SETTING UP AND USING THE CLIENT SELF-SERVICE PORTAL

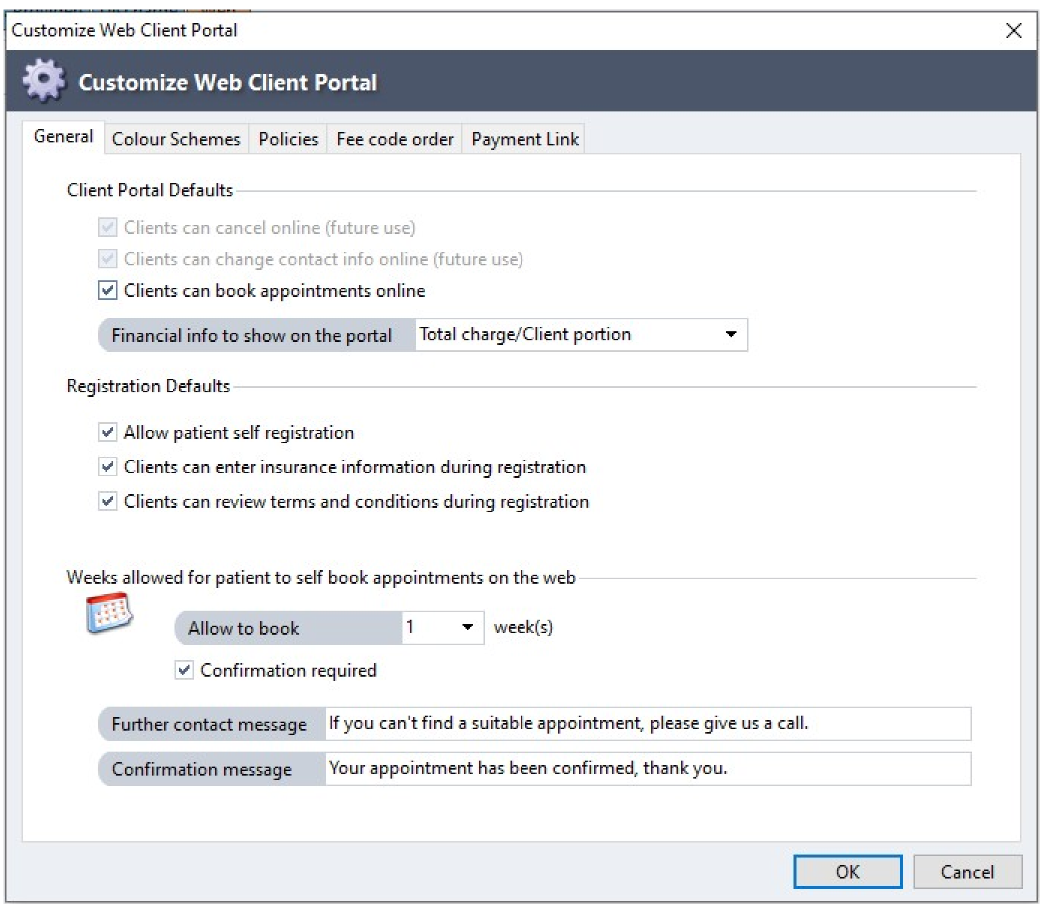
The Practice Perfect client portal can be used by your clients to register themselves, book appointments, view their financial transactions and balances and exchange documents with the clinic.

Because there are so many different variations permitted when allowing clients to perform these functions, there are many options that need to be set within Practice Perfect so that what 'faces the world' is the most effective for the clinic and its specific requirements.

Setup must be done in 4 basic places: *General, Providers, Fees* and then within each *Client*. There is also some setup required for the *Financial* portal component.

General Setup

The general setup can be found under *Settings, Customize Web Portal*. There are three tabs, starting with *General*.



The first options are for future functions and cannot be set, at present.

Clients can cancel online. Ultimately this will give patients the ability to cancel their own appointments online, if the clinic permits this to happen, hence the option (future use).

Clients can change their contact info online. Ultimately this will give patients the ability to change their basic contact information online, again at the clinic's discretion (future use).

Clients can book appointments online. If you want to <u>disable</u> the entire patient self-booking feature of the client portal, please *un-tick* this option.

Allow patient self registration. This should be selected if the clinic wants to allow new patients to register and have their information automatically brought into Practice Perfect. If not selected, new patients cannot book appointments.

Registration Location. When a new patient registers, this is the default Incident *Service/Billing Location* into which they will be placed. The next round of changes will allow users to select which location when they register instead of being placed into a default. For now, users would need to be moved to an alternate location by the clinic staff once they have registered.

Clients can enter insurance information during registration. If enabled, newly-egistering clients will also be asked to supply their insurance information.

Clients can review terms and conditions during registration. If enabled, newly-egistering clients will be asked to review and agree to your clinic's Terms and Conditions.

Allow to book. How many weeks in the future are patients allowed to self-book appointments.

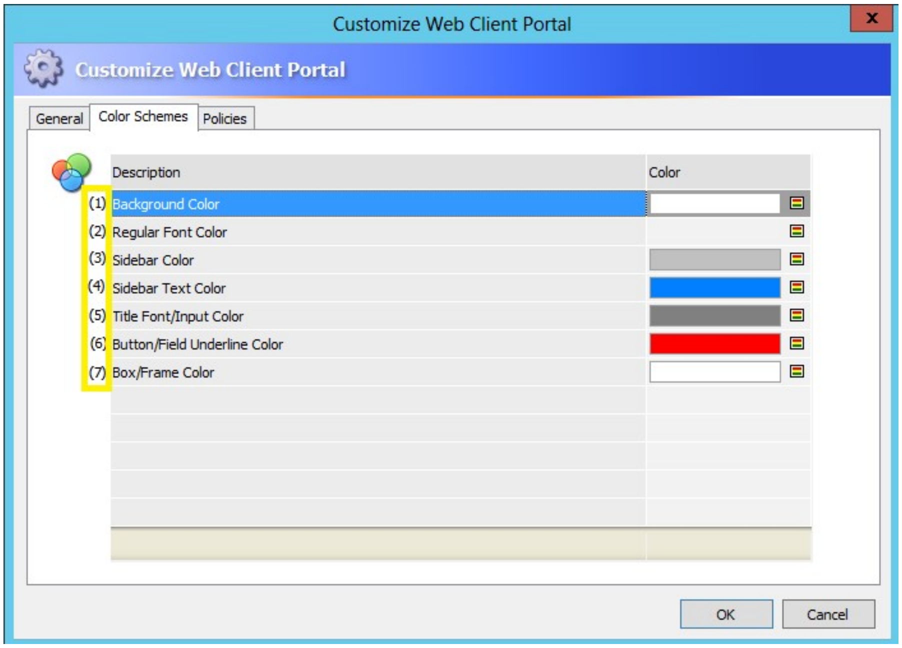
Confirmation required. If selected, the clinic will need to approve all appointments before they become official, otherwise they will remain with a status of pending and will be awaiting review.

Further contact message. This is the message that appears on the actual web booking screen intended to inform patients what do if they can't find an appointment that works (eg; "Can't find something you like? Please contact us at (555) 555-555. Thank you.)

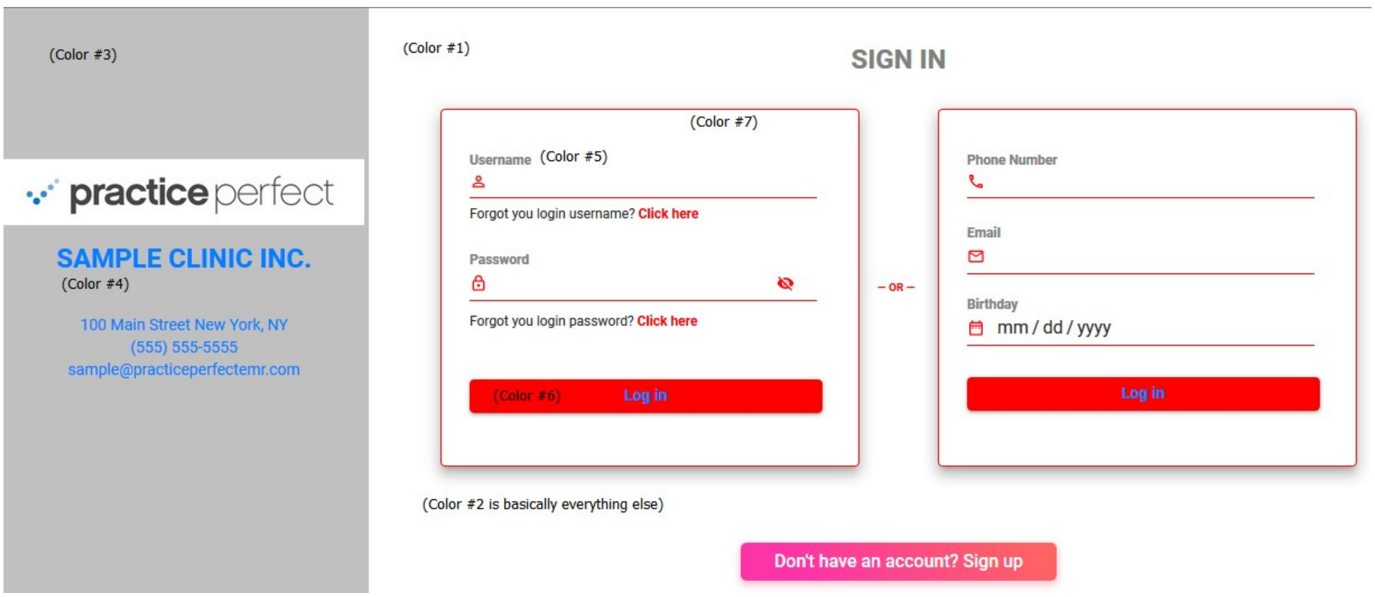
Confirmation message. This is the message that will appear on the actual web booking screen once a user has selected and verified their appointment request (Eg; "You are booked! We look forward to seeing you!")

<u>*Color Schemes* tab:</u>

The user can customize the appearance of their portal to match it at closely to their website as possible.

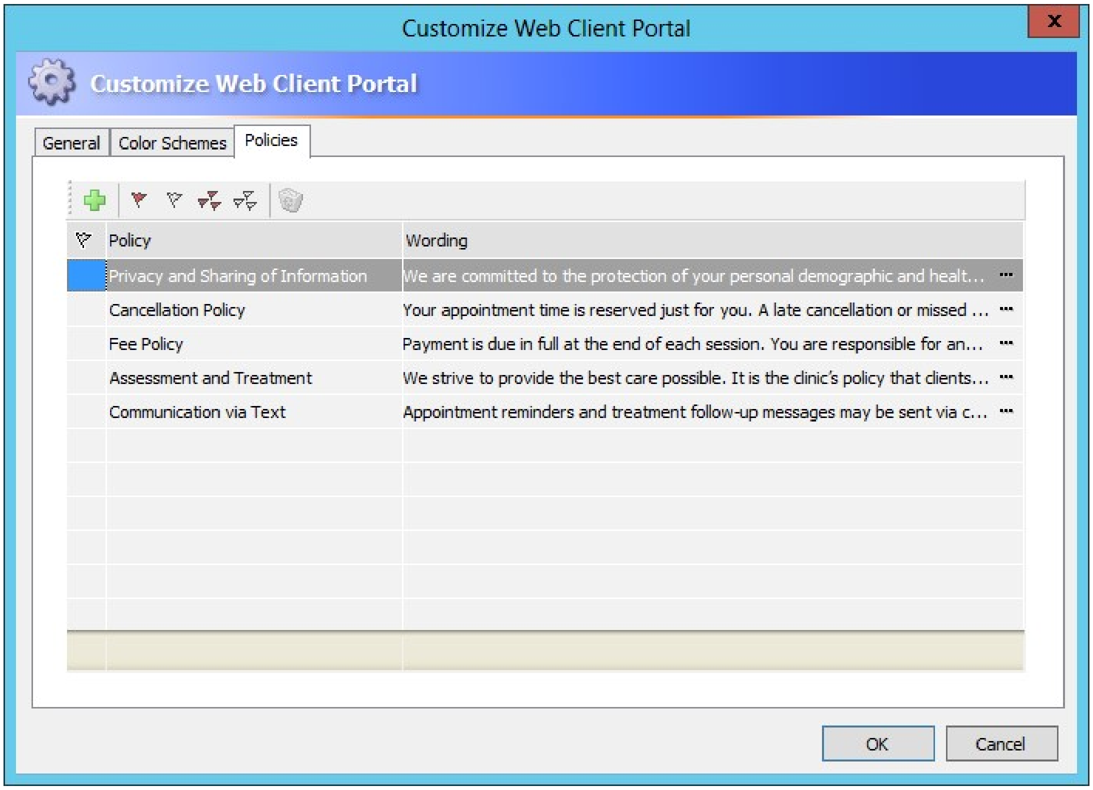


And they relate as follows:

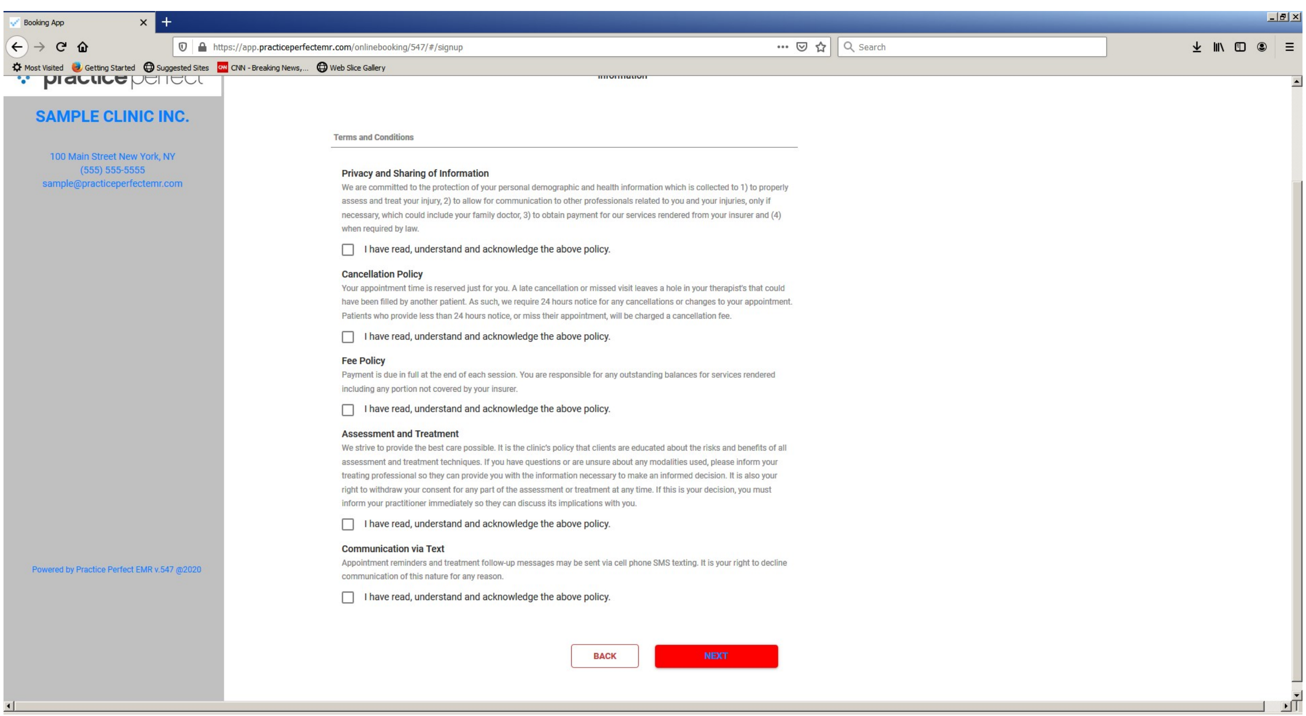


Policies tab:

This is where the clinic can setup their policies that appear in patient self-registration. A number of policies are installed by default that can be altered, added to, etc, as follows:



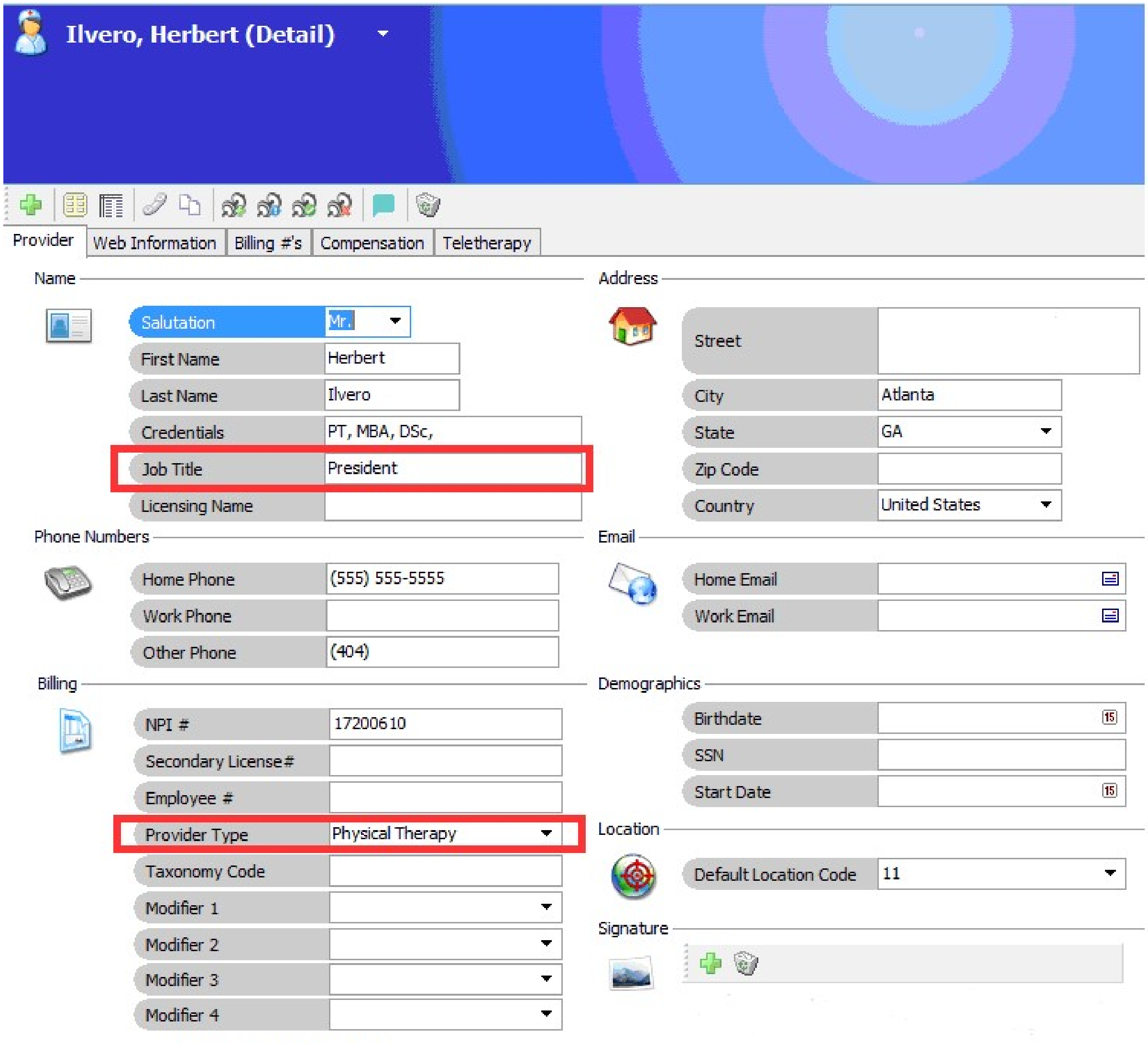
And these appear, as follows, in the portal as the last page of patient registration (assuming that the option to include terms and conditions during patient registration is enabled):



Provider Setup

There are three items to consider when setting up Providers: 1) When are they available for booking, 2) What services are they available to offer and 3) What will their profile look like to the client.

First, under *Housekeeping, Contacts, Providers*, there are two fields to consider:

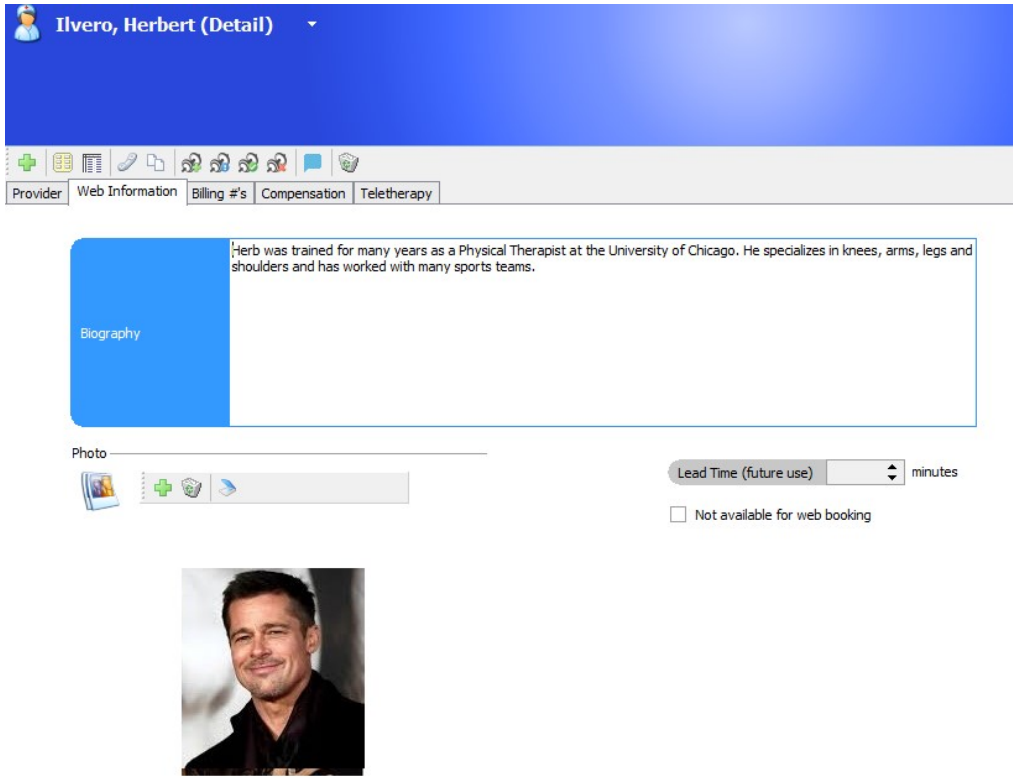


Job title. This will appear under the Provider's name on the web portal and should typically read "Physical Therapist", etc. (in red, in the sample below)

Provider Type. This is mandatory for web booking since it is how we ties Fees/Services to Providers. The Provider Type here must match the Provider Type in the Fees that this provider can perform, discussed further in this document.

Web Information tab:

This tab is where we define what ‘faces’ the patient on the website about this provider, as follows:



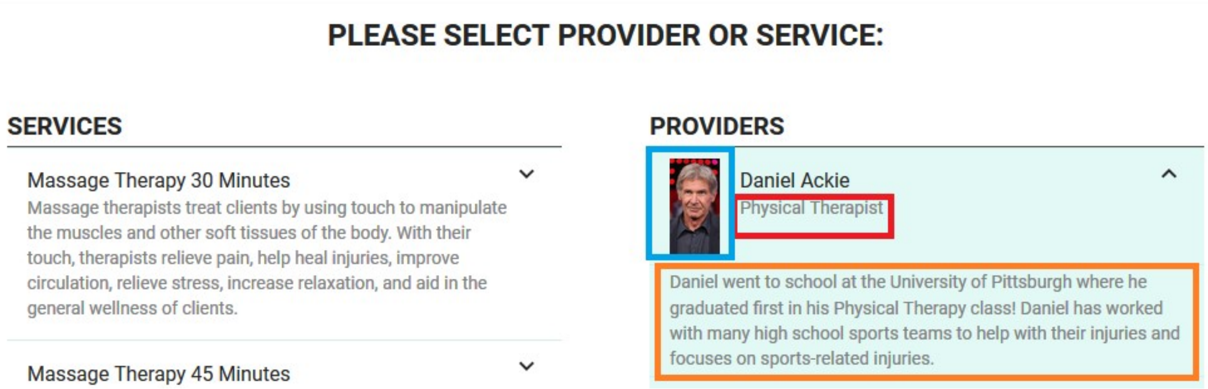
Biography. A brief description of the provider appears on the web portal (in orange, in the sample below).

Photo. A headshot of the Provider (in blue, in the same below).

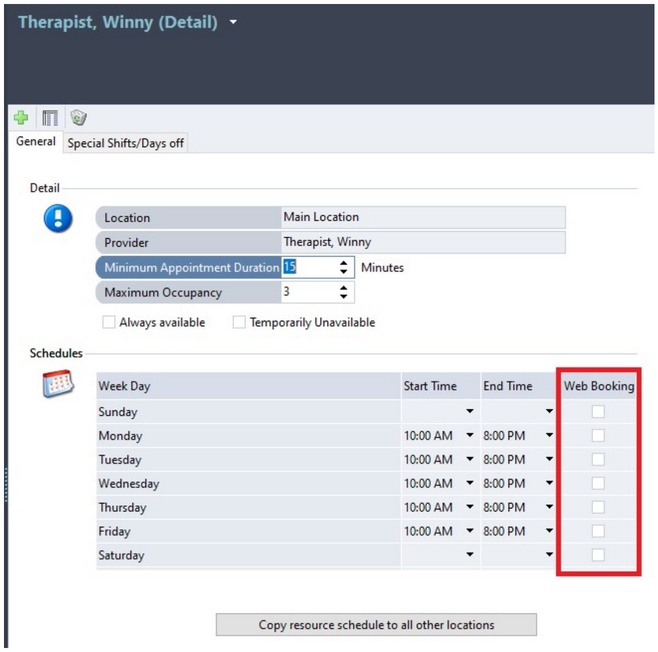
Lead Time (future use). Not yet implemented, this will allow the user to define how far in advance an appointment can be booked to prevent last minute bookings.

Not available for web booking. If selected, the Provider will not appear at all on the web portal.

And this all appears, as follows:



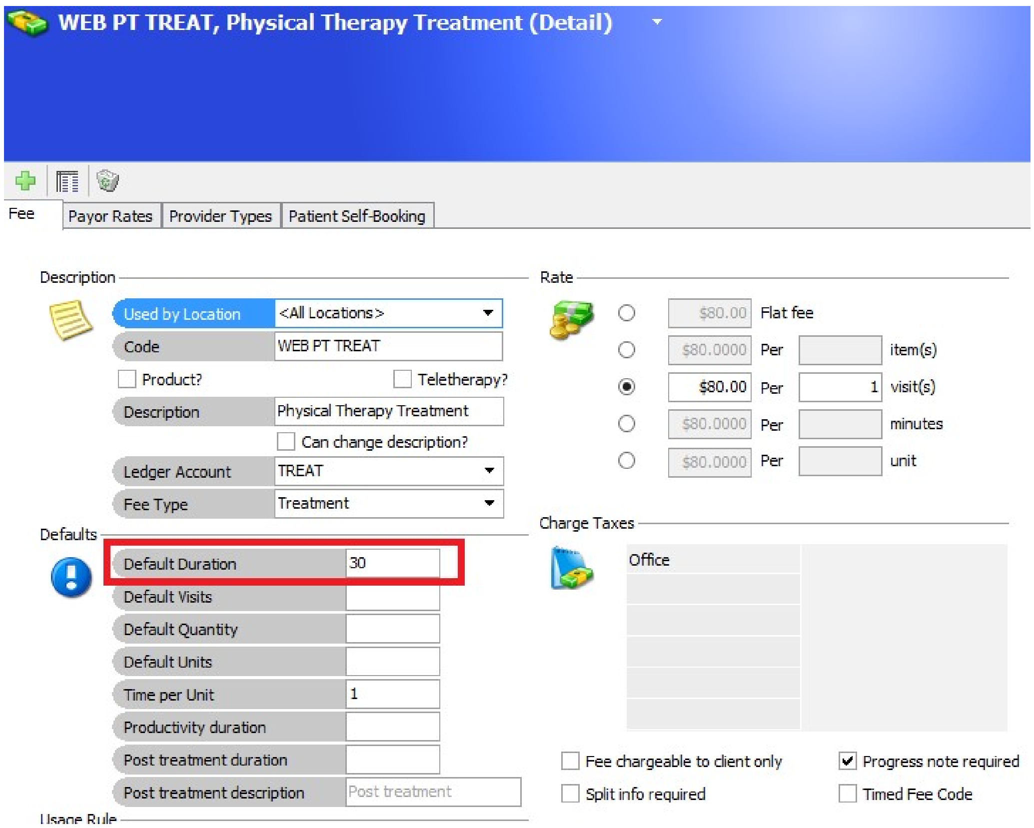
Lastly, under *Housekeeping, Under Scheduled Providers*, you must indicate which days the provider is open for web-bookings, as follows, in the red column:



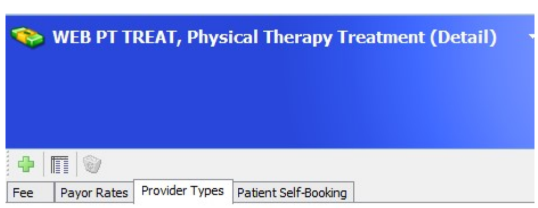
Fee Setup

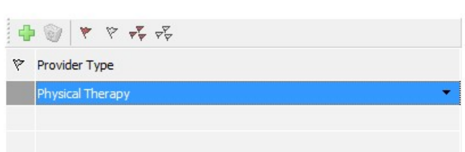
Since Fees & Services are now also client-facing, there is some setup involved here, in three areas:

First, since the entire booking system is now based upon the services selected, it's imperative that each Fee Code (that will be available for web booking), contains a *Default Duration*. Without this, the Fee will not appear on the list of available services to be booked.

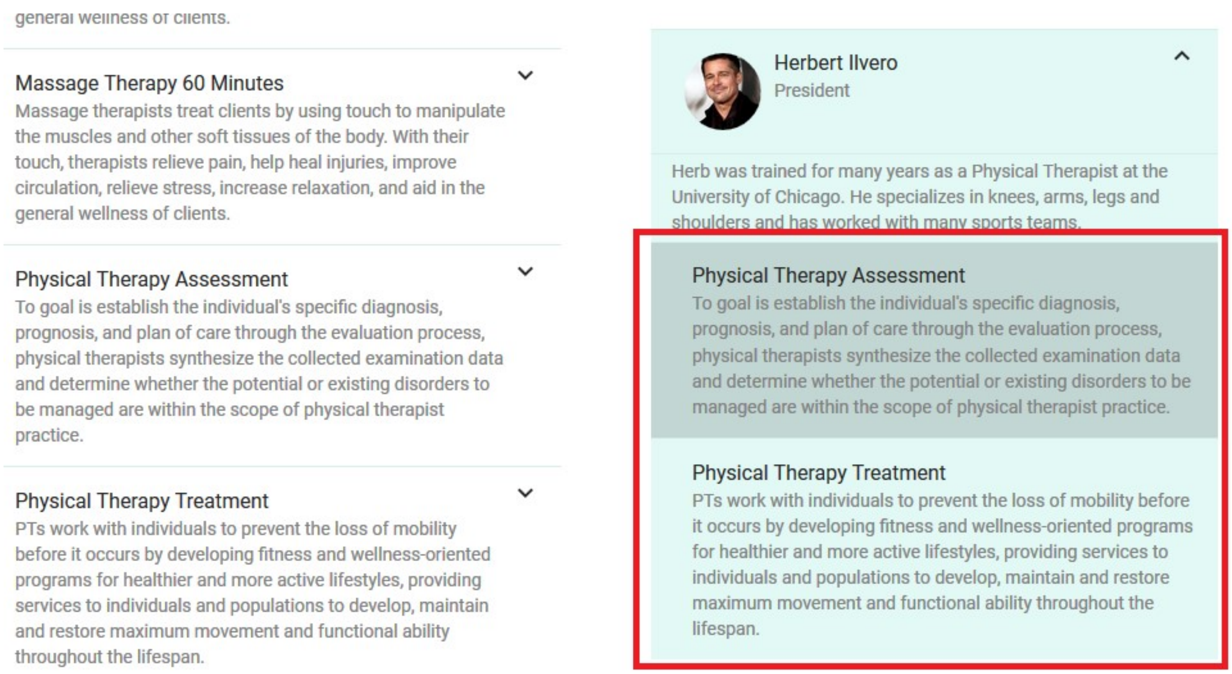


Second, in the *Provider Types* tab:

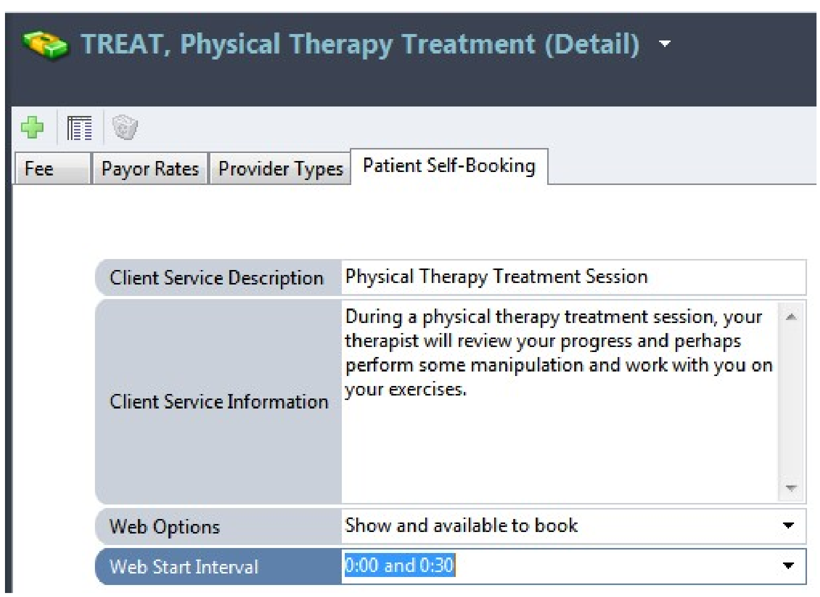




Make sure to list all *Provider Types* that this *Fee Code* can be booked/performed by. Remember, this is how we link Providers to Fee Codes. If we have a match, then that service will appear under the Provider's name on the client booking portal, as follows:



Third, under the *Fees/Patient Self-Booking* tab, there are several pieces of information required, as follows:



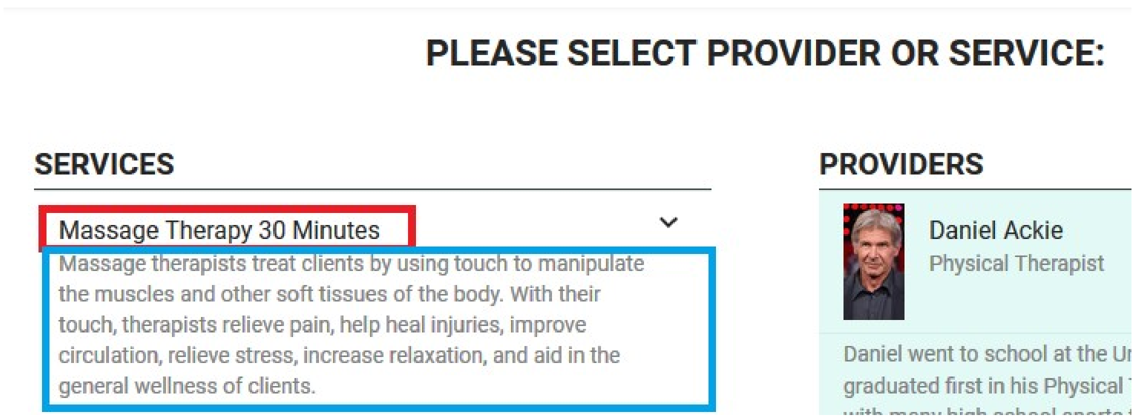
Client Service Description. The title of the service to appear on the web portal (in red, in the sample below).

Client Service Information. The detailed description of the fee to appear on the web portal (in blue, in the sample below). The clinic may want to include pricing in this description, as well, up to them.

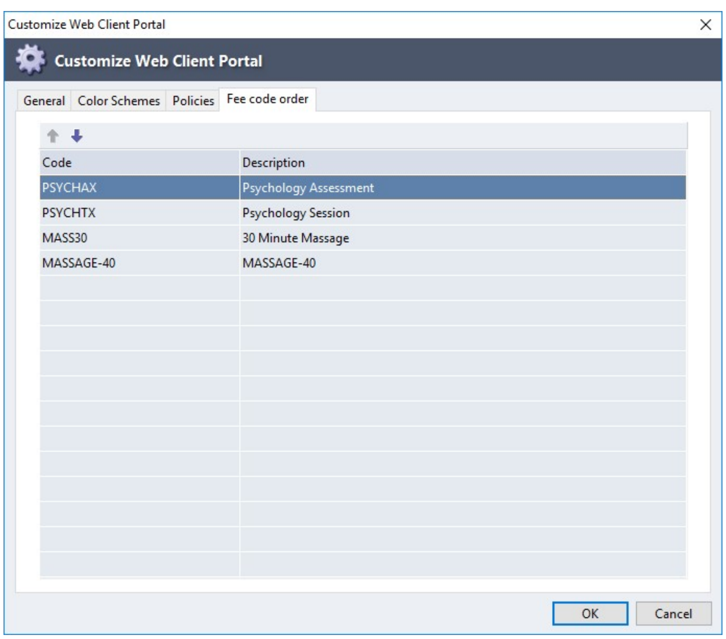
Web Options. There are three choices here, as follows: "None" means that the service will not show up at all in the client portal. "Show only" means that the service will be shown (with the associated provider info) but cannot be booked using the portal. Finally, "Show and available to book" means that the service will show up and can be booked using the portal.

Web Start Interval. This field indicates when a patient is allowed to book this specific service, eg; only at the top-of-the-hour (0:00), only on the half-hour (0:00, 0:30), or at any time (No interval).

And this all appears, as follows:



Lastly, the *order* in which your services will appear on the client portal can be defined under *Settings*, *Customize Web Portal* and clicking on the *Fee Code Order* tab.

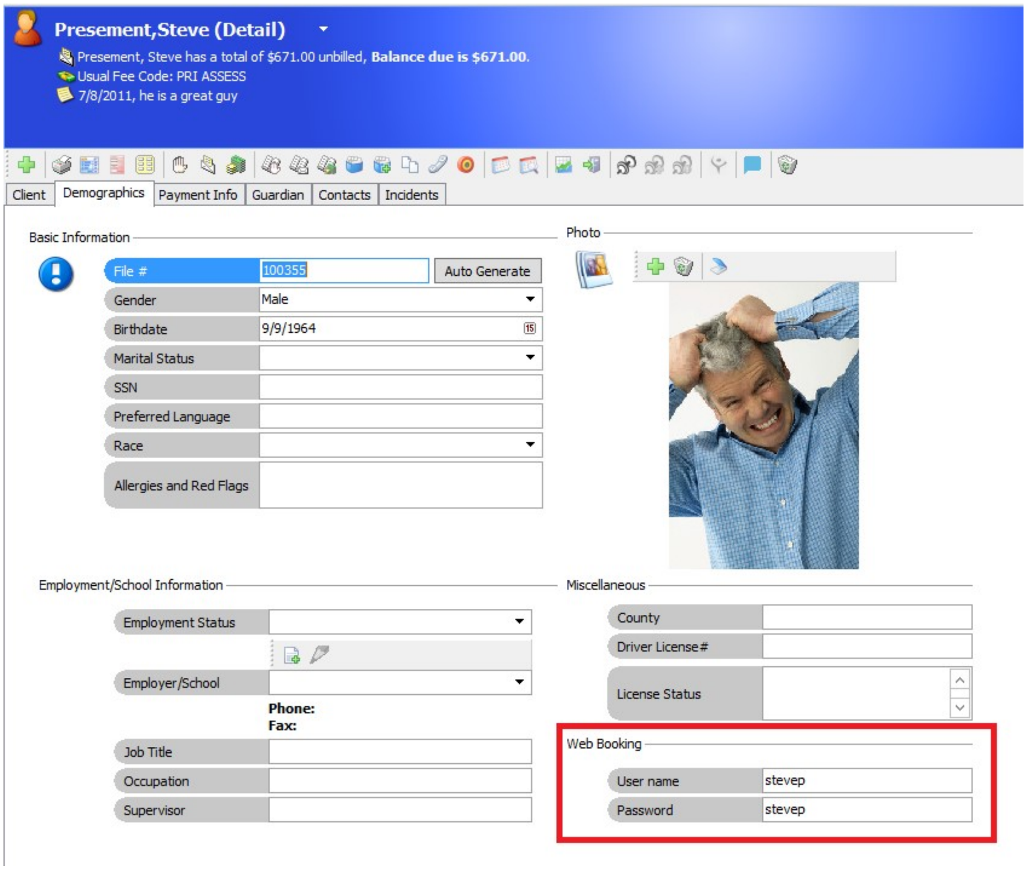


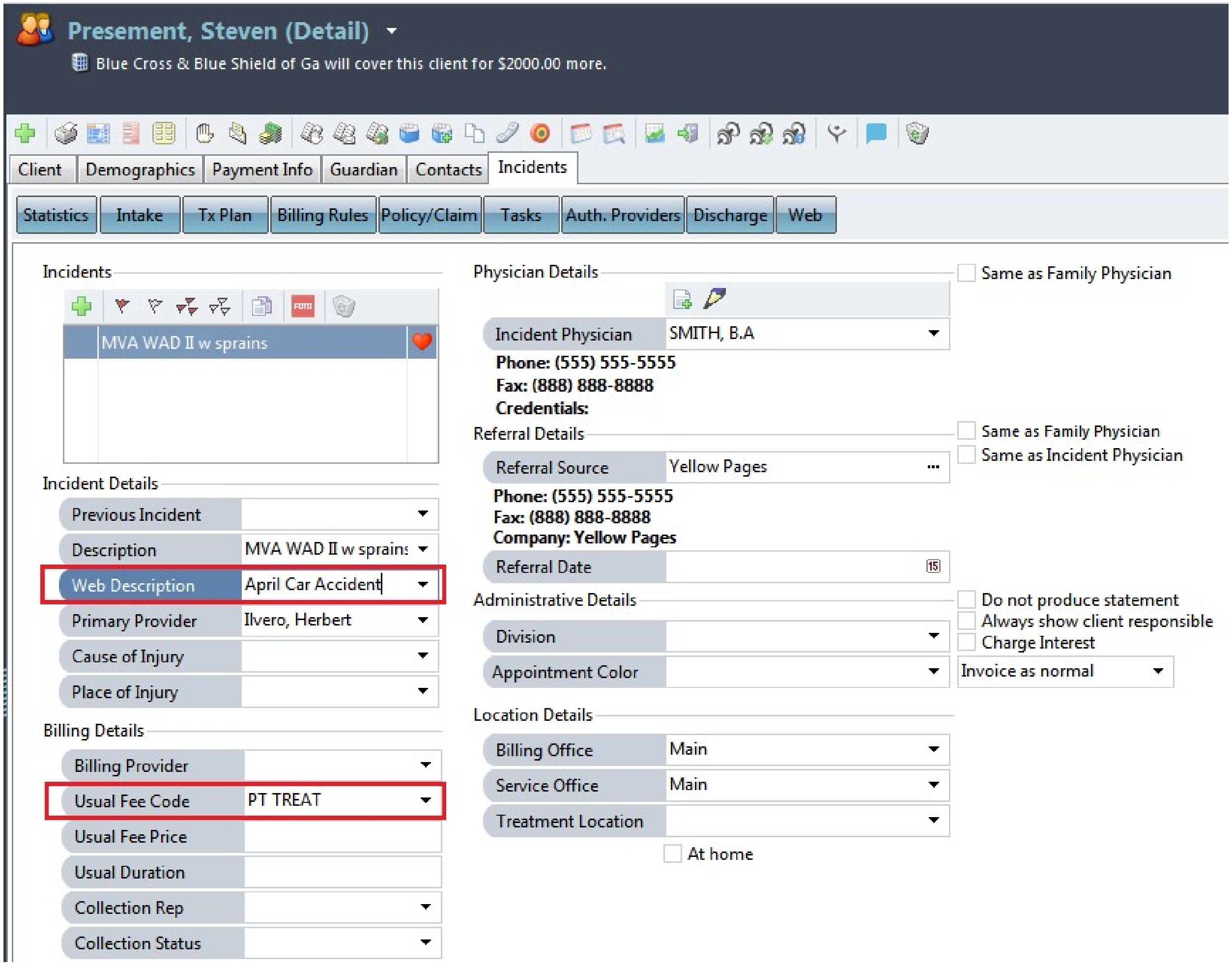
Using the *up* and *down* arrow icons, you can re-order the list of Fees that have been setup for use in the client portal.

Client Setup

There are a few minor options that can be setup on a client-by-client basis along with a few other relevant fields.

The first, under the *Demographics* tab the client's web *User name* and *Password* will appear. While the user can set this up on their own during registration, it can be forcible altered here, as well.



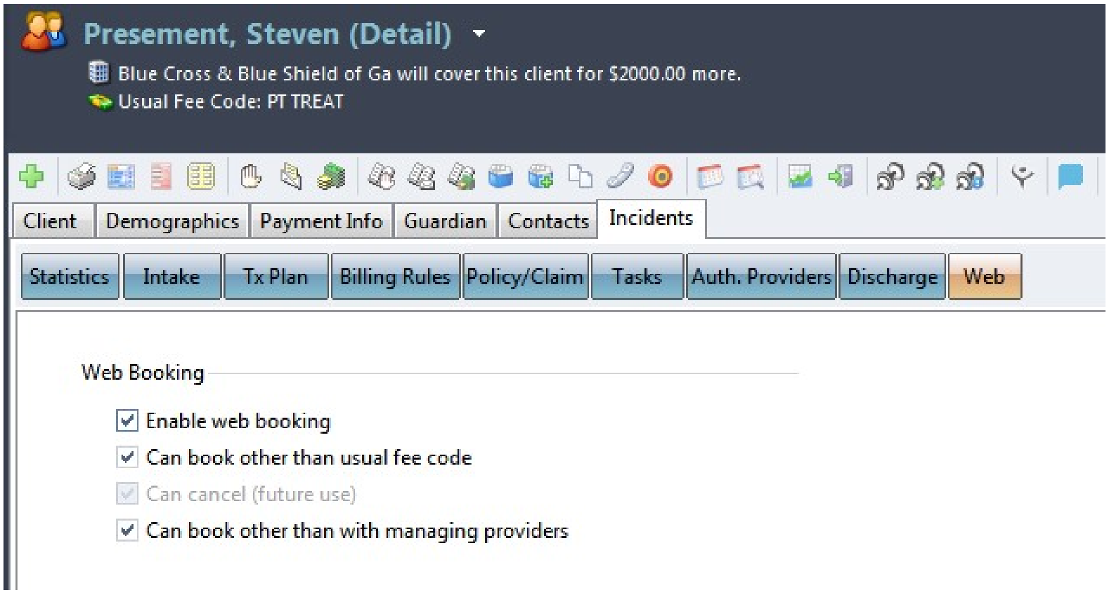


Second, when a patient books an appointment, IF they have multiple active incidents, they will be asked which for which *Incident* they wish to book. The description of the incident that the patient will see comes from the *Web Description* field, which should contain the patient-facing description of the incident. If blank, the *Description* will appear instead.

Third, you CAN still setup a *Usual Fee Code* for a client and restrict whether or not they client can pick something other than their *Usual Fee Code* (discussed in the next set of options).

<u>Please note:</u> *The Usual Fee Code* needs to be setup properly in Fees (discussed above). If not, it cannot be booked.

Lastly, under *Incidents/Web*, there are a few client-specific options that can be set, as follows:



Enable web booking. Web booking can be disabled for this specific incident, if required, if a clinic does not wish the client being able to book appointments for this Incident. This field defaults to being 'ticked'.

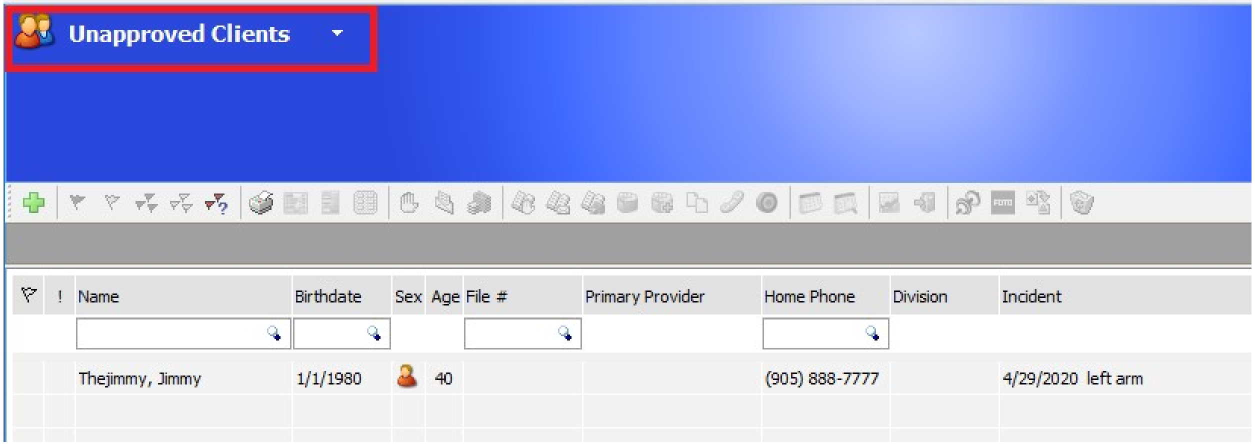
Can book other than default fee codes. If selected, clients will be able to book appointments for any available Fee Code or service. If not selected, they will only be able to book for their *Usual Fee Code*. This field defaults to being 'ticked'.

Can cancel (future use). Not yet implemented, this option would either allow or disallow a client from being able to cancel their own appointments online.

Can book other than with managing providers. If selected, the patient will be able to book with any Provider (assuming that the provider offers the service they are requesting). If NOT selected, the patient will only see their Managing Provider's availability.

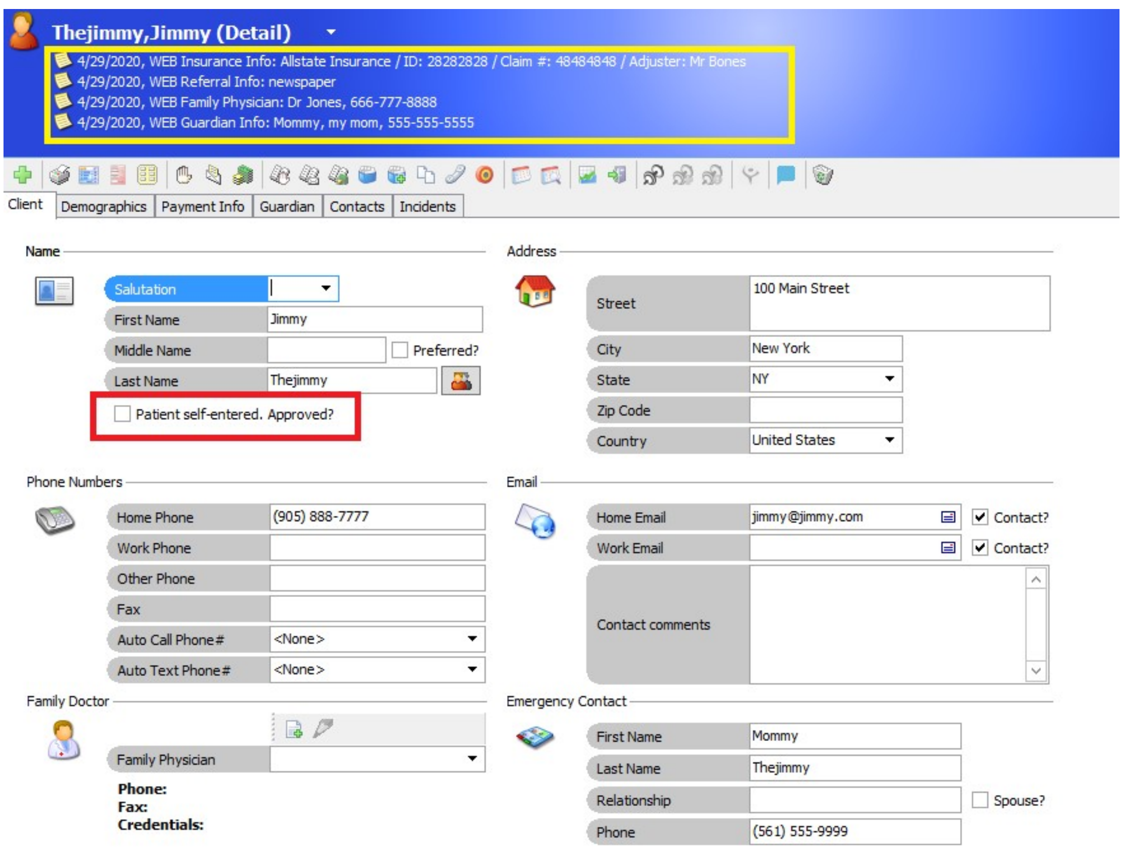
Processing Self-Entered Clients

When clients are self-entered, they appear in a special holding area, as follows:



Notice the new drop-down, we now have *All, Active, Discharged* and *Unapproved*.

The client will appear, as follows:



To move the client from *Unapproved* into the *Active Client* listing, tick the *Patient self-entered. Approved?* box. The client will be moved into the Active area and this field will completely disappear.

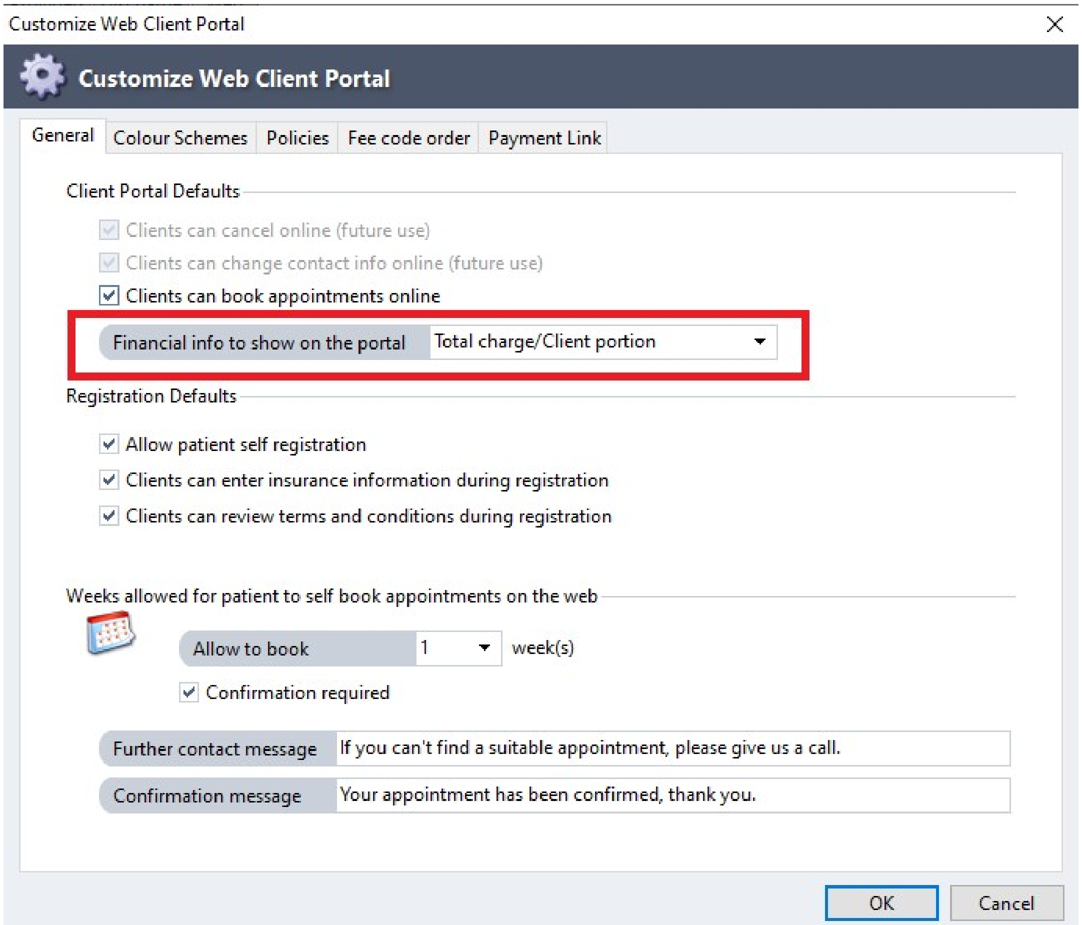
Notice the section in yellow with the word WEB prior to each line…

The clinic would need to look at this information and then enter it manually into the appropriate places such as *Billing Rules, Referral Source, Physician and Guardian*. Why? Because we don't have any way to know if this is the same Physician, Payor, etc, on file. It could be a payor with a different address, a Physician with a similar or wrongly-spelled last name, there is no reliable way to match these up unless we provide a drop-down list to the registering patients which would probably represent a privacy breach.

Financial Portal setup

There are two sets of options available for the Financial side of the client portal.

The first has to do with exactly what financial information the client can see, if anything. This is found under *Settings, Customize Web Portal* in the *General* tab, as follows:



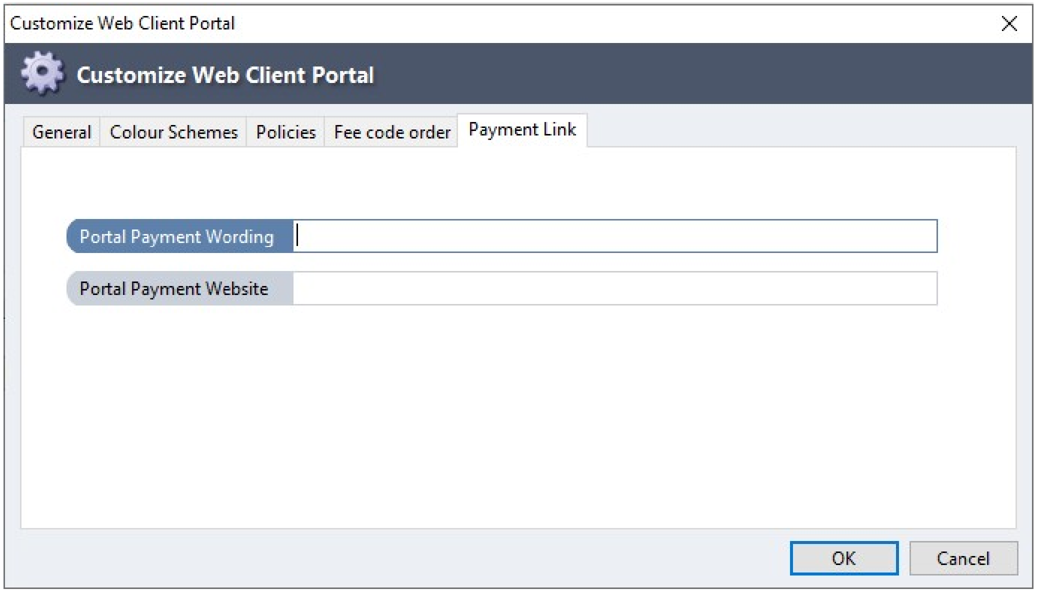
In the Financial info to show on the portal field, there are three options, as follows:

None. If selected, the clients will not be able to access ANY financial information on the portal.

Total charge/Client portion. If selected, both the *Payor and Client-sides* of the charges will be displayed.

Client portion only. If selected, only information related to the clients' portion of any charge will be displayed.

The second option set has to do with the verbiage surround client online payments. The options for this are found under *Settings, Customize Web Portal* in the *Payment link* tab, as follows:



There are two fields here, as follows:

Portal Payment Wording. This is the phrasing that will appear *under* the client's balance on the portal. Typically, this could say "Please call the clinic to pay your balance at (555) 555-5555" or "Please click on the link below to payor your balance", etc.

Portal Payment Website. If you *do* have a payment portal, the portal website would be entered here and this will appear as a *clickable-link* on the client portal under the *Portal Payment Wording* field outlined above.