OPEN ACCESS USERS GUIDE

V 9.0
OPEN ACCESS

eClinicalWorks® Open Access allows patients to be notified of open slots on their provider’s schedule. Patients can reserve appointment slots from the Patient Portal® or healow® app, and they will be notified through e-mail and/or the healow app when an opening is available. When multiple appointment cancellations occur, patients are notified of the earliest cancellation, while any others can be viewed on the Patient Portal.

**e-Mail Delivery Schedule**

To prevent patients being inundated with e-mails in the event that there are multiple cancellations, notification e-mails are sent to patients on the following schedule (this does not affect messages sent through the Patient Portal or healow app):

<table>
<thead>
<tr>
<th>Cancellation Time Frame</th>
<th>e-Mail Delivery Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today*</td>
<td>At the end of the hour</td>
</tr>
<tr>
<td>12pm - 5pm</td>
<td>At 5pm</td>
</tr>
<tr>
<td>5pm - 12am</td>
<td>Immediately</td>
</tr>
<tr>
<td>12am - 12pm</td>
<td>At 12pm</td>
</tr>
</tbody>
</table>

* Same-day cancellations must be at least two hours from the next scheduled e-mail delivery for patients to receive a message. For example, if a cancellation occurs at 9:59 AM for a 12:00 PM, patients receive an e-mail at 10 AM;

**IMPORTANT!** Visit Statuses used by your practice must be mapped to the system’s Visit Types for the system to automatically recognize appointments that have been cancelled, rescheduled, etc. This mapping is performed from the EMR menu, by clicking the eCW Visit Codes option. For more information on this process, refer to the *Front Office Setup Guide*.

**Open Access Setup Requirements**

The following setup actions must be taken for providers and patients to use Open Access:

- Providers must be on JTN (Join the Network), which is accomplished by registering for P2P™
- Providers must have their Working Hours set up
- Patients must be Web Enabled for the Patient Portal
- eClinicalWorks must be updated to V 9.0.51 or V 10
Activating Open Access

Open Access must be activated by an administrator before it can be used. There is a fee per confirmed appointment when using Open Access, up to a maximum per month per provider.

**Note:** The option to activate Open Access is only available on eClinicalWorks V 9.0.51 or V 10. If you have another version of eClinicalWorks and want to activate Open Access, contact eClinicalWorks Support to schedule an upgrade.

**To activate Open Access:**

1. From Admin band in the left navigation pane, click Product Activation.
   The Product Activation window opens.
2. In the Open Access section, click Activate:

   ![Product Activation Window](image)

   The Appointment Cancellation Broadcasts window opens:
3. Click Sign Up!

Once Open Access is activated, the Activate button on the Product Activation window changes to a Manage button, allowing you to configure the Open Access campaigns.

**Configuring Open Access Campaigns**

Once Open Access has been activated, the campaigns can be configured from the Product Activation page.

To configure Open Access campaigns:

1. From Admin band in the left navigation pane, click Product Activation.
   
   The Product Activation window opens.

2. In the Open Access section, click Manage:
3. Click Create New Campaign.

   The *When to Publish* page opens:
If any of the selected providers are not registered with JTN (P2P), the following window opens, allowing you to enable providers:
4. *(Optional)* Click Register next to a provider to register providers individually, or click Register All to register all providers on this window at once.

5. Enter information in the following sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalize your campaign's name</td>
<td>Enter a name for this campaign here.</td>
</tr>
<tr>
<td>Publish Appointment Availabilities</td>
<td>Use the slider here to select the time frame, after the current date, in which the system looks for appointment cancellations.</td>
</tr>
<tr>
<td>Select Participating Providers</td>
<td>Mouse over a provider in the left pane to expose an Add button. Click this button to add that provider to the right pane and include them in this campaign. One individual provider must be added before the All Providers option can be used.</td>
</tr>
<tr>
<td></td>
<td>To remove a specific provider from this campaign, click the X icon to the right of a provider in the right pane. To remove all providers from the right pane, click the trash can icon.</td>
</tr>
<tr>
<td></td>
<td>The providers displayed in the left pane can be filtered by either entering a provider's name in the search field or selecting a specific facility from the pick list.</td>
</tr>
<tr>
<td>Note</td>
<td>Providers must be activated with P2P to use Open Access campaigns.</td>
</tr>
</tbody>
</table>
6. Click Save & Next.

The Who to Publish page opens:

7. Check one or more of the following options:
**Option** | **Description**
---|---
Missed Follow-Up Appointments | Check this box to notify patients that have missed their follow-up appointment, or who did not schedule a follow-up appointment of any appointment availabilities in a specified time frame:

Set the following sliders:
- **Look Back** - Determines the number of days before your recommended follow-up appointment date to look for availabilities.
- **Look Ahead** - Determines the number of days after your recommended follow-up appointment date to look for availabilities.

**Example:** The Look Back slider is set to five days and the Look Ahead slider is set to one week (seven days). A patient has an appointment on 10/1, and during that appointment the provider records a recommended follow-up appointment for two weeks from that day, which would make the ideal follow-up appointment date 10/15. The system then looks for any appointment availabilities between 10/1 (five days before the recommended follow-up date of 10/15) and 10/22 (seven days after the recommended follow-up date of 10/15).

**Note:** Be careful to not set the Look Back slider too far. For example, if it is set to two weeks, and a patient has a follow-up recommendation of two weeks, then they may receive appointment availability messages for the day after their original appointment. The recommended time frame for this slider is five (5) days.

**IMPORTANT!** Providers must specify a follow-up appointment from the Follow-Up section of the Billing window on the Progress Notes. The time frame buttons in the Follow-Up section must be used to specify a recommended follow-up date to use Open Access. Free text in the Follow-Up field is not recognized by the system when looking for recommended follow-up dates.
### Configuring Open Access Campaigns

**Wait Listed Patients**

Check this box to send messages to all patients on the Wait List whenever an appointment is available.

**Note:** There are no provider or facility filters for this campaign. Patients receive messages for appointment availabilities for all providers and all facilities within your practice. This campaign is recommended only for single-provider practices.

**IMPORTANT!** The system does not automatically remove patients from the Wait List, and they will continue to receive the appointment availability notification messages for which they qualify until they are manually removed from the Wait List.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wait Listed</td>
<td>Check this box to send messages to all patients on the Wait List whenever</td>
</tr>
<tr>
<td>Patients</td>
<td>an appointment is available.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>There are no provider or facility filters for this campaign. Patients</td>
</tr>
<tr>
<td></td>
<td>receive messages for appointment availabilities for all providers and all</td>
</tr>
<tr>
<td></td>
<td>facilities within your practice. This campaign is recommended only for single-</td>
</tr>
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<td></td>
<td>provider practices.</td>
</tr>
<tr>
<td><strong>IMPORTANT!</strong></td>
<td>The system does not automatically remove patients from the Wait List, and they</td>
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Configuring Open Access Campaigns

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<tr>
<th>Option</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Bump Ups</td>
<td>Check this box to send messages to patients that already have an appointment scheduled to notify them of appointment openings at earlier dates:</td>
</tr>
<tr>
<td></td>
<td><img src="image.png" alt="Image" /></td>
</tr>
<tr>
<td></td>
<td>When a cancellation occurs, the system looks ahead in the schedule to find similar appointment types. The patients that fit the configured criteria are sent messages notifying them of an earlier appointment availability.</td>
</tr>
<tr>
<td></td>
<td>The time frame within which the system looks ahead after a cancellation occurs is selected from the Look-up Interval pick list.</td>
</tr>
<tr>
<td></td>
<td>Click one of the following radio buttons to determine the types of appointments that qualify to be bumped up:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Same Visit Duration</strong> - Search for cancelled appointments with the exact same visit duration as the appointment you want to bump up.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Within Duration</strong> - Search for cancelled appointments with a visit duration that is the same or longer than the appointment you want to bump up (e.g., if an hour-long appointment is cancelled, any patients looking for appointments that are an hour or less, such as 30 minutes or 15 minutes, are all notified of an availability).</td>
</tr>
<tr>
<td></td>
<td>- <strong>Same Visit Type</strong> - Search for cancelled appointments with the same Visit Type as the appointment you want to bump up.</td>
</tr>
<tr>
<td>IMPORTANT!</td>
<td>Visit Statuses must be manually updated to your practice's Rescheduled status once an appointment has been confirmed and booked. The system does not automatically update appointment statuses once that appointment is bumped up, so the original appointment remains on your schedule and that patient will continue to receive appointment availability notification messages for which they qualify until their Visit Status is updated.</td>
</tr>
</tbody>
</table>
Interval Follow-Up

Check this box to send messages to patients that have not been seen by your practice in a specified time frame when there is a cancellation:

1. Select a time frame within which to look for patients that have not been seen by your practice using the Set Follow-Up Interval slider. The system only looks at patients who have had an office visit with your practice within the past 365 days. Since a full year would not include any patients, selecting a year from this slider actually equals 360 days instead of 365.

2. Check at least one of the following boxes:
   - **Age Group** - Restricts Interval Follow-Up messages to a specific age group. Enter the age range in the fields that display after checking this box.
   - **Diagnosis** - Restricts Interval Follow-Up messages to patients with specific diagnoses. Click the ICD code(s) in the left pane of the section that opens after checking this box. ICD codes added to the right pane are the only diagnoses considered by this campaign. Click the X icon to the right of a diagnosis in the right pane to remove a specific diagnosis, or click the trash can icon to remove all diagnoses from the right pane.

To configure an interval follow-up campaign:

- **Option** | **Description**
  - Interval Follow-Up | Check this box to send messages to patients that have not been seen by your practice in a specified time frame when there is a cancellation:

  1. Select a time frame within which to look for patients that have not been seen by your practice using the Set Follow-Up Interval slider. The system only looks at patients who have had an office visit with your practice within the past 365 days. Since a full year would not include any patients, selecting a year from this slider actually equals 360 days instead of 365.

  2. Check at least one of the following boxes:
     - **Age Group** - Restricts Interval Follow-Up messages to a specific age group. Enter the age range in the fields that display after checking this box.
     - **Diagnosis** - Restricts Interval Follow-Up messages to patients with specific diagnoses. Click the ICD code(s) in the left pane of the section that opens after checking this box. ICD codes added to the right pane are the only diagnoses considered by this campaign. Click the X icon to the right of a diagnosis in the right pane to remove a specific diagnosis, or click the trash can icon to remove all diagnoses from the right pane.
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Configuring Open Access Campaigns

8. Click Save & Publish.

This campaign is now activated.

Editing Active Campaigns

Campaigns that have been published and are active can be edited from the Broadcast Availability window.

To edit an active campaign:

1. From Admin band in the left navigation pane, click Product Activation.

   The Product Activation window opens.

2. In the Open Access section, click Manage:

   Patients can subscribe to this notification from the Patient Portal or healow app.

   Note: There is no facility filter for this campaign. Patients receive messages for appointment availabilities at any facility for the patient's subscribed provider.
The Broadcast Availability window opens.

3. Click Edit next to the campaign you want to edit:

The When to Publish page opens, allowing you to edit the campaign in the same manner that you created it.

For more information, refer to Configuring Open Access Campaigns on page 5.
Deactivating Campaigns

Campaigns that have been published and are active can be deactivated from the Broadcast Availability window. This is useful if you do not want to currently use a campaign, but may want to use it in the future.

To deactivate a campaign:

1. From Admin band in the left navigation pane, click Product Activation.

   The Product Activation window opens.

2. In the Open Access section, click Manage:

   ![Image of Broadcast Availability window]

   The Broadcast Availability window opens.

3. Click Deactivate next to the campaign you want to deactivate:
This campaign is removed from the Active Campaigns section and added to the Inactive Campaigns section.

**Activating Deactivated Campaigns**

Campaigns that have been deactivated can be reactivated from the Broadcast Availability window.

**To deactivate a campaign:**

1. From Admin band in the left navigation pane, click Product Activation.
   
   The Product Activation window opens.

2. In the Open Access section, click Manage:
The Broadcast Availability window opens.

3. Click Activate next to the inactive campaign you want to activate:

This campaign is removed from the Inactive Campaigns section and added to the Active Campaigns section.

**Deleting Campaigns**

Campaigns that are no longer needed can be deleted from the Broadcast Availability window.
To delete a campaign:

1. From Admin band in the left navigation pane, click Product Activation.
   The Product Activation window opens.

2. In the Open Access section, click Manage:

   ![Product Activation Window](image)

   The Broadcast Availability window opens.

3. Click Delete next to the campaign you want to delete:

   ![Broadcast Availability Window](image)

   This campaign is deleted.
Confirming Open Access Appointments

When a patient reserves an appointment, it displays as a slot highlighted in green on the Resource Scheduling window:

Double-click on this appointment to confirm and book it for the patient. The system references the patient’s name, date of birth, gender, and phone number to match patients on the Patient Portal and healow app with their accounts in eClinicalWorks.
APPENDIX A: NOTICES

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Patient Portal®

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