One Click Training Guide

4/29/2020

HAWAIʻI PACIFIC HEALTH

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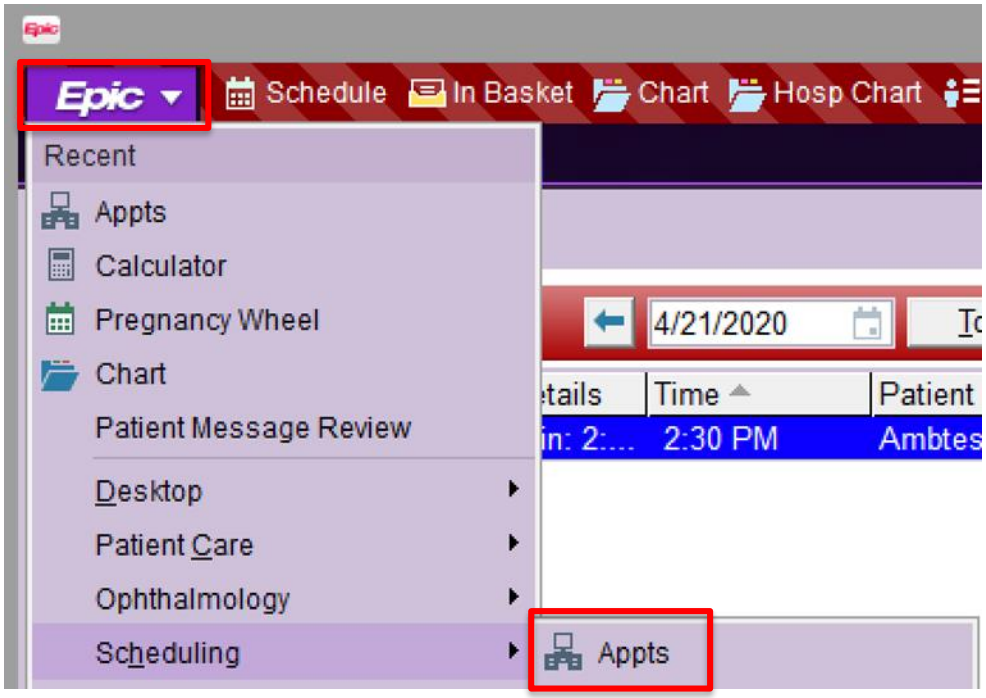
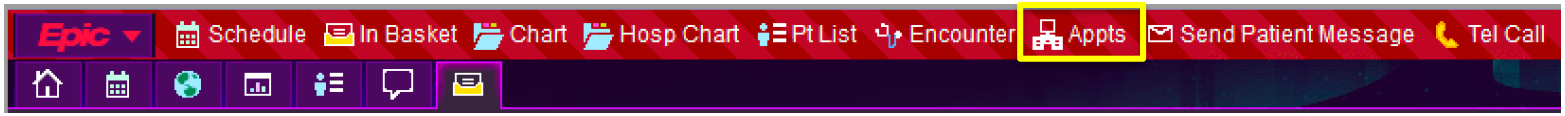
Version 3 – updated 4/29/20

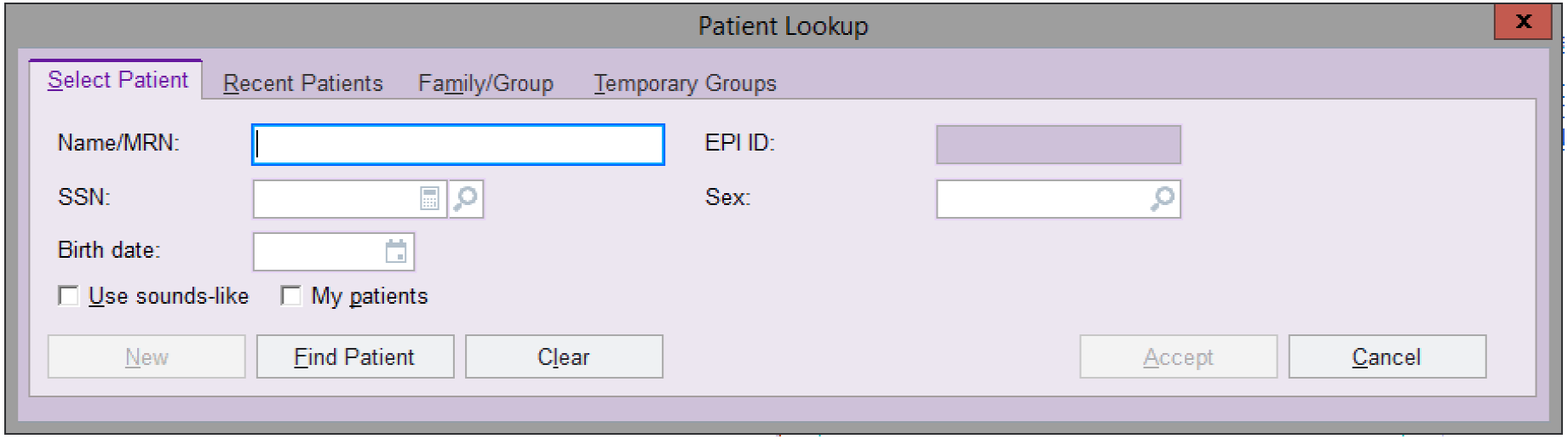


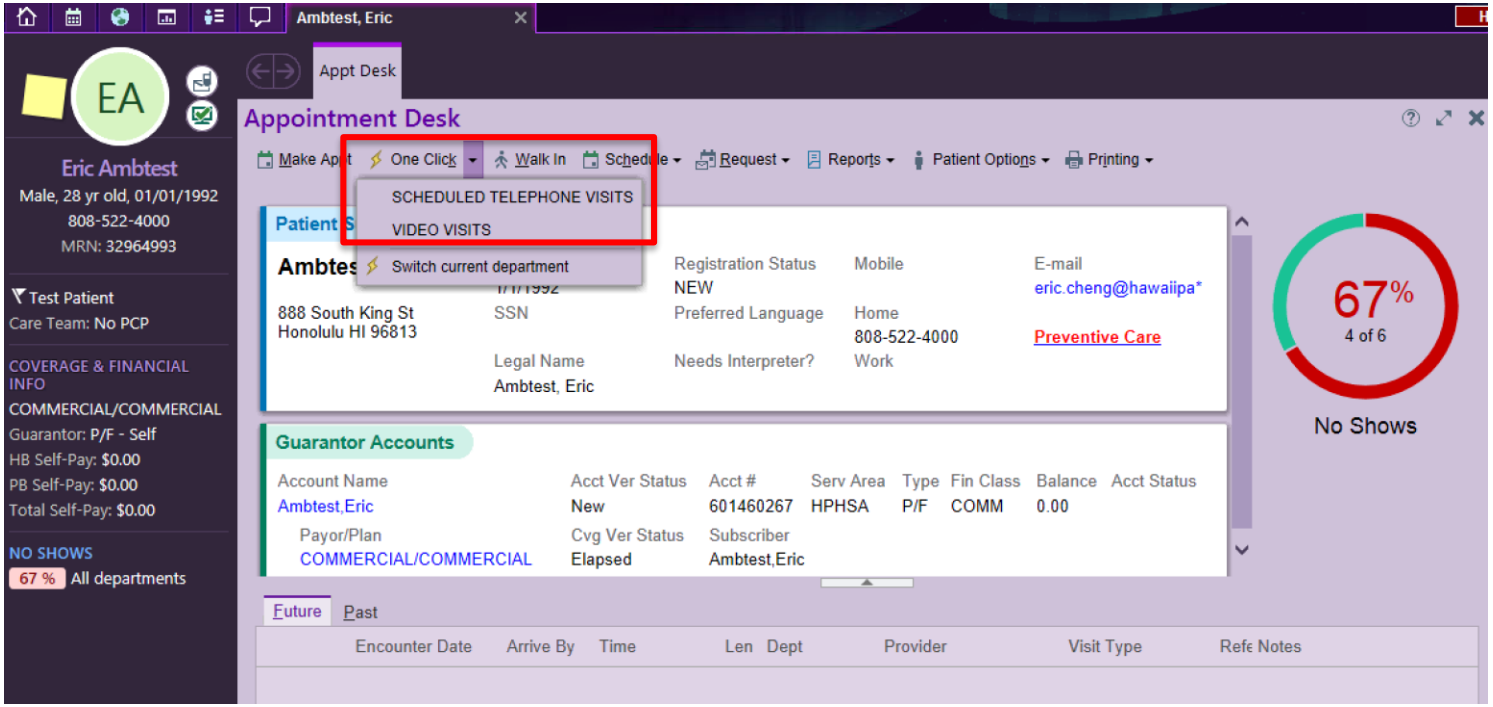
- Select the Epic drop down button in the top left corner of your screen
- Click on ‘Scheduling’ and then ‘Appts



- Or look at your Epic Toolbar for ‘Appts’

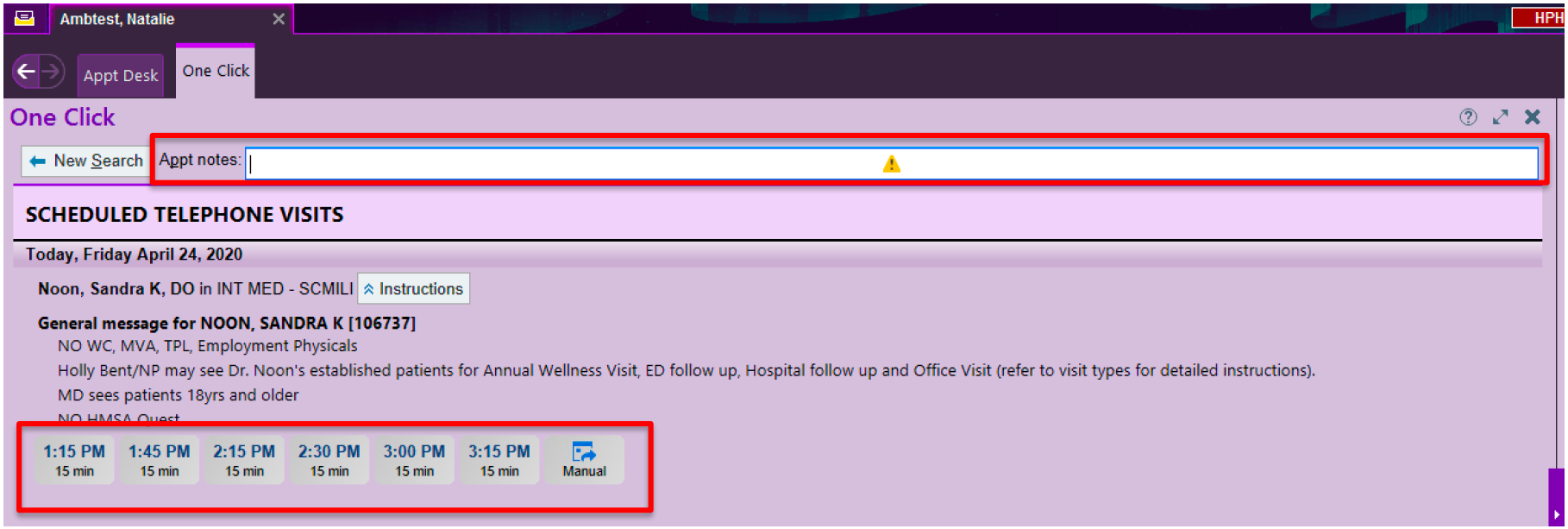
- Enter the patient's name in Patient Lookup window

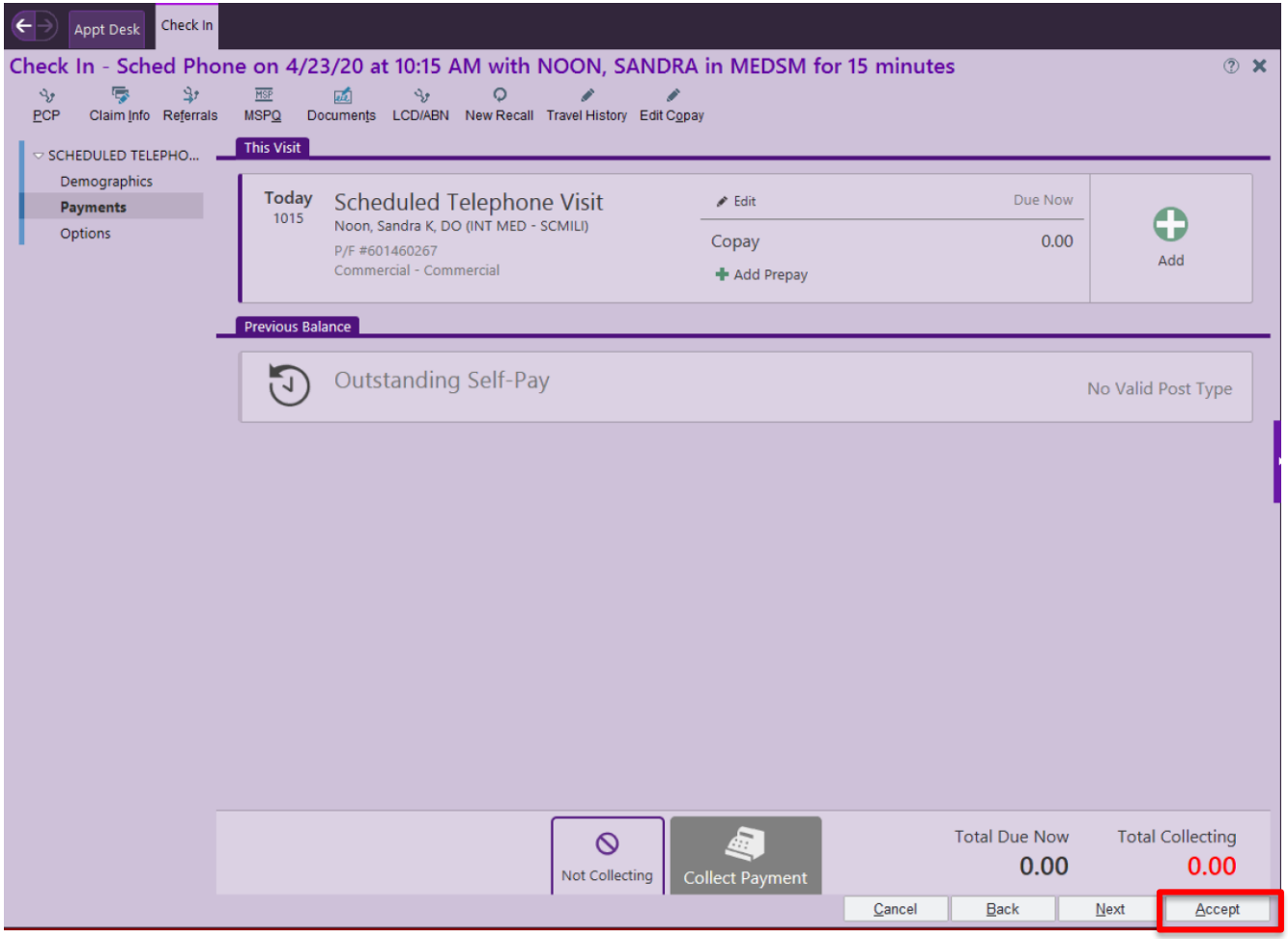




- From the appointment desk, click on the drop down arrow next to ‘One Click’.
- Select Scheduled Telephone Visit or Video Visit

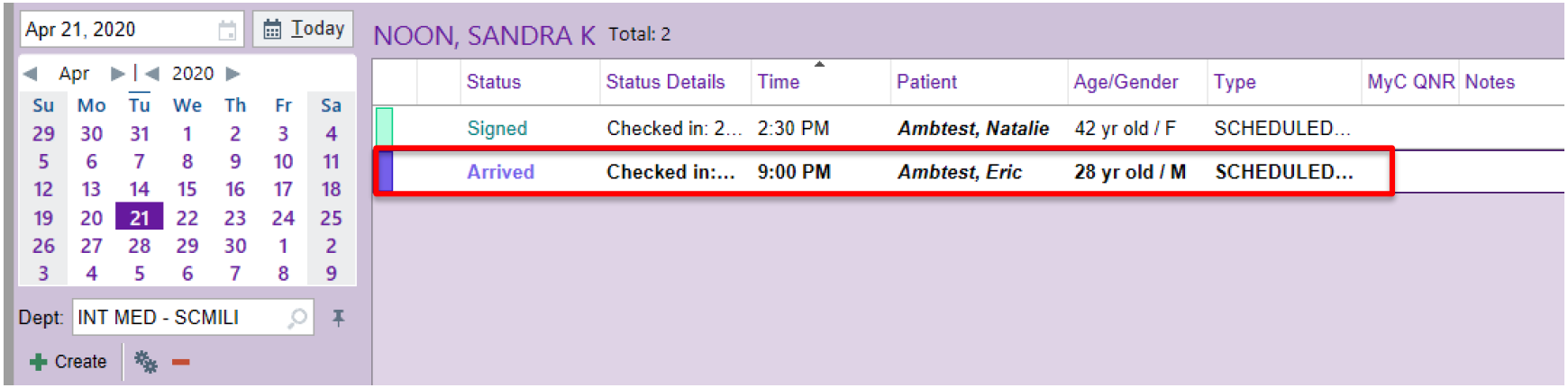
- Appt Notes – enter a reason for the visit
- Select an appointment time by clicking on one of the boxes
- Clicking on the appt time is what schedules the appointment



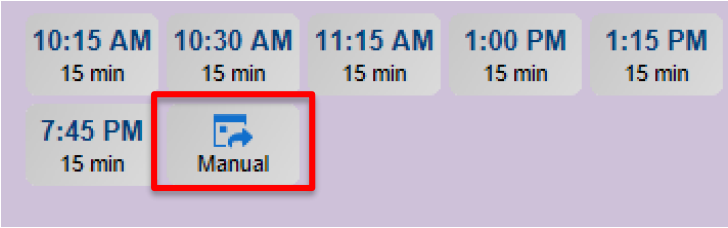


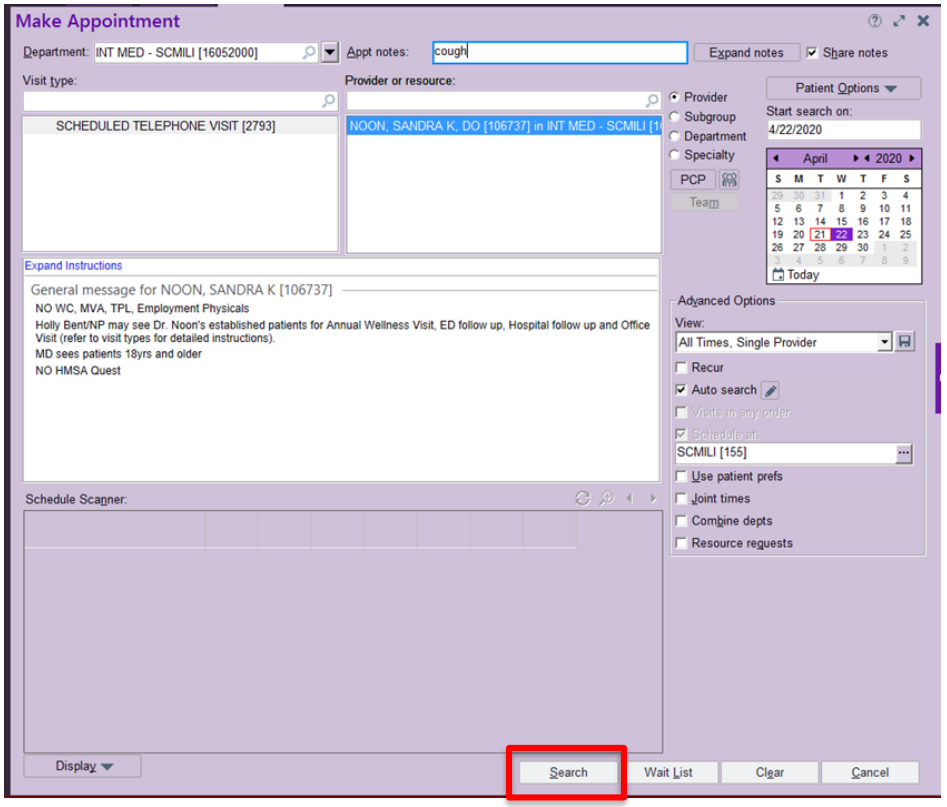
- Click Accept
- Click Continue if any Warnings appear
- Appointment will be scheduled and you will see appointment details in Appt Desk.

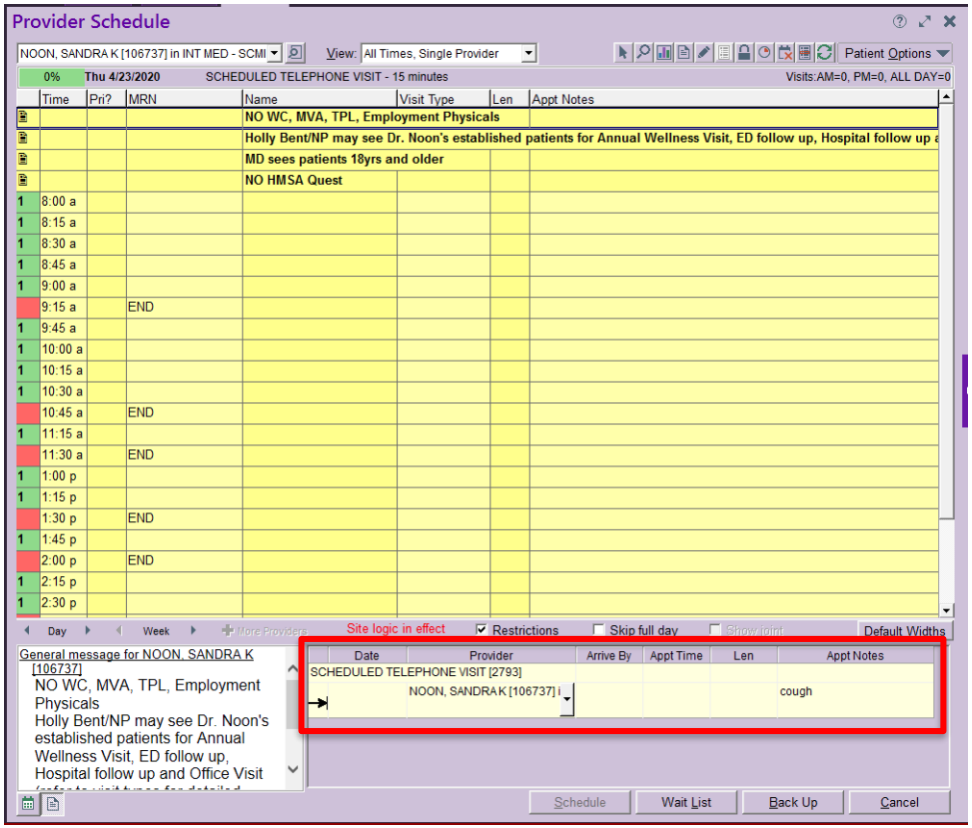
- After provider schedules an appointment, they will see the appointment in their schedule. Click on appointment to start visit and document.
- Notice: the appointment is ‘Arrived’ already



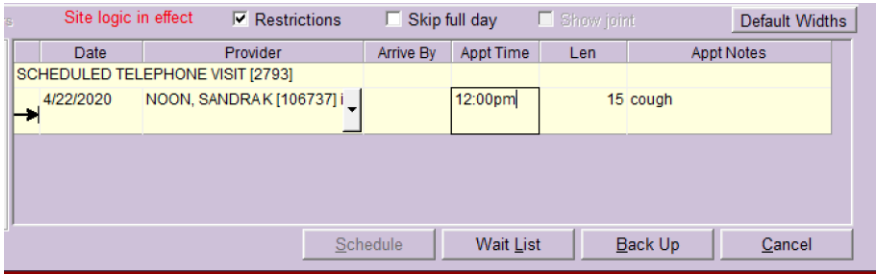
- If provider would like to schedule an appt time that is not listed, they may choose to select the Manual box.
- The Make Appointment screen will be displayed. Select the SEARCH button to continue.



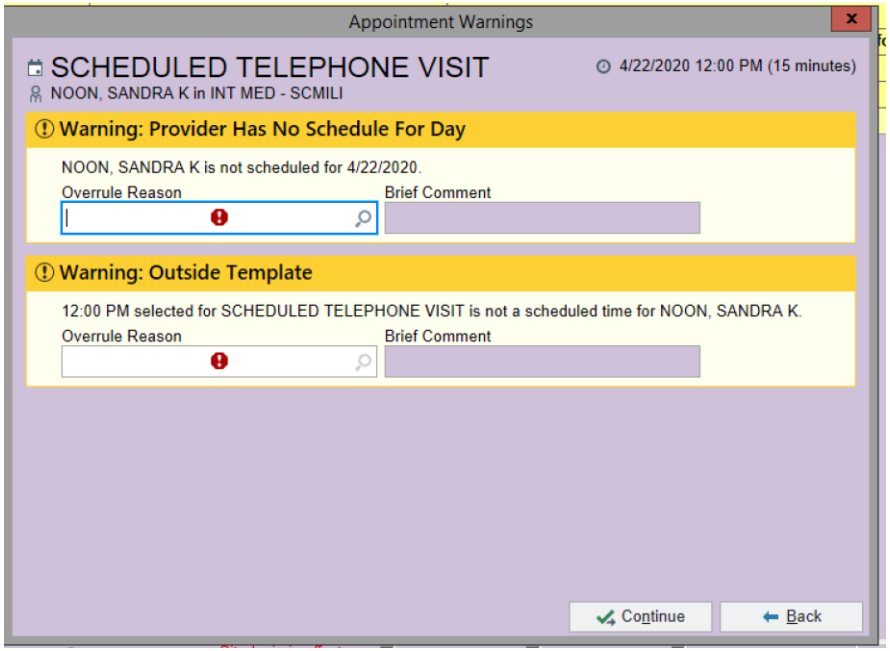


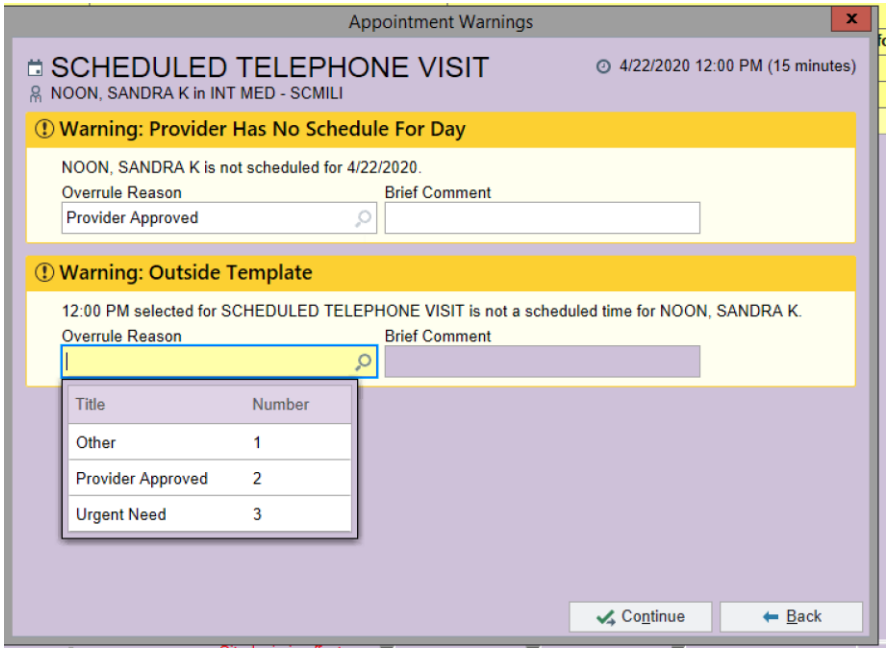


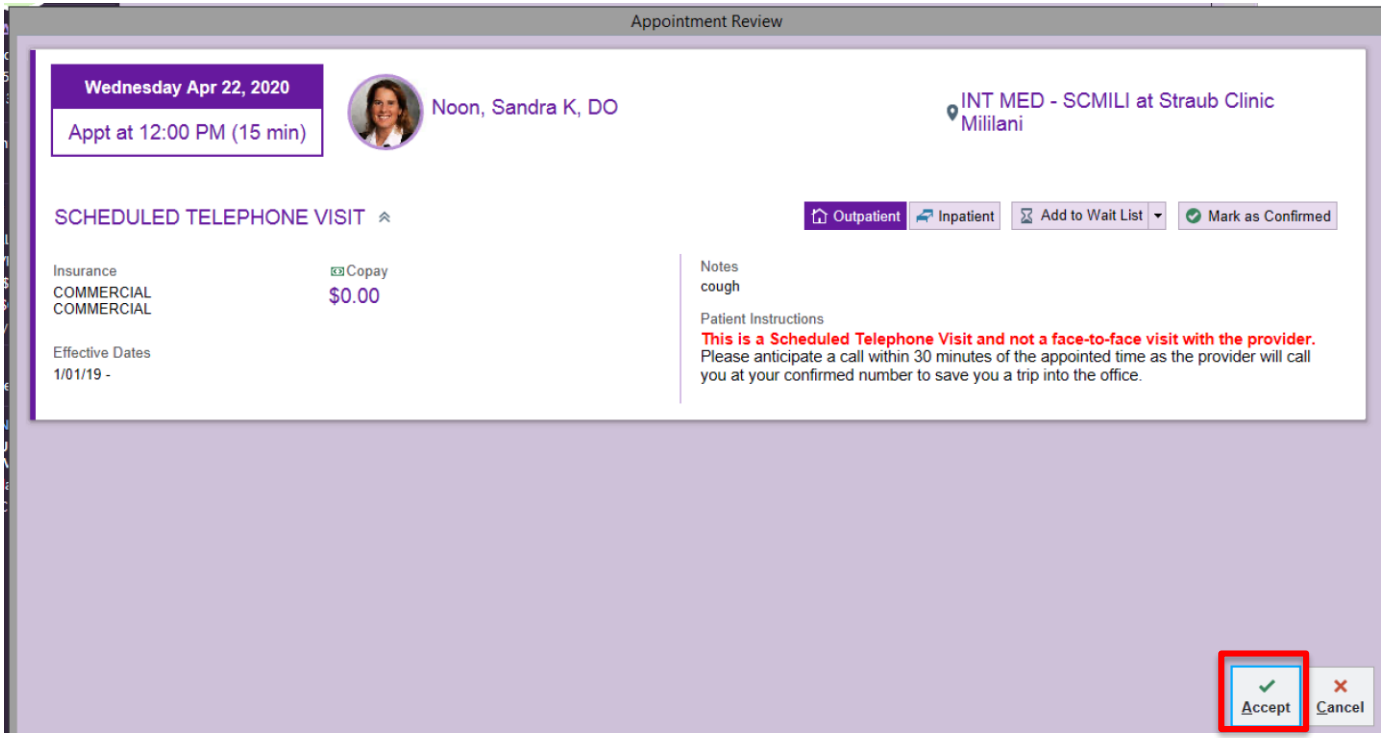
- The provider schedule will be displayed. On the bottom section of the screen, enter the date and appointment time. Tab over to the Len (length) slot to default in a length. Then hit tab again and click on schedule.



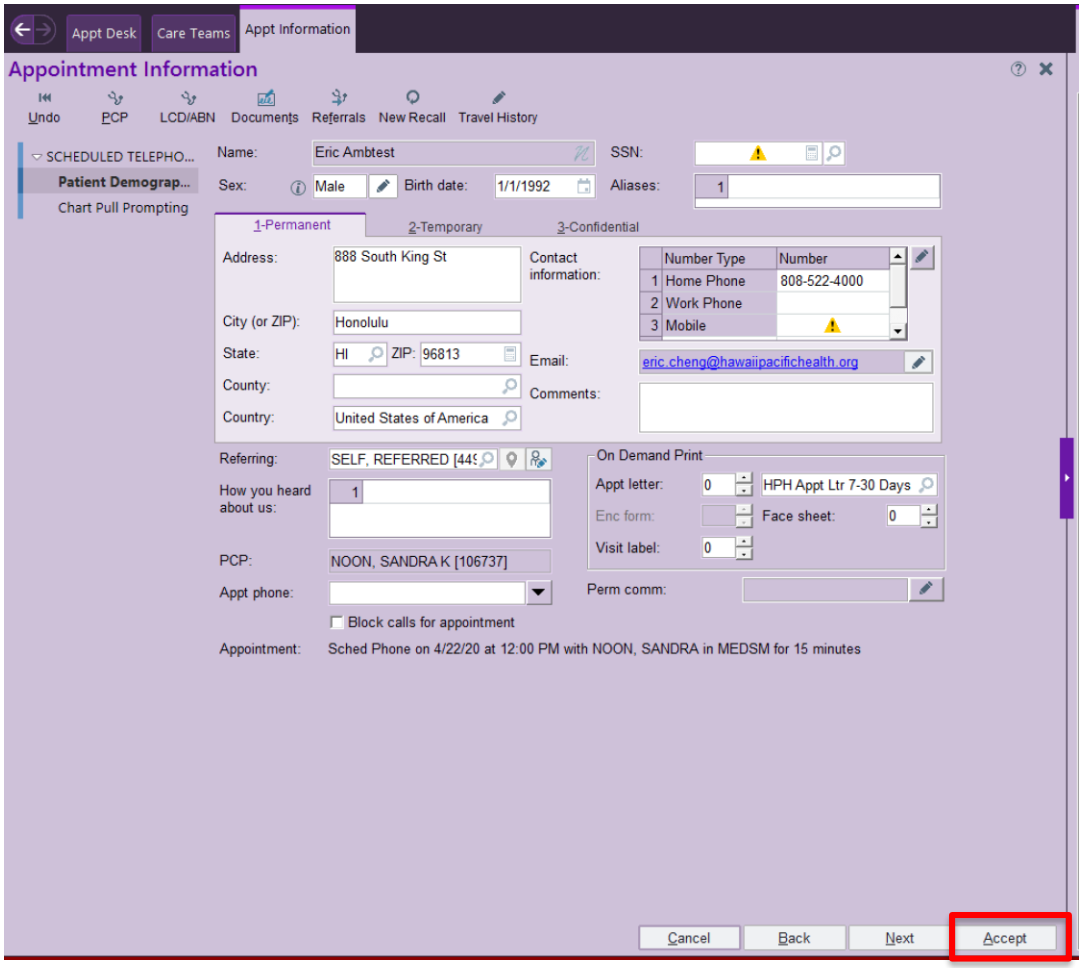
- Appointment Warnings may appear since you may be selecting a time outside of your template. Enter an overrule reason by selecting 2- Provider Approved, click on continue and then click on schedule button.







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



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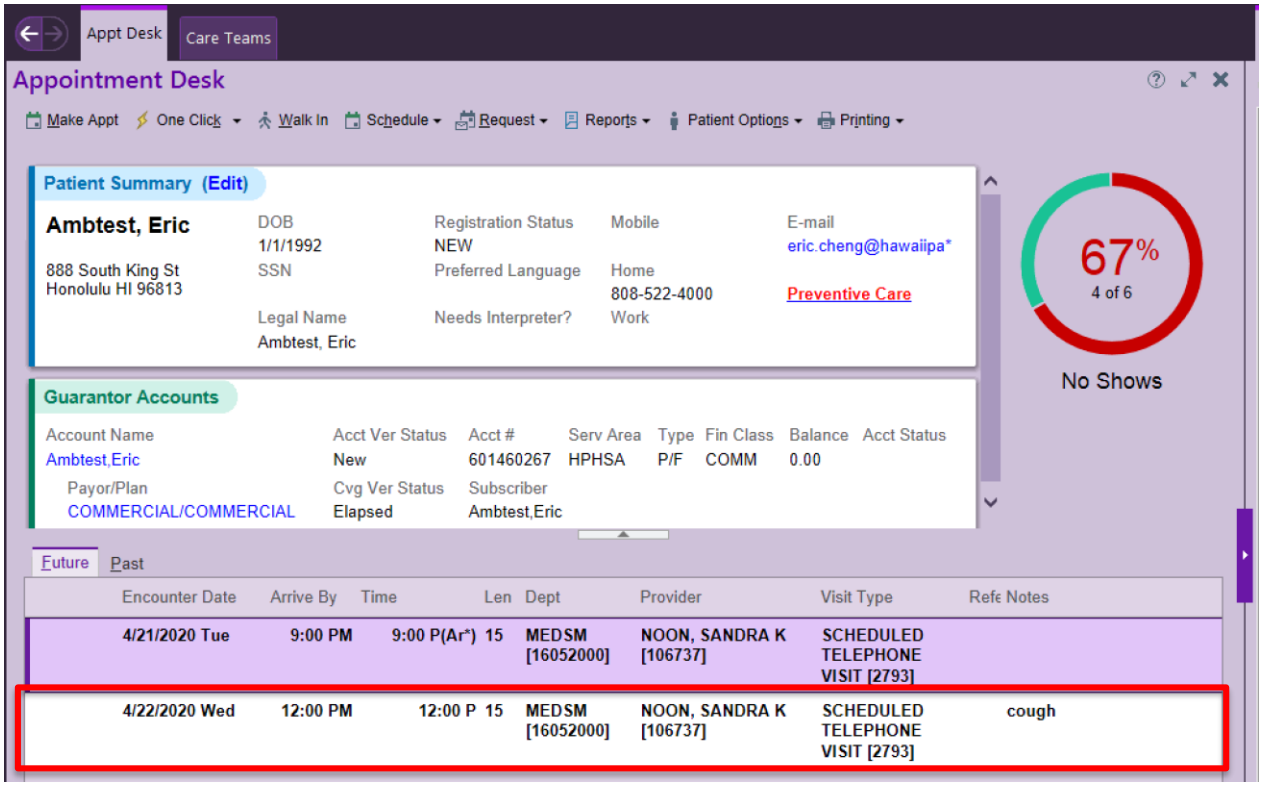
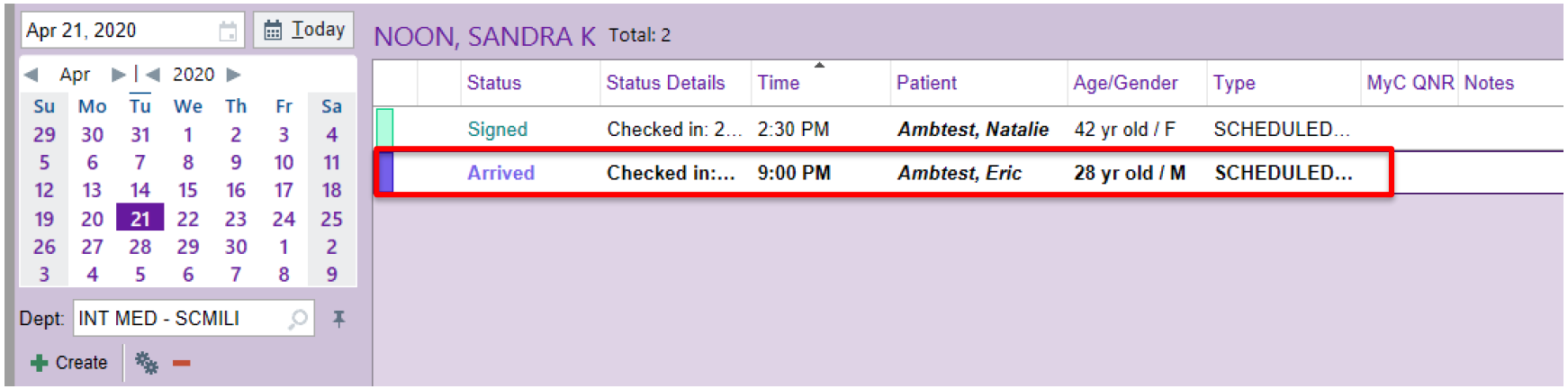
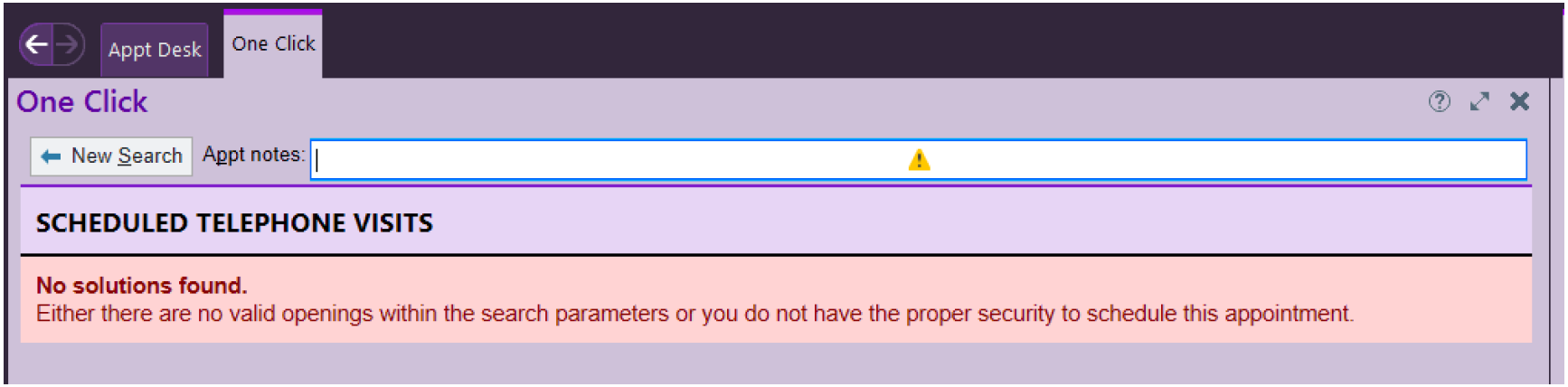


- The appointment details will be visible in the Appointment Desk

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



- 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.



- 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.