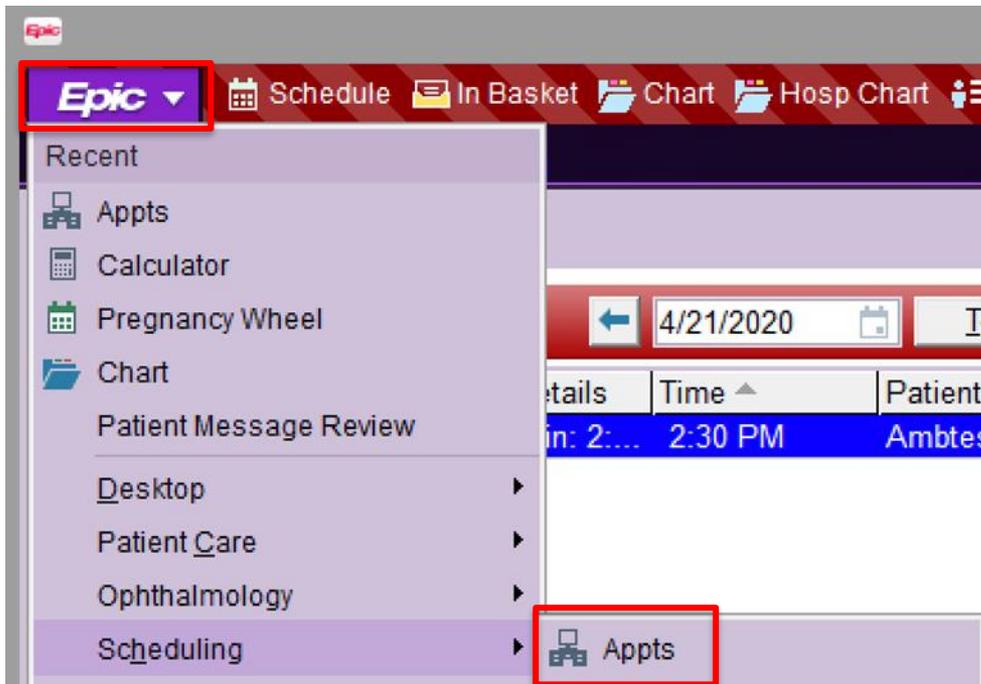


One Click Training Guide

4/29/2020

**HAWAI'I
PACIFIC
HEALTH**

KAPI'OLANI
PALI MOMI
STRAUB
WILCOX



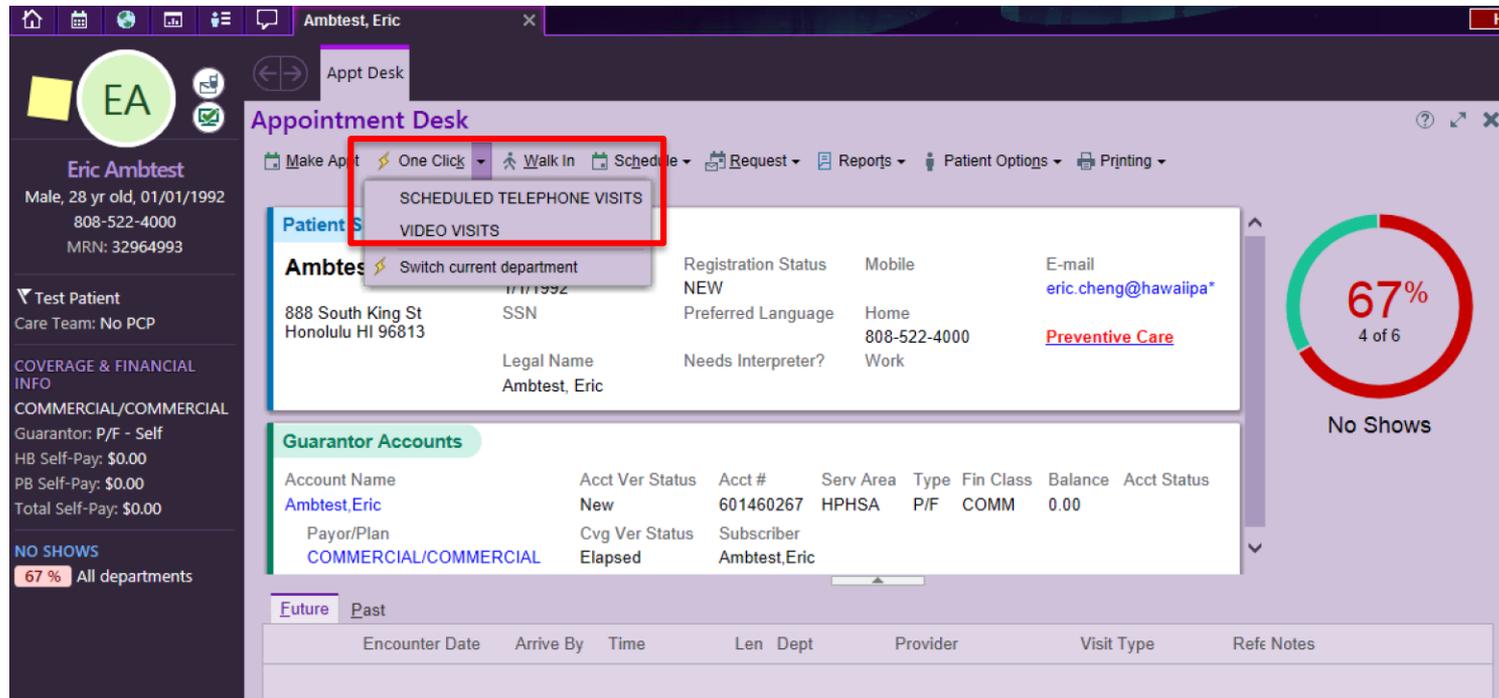
- Select the Epic drop down button in the top left corner of your screen
- Click on 'Scheduling' and then 'Appts'



- Or look at your Epic Toolbar for 'Appts'

- Enter the patient's name in Patient Lookup window

The screenshot shows a window titled "Patient Lookup" with a close button (X) in the top right corner. The window has a light purple header with four tabs: "Select Patient" (which is highlighted with a purple border), "Recent Patients", "Family/Group", and "Temporary Groups". Below the tabs, there are several input fields: "Name/MRN:" with a text box that has a blue border; "EPI ID:" with a text box; "SSN:" with a text box containing a calculator icon and a magnifying glass icon; "Sex:" with a text box containing a magnifying glass icon; and "Birth date:" with a date picker icon. Below these fields are two checkboxes: "Use sounds-like" and "My patients". At the bottom of the window, there are five buttons: "New", "Find Patient", "Clear", "Accept", and "Cancel".



Eric Ambtest
Male, 28 yr old, 01/01/1992
808-522-4000
MRN: 32964993

Test Patient
Care Team: No PCP

COVERAGE & FINANCIAL INFO
COMMERCIAL/COMMERCIAL
Guarantor: P/F - Self
HB Self-Pay: \$0.00
PB Self-Pay: \$0.00
Total Self-Pay: \$0.00

NO SHOWS
67% All departments

Appointment Desk

Make Appt One Click Walk In Schedule Request Reports Patient Options Printing

Patient S

Ambtes Switch current department

Registration Status: Mobile
NEW
Preferred Language: Home
808-522-4000
Preventive Care

Guarantor Accounts

Account Name	Acct Ver Status	Acct #	Serv Area	Type	Fin Class	Balance	Acct Status
Ambtest, Eric	New	601460267	HPHSA	P/F	COMM	0.00	
Payor/Plan	Cvg Ver Status	Subscriber					
COMMERCIAL/COMMERCIAL	Elapsed	Ambtest, Eric					

No Shows
67%
4 of 6

Encounter Date	Arrive By	Time	Len	Dept	Provider	Visit Type	Refc Notes

- From the appointment desk, click on the drop down arrow next to 'One Click'.
- Select Scheduled Telephone Visit or Video Visit

- Appt Notes – enter a reason for the visit
- Select an appointment time by clicking on one of the boxes
- Clicking on the appt time is what schedules the appointment

Ambtest, Natalie

Appt Desk One Click

One Click

New Search Appt notes:

SCHEDULED TELEPHONE VISITS

Today, Friday April 24, 2020

Noon, Sandra K, DO in INT MED - SCMILI [Instructions](#)

General message for NOON, SANDRA K [106737]
NO WC, MVA, TPL, Employment Physicals
Holly Bent/NP may see Dr. Noon's established patients for Annual Wellness Visit, ED follow up, Hospital follow up and Office Visit (refer to visit types for detailed instructions).
MD sees patients 18yrs and older
NO HMSA Quest

1:15 PM 15 min 1:45 PM 15 min 2:15 PM 15 min 2:30 PM 15 min 3:00 PM 15 min 3:15 PM 15 min Manual

Appt Desk Check In

Check In - Sched Phone on 4/23/20 at 10:15 AM with NOON, SANDRA in MEDSM for 15 minutes

PCP Claim Info Referrals MSPQ Documents LCDI/ABN New Recall Travel History Edit Copay

SCHEDULED TELEPHO... This Visit

Demographics

Payments

Options

Today 1015	Scheduled Telephone Visit	Edit	Due Now	
	Noon, Sandra K, DO (INT MED - SCMLI)			+ Add
	P/F #601460267	Copay	0.00	
	Commercial - Commercial	+ Add Prepay		

Previous Balance

Outstanding Self-Pay No Valid Post Type

Not Collecting Collect Payment

Total Due Now 0.00 Total Collecting 0.00

Cancel Back Next **Accept**

- Click Accept
- Click Continue if any Warnings appear
- Appointment will be scheduled and you will see appointment details in Appt Desk.

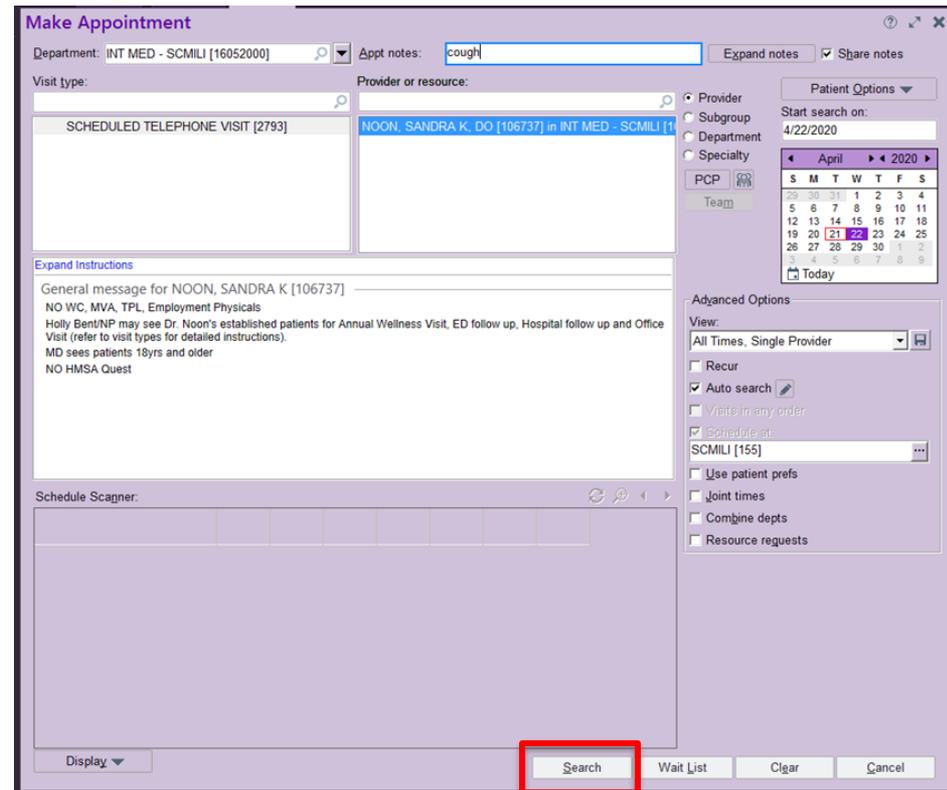
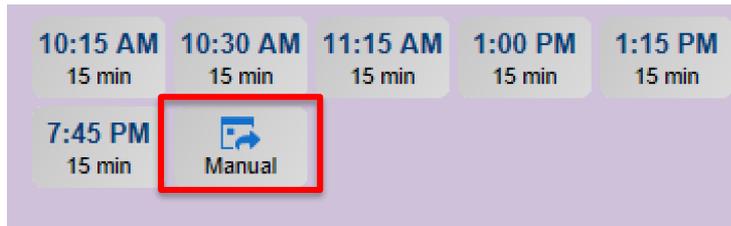
- After provider schedules an appointment, they will see the appointment in their schedule. Click on appointment to start visit and document.
- Notice: the appointment is 'Arrived' already

The screenshot shows a medical scheduling interface. On the left, there is a calendar for April 21, 2020, with the date '21' highlighted. Below the calendar, the department is set to 'INT MED - SCMILI'. The main area displays a list of appointments for 'NOON, SANDRA K' with a total of 2 appointments. The appointments are as follows:

Status	Status Details	Time	Patient	Age/Gender	Type	MyC QNR	Notes
Signed	Checked in: 2...	2:30 PM	Ambtest, Natalie	42 yr old / F	SCHEDULED...		
Arrived	Checked in:...	9:00 PM	Ambtest, Eric	28 yr old / M	SCHEDULED...		

The 'Arrived' status for the appointment with patient 'Eric' is highlighted with a red box.

- If provider would like to schedule an appt time that is not listed, they may choose to select the Manual box.
- The Make Appointment screen will be displayed. Select the SEARCH button to continue.



- Appointment Warnings may appear since you may be selecting a time outside of your template. Enter an overrule reason by selecting 2- Provider Approved, click on continue and then click on schedule button.

Appointment Warnings

SCHEDULED TELEPHONE VISIT 4/22/2020 12:00 PM (15 minutes)
 NOON, SANDRA K in INT MED - SCMILI

Warning: Provider Has No Schedule For Day

NOON, SANDRA K is not scheduled for 4/22/2020.

Overrule Reason Brief Comment

Warning: Outside Template

12:00 PM selected for SCHEDULED TELEPHONE VISIT is not a scheduled time for NOON, SANDRA K.

Overrule Reason Brief Comment

Appointment Warnings

SCHEDULED TELEPHONE VISIT 4/22/2020 12:00 PM (15 minutes)
 NOON, SANDRA K in INT MED - SCMILI

Warning: Provider Has No Schedule For Day

NOON, SANDRA K is not scheduled for 4/22/2020.

Overrule Reason Brief Comment

Warning: Outside Template

12:00 PM selected for SCHEDULED TELEPHONE VISIT is not a scheduled time for NOON, SANDRA K.

Overrule Reason Brief Comment

Title	Number
Other	1
Provider Approved	2
Urgent Need	3

Appointment Review

Wednesday Apr 22, 2020
Appt at 12:00 PM (15 min)

Noon, Sandra K, DO

INT MED - SCMILI at Straub Clinic
Mililani

SCHEDULED TELEPHONE VISIT ^

Outpatient Inpatient Add to Wait List Mark as Confirmed

Insurance
COMMERCIAL
COMMERCIAL

Copay
\$0.00

Effective Dates
1/01/19 -

Notes
cough

Patient Instructions
This is a Scheduled Telephone Visit and not a face-to-face visit with the provider.
Please anticipate a call within 30 minutes of the appointed time as the provider will call you at your confirmed number to save you a trip into the office.

Accept Cancel

- Account Selection form may appear, just select continue
- Accept the Appointment Review
- Accept through any other screens and select Finish

← Appt Desk Care Teams Appt Information

Appointment Information

Undo ECP LCD/ABN Documents Referrals New Recall Travel History

SCHEDULED TELEPHO...
 Patient Demograp...
 Chart Pull Prompting

Name: Eric Ambtest SSN: [Warning Icon] [Info Icon] [Search Icon]
 Sex: Male Birth date: 1/1/1992 Aliases: 1

1-Permanent 2-Temporary 3-Confidential

Address: 888 South King St Contact information:

Number Type	Number
1 Home Phone	808-522-4000
2 Work Phone	
3 Mobile	[Warning Icon]

City (or ZIP): Honolulu
 State: HI ZIP: 96813 Email: eric.cheng@hawaiiipacifichealth.org
 County: [Search Icon] Comments:
 Country: United States of America [Search Icon]

Referring: SELF, REFERRED [44] [Info Icon] [Search Icon]

How you heard about us: 1

PCP: NOON, SANDRA K [106737]

Appt phone: [Dropdown] Perm comm: [Text Field]

Block calls for appointment

Appointment: Sched Phone on 4/22/20 at 12:00 PM with NOON, SANDRA in MEDSM for 15 minutes

On Demand Print
 Appt letter: 0 HPH Appt Ltr 7-30 Days [Search Icon]
 Enc form: [Dropdown] Face sheet: 0 [Dropdown]
 Visit label: 0 [Dropdown]

Cancel Back Next **Accept**

- Accept through any other screens and select Finish.

← Appt Desk Care Teams

Appointment Desk

Make Appt One Click Walk In Schedule Request Reports Patient Options Printing

Patient Summary (Edit)

Ambtest, Eric DOB 1/1/1992 Registration Status NEW Mobile E-mail eric.cheng@hawaiiipa
 888 South King St SSN Preferred Language Home 808-522-4000 [Preventive Care](#)
 Honolulu HI 96813 Legal Name Needs Interpreter? Work
 Ambtest, Eric

Guarantor Accounts

Account Name	Acct Ver Status	Acct #	Serv Area	Type	Fin Class	Balance	Acct Status
Ambtest, Eric	New	601460267	HPHSA	P/F	COMM	0.00	
Payor/Plan	Cvg Ver Status	Subscriber					
COMMERCIAL/COMMERCIAL	Elapsed	Ambtest, Eric					

Future Past

Encounter Date	Arrive By	Time	Len	Dept	Provider	Visit Type	Refs Notes
4/21/2020 Tue	9:00 PM	9:00 P(Ar*)	15	MEDSM [16052000]	NOON, SANDRA K [106737]	SCHEDULED TELEPHONE VISIT [2793]	
4/22/2020 Wed	12:00 PM	12:00 P	15	MEDSM [16052000]	NOON, SANDRA K [106737]	SCHEDULED TELEPHONE VISIT [2793]	cough

67%
4 of 6
No Shows

- The appointment details will be visible in the Appointment Desk

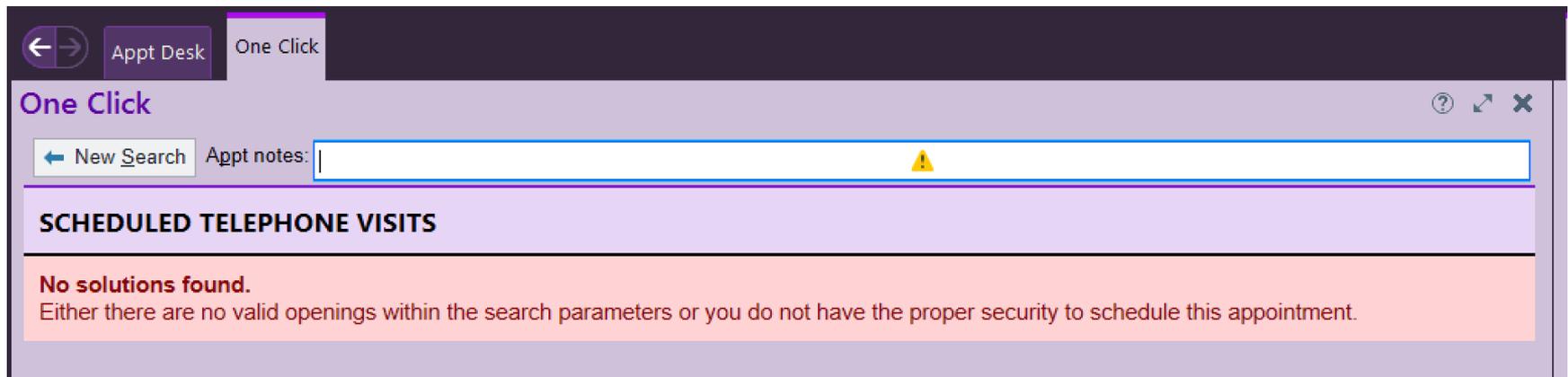
- After provider schedules an appointment, they will see the appointment in their schedule. Click on appointment to start visit and document.

The screenshot displays a medical scheduling interface. On the left, there is a calendar for April 2020, with the 21st highlighted. Below the calendar, the department is set to 'INT MED - SCMILI'. The main area shows a list of appointments for 'NOON, SANDRA K' with a total of 2 appointments. The appointments are as follows:

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Signed	Checked in: 2...	2:30 PM	Ambtest, Natalie	42 yr old / F	SCHEDULED...		
Arrived	Checked in:...	9:00 PM	Ambtest, Eric	28 yr old / M	SCHEDULED...		

The 'Arrived' appointment for 'Ambtest, Eric' is highlighted with a red rectangular box.

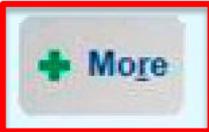
- If the time of your last available appt slot has passed or provider has used up all available slots for that day, a message stating “No solutions found” will display. Provider will not be able to schedule any further visits for that day.
- A clinic manager will be able to add appt slots to the schedule template should this be needed.



Today, Friday April 24, 2020

Shigemura, Lisa A, MD in PEDS - SCKANE

8:30 AM 15 min	8:45 AM 15 min	9:00 AM 15 min	9:15 AM 15 min	9:30 AM 15 min	9:45 AM 15 min	10:00 AM 15 min
2:30 PM 15 min	2:45 PM 15 min	3:00 PM 15 min	3:15 PM 15 min	3:30 PM 15 min	3:45 PM 15 min	Manual



VIDEO VISITS

Today, Friday April 24, 2020

Shigemura, Lisa A, MD in PEDS - SCKANE

8:30 AM 15 min	8:45 AM 15 min	9:00 AM 15 min	9:15 AM 15 min	9:30 AM 15 min	9:45 AM 15 min	10:00 AM 15 min	10:15 AM 15 min	10:30 AM 15 min	10:45 AM 15 min
2:30 PM 15 min	2:45 PM 15 min	3:00 PM 15 min	3:15 PM 15 min	3:30 PM 15 min	3:45 PM 15 min	Manual			

Yanagihara, Lynn B, MD in PEDS - SCKANE

8:45 AM 15 min	9:00 AM 15 min	9:15 AM 15 min	9:30 AM 15 min	9:45 AM 15 min	10:00 AM 15 min	10:15 AM 15 min	10:30 AM 15 min	10:45 AM 15 min	11:00 AM 15 min
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Hino, Justin M, MD in PEDS - SCKANE

8:45 AM 15 min	9:00 AM 15 min	9:15 AM 15 min	9:30 AM 15 min	9:45 AM 15 min	10:00 AM 15 min	10:15 AM 15 min	10:30 AM 15 min	10:45 AM 15 min	11:00 AM 15 min
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- If you click on 'More', you may see other providers appt slots. Please make sure you are clicking on your appt slots.

Reminders/Tips

- Providers
 - Please remember to obtain verbal consent from patient
 - If you choose to schedule a video visit, please remember that you will need to complete the workflow that your MA would normally do such as inputting chief complaint, verifying meds, allergies, etc. You may also need to walk the patient through connecting to the video visit and trouble shooting for them
 - When in clinic, it is recommended you utilize your normal scheduling workflow (PSR schedules appt)
 - One Click will be most useful when provider does not have access to PSR staff, such as during evenings/weekends when provider is on call
 - Date of service (day you spoke to patient) needs to match the date of encounter (calls after midnight are the next date)
 - Not currently designed to schedule follow up appts
 - Though manual button is available, it is recommended to utilize the One Click appt time slots to schedule, which is much easier and faster
 - When you use One Click, the encounter will go to a PSR work queue to address demographic or insurance edits, obtaining a TCS if needed, etc.

Reminders/Tips

- Managers/Operations
 - Will need to adjust providers scheduling templates
 - When adding appt slots to a template, marking them as “private” will indicate to contact center NOT to book these slots
 - Do not mark appt slots designed for One Click use as “alternative access” slots, it will NOT allow provider to schedule that time slot
 - Recommend spreading appt slots out from close of clinic until 11:45pm to insure provider will always have an available appt slot to choose
 - For example, if a provider is on call Friday night, adjust template to have appt slots at 6pm, 7pm, 9pm, 10pm, and 11:45pm. If provider receives a call at 8pm, they can use the One Click 9pm slot to schedule. If they speak to a patient at 11:00pm, they will only see the 11:45pm slot and the manual button because the earlier slots were either used or have “expired.”
 - For Saturday/Sundays, consider spacing appt slots from 1-2am to 11:45pm in order to give provider easy one click options throughout the day and evening.