key Function and then select the **Remove Patients** Button. The selected patients will be removed from the Recipient List.

Sending the Broadcast Message

1. Once the desired patients have been selected, click the **Send Broadcast Message** Button. The *Portal Templates* Window opens displaying the Message Templates which were defined on the practice's Portal website.



2. Highlight the desired Message Template and then click the **Select** Button. The Message Template is displayed.



3. The template cannot be changed here, but a subject may be entered in the *Subject* Field.

4. Select the type of message to be sent from the **Delivery Mode** Dropdown.

   - **E-Mail** – the Broadcast Message will be sent via a standard, unsecured e-mail message. This option can be used for patients both with and without a portal account.

   - **Secured E-Mail** – the Broadcast Message will be sent to the patient's Patient Portal Account. The patient will receive an e-mail asking them to log into their portal account to retrieve the message.

Note: A message stating that the practice will hold a flu clinic on a specific date is a good example of a message which can be sent via the E-Mail Delivery Mode. A message telling the patient the results of a test, however, is best sent via the Secured E-Mail Delivery Mode.

5. Select the **OK** Button to confirm the **E-Mail Delivery Mode**. A message box opens.

6. Select the **Yes** Button to continue sending the Broadcast Message. Select the **No** Button to cancel the delivery and return to the *Message Template* Window.

7. After sending the Broadcast Message, a confirmation window opens stating that the message has been sent. A copy of the message is also added to the *Correspondence* Section of each recipient's Patient Chart.

Note: Depending on how many recipients the message was sent to, it may take a few moments to send the message. Do not navigate away from the *Broadcast Messaging* Area until you receive the *Confirmation* Window.

Bidirectional Messaging

The Bidirectional Messaging feature allows patients with active Portal accounts to communicate with the Practice. There are two (2) types of bidirectional messages:

1. *Ask the Staff* – These messages are generated by the patient on the Portal and are then sent to an assigned user's inbox within the *Messaging* Area.

2. *Standard Communication* – These messages are generated by the VertexDr Practice Suite when a Portal requested appointment is either denied or scheduled. The patient can reply to these appointment messages on the Portal. The response is sent to an assigned user or role. These messages are labeled with "Patient Portal" in parenthesis after the subject.

Items to Take Note Of

- When responding to messages generated from the Patient Portal, the **Attach** Button is not available.

- When replying to messages generated from the Portal, the *Subject* Field will need to be re-entered. For ease of use for the patient, try to keep the new subject similar to the original subject.

- *Ask the Staff* Messages are limited to a maximum of four (4) messages. For example:

    1. The patient sends a message to the practice.

    2. A user at the practice responds to the message (Remember to re-enter the subject!).

    3. The patient responds to the second message.

    4. A user at the practice responds to the third message. Following this message, no further messages can be sent.

Note: There is no limit to the number of *Standard Communication* Messages that can be sent.

Setting up Bidirectional Messaging

Bidirectional messages are set up on the **Electronic Messaging** Tab in Portal Parameters. For more information on setting up this feature, reference the *Parameter Settings* Section of this manual.

Portal Set-Up

My Desktop Configuration

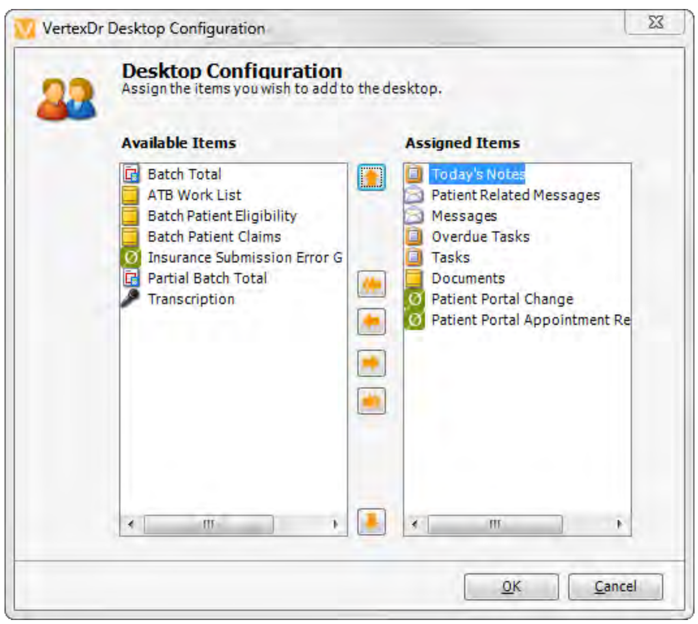
The *My Desktop* Window can be configured to display links to various areas of the software that pertain to the user who is currently logged in.

Patient Portal Appointment Requests and Patient Portal Changes are also available.

Add Desktop Items

To add these items to the desktop:

1. Select **Edit** from the Toolbar and then select **Desktop Configuration**. The *Desktop Configuration* Window displays. The *Available Items* List Box displays all of the items that the user can add to their desktop. *The Assigned Items* List Box displays the items which are currently displayed on the users desktop.



2. To add an available item to the *Assigned Items* List Box, highlight the item and then click the **Single Right Arrow** Button.

3. To add all available items to the *Assigned Items* List Box, select the **Double Right Arrows** Button.

4. When finished, select the **OK** Button to save the changes.

Remove Desktop Items

1. To un-assign and item, highlight the item in the *Assigned Items* List Box and then select the **Single Left Arrow** Button.

2. To un-assign all items, select the **Double Left Arrows** Button.

3. When finished, select the **OK** Button to save the changes.

Parameter Settings

Anytime a new document or Portal user is added to the Suite, you will need to link this to the Portal Parameters. This will not be set automatically.

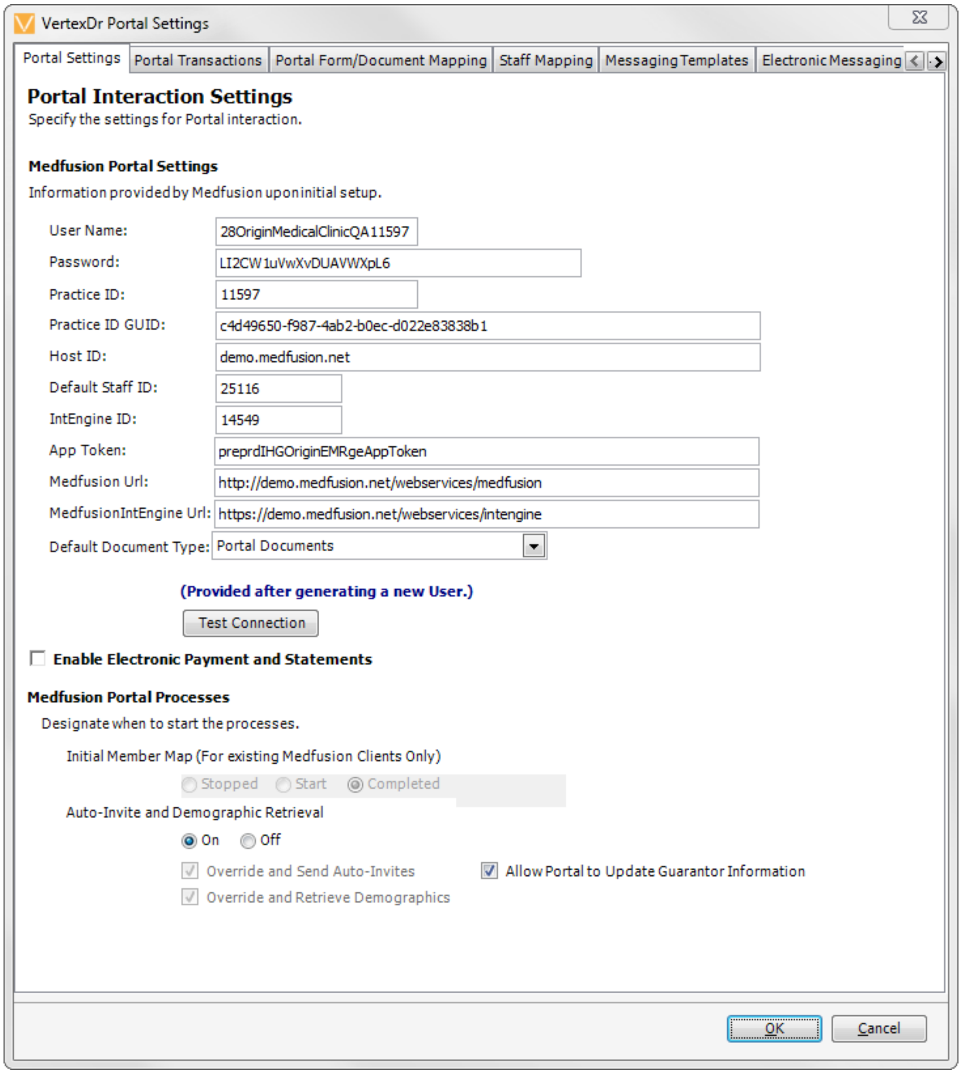
To access the Patient Portal Workflow Parameters settings, select *Definitions*, *Parameters*, *Third Party Settings*, and then *Portal Settings*. This will open the *Portal Settings* Window.

Note: Many of the areas covered in this section will be set up prior to the practice going live with the Patient Portal. If there are any questions or concerns, please contact Support before changing Portal Settings.

Third Party Settings

Portal Settings

The **Portal Settings** Tab houses the identifying information which allows your practice's customized website to interface with the Patient Portal. The following sections detail the information contained within the **Portal Settings** Tab.



<u>Medfusion Portal Settings</u>

- *User Name*, *Password*, and *Practice ID* Fields – These fields are your practice's identifying names and number with Medfusion. These numbers will be provided by Medfusion during the initial implementation process.

- *Default Staff ID* Field – This field is generated automatically when your practice's website is registered with Medfusion.

- *IntEngine ID* Field – Identifies your practice's interface between Medfusion and the Patient Portal.

- **Default Document Type** – Defines the default document type that will be selected when a Medfusion custom form imports into VertexDr Manager.

- The **Test Connection** Button allows for the connection between the Patient Portal and Medfusion to be tested during the implementation process.

Medfusion Portal Processes

The *Medfusion Portal Processes* Section determines how your patients will receive Patient Portal invitations.

Initial Member Map

If your practice was active with Medfusion prior to activating the Patient Portal, the *Initial Member Map* Area will allow you to integrate your existing Medfusion Portal patients with the Patient Portal.

Note: This area will be grayed out and the **Completed** Radio Button will be selected once the integration process has completed.

Auto-Invite and Demographic Retrieval

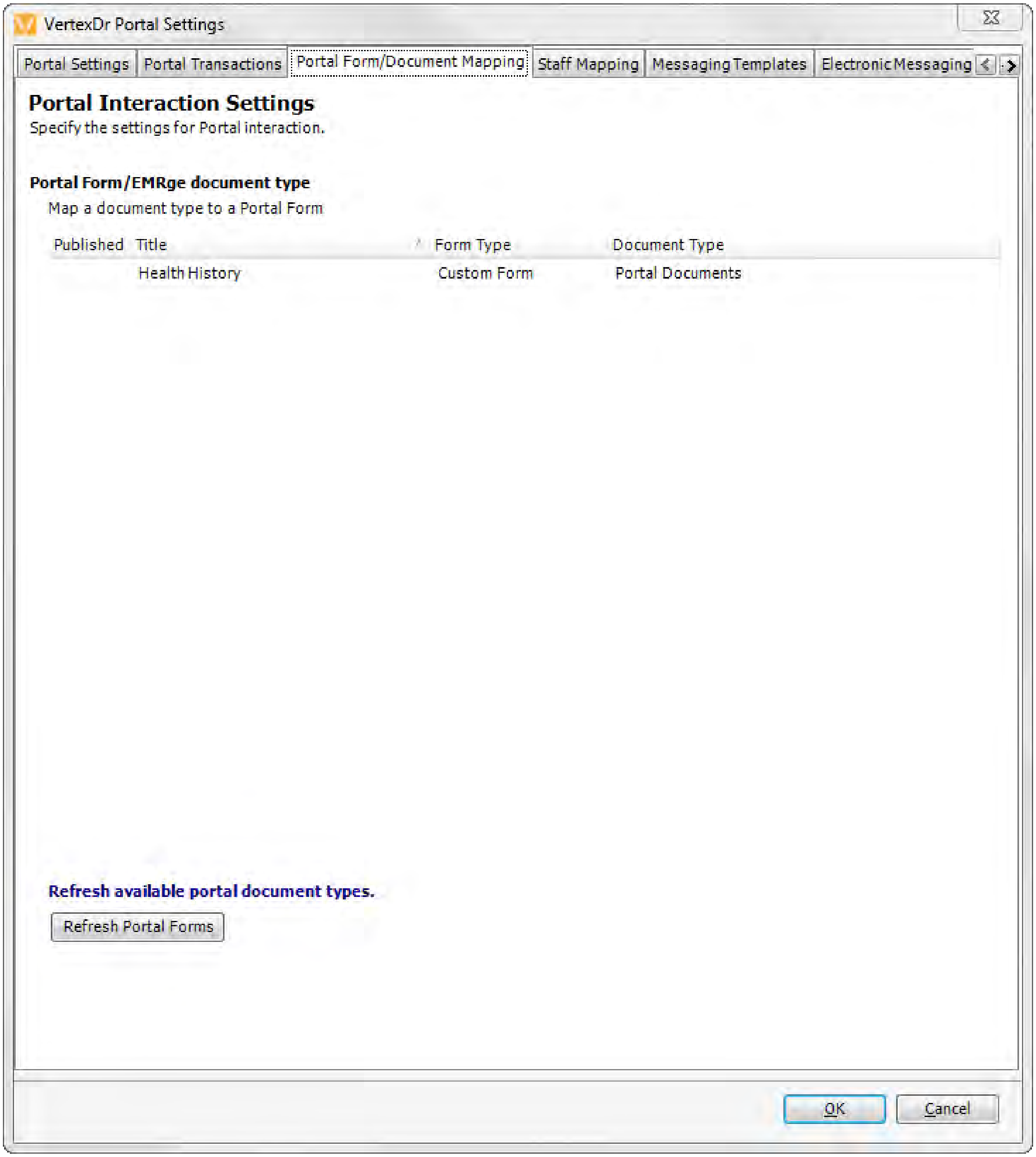
The **Auto-Invite and Demographic Retrieval** Checkbox will ensure that once a patient has been registered, an e-mail invitation will be sent to the patient requesting they join the Patient Portal. When the practice first goes live with the Patient Portal, this setting will send the initial mass invitation to all patients with an e-mail address listed.

Portal Form/Document Mapping Tab

The **Portal Form/Document Mapping** Tab is used to link Medfusion custom forms that are created by the patient using the Portal to a document type in VertexDr Manager.

When the form is filled out on the Portal, this is the Document Type that will be listed under in the *Documents* Section of the Patient Chart.

Note: The Document Type needs to be defined as either **Clinical** or **All** in Document Type Definition.

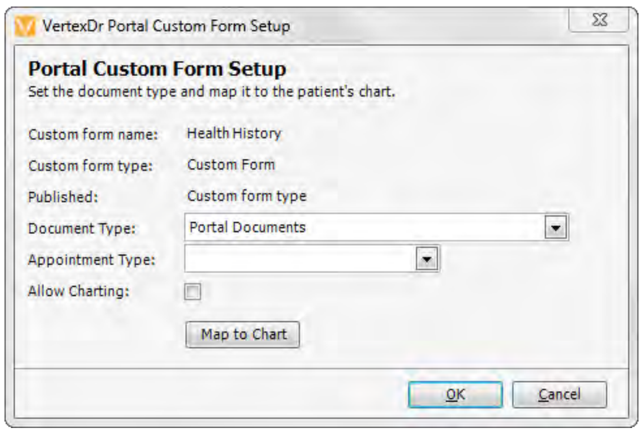


The checkmark in the *Published* Column indicates that the document is visible on the Patient Portal for patients to access and complete.

1. If there are no document types listed or a document is missing from the *Portal Form/Vertex Dr document type* Section, click the **Refresh Portal Forms** Button. This will download any new form types that have been created on the portal.

2. Once the Portal form types have been downloaded, double-click the document that needs to be linked. This opens the *Portal Custom Form Setup* Window.

3. From **Document Type** Dropdown, select the Document Type in the system that corresponds to the selected Medfusion custom form.



1. The **Appointment Type** selected from the Dropdown will become the Encounter Type if this document is to be used with the Medcin Integration Feature.

2. Selecting the **Allow Charting** Checkbox will make this document available for the Medcin Integration Feature.

3. Once the **Allow Charting** Checkbox is selected the **Map to Chart** Button will become available. This button will open the *Custom Form-to-Medcin Map* Window.

Note: In general, setting up these items will be handled by VertexDr Healthcare Solutions during implementation. Please contact Support before making changes in this area.

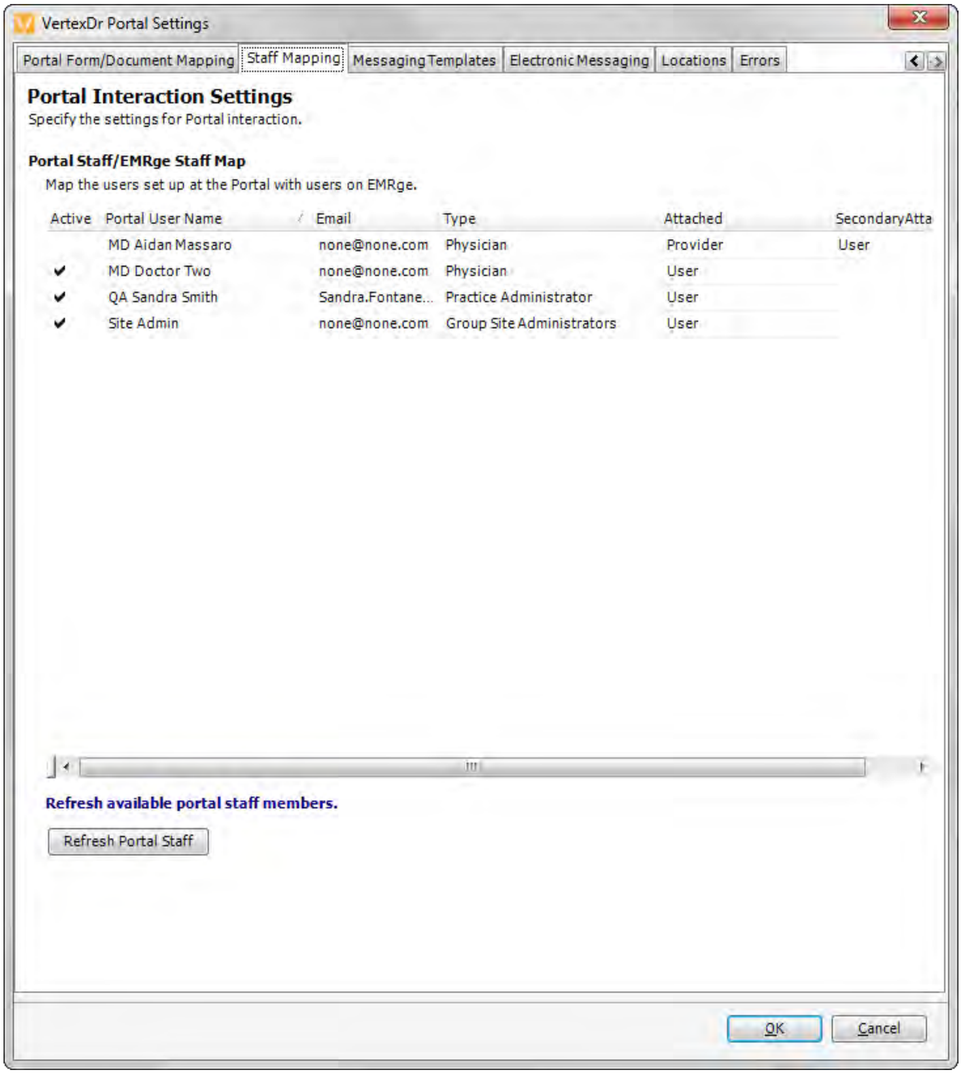
4. When finished, click the **OK** Button to exit the *Portal Custom Form Document Type* Window.

Staff Mapping Tab

The **Staff Mapping** Tab shows a listing of the office staff members that are registered on the *Patient Portal.*

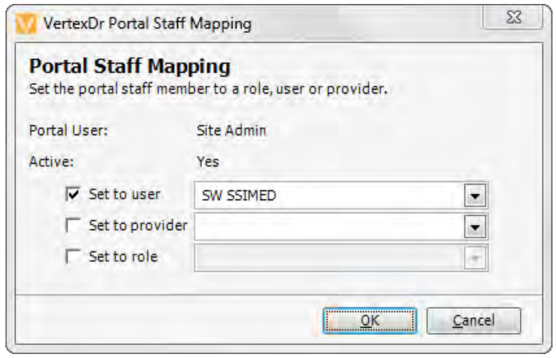
From this section, staff registered on the Portal can be matched to users or roles that exist in the Suite application.

Note: Every provider must have a Portal account and be linked to that account in this area. Only linked providers will be available for patients to select as *Preferred Providers* when sending appointment requests and demographic changes through the portal.



The **Refresh Portal Staff** Button is used to download a list of office staff members who have security access to the Patient Portal. Once staff members have been downloaded from the portal, they will need to be matched to users in the VertexDr Manager application.

1. Double-click the user to be mapped. The *Portal Staff Mapping* Window opens.



2. From the *Portal Staff Mapping* Window check one of the boxes in the *Active* Column indicating whether they are considered a standard **User**, **Provider**, or a **Role**.

Note: Multiple checkboxes cannot be selected.

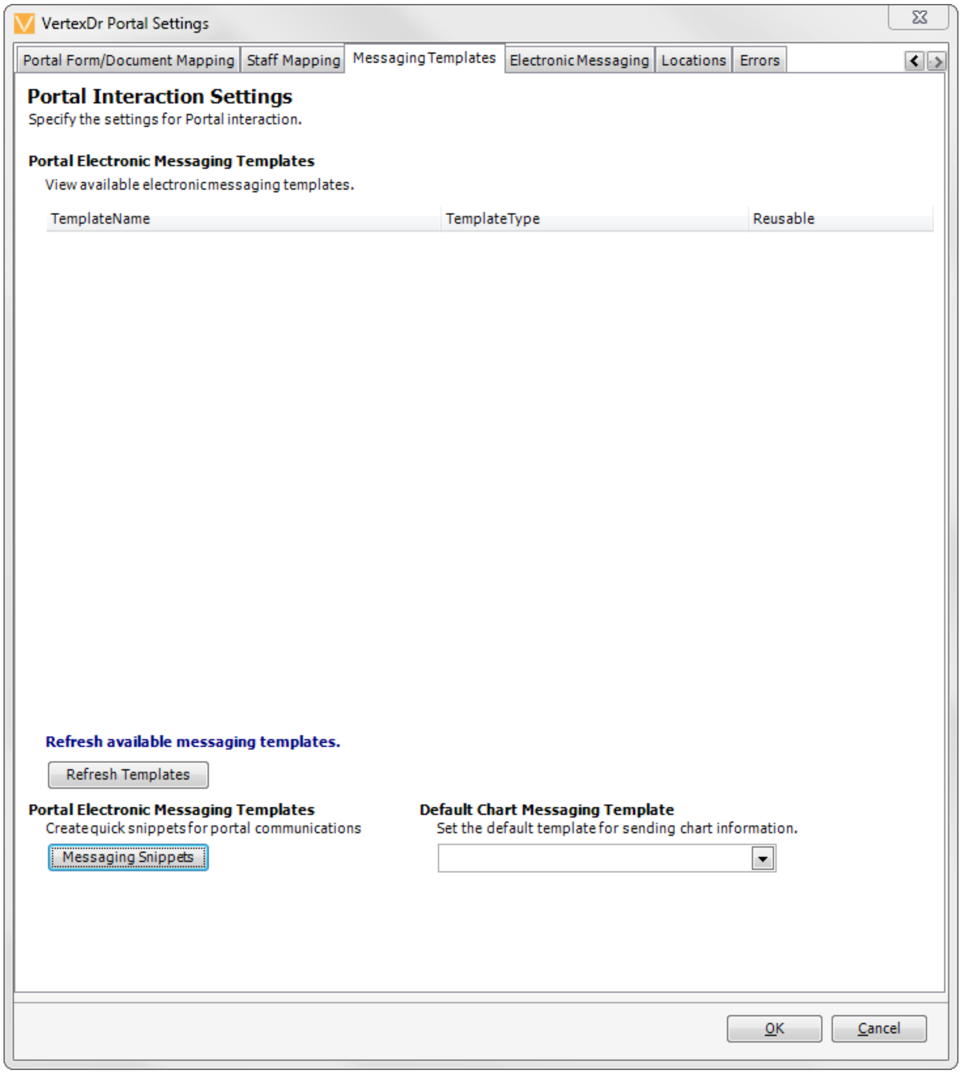
- **Provider –** When an appointment is requested on the portal for a specific provider, this matches the provider on the portal with a provider in the system.

- **User/Role** – This option is for bi-directional communication. When a patient selects a user to send a message to on the portal, this is the user that will receive the message in the system.

3. From the Dropdowns select the appropriate user, provider or role. Once this has been selected click the **OK** Button. The *Portal Staff Mapping* Window closes allowing for the selection of the next Portal user.

Messaging Templates Tab

The **Messaging Templates** Tab houses the Broadcast Message Templates which were created on the practice's Portal site.



If no Message Templates are listed, click the **Refresh Templates** Button to download the Message Templates from the Patient Portal.

<u>Messaging Snippets</u>

Messaging Snippets are defined messages which can be sent when:

- Confirming that the requested appointment was scheduled.
- Explaining why the requested appointment was denied.

From the *Portal Settings* Window, Messaging Snippets can be defined by selecting the **Messaging Snippets** Button.

To enter a new snippet:

1. Click the **Messaging Snippets** Button, the *Portal Message Snippets Table* Window opens.

2. The *Portal Messaging Snippets Table* Window lists all currently defined snippets. Click the **Insert** Button to define a new snippet.

3. Enter the *Message* and select **Appointment** from the **Message Type** Dropdown.

Note: There are other options in the dropdown, however, they are reserved for future Patient Portal enhancements.

Electronic Messaging Tab

The **Electronic Messaging** Tab houses the information needed for Bidirectional Messaging.

Electronic Messaging Settings

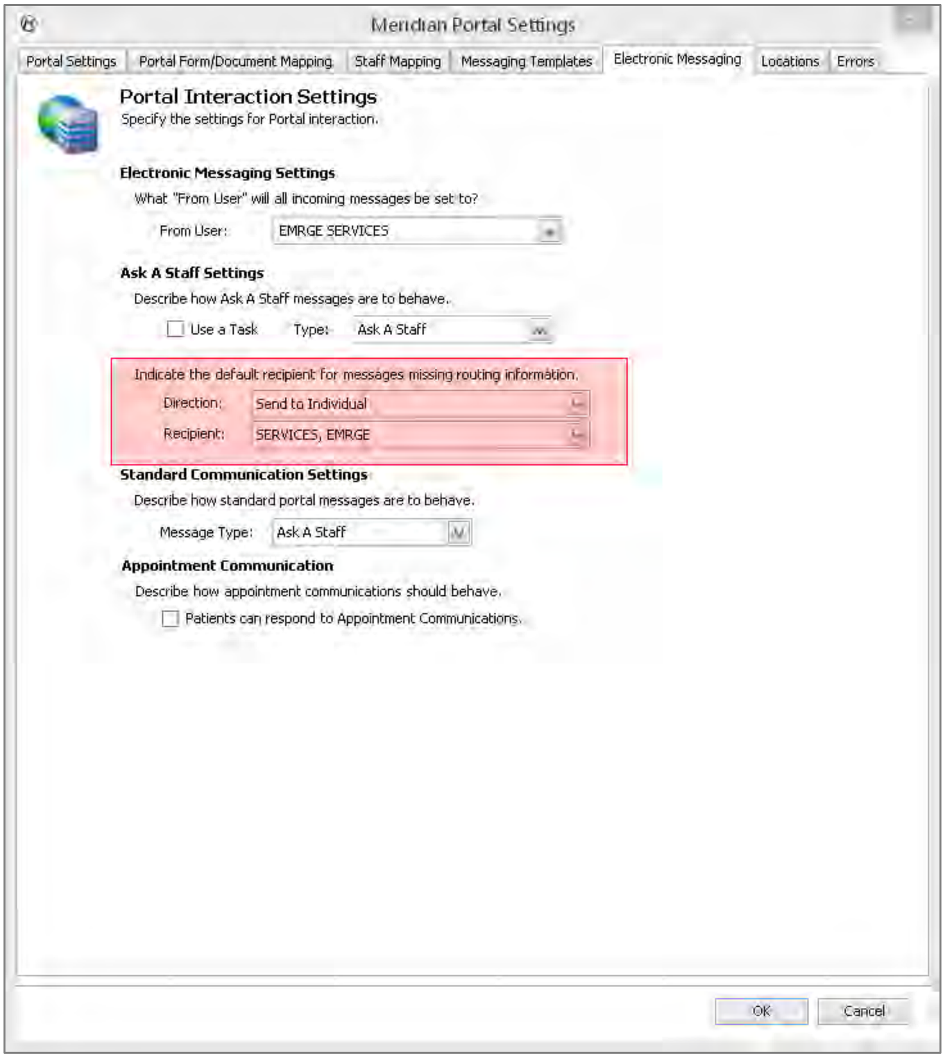
Select a user to attach as the “From User” when messages are received from the Patient Portal. Generally, this field should be set to Services Vertex Dr to indicate that it was generated outside of the practice.

Ask a Staff Settings

When *Ask a Staff* Messages are received from the Patient Portal, the Practice Suite will attach the selected Message Type to them. Select the appropriate Message Type from the dropdown.

Note: The **Set as Priority (Message)** Checkbox will be available in a later version.

Using the **Direction** and **Recipient** Dropdowns, the Practice can define a user or role to receive Ask a Staff Messages when the patient did not select a recipient.



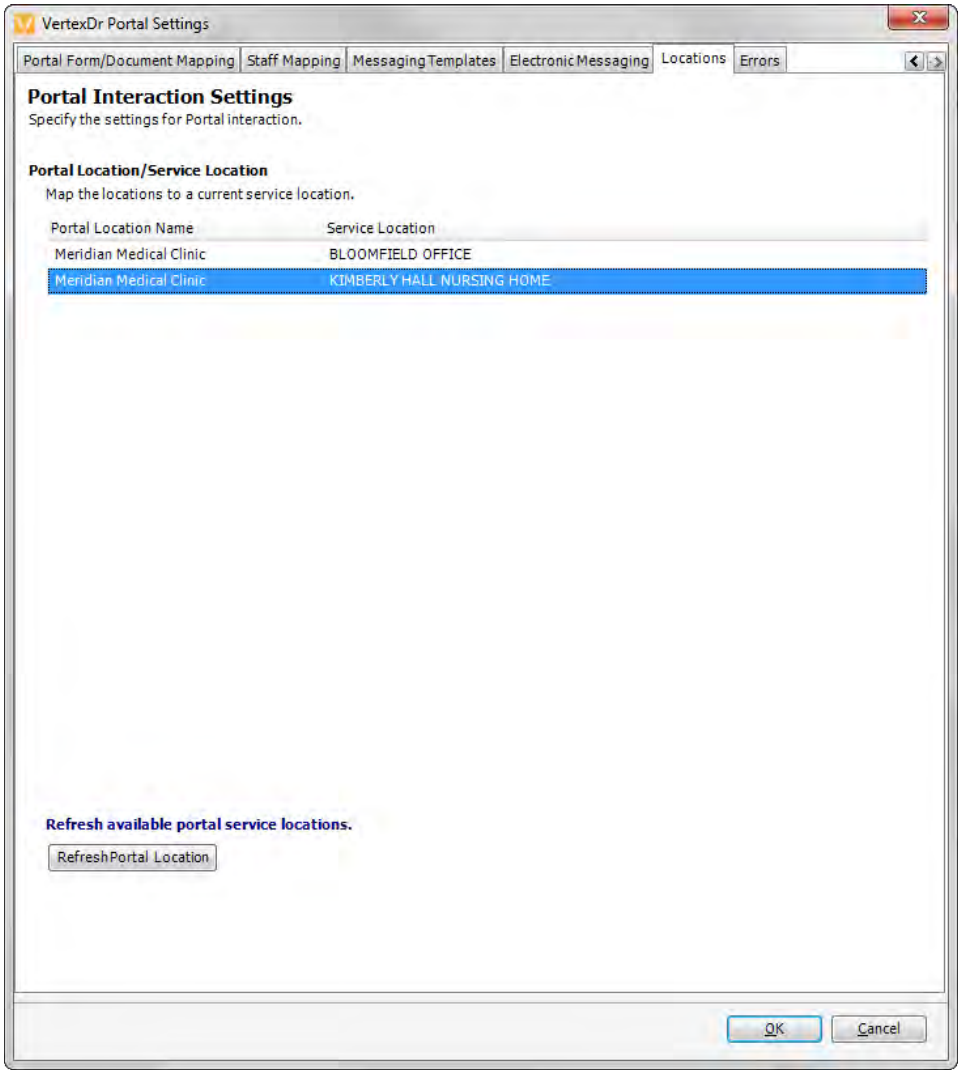
Standard Communication Settings

When *Standard Communication* Messages are received from the Patient Portal, the VertexDr Practice Suite will attach the selected Message Type to them. Select the appropriate Message Type from the **Dropdown** Menu.

Note: The **Set as Priority (Message)** Checkbox will be available in a later version.

Locations Tab

Similar to the **Staff Mapping** Tab, the **Locations** Tab links locations listed on the Patient Portal to the practice's Service Locations. Locations must be linked in order for patients to select a *Preferred Location* when requesting appointments and demographic changes.

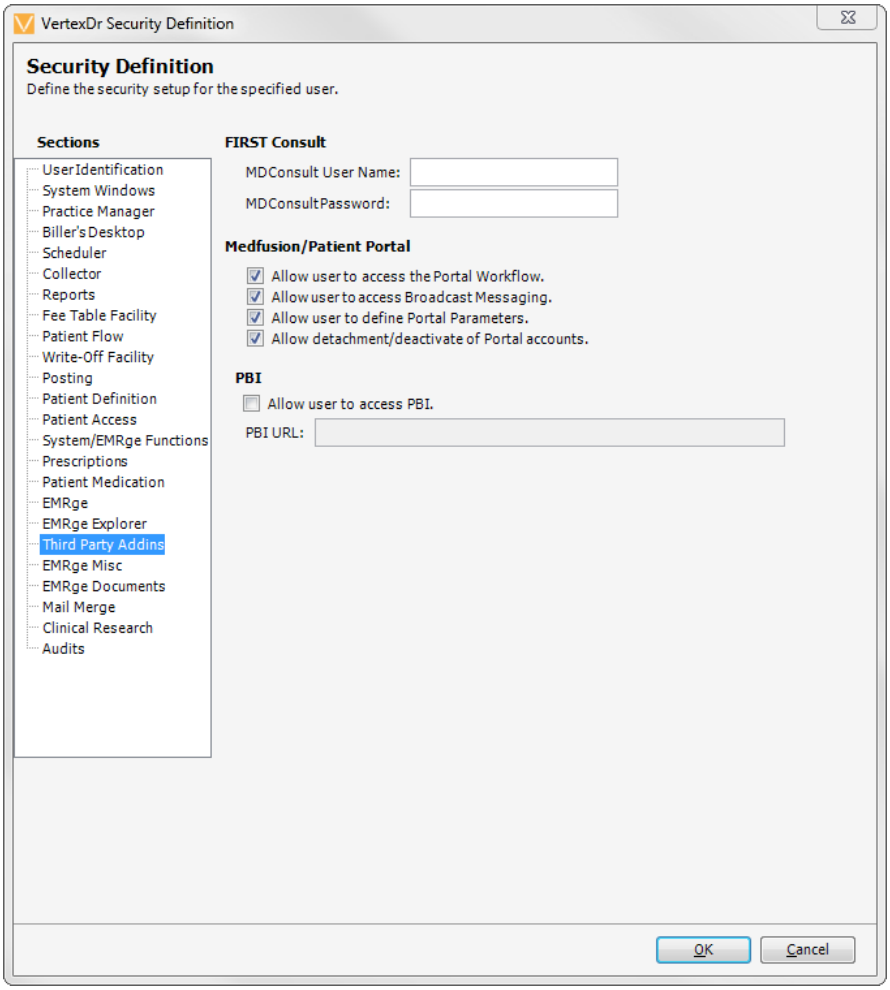


User Securities

To allow a user to access the Patient Portal:

1. Search for and select the user from the *User Table*.

2. On the *Third Party Addins* Section there are three (3) securities which can be provided to the selected user:



- **Allow user to access the Portal Workflow** – This setting will allow the user access to the Patient Portal Workflow Icon in the *Office* Section of the Navigation Pane.

- **Allow user to access Broadcast Messaging** – This setting will allow the user to access the *Broadcast Messaging* Area where Broadcast E-Mail and Secure E-Mail communications can be sent.

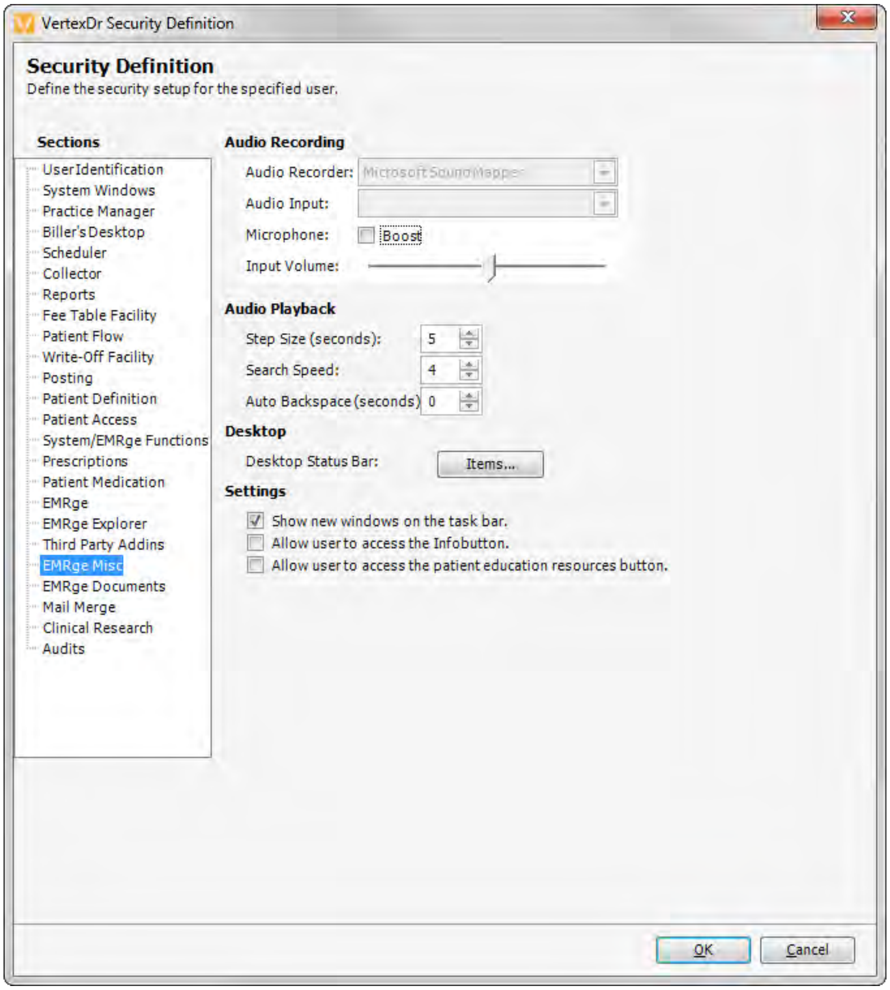
- **Allow user to define Portal Parameters** – This setting will allow the user access to Portal Settings.

3. When finished, select the **OK** Button to save the changes.

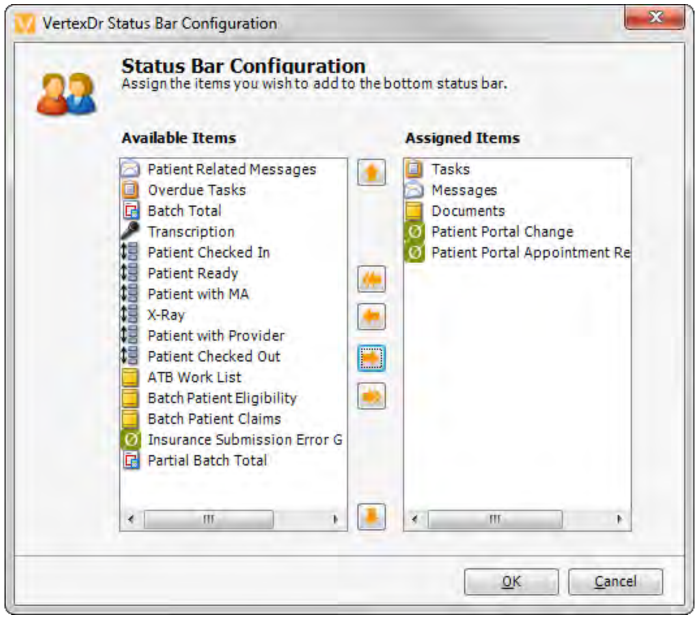
To add Portal items to Desktop Status Bar:

1. Search for and select the user from the *User Table*.

2. On the *Vertex Dr Misc* Section select the **Items** Button.



The *Status Bar Configuration* Window opens.



This window functions similarly to the *Desktop Configuration* Window. For more information, see the *My Desktop Configuration* Section of this manual.

Additional Patient Portal Information

The Patient Portal works in conjunction with web-based Medfusion software.

The purpose of this document is to provide you with detailed information about how to register new patients, update existing patient demographics, and schedule appointments through the VertexDr Practice Suite once the information has been received from your customized website.

For more information about creating, updating, and maintaining a customized website for your practice contact your Medfusion representative.