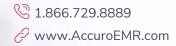


# USER GUIDE

# Online Booking & Notifications







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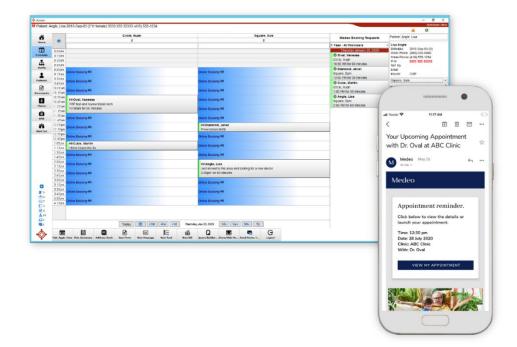
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## WELCOME TO ONLINE BOOKING

Online Booking for Accuro is a convenient and innovative way for patients to book appointments online. Clinics save time usually spent answering phones and scheduling patients, yet they maintain full control over the clinic schedule.

Your patients can request bookings, accept appointments, and view their upcoming appointments through the Medeo virtual care platform.



You can respond to Online Booking requests and manage your bookings in the Scheduler.

## **Overview**

- Create appointment types that are shown to patients as options when they book online.
- **Create availability** for Online Booking in the Provider's schedule.



- Invite patients to Online Booking in Medeo.
- **Respond** to Appointment Requests.

## **CLINIC CONFIGURATION**

There are 3 configuration steps that allow patients to book with Medeo Online Booking:

1. Create **Medeo Booking Request Types** that patients select when requesting appointments online (e.g. New Patient, Follow up, Prescription Renewal, Flu Shot).

**Note**: Medeo Booking Request Types link with **Appointment Types** and their corresponding billing codes.

- 2. Associate **Medeo Booking Request Types** with **Appointment Suggestions** that designate when a Provider is available for booking through the day.
- 3. Create booking availability by applying **Scheduler Templates** by day, week, month, or year allowing appointments to be booked online.



## Medeo Booking Request Types

Patients that book online with Medeo must select an Appointment Type before submitting their request.

You can customize the selectable Appointment Types by creating **Medeo Booking Request Types** in **Scheduler Management**.

**Note:** Accuro users require permission to create Medeo booking request types. To enable permission, complete the following steps as a System Administrator:

- 1. Open the Accuro Start Menu, click Users, and select Manage Security.
- 2. In Feature Access, open the Role Permissions tab or User Permissions tab,
- 3. Under **Scheduling**, select **Configure Medeo Booking Options**, and select a row inside the enable column to enable permission. A green check mark indicates that permission is enabled.

<b>\$</b>		Manage Security						
Roles Open Providers	Feature Access Management							
Offices		Enable or disable access to specific features of Accuro. Features can be controlled at the role, office, or user level.						
Templates	Role Permis	ssions User Permissions						
Users	Ruie Permis							
Feature Access	Office:	Downtown Office - ON						
Notifications	User:	S crectangle						
System Settings	User.	a crectange						
Audit Logs		Feature	Enabled					
Admin Delete		A Home						
Reports		Review Documents	1					
System Information		Review Labs	1					
Active Users		7 Scheduling						
		Scheduler - Apply/Remove Templates	1					
		Scheduler Management - Apply/Remove Templates	4					
		Scheduler Management - Manage Templates	1					
		Scheduler Management - Priorities/Reasons/Statuses	1					
		Scheduler Management - Settings	1					
		Scheduler Management - Types	1					
		- Scheduler Management - Types	1					
		Configure Medeo Booking Options	1					
		Override Priority Templates	1					
		···· Manage Rooms	A					
		- Manage Programs	×					
		Manage Appointment Reason Descriptions	1					
		- Manage Appointment Cancellation Reasons	1					
		- Manage Cancellation List Reasons	1					
		Hanana Céna	1					

4. Select **Close** to save your changes.

Note: For the permission change to take effect, log out of Accuro and log back in.



## Managing Booking Request Types

To add, edit, or delete Booking Request Types:

- 1. Open the Accuro Start Menu, select the Scheduler, and then choose Scheduler Management.
- In the Types tab, click the Add button within the Medeo Booking Request Types Section, or select an appointment type to Edit or Delete.

Priorities, Reasons an	d Statuses Se	ettings Types	Suggestions Temp	lates				
ccuro Appointment Types Medeo Booking Request Types								
Туре	Color	Shared	Share to Medeo	Туре	Color	Length	Starts On	Accuro Appointment Type
				Follow up		10 Minutes	:00, :10, :20, :30,	Follow Up
Consultation				New Patient		30 Minutes	:00, :30	Consultation
Flu Shot only				Prenatal		15 Minutes	:00, :15, :30, :45	Prenatal
Follow Up				Prescription Renewal		15 Minutes	:00, :15, :30, :45	Prescription Renewal
General Visit				Regular appointment		15 Minutes	:00, :15, :30, :45	General Visit
Other				Well baby or child visit		30 Minutes	:00, :30	Well Baby Visit
Prenatal								
Prescription Renewal								
Procedure								
Virtual Visit - COVID								
Virtual Visit - Follo								
Virtual Visit - Other								
Virtual Visit - Rx Re								
Well Baby Visit								



3. Complete the details in the Medeo Booking Request Type window:

**Note:** Users will be unable to edit or delete Medeo Booking Request Types from any other office aside from the one the type was initially created in. Hovering over the Type will display which office it originated from.

#### The Booking Request Type Window

- Name: The type of appointment your patients select when booking online. For example, New Patient, Regular Visit, Follow up, Prescription Renewal, Flu Shot, or Vaccination.
- **Description:** Provide a brief description to help patients select the correct request type when booking in Medeo.

**Note**: Name and Description can be seen by the patient.

 Interaction Type: Select which category the appointment type appears under during Online Booking: In-Office, Video Appointment (available to offices subscribed to Video Visits), or Either (In-Office or Video). The default selection is In-Office.

**Note**: Phone appointments must use In-Office as the Interaction Type.

- х Medeo Booking Request Type Name New Patient Description Book a New Patient Appointment if this is your first time seeing this doctor Interaction Type Either (In-Office or Video) Length In-Office Starts On Either (In-Office or Video) ☑ Default Starts On to match Length Color Mapping Consultation OK Cancel
- **Length:** The duration of the appointment. Patients will only see time slots that can accommodate the duration of their chosen appointment type.
- **Starts On:** This is the number of minutes past the hour that appointments may be scheduled on (e.g. :00 is exactly on the hour, :10 is ten minutes past the hour).

(Continued on next page)

Version: 8.5 Date of Revision: July 10<sup>th</sup>, 2023



- **Default Starts On to match Length:** This option defaults the Starts On minutes to match the length of appointments. When turned off, you can choose the number of minutes past the hour that appointments may be scheduled on, regardless of the length of appointment. The default for this setting is on.
  - For example: if an appointment is scheduled for thirty minutes, selecting Default Starts
     On to match the appointment's length will allow your patient to book on the hour and on the half hour.
- **Color:** The color that appears in the Medeo Booking Requests column in the Scheduler when a patient requests an appointment.
- **Mapping:** Associate the Medeo Booking Request Type with the appropriate Accuro Appointment Type. When a patient books online, an Appointment is created with the Accuro Appointment Type prepopulated based on this mapping.

Version: 8.5 Date of Revision: July 10<sup>th</sup>, 2023



## **Appointment Suggestions**

Appointment Suggestions are used to mark the appointment time slots in your Scheduler that are available for patients in Medeo Online Booking.

To set up Online Appointment Suggestions:

- 1. Select the Accuro Start Menu, select Scheduler, choose Scheduler Management.
- 2. Click the Suggestions tab.
- 3. Under Appointment Suggestions, click **Add** to create a new suggestion.
- 4. Complete the following fields:

Name: What to call the Appointment Suggestion in Accuro.

Label: The text shown in the Scheduler after you apply the Suggestion.

Color: The color shown in the Scheduler. Select the ellipses button to choose a color.

**Display**: Displays a solid color or a gradient in the Scheduler.

**Appointment Type** (not required): The default appointment type when an appointment is scheduled on top of an Appointment Suggestion. (e.g. Flu Shot, Consultation, Prenatal).

**Appointment Reason** (not required): The default reason a patient makes an appointment (e.g. Prescription Refill, Cough, Pain).

**Medeo Booking Request Type:** Maps Medeo Booking Request Types to the Appointment Suggestion. When you apply a suggestion to Scheduler, the selected Medeo Booking Request Types will be available to patients for Online Booking in Medeo. You can select one or multiple Medeo Booking Request Types. (e.g. Flu Shot, General Visit, Follow up).

Allow Accuro Appointment Creation: Enable this checkbox to let Accuro users book appointments in time intervals with this suggestion type.





Allow Medeo Booking Request Appointment Creation: Enable this option to make your Appointment Suggestion available to patients for Medeo Online Booking. Uncheck this option if you'd like to configure your clinic's schedule for Online Booking, but not yet allow patients to book appointments. When you are ready to let patients book online, edit your suggestion and enable this checkbox.

Ap	ppointment Suggestion
Name	Online - 15
Label	Online Visit
Color	
Display	● Solid ○ Bar
	✓ Active
Appointment Type	General Visit 🗸
Appointment Reason	Back Pain 🗸
Medeo Booking Request Type	Regular appointment
	Allow Accuro Appointment Creation
	Allow Medeo Booking Request Appointment Creation
Clear	Update Cancel

Version: 8.5 Date of Revision: July 10<sup>th</sup>, 2023



## **Applying Suggestions**

There are several ways to apply Appointment Suggestions for Online Booking to your Scheduler:

To specific time intervals in the Scheduler using ad-hoc Appointment Suggestions.

To entire days in the Scheduler using Suggestion Templates.

To sequences of future days using Apply Templates in Scheduler Management.

#### **Applying Suggestions to Time Intervals**

To apply an Appointment Suggestion to a specific date and time:

- 1. In the **Scheduler**, use **SHIFT+click**, or click and drag your mouse cursor to select the time intervals you'd like to make available for online booking.
- 2. Right-click your selection, then hover your mouse over **Apply Appointment Suggestion**, then select an Appointment Suggestion.
- 3. At the prompt, select either **Group** or **Single Line**, then click **OK**.

**Group**: Applies the suggestion to the entire selected area of time.

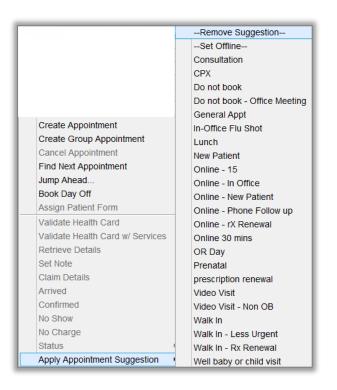
**Single Line**: Applies the suggestion to each individual time interval.

Apply Suggestion
Please select the format for the suggestion:
O Group 💿 Single Line
OK Cancel



**Note:** To remove a suggestion from the Scheduler:

- 1. Right-click the time interval in the Scheduler.
- 2. Hover your mouse over Apply Appointment Suggestion.
- 3. Select Remove Suggestion.





#### **Managing Suggestion Templates**

Suggestion Templates let you plan out the types of appointments available for booking over an entire day, or part of the day.

To Manage your Appointment Suggestions:

1. Search for Manage Templates in the Accuro Start Menu.

Alternatively, open the Accuro **Start Menu**, select the **Scheduler**, and then select **Scheduler Management.** Under the **Templates** tab, select the **Manage Templates** tab.

2. In the Suggestion Templates section, click the 💽 Add button to create a new template.

¢		Schedule	r Management	×
Priorities, Reasons and Statuses Settings Type	s Suggestions	Templates		
Apply Templates Manage Templates				
Suggestion Templates			Availability Templates	
Name	Interval	Priority	Name	
Mondaye Dr. Square	15 Minutes	Phoney	Monday, Tuesday, Wednesday Mornings	
Office Day (online)	15 Minutes		Regular Availability	
UK Day	15 Minutes		Wednesday and Thursday Afternoons	
Regular Office Day	15 Minutes		Woundaday and maraday Anomouna	
			×	
			Ľ <b>□ 0 0</b>	
Colur	n1			
8:00am			A	
8:15am New Patient				
8:30am				
8:45am 9:00am Rx Renewal				
9:15am Online Visit				
9:30am Online Visit				
9:45am Online Visit				
10:00am Rx Renewal				
10:15am Online Visit			-	
10:30am Online Visit				
10:45am Online Visit				
11:00am Rx Renewal 11:15am				
11:15am Online - New Patient				
11:45am Do not book				
12:00op				
12:15pm Online - New Patient				
12:30pm Lunch				
12: C (3)			▼	
<b>V</b>				
		Applied templar	es will not be changed.	
			Apply	Close

- 3. Enter a Name for your Suggestion Template.
- 4. Select a time **Interval** from the drop down list, either 5, 10, 15, 20, or 30 minutes. We suggest making this time interval the same as your Scheduler time interval and Provider time intervals.
- 5. Select the **Priority** checkbox if you do not want anyone to override the template. Once it is applied, only users with specific permissions can remove the template.

**Trainer Tip:** Priority helps when you're blocking days off for Statutory Holidays! (Continued on next page)



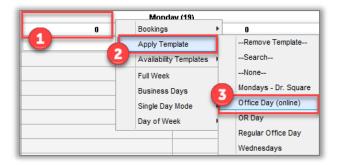
- 6. Next, select time intervals inside Column 1 by either clicking and dragging or using **SHIFT+click**.
- 7. Right-click your selected intervals, then choose an Appointment Suggestion to apply to your template.
- 8. At the prompt, select either Group or Single Line, then click OK.
- 9. Repeat steps 7 and 8 to complete your Suggestion Template.
- 10. Select **Apply** in the bottom right corner to save your Suggestion Template.



## **Applying Suggestion Templates to Specific Days**

To apply Suggestion Templates to specific days:

- 1. In the **Scheduler**, right-click the day (e.g. Monday) or the Provider's name at the top of a day column.
- 2. Hover your mouse over Apply Template.
- 3. Select your suggestion template from the drop down menu.



4. Your suggestions are then displayed inside the day column of the Scheduler.





#### **Applying Suggestions to Sequences of Days**

You can apply Suggestion Templates into the future based on: **Days**, **Days of the Week**, **Days of the Month**, or **Days of the Year**.

To Apply Suggestion Templates to future time periods:

1. Search for Apply Templates in the Accuro Start Menu.

Alternatively, open the Accuro Start Menu, select the Scheduler, then Scheduler Management. Under the Templates tab, select the Apply Templates tab.

- Using the drop down list, select a Provider. To apply templates to multiple physicians, select the Multiple Providers button, then use the drop down to select the appropriate checkboxes.
- 3. Choose your template from the Templates Suggestion drop down.

<b></b>	Scheduler Man	agement		x
Priorities, Reason	s and Statuses Settings Types Suggestions Templates			
Apply Templates	Manage Templates			
			Column 1	
Provider Square	e, Sam 💌 🎎	8:00am		~
Templates		8:15am		
remplates		8:30am		
Suggestion	None V	8:45am		
Availability	None	9:00am		
Availability	Mondays - Dr. Square	9:15am		
	Office Day (online)	9:30am		
Day Weekly	OR Day	9:45am		
	Regular Office Day	10:00am		
Starting MM/	Wednesdays	10:15am		
		10:30am		
Every 1 🗘	week(s) on:	10:45am		
	Tue Wed Thurs Fri	11:00am 11:15am		
		11:15am 11:30am		
Sat S	un	11:30am 11:45am		=
		12:00pm		
		12:15pm		
		12:30pm		
		12:45pm		
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		2:15pm		
		2:30pm		
		2:45pm		
		3:00pm		
		3:15pm		
		3:30pm		~
L				
			View Log Remove Apply Close	
				-



- 4. Select either the **Day**, **Weekly**, **Monthly**, **or Yearly** tab to choose the length of time you would like to apply the template over, then enter the desired details.
- **Day**: This applies a template to a specific day in the future. (E.g. The Provider decides to take a Friday off in two weeks).
  - 1. Enter your **On** date.
  - 2. Click Apply.
- **Weekly**: This applies templates on a weekly basis. (E.g. The Provider books the same schedule of appointments on Mondays, Wednesdays, and Fridays).
  - 1. Enter **Starting** and **Ending** dates
  - 2. Select the days of the week to apply the template over.
  - 3. Click **Apply** to save.
- Monthly: Applies templates monthly. (E.g. The Provider takes the second Monday of the month off every 2 months).
  - 1. Enter **Starting** and **Ending** dates

Apply Templates Manage Templates					
Provider Circle, Huan 🗸					
Templates					
Suggestion Office Day (online)					
AvailabilityNone V					
Day Weekly Monthly Yearly					
Starting MM/DD/YYYY Ending MM/DD/YYYY					
Every 1 week(s) on:					
□ Mon □ Tue □ Wed □ Thurs □ Fri					
□ Sat □ Sun					

- 2. Use the drop down lists to select the occurrences.
- 3. Click **Apply**.
- Yearly: This is used to apply templates annually. (E.g. Every year, the Provider has a holiday on their birthday and Christmas).
  - 1. Select a date range and occurrences.
  - 2. Click Apply.

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## **Appointment Suggestion Icons**

When an appointment suggestion is added to the Scheduler, an icon representing the type of appointment is shown inside the booked time interval.

In-Office: No icon

Video Appointment: 💇 Webcam icon

Either (In-Office or Video): Webcam/House icon

**Note**: Your office must be subscribed to Video Visits for this function to appear in Accuro.

The ((•)) icon indicates that an appointment is available for online booking.

In-Office Visit (••)	
In-Office Visit (••)	
Online Visit 🕪 窗	
Online Visit 👀 🙆	
Video Visit (👀 🧕	
Online Visit 🕪 窗	
Online Visit 🕪 窗	
Online Visit 🕪 窗	
Rx Renewal (••) 🙆	

#### Warning Icons

There are several warning icons that may appear when applying Appointment Suggestions:

For instance, you'll see a warning icon if an Appointment Suggestion is applied to a Scheduler time interval that is shorter than the associated Medeo Booking Request Type.



At least one of the Medeo Booking Request Types matches the length of the applied Appointment Suggestion, but there are other Medeo Booking Request Types connected to the same Appointment Suggestion that do not match the length of the applied suggestion.



None of the Medeo Booking Request Types match the length of the applied Appointment Suggestion.

There is no default office associated to the Provider or if availability has not been set for the selected area. Set the default office Provider via configuration details (F2), or right-click inside the Scheduler, then select the correct office under **Availability**.

Note: To configure Online Booking for multiple clinics, please see Apply Multi-Office Availability.



## WORKFLOW

## **Invite Your Patients to Medeo**

Now that your schedule is set up for your patients to book appointments online, ask your patients to create Medeo accounts for Online Booking by sending out email invitations from Accuro. You can send invitations to patients individually, or in groups of patients using the <u>Query Builder</u>.

**Note:** Every Medeo Online Booking account requires a unique email address. For those without email addresses, please refer to the section on <u>Dependent Booking</u>.

### **Inviting Individual Patients**

To send a Medeo Online Booking invitation to a specific patient:

- 1. Search for and select your Patient.
- 2. Ensure the patient has an email address.
- Press ALT on your keyboard or use the Accuro Search Menu, then in the search field type Invite patient to Online Booking.
- 4. Select Invite patient to Online Booking.
- Invitations are then sent by email with the subject line: Book with (your office) – (your province) online.

# <u>Welcome</u> to Medeo



Hello,

We know how busy life can get, so we're happy to offer Online Booking through Medeo to help make your healthcare experience easier.

How does Online Booking work?

It's simple:

- 1. Select your Provider and preferred time
- 2. Create an account OR Sign In with your existing Medeo account
- 3. Click "Request Appointment"
- 4. We'll send you an email confirming your appointment

BOOK YOUR APPOINTMENT NOW

Trainer Tip: Create a Quick Action Button

to invite a patient to Online Booking with one click! See <u>Quick Action Buttons</u>.

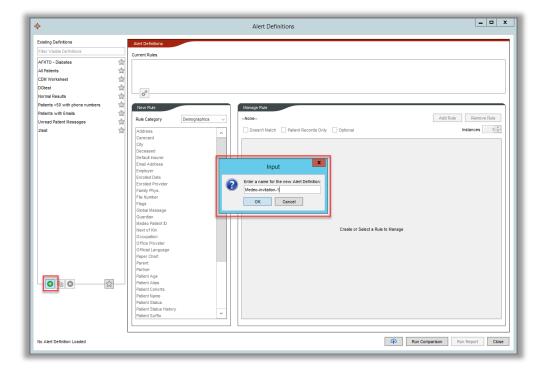


### **Inviting Multiple Patients**

You can invite more than one patient to Online Booking at the same time using the **Query Builder**. In the Query Builder you can generate lists of patients by defining filters and logic to your patient database, then invite those patients to Online Booking.

To invite groups of patients using the Query Builder:

- 1. From the Accuro Start Menu, select Reports, and then the Query Builder (Alerts).
- 2. Click the **Add** button located at the bottom of the **Existing Definitions** Section to create a new **Alert Definition**, then enter a name and click **OK**.





3. Select **Demographics** as the Rule Category within the New Rule Section, then select **Email** Address and click Add Rule located in the Manage Rule Section.

New Rule Rule Category	Demographics 🗸		Manage Rule Email Address	Add Rule Remove Rule
Address	^		Doesn't Match Patient Records Only Optional	Instances 1 🗘
Carecard				
City				
Deceased				
Default Insurer				
Email Address				
Employer		۰.		
Enrolled Date				
Enrolled Provider				
Family Phys.				
File Number	=			
Flags				
Global Message				
Guardian				
Medeo Patient ID			Not Constrained	
Next of Kin			🕒 New	
Occupation				
Office Provider				
Official Language				
Paper Chart				
Parent:				
Partner				
Patient Age				
Patient Alias				
Patient Cohorts				

- Create a second rule to filter your patients. In this example, we filter by Patient Name. Select Patient Name, then click New within the Manage Rule Section, and select Last Name from the drop down list.
- 5. Next in our example, we generate a query for all last names beginning with A, B, C, or D. Select **Starts With** from the drop down list, then enter A.

Last Name:	Starts With V A
	• New

(Continued on next page)		
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6. Select the **New** button, then select **Last Name**, and enter B. Repeat this step for letters C and D, then click **Add Rule**.

Manage Rule		
Patient Name		Add Rule Remove Rule
Doesn't Match Patient Recor	ds Only 🗌 Optional	Instances 1
	Starts With V	8
	OR	
	Starts With V B	8
Last Name:	OR	
	Starts With V C	8
	OR	
	Starts With V	<b>8</b>
	• New	

- 7. At the bottom of the window, click **Run Report**.
- 8. In the **Check for Alert Matches** window, select which Provider's patients to apply the rule against (or leave All Patients selected), then click **Run**.

**Trainer Tip**: When adding Email Address within the **New Rule** section, ensure that the field contains the **@ symbol**. This will produce an accurate search for your query.

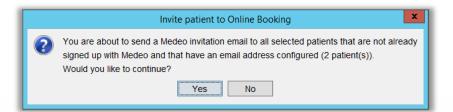


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<b></b>				Invite to	Mede	90			_ 0	x
				Invite to	Mede	0				
Last Name	First N	lame	PHN	Birthdate	Sex	Home Phone	Status			
Angle	Chloe		1111111111111	03/02/1991	F	(647) 555-1133	Unassigned			^
Angle	Molly		000444444444	12/13/1979	F	(000)	Unassigned			
Angle	Simon		555555555555555555555555555555555555555	04/15/1988	M	(905) 555-6814	Unassigned			
Cross	Andrew	v	8596321475	02/04/1996	М	(416) 555-8633	Unassigned			
Cross	Debra	(Debbie)	999999999947	05/19/1987	F	(416) 555-8526	Unassigned			
Cross	Michae	el la	999999999921	05/01/1981	M	(416) 555-5555	Unassigned			
Cube	Martin		0000000000000	06/18/1943	М	(905) 555-4567	Unassigned			
Decahedron	Darryl		8888888888888	01/01/1982	М	(000) 000-0000	Unassigned			
Diamond	Bob		555555555666	03/15/1975	М	(647) 555-9563	Unassigned			=
Diamond	Janet		00099345555F	07/05/1988	F	(000) 000-0000	Unassigned			
Heart	Jon		000011111111	02/17/1989	М	(000)	Unassigned			
Heptagram	Judith		1111111111AB	05/02/1982	F	(416) 555-1235	Unassigned			
Line	Ravind	er	888888888888	05/19/1996	М	(416) 555-3258	Unassigned			
Naomi	Test		0000000000000		М	(000)	Unassigned			
Nonagon	Adam		9333333333333	10/12/1973	М	(999) 250-4444	Unassigned			
Octagon	Otto		2222222222	11/09/1951	M	(647) 555-6548	Unassigned			
Oval	Matthe	w	77777777777777	06/02/2004	М	(905) 555-8989	Unassigned			
Oval	Michae	el 🛛	0001111111AD	06/07/1988	M	(416) 555-8633	Unassigned			
Oval	Vaness	sa	3333333333333	01/28/1971	F	(416) 555-5555	Unassigned			
Polygon	Christo	pher (Chris)	00089445555	03/30/1967	М	(416) 555-0566	Unassigned			
Pylon	Pam		8596321475AA	03/02/1981	F	(000)	Unassigned			
Rectangle	Randa	ll (Randy)	0000000000000	08/01/2002	М	(000)	Unassigned			
Destangle	Dah	-	0000000000	00/00/4000		(000)	Unanoianad			
29 Mate	:hes 🛝	- Select Action	on -		pleted	Rerun	Print All	Export	Close	
		Create Bill		^						
		Set Patient S	status							
		Assign Flag								
		Remove Flag								
		Assign to Pa		=						
		Create Patie								
			to Online Booking							
		Add to Privat	te Online Booking	$\sim$						

9. Your query matches are displayed in a new window. Highlight your matching patients by shiftclicking or with **CTRL+A** on your keyboard.

- 10. Use the drop down list to select **Invite patient to Online Booking**.
- 11. Send your mass invitation by selecting **Yes** at the **Invite patient to Online Booking** prompt, then close the Query Builder window.



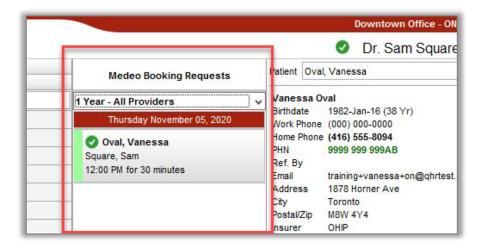
**Trainer Tip:** Many clinics use the Rule Category **Appointments** to filter patients by their last visit. For example, choose **Appointment**, click on the New button, select Date, and use the drop down list and select **In the Last 2 Years**.



## The Medeo Booking Requests Column

When a patient books an appointment online in Medeo, the Booking Request is displayed in the **Medeo Booking Requests** column on the right-hand side of the Scheduler.

Each booking request displays the patient name, date & time, and appointment length. The color on the left-hand side of each booking request (green in the screenshot below) corresponds to its preconfigured Booking Request Type Color.



If the patient requests a Video Visit, a 🖳 video icon displays on the Booking Request and the appointment in the Scheduler.

Oval, Vanessa \*Surgery (Nose) ... 💽

**Note:** You can show or hide the Medeo Booking Requests column by opening the **Accuro Start Menu** and searching for **Medeo**, then choosing **Show/Hide Medeo Booking Request Column.** 

**Trainer Tip**: You can create a Quick Action Button to show and hide the Medeo Booking Requests column with one click. Review the section below on <u>Quick Action Buttons</u>.



## **Booking Request Filters**

When you first open the Medeo Booking Requests Column, it will appear blank until you configure a View. You can create Views to only show requests for specific Providers, Date Fields, or Request Types. Alternatively, you can create a catch-all view that only filters by Date.

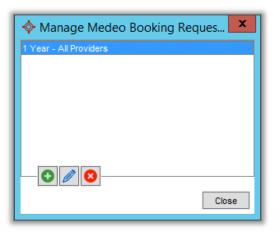
Note: A commonly used View is, 1 Year - All Providers.

To Create a Booking Request View:

1. In the **Scheduler**, select **Manage** from the Medeo Booking Requests drop down list to display the Manage Medeo Booking request window.

	Downtown Office - ON
	Ø Dr. Sam Square
Medeo Booking Requests	Patient Oval, Vanessa
1 Year - All Providers	Vanessa Oval
Select a View 1 Year - All Providers	Birthdate 1982-Jan-16 (38 Yr) Work Phone (000) 000-0000 Home Phone (416) 555-8094
Manage	PHN 9999 999 999AB
12:00 PM for 30 minutes	Ref. By Email training+vanessa+on@qhrtest.
	Address 1878 Horner Ave City Toronto
	Postal/Zip M8W 4Y4 Insurer OHIP

2. Click Add to open the Edit Request View window.





3. Complete the fields:

**View Name**: Enter a short name for the view that you are creating that will help you distinguish it between other views.

**Providers**: Show the Online Booking requests of specific Providers or select **All** to display all the requests at your clinic.

**Date Filter**: Enter a value and select either days, weeks, months, or years to show appointment requests from now until the end of the date filter. The date filter uses the Appointment Date and not the Received Date.

**Medeo Types:** Select the Medeo Booking Request Types you wish to view requests for, otherwise leave blank for all requested Medeo appointment types.

**Order By:** Choose how you would like the booking requests to be chronologically displayed in your list of requests. Select either **Appointment Date** (the date the patient wants to see the Provider) or **Received Date** (the date the patient completed the online appointment booking request).

Click **OK** to save the new filter.

Edit Request View
View Name: 1 Year - All Providers
Providers:All
Date Filter: 1 🔶 Years 🗸
Medeo Types:All
Order By: Appointment Date V
OK Cancel



## **Checkout / Check-in Button**

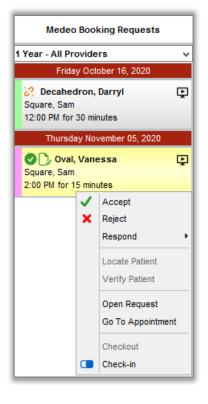
The Checkout button lets Accuro users take ownership of an appointment request while they are working with it and indicate to other users that the request is already being actioned. When an Accuro user checks out an appointment request, other Accuro users should not process it.

To checkout an appointment request:

1. Right click a request in the Medeo Booking Requests

Column and select the Checkout Checkout button.

2. Selecting the **Check-in Check-in** button lets other Accuro users check out and process an appointment request.



Version: 8.5 Date of Revision: July 10<sup>th</sup>, 2023



#### **Checkout Status Icons**

When an appointment request is checked out to an Accuro user, they see a green  $\bigcirc$  Checked Out icon in both the Booking Request Column and the Appointment Details window.



Other Accuro users at the same clinic see a red Checked out status indicating the appointment is unavailable to them.

📀 💪 Oval, Vanessa	Þ
Square, Sam	
Thu Nov 05 at 2:00 PM for 15 minutes	

The Checked In/Out status is also displayed in the Medeo Booking Request section of the <u>Appointment</u> <u>Details window.</u>

		•
Vanessa Oval		•
1982-Jan-16		
9999999999999		
training+vanessa+on@qhr	test.com	



## Viewing the Appointment Reason

When managing incoming Appointment Requests, it is helpful to view the **Medeo Appointment Type** and **Appointment Reason** submitted by patients, which is displayed in the bottom right of the Appointment Details window.

To view the Appointment Reason, double-click the booking request, or select **Open Request** from the right-click menu.

The Medeo Booking Request information displays at the bottom of the Appointment Details window.

Vanessa Oval	•	New Patient	
1982-Jan-16		Extreme Migraines	
999999999999			
training+vanessa+on@qhrtest.com			
D Checkout		🔗 Respond 🗸 Accept	🗙 Rej



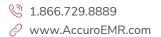
## **Linking Patients**

The first time a patient books an appointment using Medeo Online Booking, you will need to link the Medeo Account the patient created to the patient in Accuro. Subsequent appointment requests from the same Medeo account will automatically be linked to the Accuro patient.

To link Medeo and Accuro Patients:

1. Right-click a booking request, then select **Locate Patient**. Alternatively, you can double click a booking request in the Medeo Booking Request column to open the **Appointment Details** window and click the **Link** button in the **Medeo Booking Request** section.

Medeo Booking Request Pending	R	Medeo Booking Re	equests	Patient
		1 Year - All Providers	~	No Patiei
Vanessa Oval 1982-Jan-16 99999999999 training+vanessa+on@qhrtest.com	55	4:00 DM for 15 minutos	rr 02, 2022 ↓ Accept ★ Reject Respond	Square, \$
		6	Locate Patie	ent
Checkout			Verify Patier Open Reque Go To Appo	est
No Patient		· · · ·	Checkout Check-in	





2. The **Match Medeo Patient to Accuro Patient** window displays a list of possible matches. Select a patient from the **Possible Matches** section, then select **OK.** You can also manually search for patients in Patient Search.

Medeo	∲ ACCURO <sup>®</sup>
Vanessa Oval	Oval, Vanessa
999999999999	9999999999AB
1982-Jan-16	1982-Jan-16
training+vanessa+on@qhrtest.com	training+vanessa+on@qhrtest.com
+14168402136	1878 Horner Ave Toronto, ON M8W 4Y4
	(416) 555-8094
Patient Search	
Last Name oval	20 Oval Michael 1234567778ab 1984-Jun-18
	4 Oval Vanessa 999999999AB 1982-Jan-16
First Name	
First Name	

3. If any of the information supplied by the Medeo patient does not match with the Accuro Patient record, you will be prompted with the Update Demographics window. Use the checkboxes to select any demographic details you'd like to update in Accuro, then click **OK**.

Demographic         Medeo Patient         Accuro Patient           Date of Birth         1982-Jan-16         1971-Jan-28           Work Phone Number         (416) 840-2136         (000) 000-0000	
Work Phone Number (416) 840-2136 (000) 000-0000	

4. If a Medeo patient does not exist in Accuro, select **New Patient** to create a matching Accuro patient record.

Note: Patients that are linked to a Medeo account cannot be merged in Accuro.



#### Unlinking or Restoring a Medeo Account

There are a few instances where you may need to unlink a patient's Medeo ID from their Accuro account.

- The patient creates a brand new Medeo account. They may do this if they lose access to their personal email address.
- A user at your office accidentally links the wrong Medeo account to the wrong patient account.
- A parent may share an account with a child and the child becomes an adult. The now grown adult can create a new Medeo account and will need to be unlinked from the previously shared account.

#### **Unlinking a Medeo Account**

Users can now unlink a Medeo ID without needing access to the Audit Logs. If you find a patient in Accuro is incorrectly linked to a Medeo account, there is an option to unlink the connection within the Patients Section.

- 1. Click on Patients in the Accuro navigation bar to enter the **Patients Section**.
- 2. Select the Other tab.
- 3. Select the **Unlink button** next the Medeo Patient ID field.
- 4. Click Unlink in the Unlink Medeo patient window to unlink the account.



	_	
Home		Last Name Oval Heath ≠ Search Only First Name Vanessa
7		Prist Name Vanessa
Scheduler		Middle Name Birthdate MM/DD/YYYY 🔍 📢
-		
Traffic	Titl	e: Mrs. v Suffix: v Patient Status: Active v Office Provider: Square, Sam
1	Der	nographics Other Relationships Notes Status History Private Billing Insurer Rules Providers Provider Enrollment History Merged Patients
Patients		Employer ContactNone Employer Name Acme Dance Co.
Ē		
Documents		Occupation Ballet Instructor
		Registration No.
\$ Claims		Referral Date MM/DD/YYYY
â	Ο	Global Message Your Message
EMR		
<b>6</b>		Last Updated: 2020-Mar-09 2:04 PM Last Updated: Never Br. Cr. Huan Orde
Wait List		Paper Chart
		Official Language English
		Spoken Language English
-	Ø	Parent:
		Guardian
i 0		Partner
⊠ 14 8 <u> </u>	Ð	Alias
8 📄	8	Last Name: Oval First Name: Vanna Alias Type: Chosen name 🗸
益 0 □ 0		Medeo Patient D: 44548 Unlink
0		Manage Cohorts Delete Patient Patient Relationships Merge Update Patient Clear (F1)

#### **Restoring an Unlinked Medeo Account**

A Medeo patient can be linked from an unlinked account if the patient books an appointment or sends a secure message. If the patient has not done this, you will need to restore an unlinked patient in Accuro by following the steps below:

- 1. Open the Audit Logs by clicking on the Accuro Start Menu, selecting Users, and then selecting Manage Security.
- 2. Select Audit Logs.
- 3. Double-click into the Date Range fields to update the calendar date to refine your search.
- 4. Using the Activity drop down list, select **Update Patient**.
- 5. If blank, select the Patient checkbox and enter the patient's name in the empty field.
- 6. Select List Results.



- 7. Locate the patient in the Activities list.
- 8. Right-click the populated search result and select **Restore**.

¢				Manage S	Security			x
Roles Open Providers	Audit Logs							
Offices								
Templates	Date Range 05/18/2023 to 05/18/2023 G OS/18/2023 G Group by Activity 🗌 include Access Logs							
Users	Activity	Update Patient 🗸	User	All v	User Demographics Name	All V		
Feature Access	Patient	Oval, Vanessa	Role	All V	User ID	-Al V		
Notifications System Settings		010, 1010000	-					
Audit Logs	Patient ID		Com	ments				
Admin Delete								
Reports	Activities 4	Archive						
System Information							List Re	sults
Active Users								E.
Applications	Date/Time				User Name	Patient	Comment	
	2023-May-	Restore		Update Patient	Dr. Sam Square	Oval, Vanessa	UnLinked Medeo Patient 44548 from Accuro patient 4	^
								v
_								Close

9. A pop-up window will appear. Select **OK** to confirm.



## **Responding to Medeo Booking Requests**

After receiving a booking request and linking the patient, you can respond to the request by selecting either **Accept**, **Reject**, or **Respond** in the Appointment Details window or by right clicking the request.

To respond to a booking request:

- 1. Right click a request in the Medeo Booking Requests column.
- 2. Select either **Accept**, **Reject**, or select a custom response from the **Respond** drop down list.

**Accept**: Accepts the request, adds the appointment to your Scheduler, and sends the patient a confirmation email.

**Reject**: Denies the request, removes the appointment from Booking Requests, and sends the patient a notification email.

**Respond**: Lets you select a customized Accept or Reject response.



**Note:** After accepting an Appointment, it must be cancelled via the Scheduler. It's not possible to undo appointment acceptances. Please see the section on <u>Cancelling Appointments</u>.



### Managing Booking Responses

When you respond to a booking request with either **Accept** or **Reject**, or **Respond**, patients receive a secure message to their Medeo Inbox and an email notification instructing them to log in and view the message. You can customize these messages as Medeo Responses.

**Note:** Accuro users require permission to manage Medeo response types. To enable permission, complete the following steps as a System Administrator:

- 1. Open the Accuro Start Menu, select Users, then choose Manage Security.
- 2. In Feature Access, open the Role Permissions tab or User Permissions tab.
- 3. If under the **Role Permissions** tab, choose the role in the left section. If under the **User Permissions** tab, choose the Office and User from the drop down list.
- 4. Under Medeo Booking, go to Configure Medeo Booking Requests Responses, select the Enabled column. The green check mark indicates that permission is enabled.
- 5. Select **Close** to save your changes.

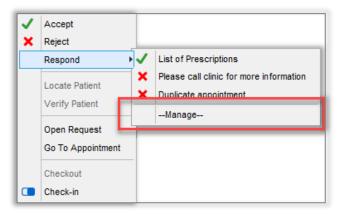
Rois Open Provides Office       Eable or disable access to specific features of Accuro. Features can be controlled at the role, office, or user lead.         Templates Users       Office       Administrator         System Siftings       Administrator       Image Cliffice Logins       Image Cliffice Logins       Image Cliffice Logins         System Sifting       Full Access Bling       Image Cliffice Logins       Image Cliffice Logins <th>&gt;</th> <th></th> <th>Manage Security</th> <th></th> <th></th> <th></th>	>		Manage Security			
Feature Access       Additions         System Settings       Additions         Audit Logs       Adminisheritator         Audit Logs       Adminisheritator         Adminisheritator       Configure Office Providers         System Settings       Respin         Adminisheritator       Configure Office Providers         Adminisheritator       Configure Office Logins         Adminisheritator       Configure Office Providers         Applications       Configure Office Providers         View and Export UUDis       Configure Office Providers         - Cost Data Export       Cost View Witers	Open Providers Offices Templates	Role Permissions User Permissions	-	ffice, or user level.		
System Settings         Additubate         - Vew Activity Log         Image: System Settings         Image:		Office: All Offices				¥
Configure Canceled Medeo Booking Request Reasons     Launch Medeo Administration Tool     Configure Canceled Medeo Administration Tool     Configure Canceled Medeo Administration Tool     Configure Canceled Medeo Administration Tool	System Settings Audit Logs Admin Delete Reports System Information Active Users	Physician     Nurse     Nurse     Siling     A     Recoption     Power User     A     Full Access Billing     A     Full Access Nurse	Edit Office Providers     Configure Office Providers     Merge Providers     Merge Providers     Mange Global/Office Logins     View SK OP CDM Worksheet Export Activity     User Demographics Dalog     Manage Tites     View and Export UUDs     Accuro Debugging     Sk Interjoersitility Export List     External     ODS Data Export     Pharmacelular Information Program (PP)     Chat     Chat vith Users     Provides Mesage     Medee Booking     Configure Medee Booking Requests Responses     Launch Medee Administration Tool		· · · · · · · · · · · · · · · · · · ·	



To manage Booking Request Responses:

1. In the Accuro Start Menu, search for Manage Medeo Responses.

Alternatively, in a booking request window, select **Manage** from the **Respond** drop down list in the Booking Requests Column, or the **Appointment Details** window.



**Note**: To view Manage in the **Appointment Details** window, select the **Respond** button and click **Manage**.

- 2. In the Configure Booking Request Responses window, you can Add, Edit, or Delete responses using the action buttons.
- 3. Enter the **Name** for the response.

2		Configure	e Booking Request Responses	
	Custom	Name	Message	
~		Accept		
×		Reject	Your appointment cannot be processed at this time.	
✓	✓	List of Prescriptions	Please make sure to bring a list of Prescriptiond that you are currently taking	
×	Please call clinic for more information Please contact clinic for more information			
×	<ul> <li>Duplicate appointment</li> <li>Unfortunately, we do not allow multiple bookings on the same day. Please call the</li> </ul>			
L	OK Close			



4. Select **Pre-Configured** or **Prompt**:

**Pre-Configured**: sends your pre-configured message response to the patient and automatically updates the Scheduler.

**Prompt**: opens a window containing the pre-configured message with an option to edit and personalize the message before sending the response.

- 5. Enter the **Message** you'd like patients to see with this response.
- 6. Select the **Type**: either **Accept** or **Reject**.
- 7. Click **OK** to save the changes.

Configure Booking Request Response	
Reject - Duplicate Appointment	
O Pre-Configured	
Unfortunately, we do not allow mulitple bookings on the same day. Please call the office for further information.	
◯ Accept	OK Cancel
	Reject - Duplicate Appointment         Pre-Configured               Prompt         Unfortunately, we do not allow multiple bookings on the same day. Please call the office for further information.

Note: The Accept and Reject response types at the top of the list can be edited, but not deleted.

**Trainer Tip:** We recommend starting your Response Names with Accept or Reject so you can easily distinguish your responses in the drop down list.



### Automatically Accept Online Booking Requests

You can configure Accuro to automatically accept Online Booking requests and send patients a confirmation message.

**Note:** Automatic acceptance only applies to patients who are linked in Accuro. If a patient is not yet linked, responses must be managed manually. Please see <u>Linking Patients</u> in this guide for more information.

To enable automatic acceptance for Online Booking requests:

- 1. In the Accuro Start Menu, search for Office Management.
- 2. Open the **Preferences** tab.
- 3. Under Scheduling, check the box Auto Accept Medeo Booking Requests.
- 4. Enter a message to send to patients upon the automatic acceptance in the field below.
- 5. Click Save Office, then Close.

Office Management	
Setup Preferences Medeo Announcements	
Password:	^
Tast C	onnection
1651.0	onnection
General	
Office Provider Filtered Patient Searches	
Hide Patient Notes from other Offices	
Hide Outstanding Lab Requisitions made in this office from other offices	
Disable Patient Alerts on Patient Status Bar	
☑ Display Patient Profile Picture	
Icon:	
Change	=
Scheduling	
Default Group Appointments To Single Patient	
Require Appointment Site	
Hide Appointments Booked in this Office from Other Offices	
Allow patient cancellation of Medeo booking requests	
Hours of notice required for cancellations: 0 v	
Auto Accept Medeo Booking Requests	
Message to send patient upon automatic request acceptance:	
Apply status to multiple appointments: Never Apply	
Video Appointments Use Custom Notifications	
Walk-In Video Appointment Initial Provider: -Not Set-	
Billing	
	~
	Save Office



## **Verifying Patients**

The first time a patient who used Online Booking arrives at your clinic, their identity must be verified. Verification gives your clinic certainty that any patient information that gets pushed to the Medeo user account belongs to the correct patient.

If a patient is not verified when you mark them as **Arrived** in the **Scheduler**, a prompt appears asking you to verify the patient.

To verify a patient:

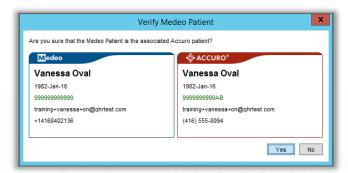
1. Right-click an appointment request, select Medeo Booking Request, and then Verify Patient.

Alternatively, you can:

- 1. Double-click an appointment in the Scheduler to open the Appointment Details.
- 2. In the Medeo Booking Request section, click the Verification button to open the **Verify Medeo Patient** window.

Vanessa Ova	l		
1982-Jan-16			
9999999999999			
training+vanessa+on	@qhrtest.com		

3. Confirm that the patient's identification matches with the Accuro and Medeo Patient details displayed in the **Verify Medeo Patient** window. Click **Yes** to complete verification.





### Notes on Patient Verification

- If a patient was verified in error, a System Administrator can undo the verification of the patient through the Accuro Audit Logs. Follow the same workflow outlined in <u>Unlinking Patients</u>.
- The word **Pending** next to the green check mark in **Appointment Details** refers to the booking request, and not the verification status.

	Booking Request Status
Medeo Booking Request Pending 🔗	
	Patient verification status
Vanessa Oval 🔗 💎	
1982-Jan-16	
999999999999	
training+vanessa+on@qhrtest.com	
Check-in Checked out to Dr. Sam Square	



## **Cancelling Appointments**

To cancel appointments from Online Booking, follow the same workflow for cancelling regular appointments using the **Accuro Scheduler**.

**Note:** Accuro users require permission to create a managed list of Cancellation Reasons. To enable permission, complete the following steps as a System Administrator:

- 1. Open the Accuro Start Menu, select Users, and then Manage Security.
- 2. In Feature Access, open the Role Permissions tab or User Permissions tab.
- 3. Under Scheduling select **Configure Cancelled Medeo Booking Request Reason**, select a row in the enable column to enable permission. A green check mark indicates that permission is enabled.
- 4. Click **Close** to save your changes.

For the permission change to take effect, users will need to log out then back in to Accuro.

To cancel an appointment from Online Booking:

- 1. Right-click the **Appointment** in the **Scheduler**.
- 2. Select Cancel Appointment to open the Cancel or Delete Appointment? window.
- 3. Using the first drop down, select a Cancellation Reason for your clinic records.
- 4. Using the second drop down list, select a **Cancellation Reason** to be sent to your patient, then click **OK**.

Note: Patients will need to log into their Medeo account to see the cancelation response.



### **Patient Cancellation**

Clinics can allow patients to cancel appointments from their Medeo accounts within a specified time frame.

To enable patient cancellation in Medeo:

- 1. Open the Accuro Start Menu, select Users, then select Manage Security.
- 2. Select Offices, and then the **Preferences** tab.
- 3. Under Scheduling, enable the checkbox: Allow patient cancellation of Medeo booking requests.
- 4. Using the drop down list, select the Hours of notice required for cancellations, either 0, 24, 48, or 72 hours, then click **Save Office**.

Office Management				
Setup Preferences Medeo Announcements				
Password: Test Connection				
General	-			
Office Provider Filtered Patient Searches				
Hide Patient Notes from other Offices				
Hide Outstanding Lab Requisitions made in this office from other offices				
Disable Patient Alerts on Patient Status Bar				
Display Patient Profile Picture				
Icon: Change	≡			
Scheduling				
Default Group Appointments To Single Patient				
Hide Appointments Booked in this Office from Other Offices				
Allow patient cancellation of Medeo booking requests				
Hours of notice required for cancellations: 24				
Auto Accept Medeo Booking Requests				
24 Message to send patient upon automatic reques				
72				
Apply status to multiple appointments: Never Apply 🗸				
Video Appointments Use Custom Notifications				
Walk-In Video Appointment Initial Provider: -Not Set-				
Differen				
Billing				
Default Start Time	~			
Save Of	ice			



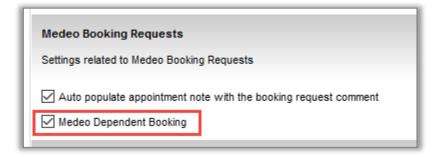
### **Dependent Bookings**

Your patients, who may also act as a caregiver, can use Online Booking to request appointments on behalf of their dependents. If you have patients that are caregivers who need the ability to book on behalf of their dependents you will need to enable Dependent Booking.

### **Enabling Dependent Booking**

To enable Medeo Dependent Booking as a System Administrator:

- 1. Open the Accuro Start Menu, select Users, then choose Manage Security.
- 2. Select System Settings, select the General tab, then scroll to Medeo Booking Requests.
- 3. Enable the Medeo Dependent Booking checkbox.



4. Click Save Settings, then Close.

#### **Processing Individual Dependent Booking Requests**

Caregivers should be advised to include the name of their dependent and their relationship to the dependent in the notes of each booking request. When a new booking request is received, and it is determined that it is a dependent booking:

- 1. Create a Patient Relationship between caregiver and dependent patient.
- 2. Assign the **Appointment Request** from the caregiver to the dependent patient who will be receiving care.



### **Creating Dependent Relationships**

To manage dependent bookings, Patient Relationships must be created between patients.

To create a Patient Relationship between a caregiver and a dependent:

- 1. Navigate to the Patients section of Accuro and select either the dependent or caregiver patient.
- 2. Click the **Patient Relationships...** button, then select **O**Add.

Ô	Last Name Oval Health # Search Only		
Home	First Name Vanessa & Identifier Search Only		
7 Scheduler	Middle Name Birthdate MM/DD/YYYY 🔍 📢		
њ	Mrs. V Suffx: V Patient Status: Active V Office Provider: Square, Sam		
Traffic	graphics Other Relationships Notes Status History Private Billing Insurer Rules Providers Provider Enrollment History Merg	ed Patients	
1	Health # 🚫 9999999999AB ON, Canada 🗸 Expiry MM/DD//YYY File Number 17-4	<b>(</b>	
Patients			
	Family PhysNone		
	Address 1878 Horner Ave Note 🗸 🗸		
\$ Claims	City Toronto ON, Canada v Postal/Zip M8W 4Y4 Type v		
Ô	Email Address: training+vanessa+on@qhrtest.com Check for Duplicates		
EMR	Phone #s: Home (416) 555-8094 Work (000) 000-0000 Cell (555) 552-2222 Fax (	Preferred Contact Meth	
•1•	Default Insurer OHIP V		
	Admission Date MM/DD/YYYY Discharge Date MM/DD/YYYY Master Number [0] None V		
12 €	Current Enrollment Status: Enrolled (Square, Sam)		
≣⊒ 11 Ē 3	Pharmacy Contact Downtown Pharmacy		
👗 13	Last Updated: 2020-Sep-21 by Dr. Sam Square ( Downtown Office - ON )		

3. In the **Manage Patient Relationships** window, the middle field is populated with your globally selected patient. Select the right-hand field, then search for the related patient.



- 4. Using the drop down list, indicate the relationship between the two patients. In the example below, Vanessa is the parent (caregiver) and Janet is the child (dependent).
- 5. Click OK.

<b></b>	Manage Patient Relationshi	ips 🗖 🗖	x
Relationships for Diamond, Janet			
Child-Parent	✓ Diamond, Janet	- Oval, Vanessa	8
	OK Cancel		



### Assign the Booking Request to the Dependent

To assign a caregiver's booking request to a dependent patient:

1. Open a booking request, then select the *I* Link Dependency button.

edeo Booking Request Pending	<b>v</b>	• •
Vanessa Oval	0	New Patient
1982-Jan-16 9999999999999		Extreme Migraines
training+vanessa+on@qhrtest.com		
Checkout		Respond 🗸 Accept 🗶 Reject
No Patient     Oval, Vanessa	training+vaness	a+on@qhrlest.com

2. In the Link Relationship to Medeo Patient window, select the dependent patient, then click OK.

Link Relationship to Me	deo Patient 🛛 🗙
	Available Relationships
Oval, Vanessa	
None	~
None	
Spouse-Spouse (Oval, Michael)	
[	OK Cancel



3. Select **Yes** at the prompt to confirm the one time change of the **Dependency Appointment**.

	Dependency Appointment X
0	Appointment will be permanently linked to Oval, Michael Do you want to continue?

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## **Medeo Announcements**

With Medeo Announcements you can show customized messages to the patients at your clinic using Online Booking. Medeo Announcements are displayed at the top of the Online Booking interface until the message's Expiration Date.

Note: Medeo Announcements can only be managed by a System Administrator.

To create a Medeo Announcement:

- 1. In the Accuro Start Menu, search for Office Management.
- 2. Select the Medeo Announcements tab.
- 3. Use the action buttons to Add, Edit, or Delete Medeo Announcements.

	Office Management		
Setup Preferences Medeo Announ	cements		
Title	Description	Expiration Date	
COVID-19	Do not visit if you are sick or if you ar	01/01/2022	
			Save Office



## The Medeo Administration Tool

The Medeo Administration Tool is a stand-alone application, that provides a central location for Medeo Organization settings management.

1. To open the Medeo Admin Tool, type Launch in the Accuro menu search field and select the Launch Medeo Administration Tool.

File	First Launch Tutorial
Scheduler	Launch Medeo Administration Tool
Tools	Launch to Registry Registration Page
Reports	
Billing	
Users	
Help	
Backup	
CDS	
Configuration	
Search Result	
launch	
ACCURO® EMR	■ 米 ♥ 哈 G

2. The Medeo Admin Tool will launch in a separate JX browser window and by default will open to the Provider Settings page.

(Continued on Next Page)

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3. Click on My Offices to view a list of Accuro offices linked to your Medeo Organization. You can select the office that you would like to configure settings for. These settings are mainly for managing Private Online Booking sites.

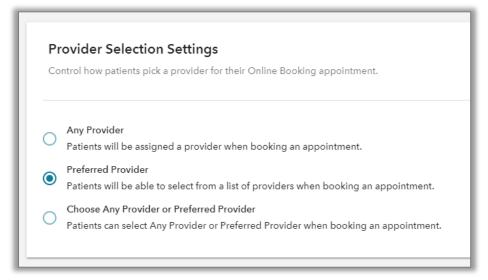
Online Booking Settings Public online booking sites are available to e	versione By managing Online Reaking	accoss balow, your site will only be ava	ilable to existing patients or pa	tionta vou invita. Vou can
also remove Online Booking sites are available to e			nable to existing patients of pa	tients you invite. Fou can
		5		
iettings				
Manage Online Booking access			🛨 Upload Data	Search name / email 🛛 🗙

4. Once enabled, Manage Online Booking access turns an Online Booking site into a Private Booking site. An office with a Private Online Booking site can grant or remove access for patients to book online. This requires the patient to log into their Medeo account before accessing the booking page.

### **Provider Selection and Cancellation Settings**

**Provider Selection Settings** allows you to choose one of three options: Any Provider, a Preferred Provider, or both.





**Cancellation Settings** allows patients to cancel their online appointments within a specified time frame.

<b>Cancellation Settings</b> Control whether a patient can cancel their existing Online Bookir	ıg appointment.
	0 hours
Allow patients to cancel appointments online	24 hours
Hours of notice required to cancel an Online Booking appointmer	48 hours
	72 hours



# APPLY MULTI-OFFICE AVAILABILITY

If Providers work in multiple offices within your database, use Availability to indicate when and where those Providers are available for Online Booking with patients.

Availability can be applied to the Scheduler ad-hoc, or using customized Availability Templates that cover specific dates, Days of the Week, Days of the Month, or Days of the Year.

## **Applying Availability to Time Intervals**

- 1. Click and drag your mouse to select time intervals that a Provider is available for at a certain clinic.
- 2. Right click your selection, then hover your mouse over Availability.
- 3. Select the Provider's office. In the example below, the Provider will be at Ontario CMS Clinic between 2:30pm and 4:00pm.

2:30pm	Consultation (••)	Set Note			Consult
2:45pm	Consultation (!•)	Claim Details			Consult
3:00pm	Consultation (!·)				
3:15pm	Consultation (!·)	Arrived			Visit
3:30pm	Consultation (!·)	Confirmed			Visit
3:45pm	Consultation (+)	No Show			Visit
4:00pm		No Charge			Visit
4:15pm	Catab us	Status 🕨			Visit
4:30pm	Catch up	 Suggestion Templates	•	1	Visit
4:45pm		Availability	•	Remove Avai	ability
		Copy Appointment		Ontario CMS CI	inic
		Cut Appointment		Demo ON Clinic	



4. A vertical stripe matching the color of the Accuro Office's lcon is then applied on the right-hand side of the chosen time intervals. This is indicated with the green stripe in the below screenshot.

2:30pm	Consultation (•)
2:45pm	Consultation (••)
3:00pm	Consultation (••)
3:15pm	Consultation (••)
3:30pm	Consultation (••)
3:45pm	Consultation (••)

5. The office icons at the top of each day column in the Scheduler indicate the office locations where a Provider is working on that day. Hovering your mouse over the office icon shows the name of each Office.

Square, Sam	
4	ÔÔ
	Ontario CMS Clinic
	Demo ON Clinic

**Note:** To configure Office Icon colors: go to the **Accuro Start Menu**, search **Office Management**, select the **Preferences** tab, locate the **General** heading, **Icon**, select the **Change** button.



### **Managing Availability Templates**

For Providers working in multiple offices on pre-determined schedules, Availability Templates save administrative time by applying a range of availabilities as future time intervals in the Scheduler.

For example, a Provider might work Monday, Tuesday, and Wednesday mornings at the Ontario CMS Clinic, and work Wednesday and Thursday afternoons at the Specialist Clinic. Using availability templates means your patients can book Providers during their correct availabilities – without doing daily data entry.

To create an Availability Template:

- 1. Open the Accuro Start Menu, select the Scheduler, then Scheduler Management.
- 2. Open the **Templates** tab, then choose the **Manage Templates** tab.
- 3. Press the **O** Add button under the Availability Templates section.
- 4. Enter a **Name** for the template.

In **Column 1** beneath the **Availability Templates** Names, click and drag to select the time intervals that a Provider is available for at a certain office. Hold down CTRL to select more than one non-consecutive time interval.

		Schedule	Management	L
iorities, Reasons and Statuses Settings Type: pply Templates Manage Templates	s Suggestions Te	mplates		
Suggestion Templates			Availability Templates	
Name	Interval	Priority	Name	
Office Day (online)	15 Minutes		Regular Availability	
DR Day	15 Minutes		Monday, Tuesday, Wednesday Mornings	
Regular Office Day	15 Minutes		Wednesday and Thursday Afternoons	
Vednesdays	15 Minutes			
0 8			-00	
			Column 1 8.00am	-
			8:15am	-
			8:3Dam	_
			8:45am	
			9.00am	
			9:15am	
			9:30am	_
			9:45em 10:00em	-
			10:00em	_
			10:30am	_
			10:45am	
			11:00am	
			11:15am	
			11:30am	
			11:45am	
			12:00pm	
			12:15pm 12:30pm	_
			12:30pm 12:45pm	-
00				
		Applied template	will not be changed.	



- 5. Right click your highlighted time intervals, then select the relevant office. A colored stripe corresponding to the relevant office appears to the right of the chosen time intervals in **Column 1**.
- 6. Click **Apply** to save your changes, then click **Close**.

	Column 1	
7:30am		1
7:45am		
8:00am		
8:15am		
8:30am		
8:45am		
9:00am		
9:15am		
9:30am		=
9:45am		1
10:00am		
10:15am		
10:30am		
10:45am		
11:00am		
11:15am		
11:30am		
11:45am		
12:00pm		
12:15pm		Ļ
40.00		Ľ

Note: To remove time intervals from an Availability Template:

- 1. Right-click the time interval.
- 2. Select Remove Availability.



## **Applying Availability Templates**

Availability Templates let you apply a Providers availability by clinic on a single day or over a range of future of dates. The workflow for applying Availability Templates is the same as for applying Suggestion Templates.

To apply Availability Templates:

- 1. In the Accuro Start Menu, search for Scheduler Management.
- 2. In the **Templates** tab, select the **Apply Templates** tab.
- 3. Select a **Provider** from the drop down list.
- 4. Select a Suggestion Template and an Availability Template.
- 5. Choose the calendar frequency: Day, Weekly, Monthly, or Yearly.
- 6. Complete the relevant details.
- 7. Click the **Apply** button and then select **Close**.

<u>۶</u>	Scheduler Mana	agemen	t	x
Priorities, Reason	ns and Statuses Settings Types Suggestions Templates			
	Manage Templates			
			Column 1	
Provider Squar	e, Sam 🗸 😼	8:00am	Column	
		8:15am		F
Templates		8:30am	New Patient	
Suggestion	Office Day (online)	8:45am		
			Rx Renewal	1
Availability	Regular Availability V	9:15am	Online Visit	1
		9:30am	Online Visit	1
Day Weekly	Monthly Yearly	9:45am	Online Visit	1
Day WOONY	woniny reary	10:00am	Rx Renewal	
Starting MM	/DD/YYYY Ending MM/DD/YYYY	10:15am	Online Visit	
oraning min		10:30am	Online Visit	1_
Every 1	week(s) on:	10:45am	Online Visit	
		11:00am	Rx Renewal	
Mon	Tue Wed Thurs Fri	11:15am		
Sat S	Sun	11:30am	Online - New Pallenk	
			Do not book	1
		12:00pm	Online - New Patient	
		12:30pm	Lunch	
		12:45pm		
			Online Visit	
			Online Visit	
			Online Visit	_
			Online Visit	-
			Rx Renewal	-
			Online Visit	-
			Online Visit	-
			Online Visit	-
			Rx Renewal	
		3:15pm 3:30pm	Do not book	
		a: Jupm	-	×
			View Log Remove Apply Close	e

For more details, please review the section in this guide on Applying Suggestions.



# FAQS AND KEY INFORMATION

Question	Answer
Does Online Booking work at Walk-in clinics?	Yes. If your patients do not book appointments with specific Providers, but rather book with the next available Provider, a setting can be enabled to show <b>Any Available</b> <b>Provider</b> as an option in Online Booking. Please contact QHR Support to enable this setting. Alternatively, Administrators can enable this in the Medeo
	Admin tool.
Can I double-book using Online Booking?	No, double booking columns are not supported in Online Booking. Only the first booking column of a Provider's schedule is available for Online Booking. Additional booking columns can still be used to add manually booked appointments.
What happens when I transfer an appointment made through Online Booking to another Provider?	If an appointment created through Online Booking is transferred to another healthcare Provider, or the appointment date and time are changed, the patient receives an email with up-to-date information.
Can patients cancel appointments through their Online Booking account?	<ul> <li>Yes. This is a preference that can be enabled in Accuro:</li> <li>1. Click the Accuro Start Menu and enter Office Management in the search bar (alternatively you can select the Accuro Start Menu, then Users, Manage Security, and click the Offices tab).</li> <li>2. Select the Preferences tab.</li> <li>3. Under the Scheduling heading, select the checkbox that will Allow patient cancellation of Medeo booking requests.</li> <li>4. Use the drop down menu to choose the Hours of notice required for cancellations (24 hour intervals).</li> <li>5. Click Save Office, and then Close.</li> </ul>



## **Quick Action Buttons**

If you're using a Custom Action Bar, there are two buttons available for Online Booking: Invite Patient to Online Booking and Show/Hide Booking Requests Column.





To enable Medeo Quick Action Buttons:

- 1. In the Accuro Start Menu, type configure, then select Configure Actions.
- Select the Configure Actions tab, and then Select a Medeo action button from the left-hand column, then click Add Add to move the button into your Selections.

>	User Preferences
<b>Defaults</b>	General Alerts Display Configure Actions       Scheduler Workflow         Search Preconfigured Actions       Selections         Action Search       Wiew File Queue
Display	Soverwritten Patient Email Report     Soverwritten Patient Email Report     Anage Security     Anage Security     Soverwritten Patient View     Soverwritten Patient View     Soverwritten Patient View     Soverwritten Patient Summary     PSA Doubling Time Calculator
Logins	Quick New Patient     Add     Add
Q Search	Send Medeo Invitation Show/Hide Medeo Booking Requests Column Stow/Hide Medeo Booking Requests Column View File Queue View File Queue View Log Uzeiss FORUM ✓ ✓ ✓ ✓ ✓
er e	Image: Construction of the second
	Import Export Apply OK Cancel

3. Click Apply, then OK.

**Note:** For more details on Quick Action Buttons, search for Configure Actions Overview in the Accuro User Guide (Accuro Start Menu, select Help, then select the Accuro User Guide).





## **Online Booking Reports**

You can review how many appointments have been scheduled through Online Booking by running a report.

To access Reports:

- 1. In Accuro, press CTRL+R on your keyboard to open reports, then select the **Appointment Attendance Report**.
- 2. In **Step 6** choose **Online** to report on online booked appointments or choose **All** to report on both online and Accuro scheduled appointments.
- 3. Complete the remaining steps, then click **Generate Report**.

Circle, Huan       Step 1: Select the Provider(s) from the list in the top left corner.         Sphere, Mina       Step 2: Select the Date Range for the report. (MM/DD/YYYY for no date)         Show Non Visible       From MM/DD/YYYY         Show Inactive       Step 3: Select the Date Range for the report. (MM/DD/YYYY for no date)         From MM/DD/YYYY       To MM/DD/YYYY         Step 3: Select the Appointment Types to report on.         Appointment Region Summary       Step 3: Select the Appointment Types to report on.         Full Shot only       Full Shot only         Follow Up       Step 4: Select the appointment site.         Day Sheet       Step 4: Select the appointment site.         Non-Booked Patient List       Step 4: Select the appointment site.         Office Provider Patients       Step 4: Uptown Office         Patient Appointment History       Uptown Office
Show Non Visible       Step 2: Select the Date Range for the report. (MM/DD/YYYY for no date)         Show Non Visible       From MM/DD/YYYY To MM/DD/YYYY         Scheduling       Step 3: Select the Appointment Types to report on.         Appointment Region Summary       Step 3: Select the Appointment Types to report on.         Calendar Notes       Step 1: Select the appointment sele.         Day Sheet for External       Step 4: Select the appointment sele.         Non-Booked Patient List       Step 4: Select the appointment sele.         Office Provider Patients       Step 4: Uptown Office
Show Non Visible         Image: Show Inactive
Image: Scheduling       Image: Scheduling         Appointment Reason/Type Summary       Image: Scheduling         Appointment Region Summary       Image: Scheduling         Appointment Region Summary       Image: Scheduling         Appointment Attendance Report       Image: Scheduling         Calendar Notes       Image: Scheduling         Day Sheet       Image: Scheduling         Non-Booked Patient List       Image: Scheduling         No Show/Cancellation Trend       Image: Scheduling         Office Provider Patients       Image: Scheduling
Appointment Reason/Type Summary       Image: Consultation       Image: Consultation       Image: Consultation         Appointment Region Summary       Image: Consultation       Image: Consultati
Appointment Region Summary       Image: Second Summary       Image: Second Summary       Image: Second Summary         Appointment Attendance Report       Image: Second Summary       Image: Second Summary       Image: Second Summary       Image: Second Summary         Calendar Notes       Image: Second Summary       Image: Sec
Appointment Attendance Report     Y       Appointment Attendance Report     Y       Calendar Notes     Y       Day Sheet     Y       Day Sheet for External     Y       Non-Booked Patient List     Y       No Show/Cancellation Trend     Y       Office Provider Patients     Y
Appointment Attendance Report       Image: Constraint of the second
Calendar Notes     Image: Calendar Notes     Image: Calendar Notes       Day Sheet     Image: Calendar Notes     Image: Calendar Notes       Day Sheet for External     Image: Calendar Notes     Image: Calendar Notes       Non-Booked Patient List     Image: Calendar Notes     Image: Calendar Notes       No Show/Cancellation Trend     Image: Calendar Notes     Image: Calendar Notes       Office Provider Patients     Image: Calendar Notes     Image: Calendar Notes
Day Sheet for External <sup>1</sup> / <sub>2</sub>
Day Sheet for External     \$\screwthinksinglesize       Non-Booked Patient List     \$\screwthinksinglesize       No Show/Cancellation Trend     \$\screwthinksinglesize       Office Provider Patients     \$\screwthinksinglesize
Non-Booked Patient List 규구None No Show/Cancellation Trend 규구 Downtown Office Office Provider Patients 규구 Uptown Office
No Show/Cancellation Trend ☆ Downtown Office Office Provider Patients ☆ Uptown Office
Office Provider Patients TA Uptown Office
Patient Appointment History
Patient Appointment matory
Patient Appointment Summary 5
Patient Status Summary
Patient Status History Summary
Patient Visit Summary
Provider Patients
Tasks the second
Third Next Appointment Step 6: Select the Booking type for appointments.
Visit Control Stats
Visit Control by Status
Volume to Provider Ratio
Wait List Report Description:
Only Show Favorites
After completing report criteria, click on "Generate Report". Generate Report



### **Appointment Notifications**

Appointment Notifications are reminder emails that automatically get sent to patients 24 hours in advance of their booked appointment if their email address is entered into the Patient Demographics Section. Notification emails include the details of the upcoming appointment along with a generic reminder message.

Note: There is no way to edit the message or timing of the Appointment Notification.

## **Online Booking In-Office Notifications**

If a patient books an appointment via Medeo Online Booking, they will automatically receive an In-Office Notification 24 hours before their appointment.

## **Ad-Hoc Notifications**

Notifications can also be sent manually for any appointments booked in-person or via phone.

To send Ad-hoc Notifications:

- 1. In the Scheduler, open the Appointment Details window.
- 2. Select the box Share Appointment in Medeo, then click OK.

			Appointm	ent Details			
Loads Settings from t	this Patient's Previous Appointment					D	owntown Office -
Square, Sam		✓ Confirmed	Arrived				0
None		~					
Details							
Appointment Date	2021-Apr-28			Туре	Procedure		
Appointment Time	8:30am		Ø	Reason			
Appointment Length	45 minutes (9:15am)	~		Location	O Provider's Office		
Referred By	Sphere, Mina			Priority			~
Other Providers		~	Ø	Insurer	OHIP		
Room	None	-	Q				
Video Appointment							
Notes				Popup Notes			
No Patient	mond, Janet		rron@ghrtest.com		Share Appointment in Medeo	в	Cancel



**Note:** If the patient does not have a Medeo account connected you will get an error pop-up with an option to invite them to Medeo.

## **Appointment Type Defaults**

If desired, you can default your appointment types to automatically have Share Appointment in Medeo enabled.

- 3. Open the Accuro Start Menu, select the Scheduler, and select Scheduler Management.
- 4. In the Types tab, select **Share to Medeo** using the checkboxes in the list of Accuro Appointment Types.

🔅 Scheduler Management								
Priorities, Reasons an	d Statuses	Settings	Types	Suggestions	Temp	lates		
Accuro Appointment T	ypes				_	Mede	o Booking Request	Types
Туре	Color	Shar	ed	Share to Me	deo	Тур	e	Color
						New	Patient	
Consultation						Offic	e Visit	
Flu Shot only						Pren	atal	
Follow Up						Pres	cription Renewal	
General Visit						RX F	lefill	
Other						Vide	o Visit	
Prenatal						Vide	o Visit - Non OB	
Prescription Refill								
Procedure								
Virtual Visit - COVID								
Virtual Visit - Follo								
Virtual Visit - Other								
Virtual Visit - Rx Re								
Well Baby								



### **The Medeo Patient Experience**

To help you understand the patient side of Medeo Online Booking, this section walks through the most important patient workflows.

### Accepting a Medeo Invite

- 1. After the patient creates an online appointment, they receive a notification email.
- 2. After clicking See Your Appointment, the patient's web browser opens the Medeo Sign In page.
- 3. Next, your patient logs in to their Medeo Account or clicks Sign Up to create a Medeo account.

Medeo You have a <u>new</u>	Connect with your Healthcare Provider from anywhere.
video appointment	Sign In
Good News: You have a new video appointment in Medeo on Tuesday, April 4, 2023 at 11:00 AM CST.	Email address *
Important:	Password *
Desktop users: Please check that your audio and video are working with our <u>Self-Test</u> .	Forgot Password?
Please arrive early:	SIGN UP LOG IN
Please join <b>10 minutes</b> before your appointment start time. Your provider will join you when they're ready.	
SEE YOUR APPOINTMENT	

Trainer Tip: For full details on patient workflows, see the Medeo Patient Support Site.



### **Creating a Medeo Patient Account**

- 1. After clicking the **Sign Up** button, patients are taken to the Join Medeo page.
- 2. Patients fill out their name and email information, then click **Sign Up**.
- 3. Patients return to their email inbox to confirm their account.
  - a. Open the confirmation email titled Welcome to the Medeo Platform!
  - b. Click Confirm Your Account.

**Trainer Tip**: For more details, see <u>Medeo Patient - Get Me</u> <u>Started</u>.

Connect with your Healthcare Provider from anywhere.							
Join Medeo today Already have an account? Log in							
Email address *							
This is where we'll send secure messages and appointment information							
Password							
Use 8 or more characters with a mix of upper/lower case letters, numbers & symbols							
First name *							
Last name *							
Birthday							
Month   Day (DD) Year (YYYY)							
Phone type Mobile Home Work							
Phone Number							
I agree to Medeo's <u>Terms of Service</u> and <u>Privacy Policy</u>							
SIGN UP							

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### **Appointment Details**

After creating or signing into their Medeo account, patients can view and join the appointment you created from the patient Dashboard or from the Appointments button.

They can join an appointment by clicking on Join My Appointment.

	Appointment Details	]				
	8					
	Sam Square					
	Downtown Office - SK					
i	Status: Booked	_				
	Video Appointment					
	4 April 2023					
0	10:00AM - 10:30AM PDT					
•	Downtown Office - SK 5587 4th Ave, Saskatoon, SK, Canada					
بر	+1 306 475 8888					
+	Book with this clinic again					
	JOIN MY APPOINTMENT					
Please call the clinic to cancel this appointment						



### **Booking Appointments**

Alternatively, patients can also book a healthcare appointment using Medeo:

- 1. Patients log in to their Medeo Patient account. If your patient does not have a Medeo account, please see <u>Invite Your Patients to Medeo</u>.
- 2. Patients navigate to Appointments.
- 3. Click + воок воок.

	Appointments	0 O
Dashboard	OVERVIEW HISTORY	
4. Appointments	Q Search 1-1of1 ()>	
Inbox	Need to book an appointment? + BOOK	
Documents	Upcoming appointments Dr. Sam Square: Video Appointment 07 Jan 2022 BODam PST Only 150min O Status: Bequested DETAILS	
My Account () Support		

- 4. Select a clinic, then click Next.
- 5. Choose a Provider, then click **Next**.

**Note**: If your patient does not see any Providers at this step, check that you have created availability in your Scheduler. See <u>Applying Suggestions</u>.

6. Select an appointment type, then click Next. See Medeo Booking Request Types.



7. Select a day and time for the appointment using the calendar and drop down list.



- 8. Enter the reason for making an appointment, then click Next.
- 9. Review the appointment details, then click

**REQUEST >** Request.

**Note**: The message **Appointment requested** displays once patients successfully submit their request. The appointment request then appears in your Medeo Booking Request Column. See <u>Responding to</u> <u>Medeo Booking Requests</u>.





# TRAINING AND SUPPORT

## **Clinic Support**

QHR Technologies Inc. Client Services https://accuroemr.com/resources/client-support/

### **Content Disclaimer**

All content in this User Guide is valid and deemed correct as of the date of publishing. The images and content are subject to change as the product develops and evolves. To view the most current version, please refer to the Accuro User Guide accessed from within Accuro (Accuro Start Menu > Help > Accuro User Guide).

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