Online Booking & Notifications
with **Medeo**

TABLE OF CONTENTS

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.
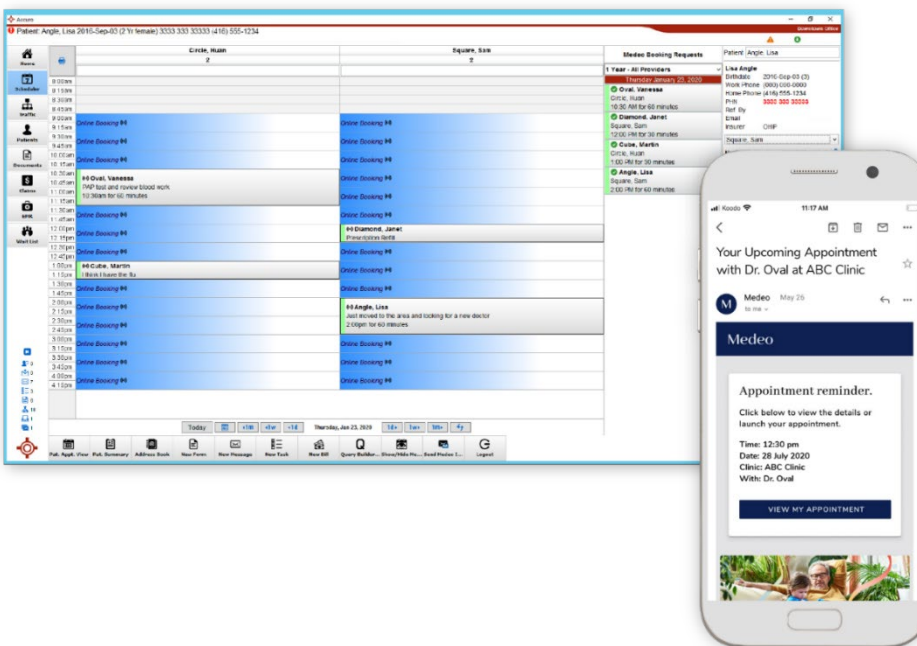
Overview

- **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.
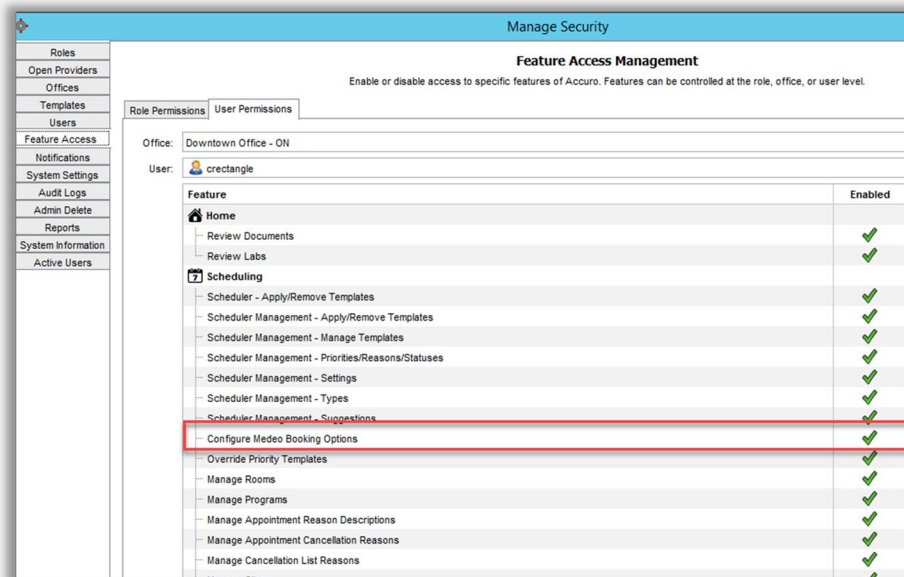
Medeo Booking Request Types

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.
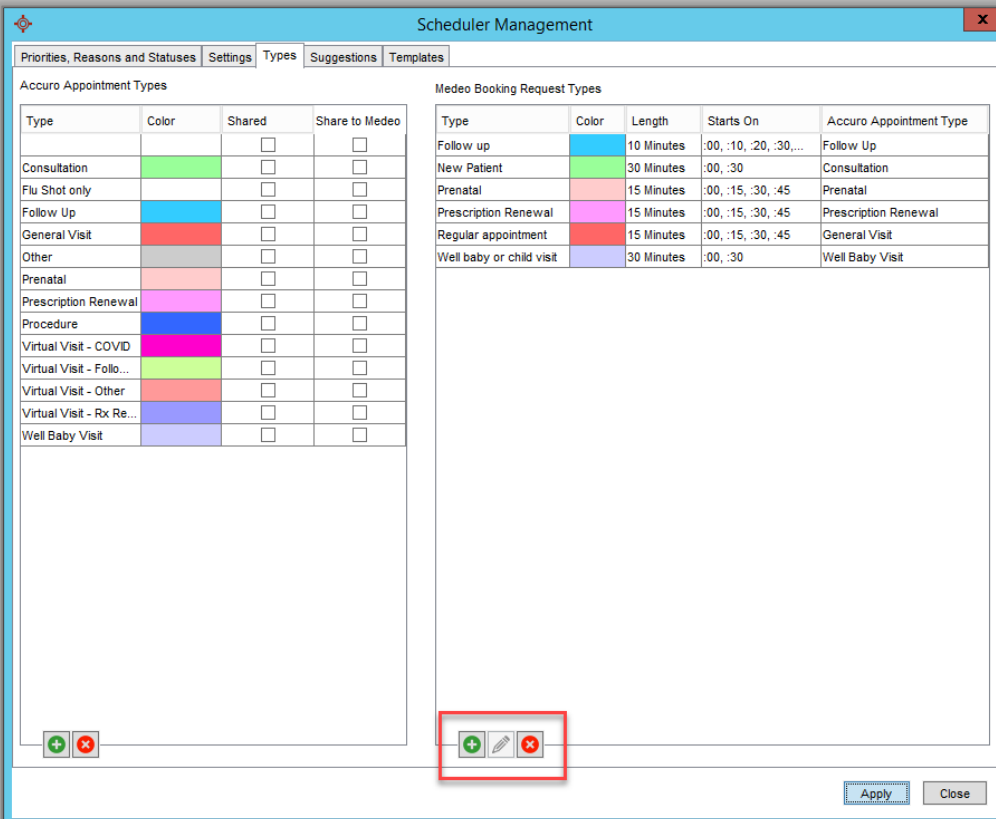

> 4. Select **Close** to save your changes.
>
> **Note:** For the permission change to take effect, log out of Accuro and log back in.

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**.

2. In the **Types** tab, click the ⊕ **Add** button within the Medeo Booking Request Types Section, or select an appointment type to ✎ **Edit** or ✕ **Delete**.

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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
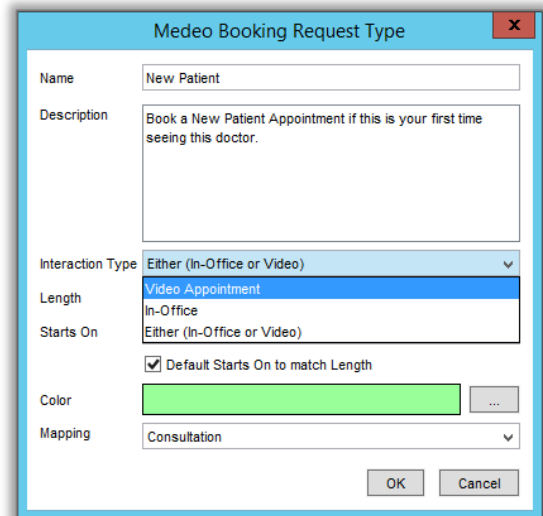
- **Name:** The type of appointment your patients select when booking online. For example, New Patient, Regular Visit, Follow up, Prescription Renewal, Flu Shot, or Vaccination.

- **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.

- **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).

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- **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.

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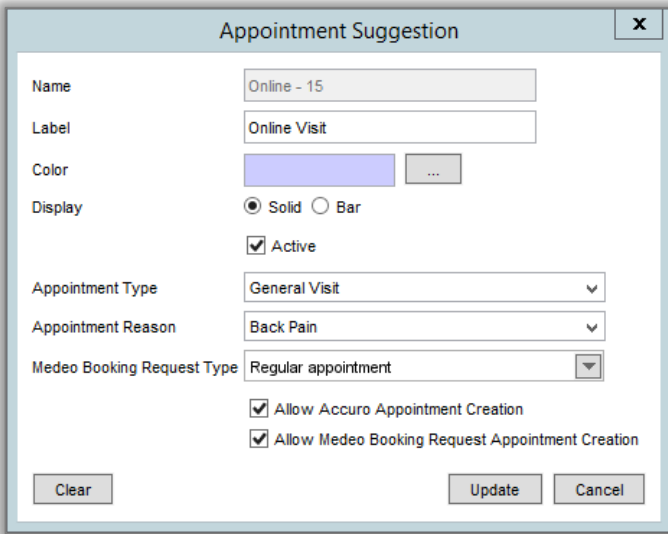
   Appointment Reason (not required)**:** The default reason a patient makes an appointment (e.g. Prescription Refill, Cough, Pain).

   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.

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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.

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.
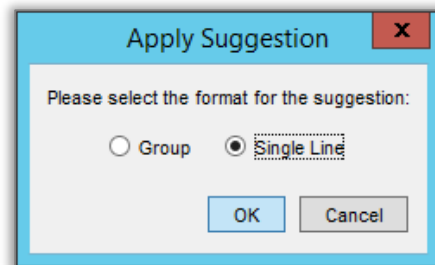
Applying Suggestions to Time Intervals

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**.

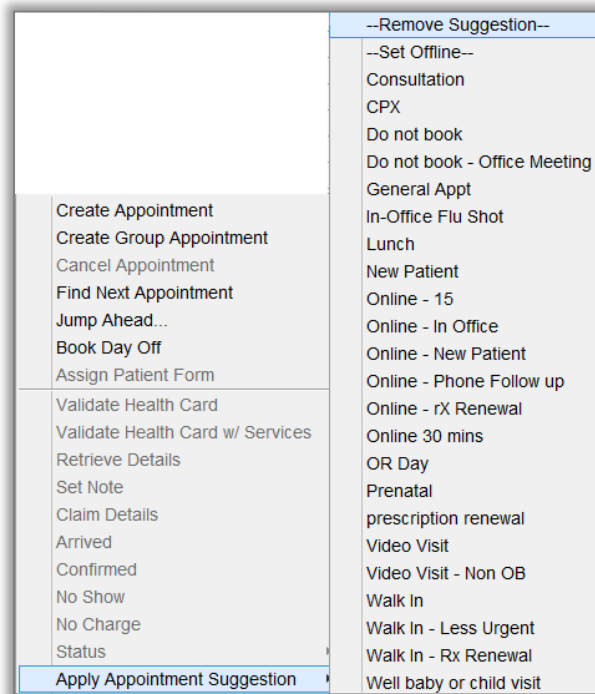   **Group**: Applies the suggestion to the entire selected area of time.

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

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**.
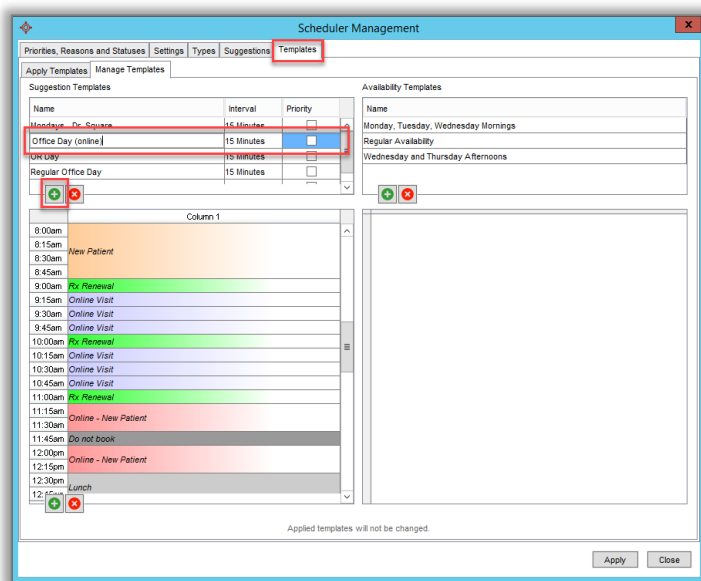
Managing Suggestion Templates

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.

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.
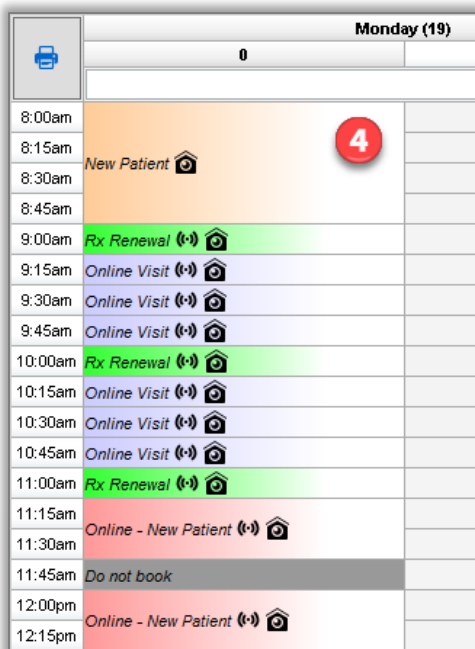
Applying Suggestion Templates to Specific Days

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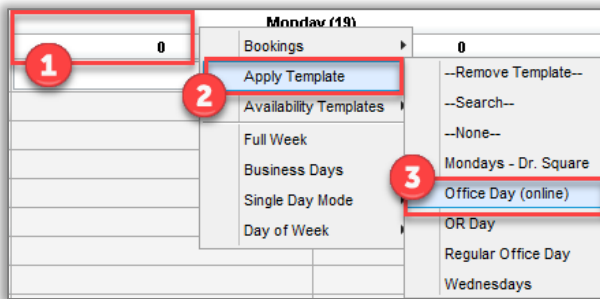
4. Your suggestions are then displayed inside the day column of the Scheduler.

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.

2. 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.
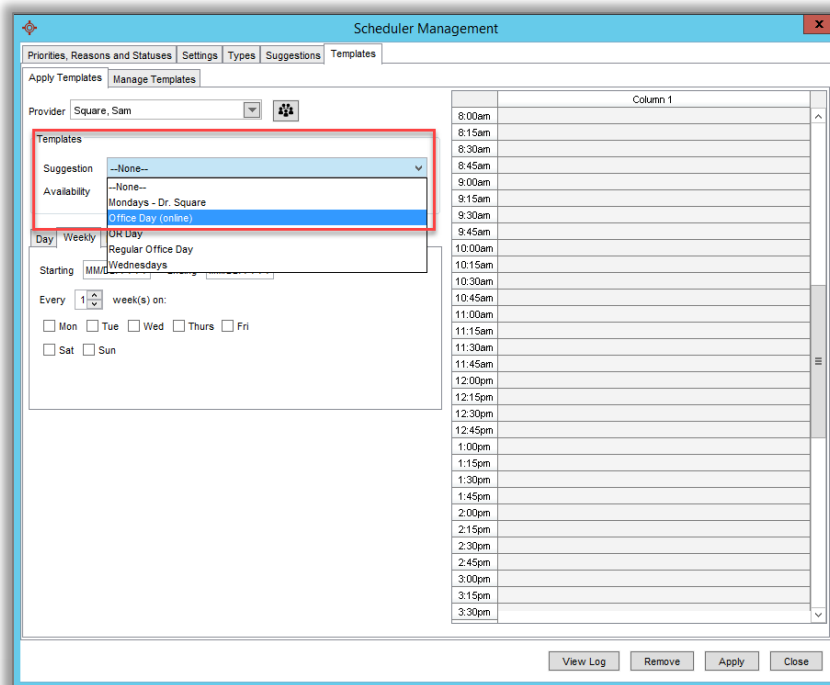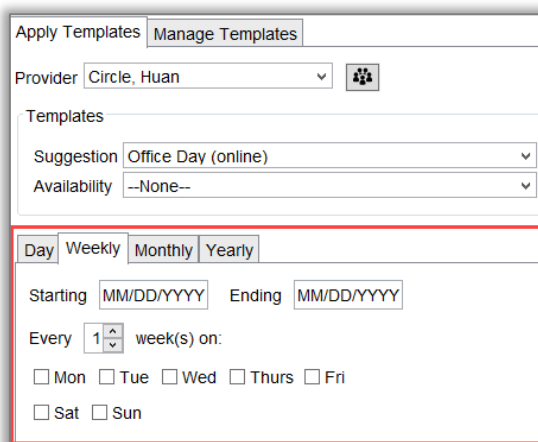

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4. Select either the **Day**, **Weekly**, **Monthly**, **or Yearly** tab to choose the length of time you would like to apply the template over, then enter the desired details.

- **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

    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**.

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.
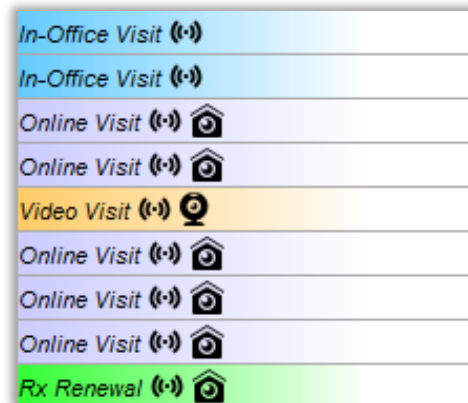
In-Office: No icon

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.

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 Query Builder.

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

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.

3. 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**.

5. Invitations are then sent by email with the subject line: **Book with (your office) – (your province) online**.
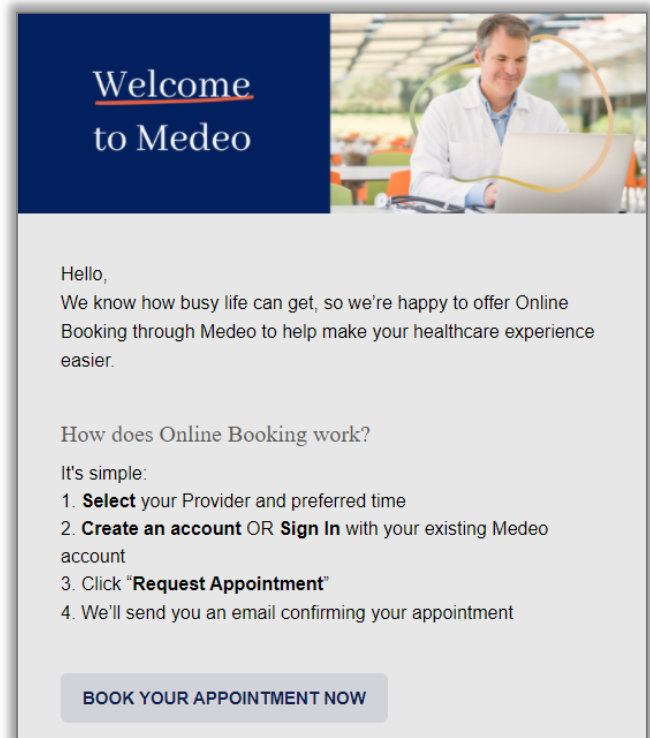
Trainer Tip: Create a Quick Action Button
to invite a patient to Online Booking with one click! See Quick Action Buttons.

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**.
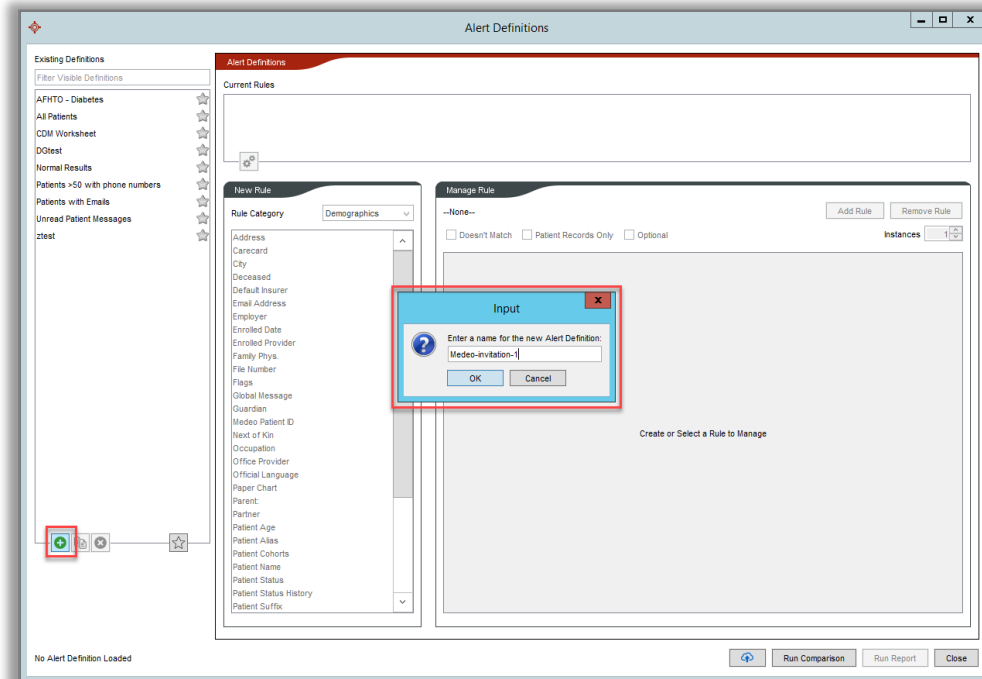
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3. Select **Demographics** as the Rule Category within the New Rule Section, then select **Email Address** and click **Add Rule** located in the Manage Rule Section.
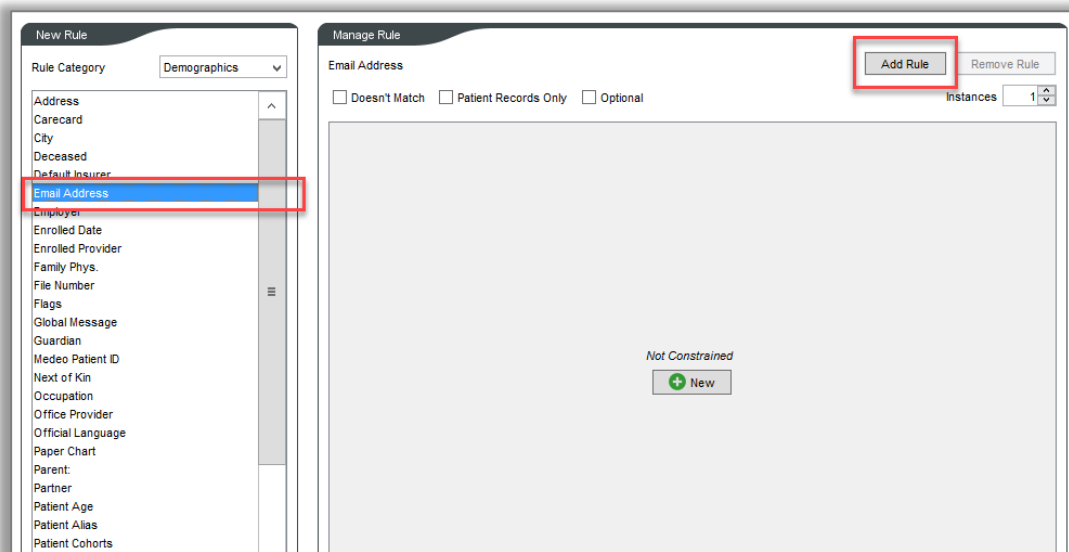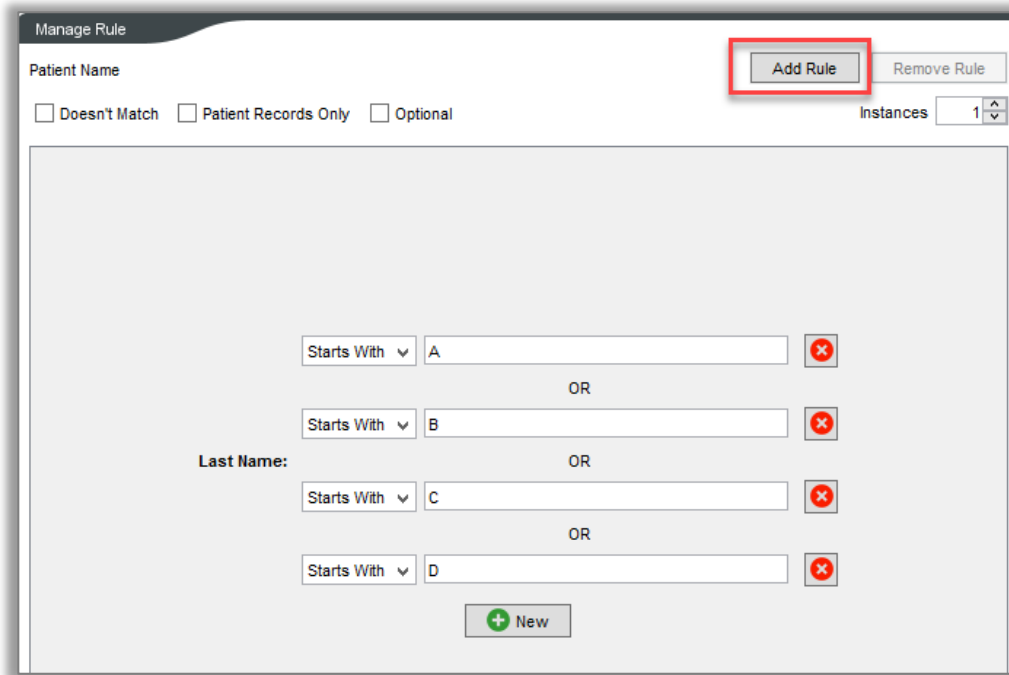
4. Create a second rule to filter your patients. In this example, we filter by **Patient Name**. Select **Patient Name**, then click **New** within the Manage Rule Section, and select **Last Name** from the drop down list.

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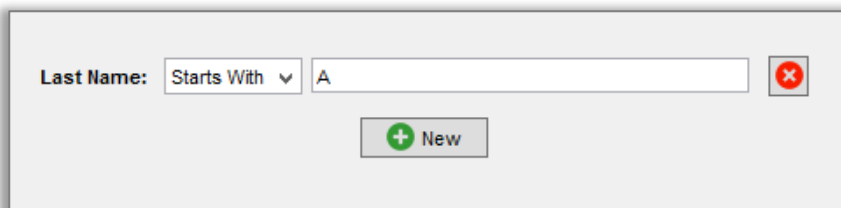
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6. Select the **New** button, then select **Last Name**, and enter B. Repeat this step for letters C and D, then click **Add Rule**.

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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9. Your query matches are displayed in a new window. Highlight your matching patients by shift-clicking or with **CTRL+A** on your keyboard.
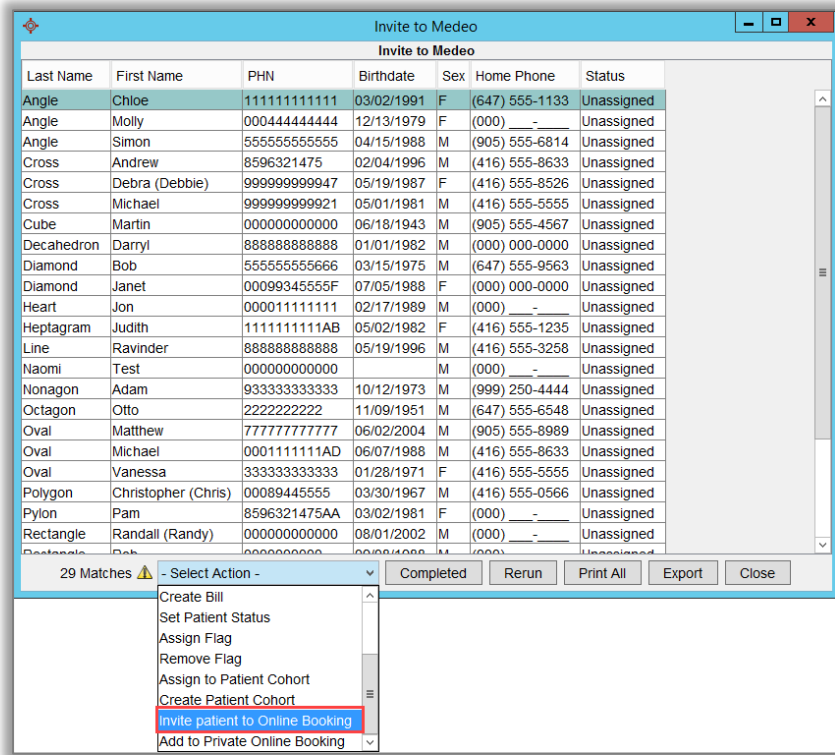
10. Use the drop down list to select **Invite patient to Online Booking**.

11. Send your mass invitation by selecting **Yes** at the **Invite patient to Online Booking** prompt, then close the Query Builder window.
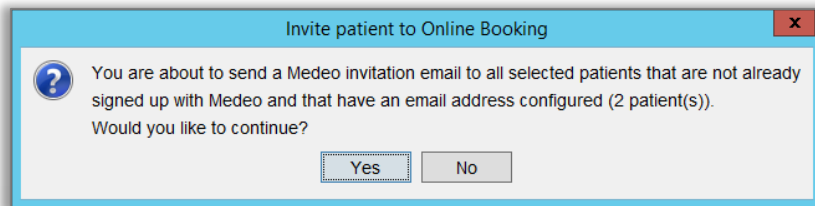
Trainer Tip: Many clinics use the Rule Category **Appointments** to filter patients by their last visit. For example, choose **Appointment**, click on the New button, select Date, and use the drop down list and select **In the Last 2 Years**.

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.
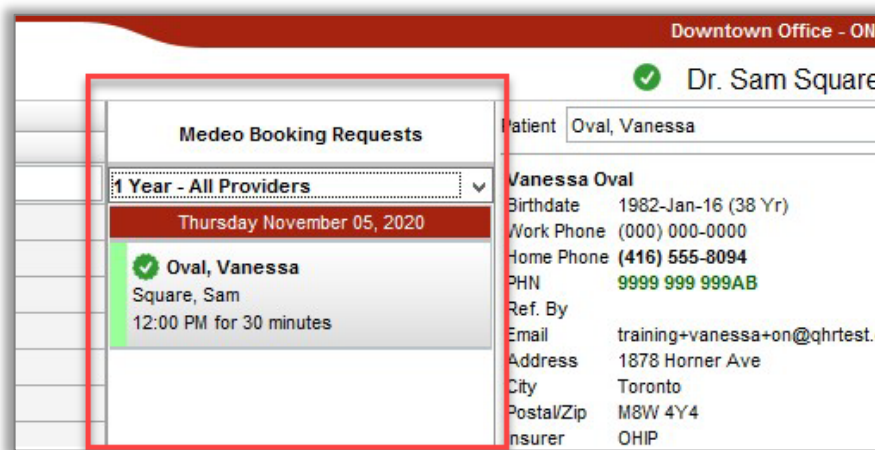
If the patient requests a Video Visit, a video icon displays on the Booking Request and the appointment in the Scheduler.
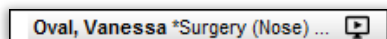
Note: You can show or hide the Medeo Booking Requests column by opening the **Accuro Start Menu** and searching for **Medeo**, then choosing **Show/Hide Medeo Booking Request Column.**

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 **Quick Action Buttons**.

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.
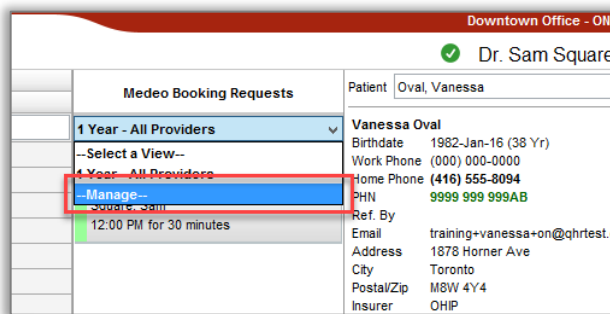
2. Click **Add** to open the **Edit Request View** window.
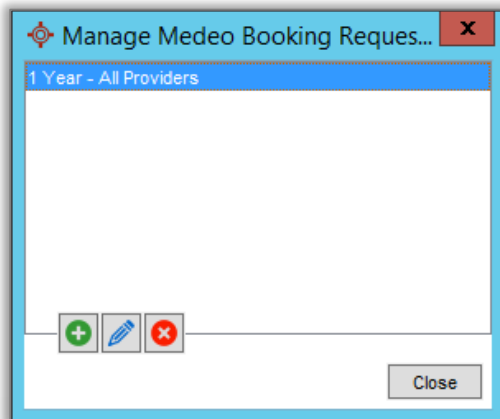
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3. Complete the fields:

View Name: Enter a short name for the view that you are creating that will help you distinguish it between other views.
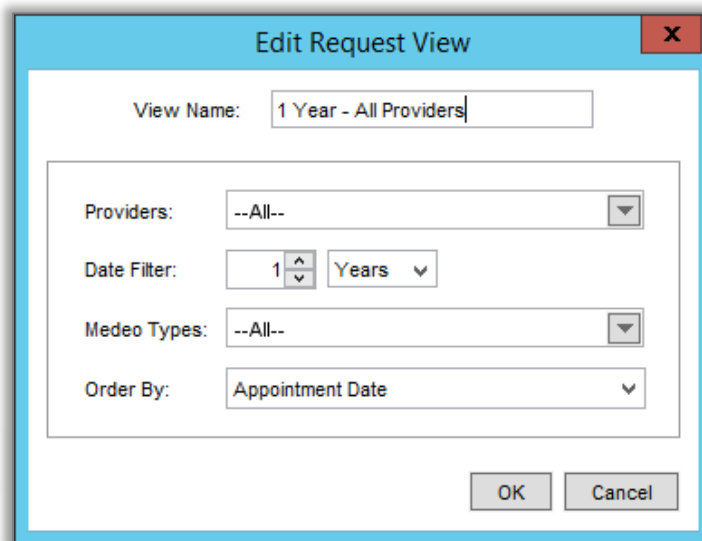
Providers: Show the Online Booking requests of specific Providers or select **All** to display all the requests at your clinic.

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.

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.
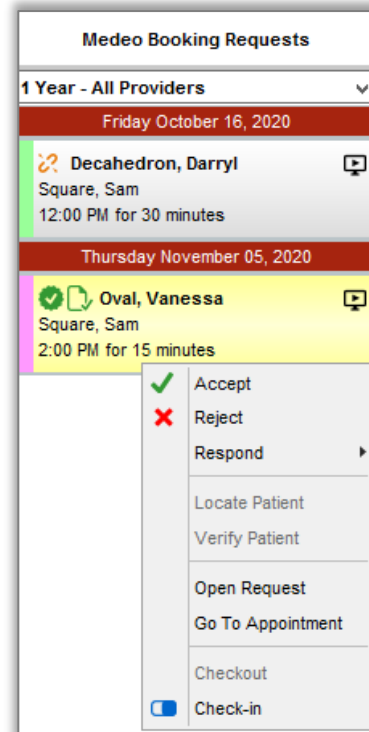
Checkout Status Icons

When an appointment request is checked out to an Accuro user, they see a green Checked Out icon in both the Booking Request Column and the Appointment Details window.
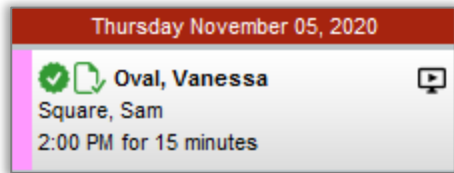
Other Accuro users at the same clinic see a red Checked out status indicating the appointment is unavailable to them.
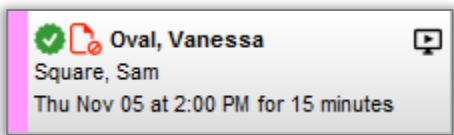
The Checked In/Out status is also displayed in the Medeo Booking Request section of the Appointment Details window.
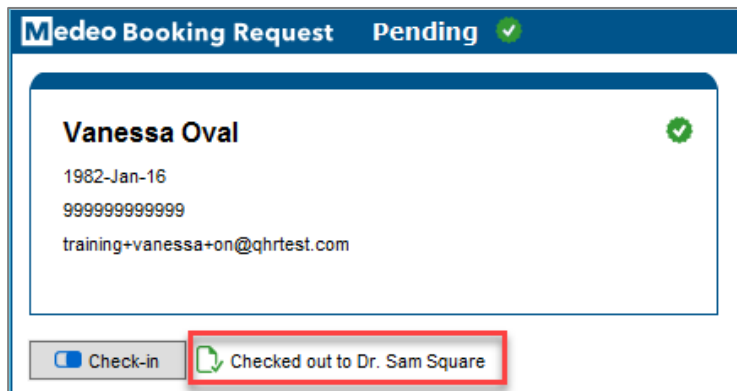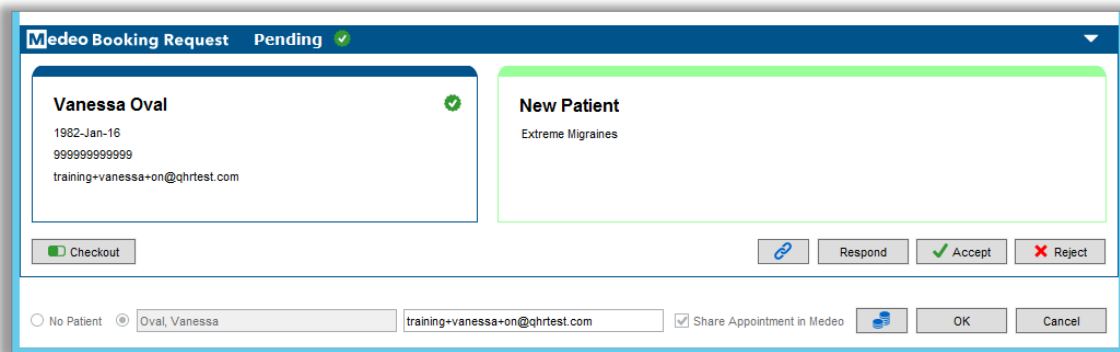
Viewing the Appointment Reason

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.

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.
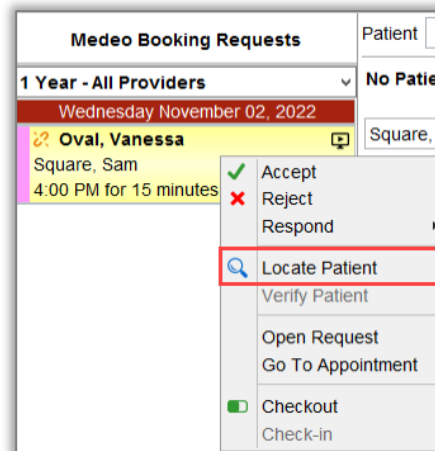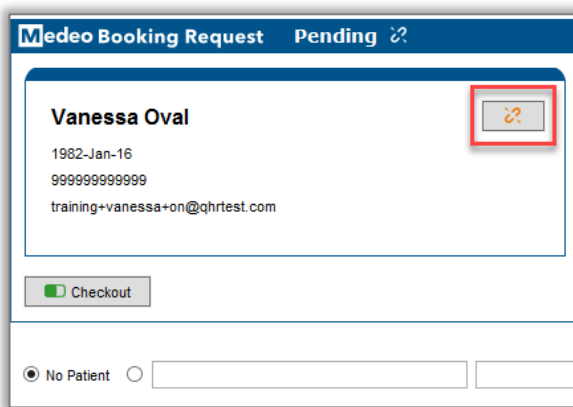
2. The **Match Medeo Patient to Accuro Patient** window displays a list of possible matches. Select a patient from the **Possible Matches** section, then select **OK.** You can also manually search for patients in Patient Search.
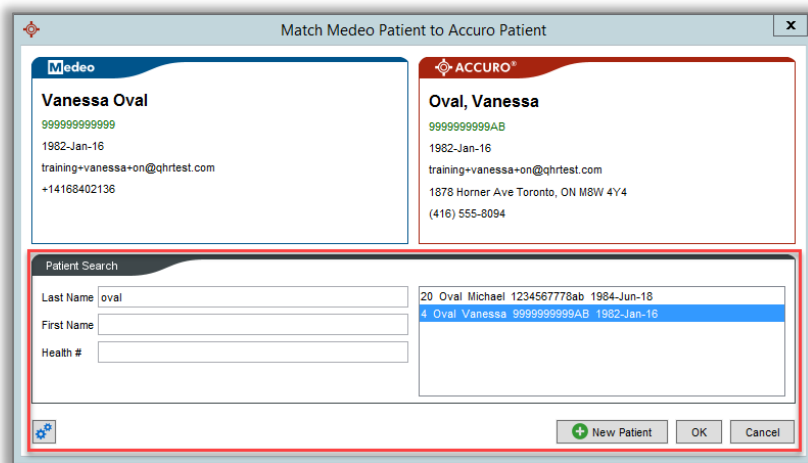
3. If any of the information supplied by the Medeo patient does not match with the Accuro Patient record, you will be prompted with the Update Demographics window. Use the checkboxes to select any demographic details you'd like to update in Accuro, then click **OK**.
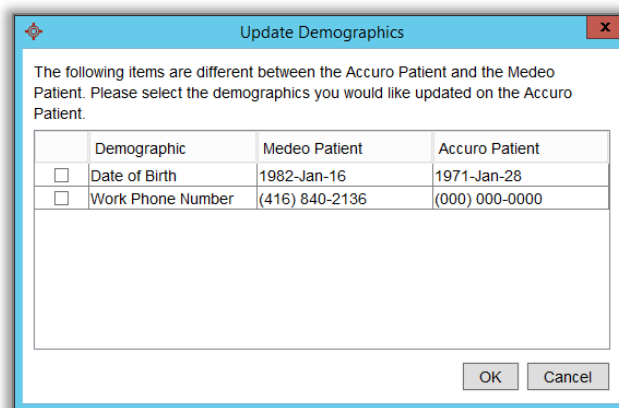
4. If a Medeo patient does not exist in Accuro, select **New Patient** to create a matching Accuro patient record.

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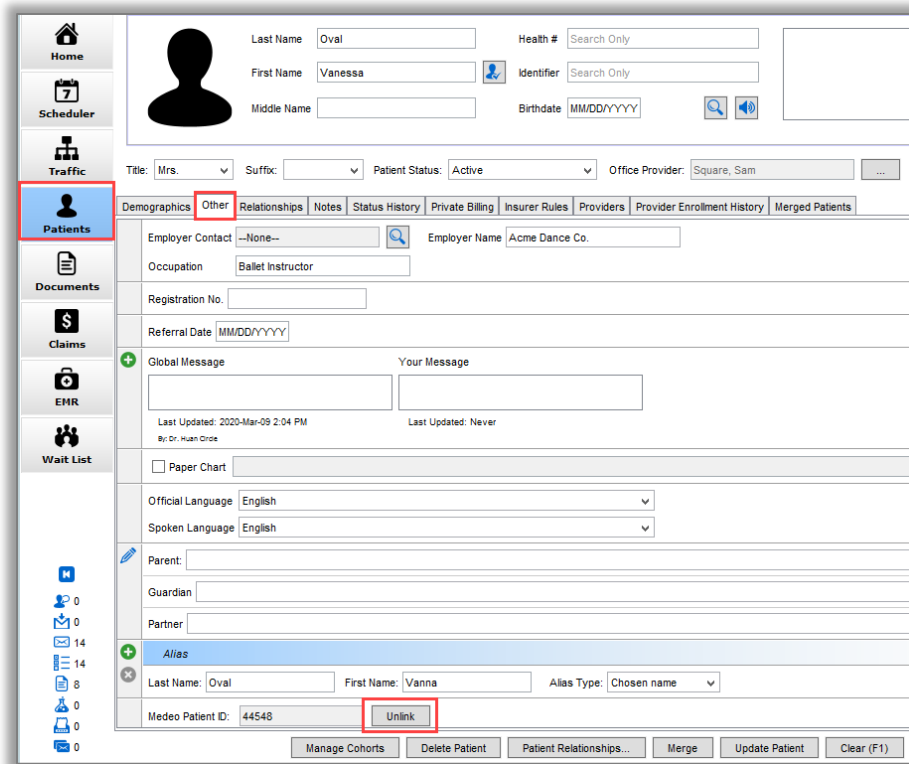
- The patient creates a brand new Medeo account. They may do this if they lose access to their personal email address.
- A user at your office accidentally links the wrong Medeo account to the wrong patient account.
- A parent may share an account with a child and the child becomes an adult. The now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

(Continued on Next Page)

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**.

(Continued on Next Page)

7. Locate the patient in the Activities list.

8. Right-click the populated search result and select **Restore**.
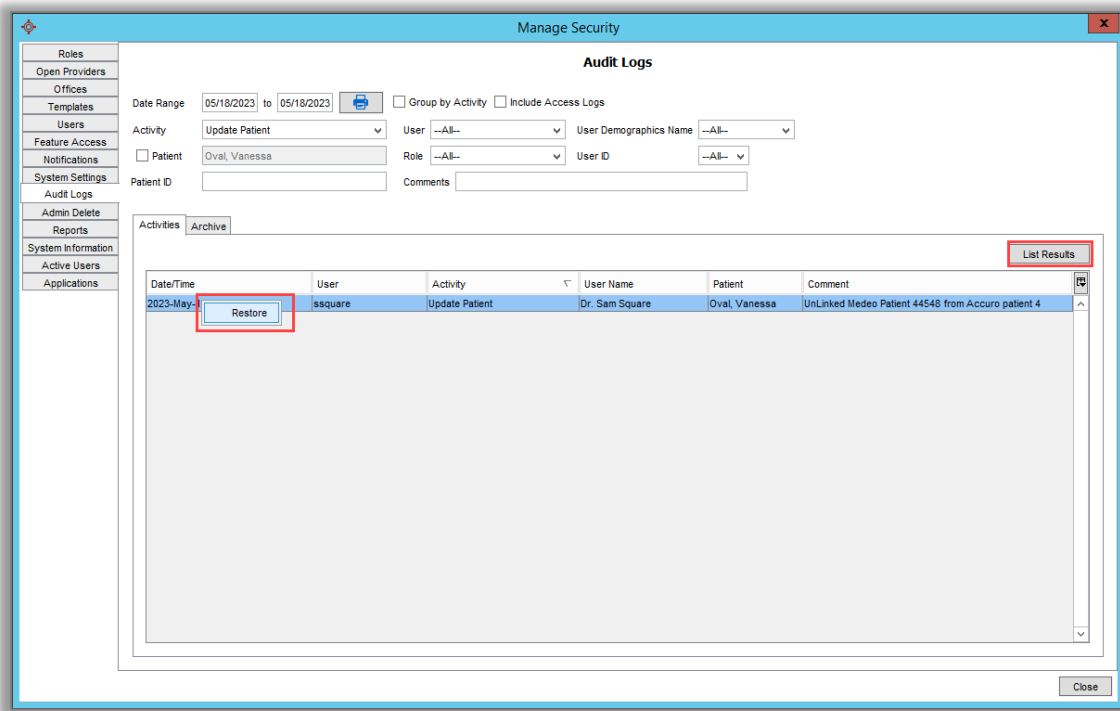
9. A pop-up window will appear. Select **OK** to confirm.

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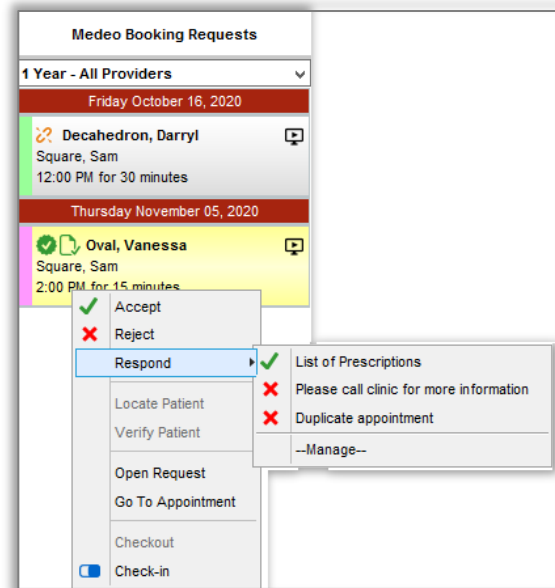
Note: After accepting an Appointment, it must be cancelled via the Scheduler. It's not possible to undo appointment acceptances. Please see the section on Cancelling Appointments.

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.
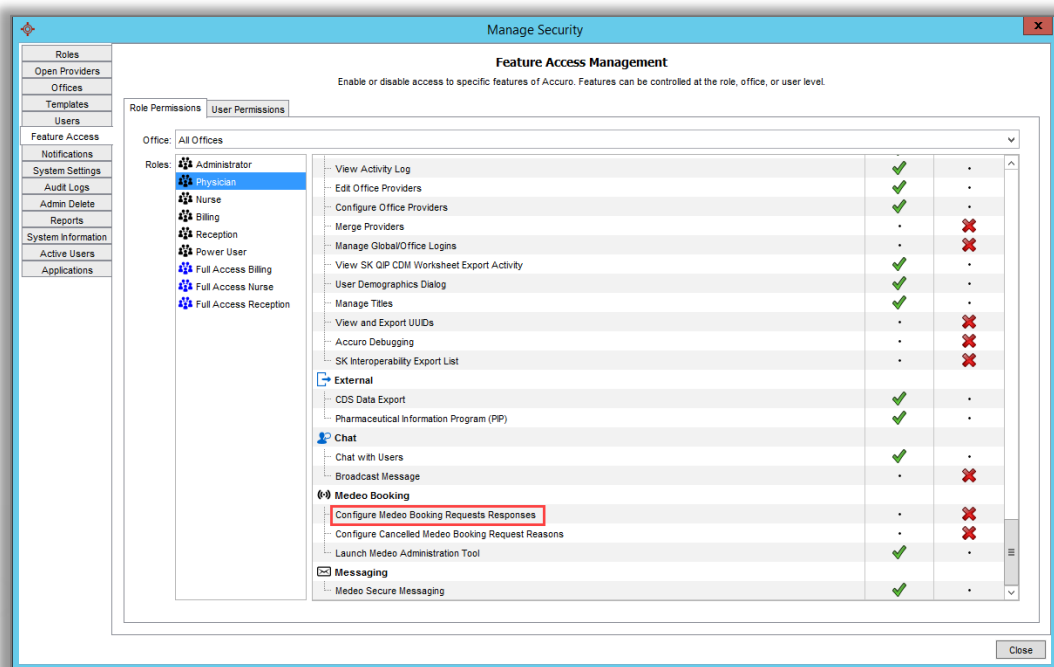
(Continued on Next Page)

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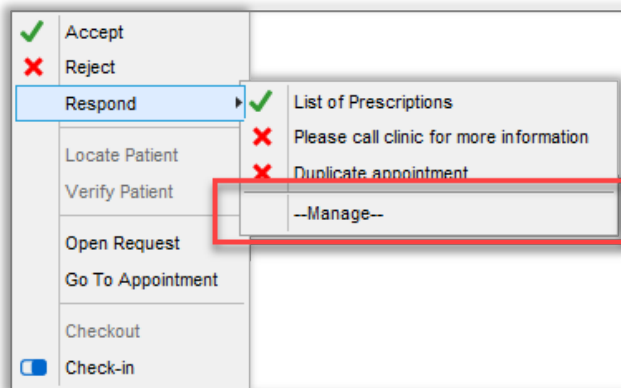
Note: To view Manage in the **Appointment Details** window, select the **Respond** button and click **Manage**.

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.
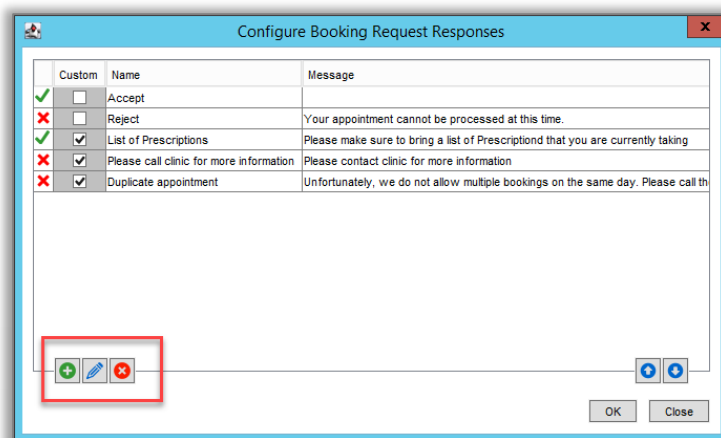
(Continued on next page)

4. Select **Pre-Configured** or **Prompt**:
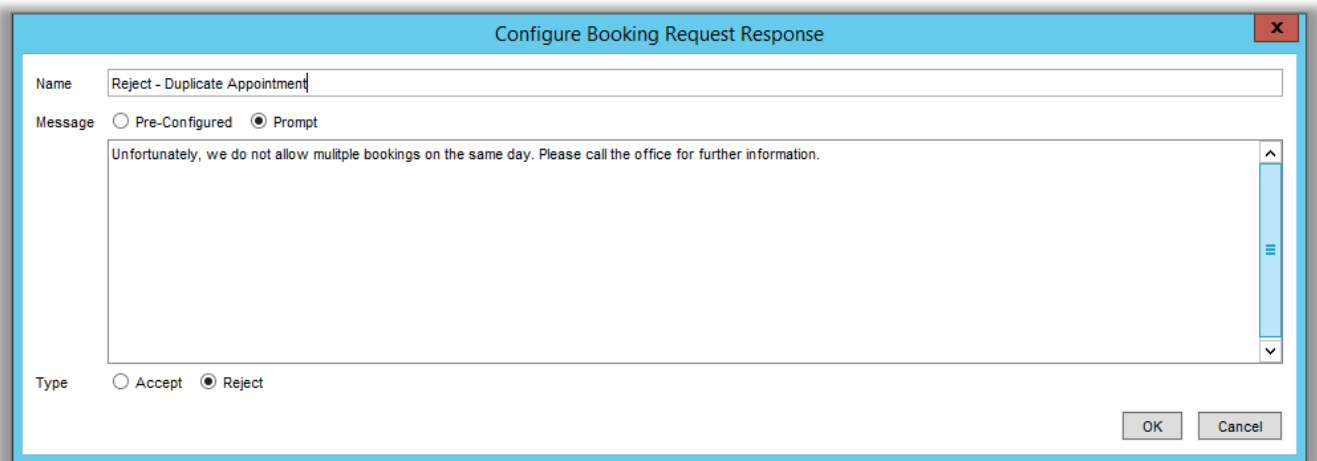
> **Pre-Configured**: sends your pre-configured message response to the patient and automatically updates the Scheduler.

> **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.

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.
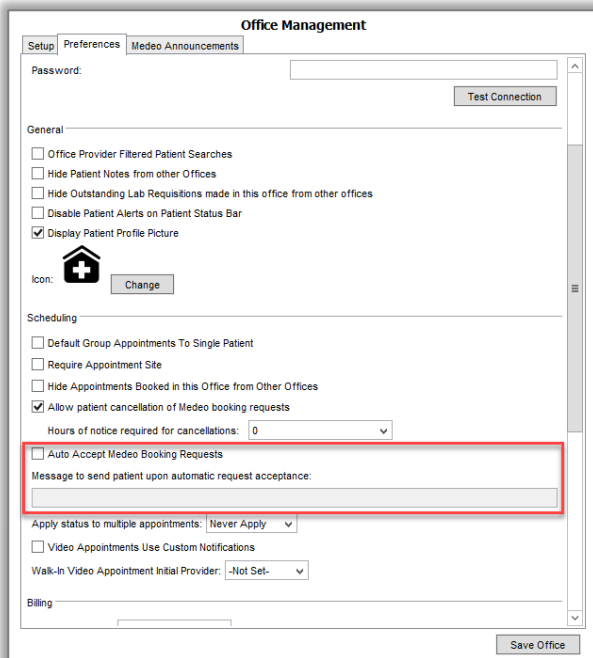
Automatically Accept Online Booking Requests

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 Linking Patients 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**.

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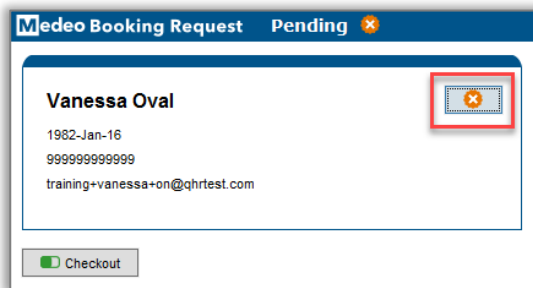
3. Confirm that the patient's identification matches with the Accuro and Medeo Patient details displayed in the **Verify Medeo Patient** window. Click **Yes** to complete verification.
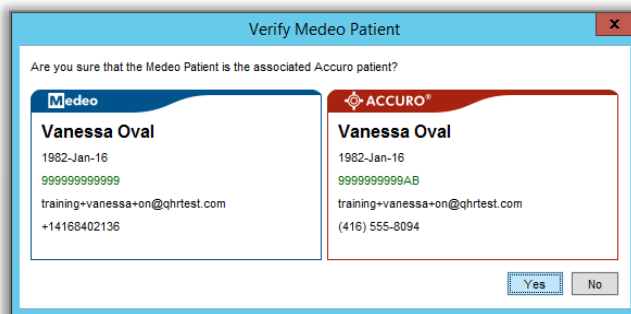
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Notes on Patient Verification

- 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 Unlinking Patients.

- The word **Pending** next to the green check mark in **Appointment Details** refers to the booking request, and not the verification status.
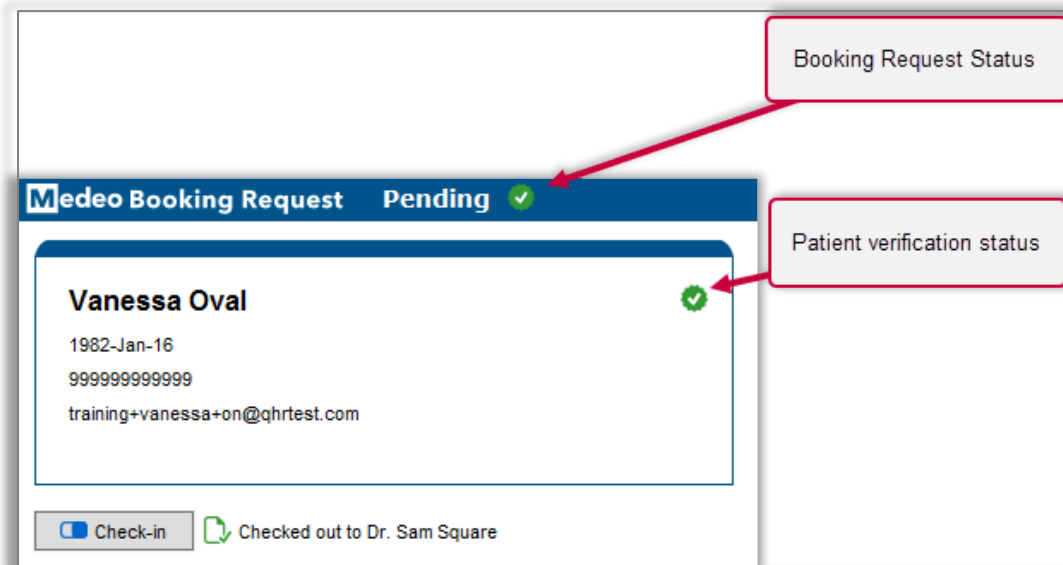
Cancelling Appointments

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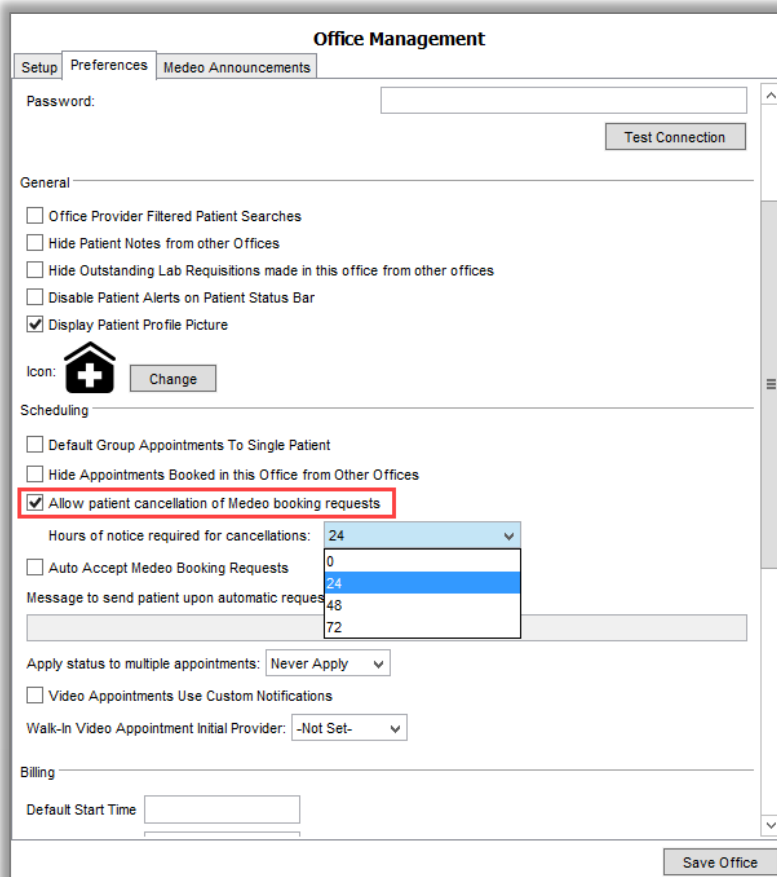
Note: Patients will need to log into their Medeo account to see the cancelation response.

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**.

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.
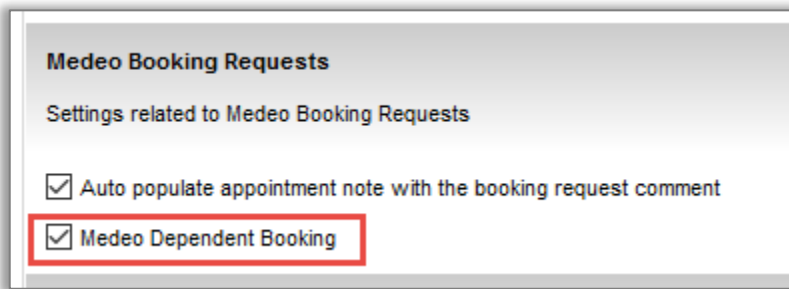
4. Click **Save Settings**, then **Close**.

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:
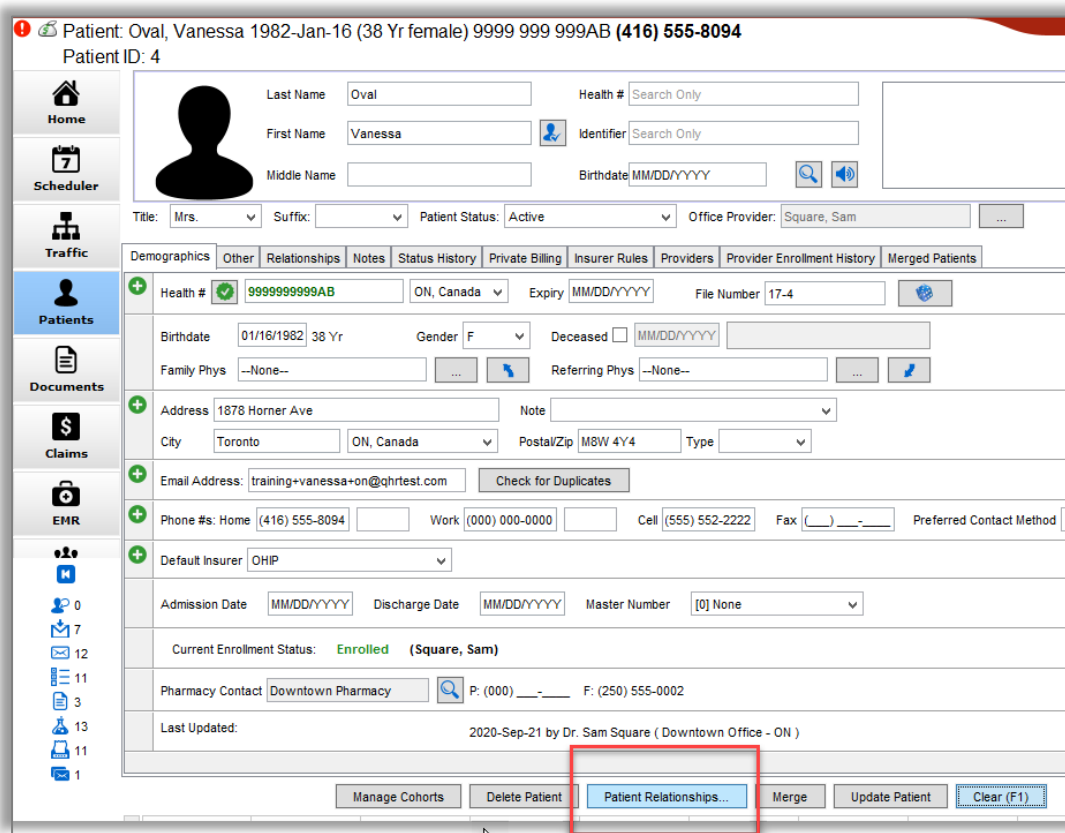
1. Create a Patient Relationship between caregiver and dependent patient.

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 ➕ **Add**.

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.

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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**.
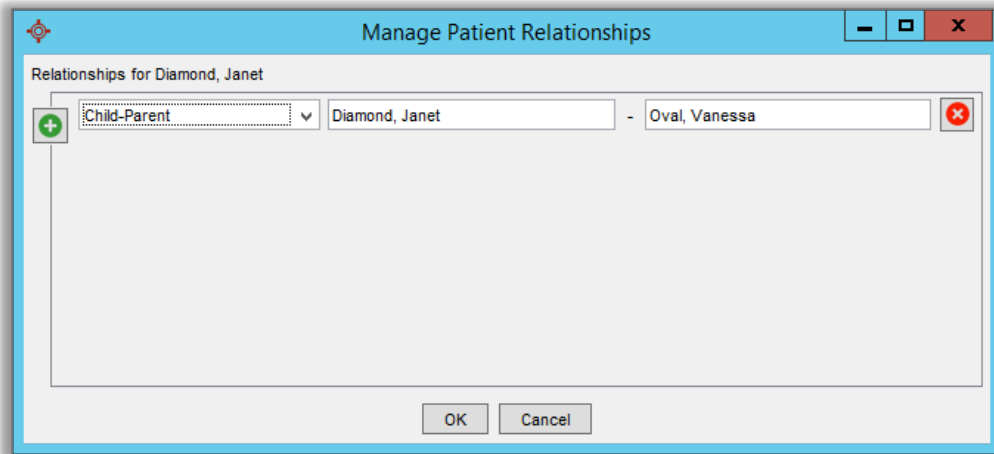
Assign the Booking Request to the Dependent

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

1. Open a booking request, then select the [link icon] **Link Dependency** button.
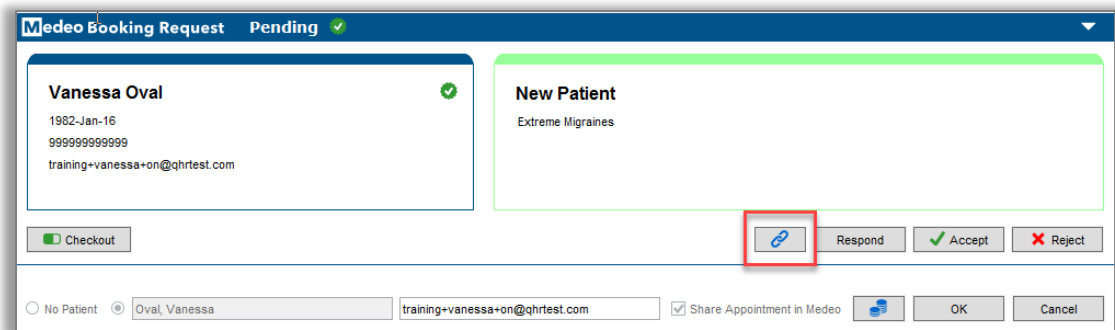
2. In the **Link Relationship to Medeo Patient** window, select the dependent patient, then click **OK.**
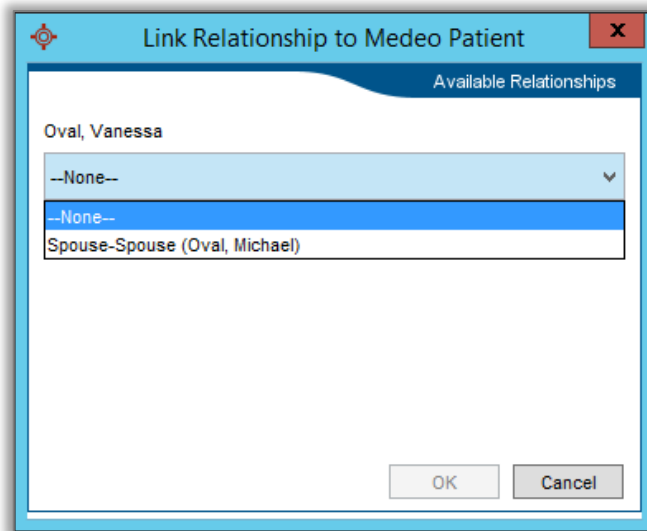
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3. Select **Yes** at the prompt to confirm the one time change of the **Dependency Appointment**.
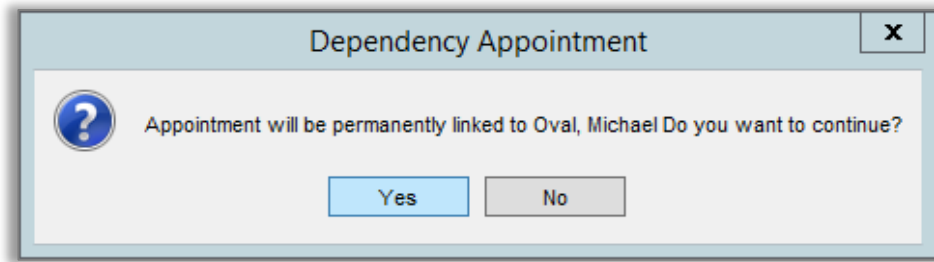
Medeo Announcements

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.
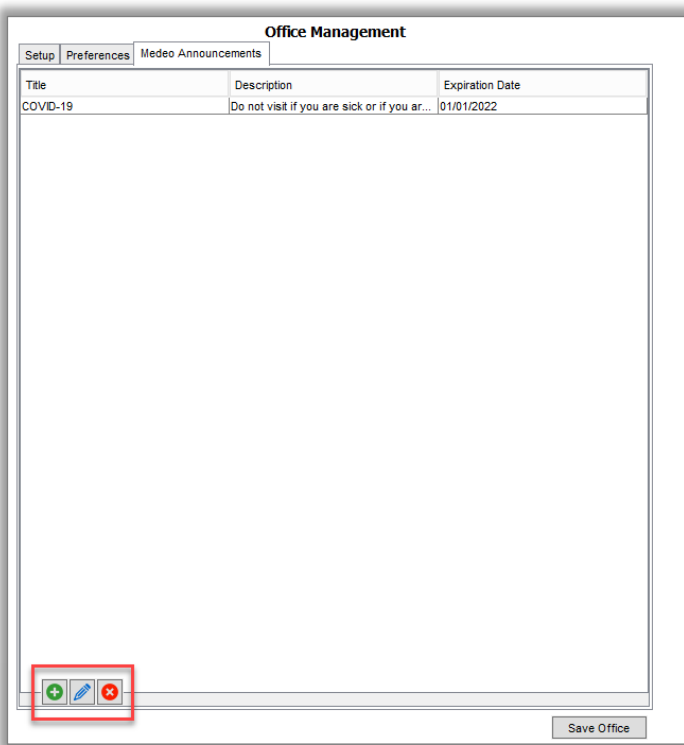
The Medeo Administration Tool

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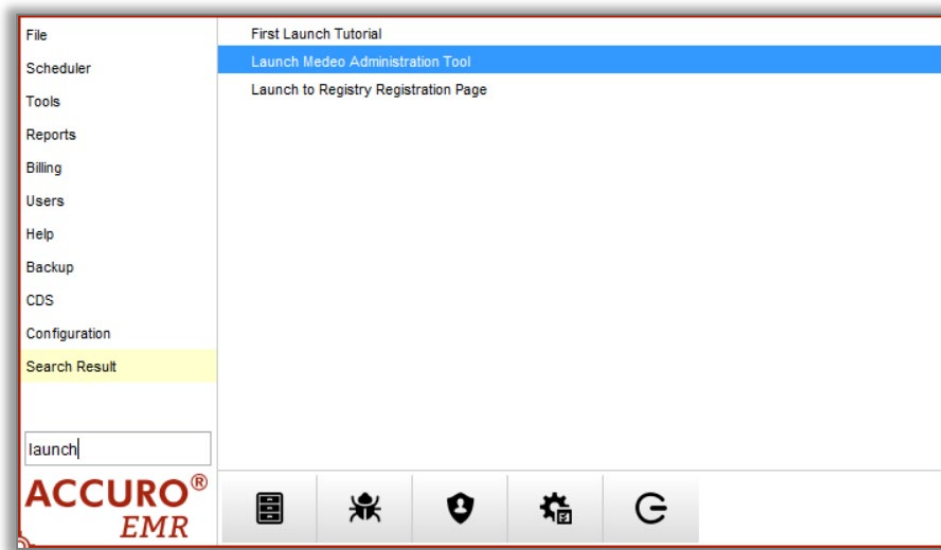
2. The Medeo Admin Tool will launch in a separate JX browser window and by default will open to the Provider Settings page.

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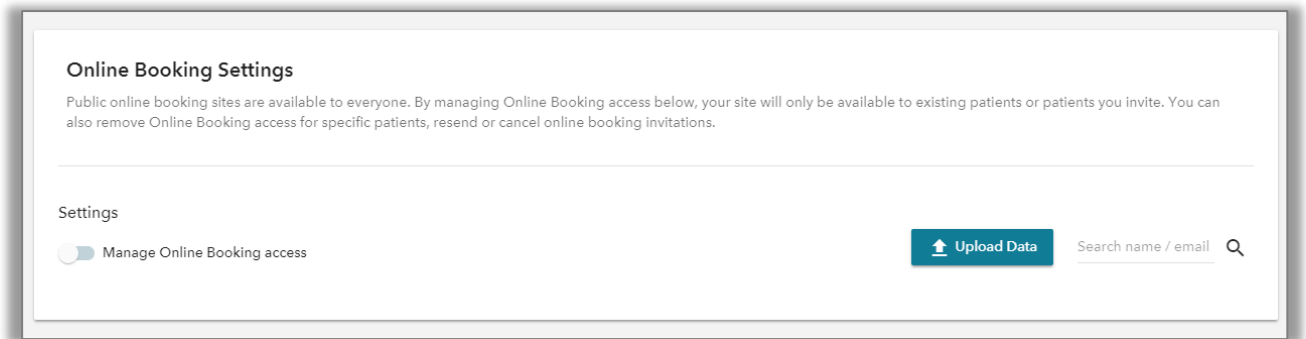
4. Once enabled, Manage Online Booking access turns an Online Booking site into a Private Booking site. An office with a Private Online Booking site can grant or remove access for patients to book online. This requires the patient to log into their Medeo account before accessing the booking page.

Provider Selection and Cancellation Settings

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

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Cancellation Settings allows patients to cancel their online appointments within a specified time frame.
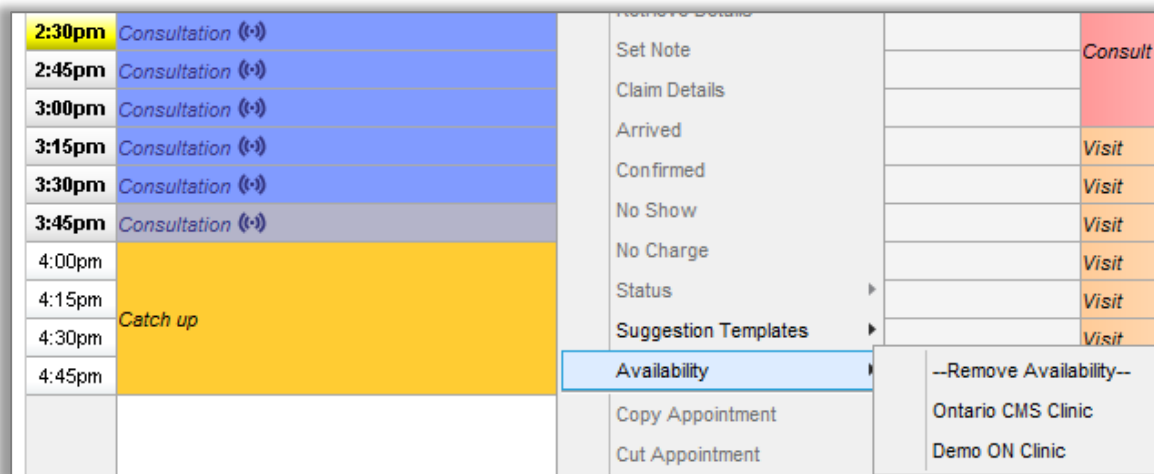
APPLY MULTI-OFFICE AVAILABILITY

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.

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

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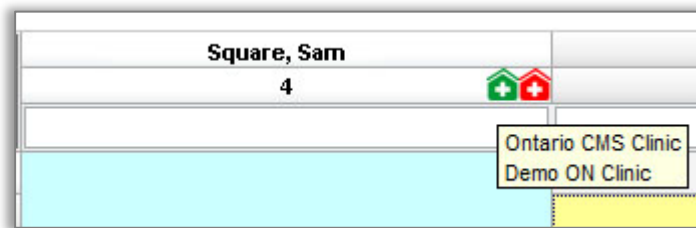
Note: To configure Office Icon colors: go to the **Accuro Start Menu**, search **Office Management**, select the **Preferences** tab, locate the **General** heading, **Icon,** select the **Change** button.

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:
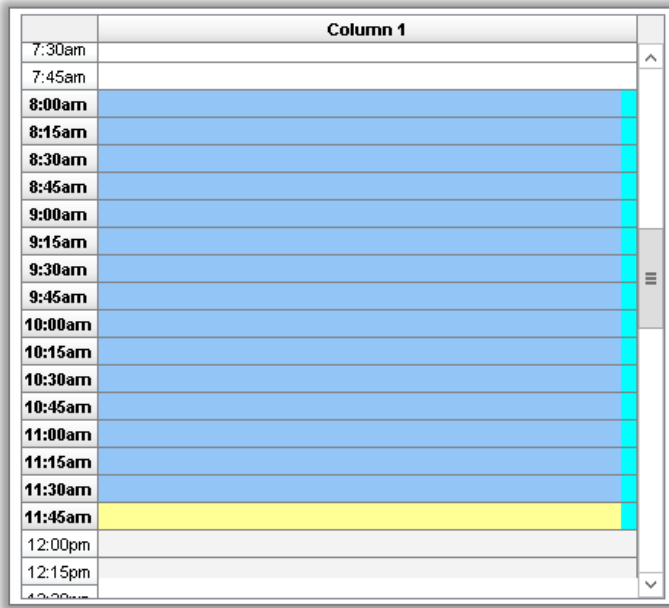
1. Open the **Accuro Start Menu**, select the **Scheduler**, then **Scheduler Management**.

2. Open the **Templates** tab, then choose the **Manage Templates** tab.

3. Press the ⊕ **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.
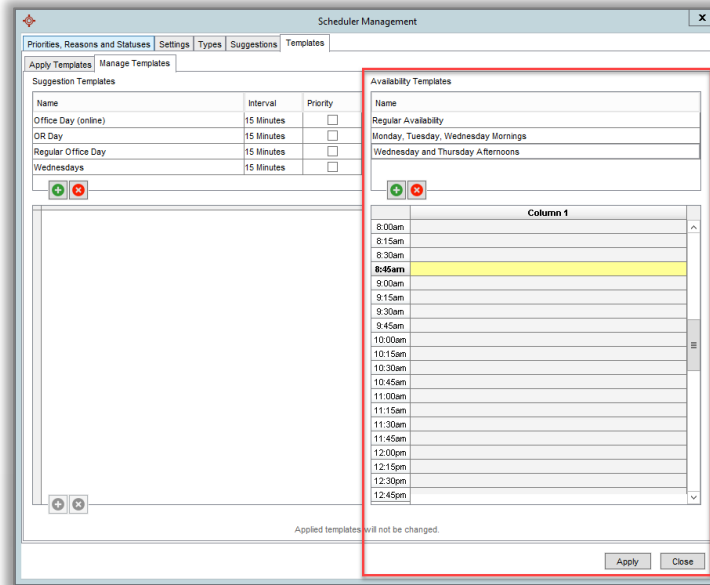
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5. Right click your highlighted time intervals, then select the relevant office. A colored stripe corresponding to the relevant office appears to the right of the chosen time intervals in **Column 1**.

6. Click **Apply** to save your changes, then click **Close**.



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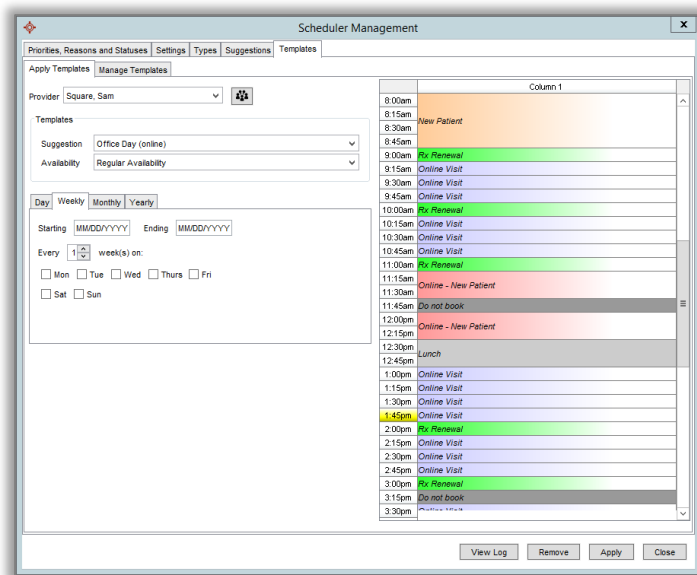
For more details, please review the section in this guide on Applying Suggestions.

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 **Any Available Provider** 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?	Yes. This is a preference that can be enabled in Accuro: 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). 2. Select the **Preferences** tab. 3. Under the Scheduling heading, select the checkbox that will **Allow patient cancellation of Medeo booking requests**. 4. Use the drop down menu to choose the **Hours of notice required for cancellations** (24 hour intervals). 5. Click Save Office, and then Close.

Quick Action Buttons
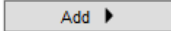
If you're using a Custom Action Bar, there are two buttons available for Online Booking:

Invite Patient to Online Booking and **Show/Hide Booking Requests Column**.
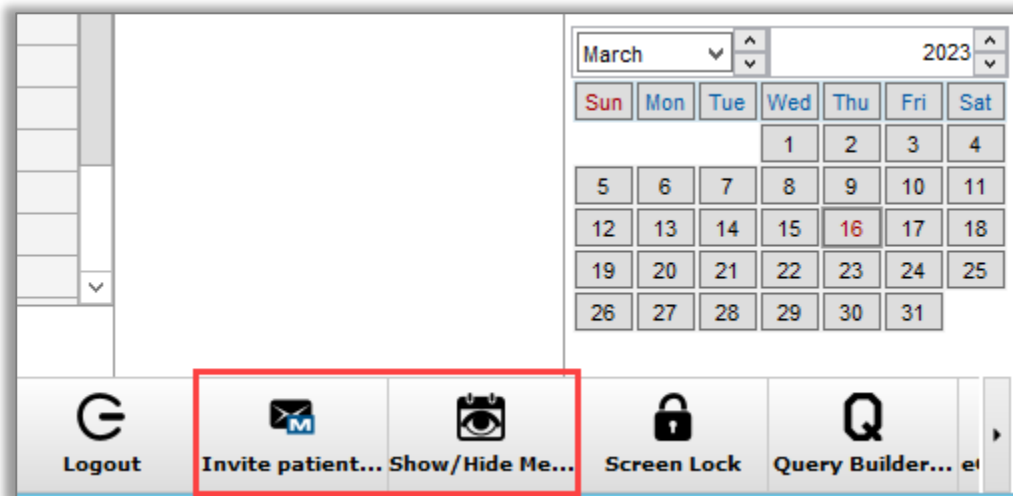
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To enable Medeo Quick Action Buttons:

1. In the **Accuro Start Menu**, type configure, then select **Configure Actions**.

2. 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.
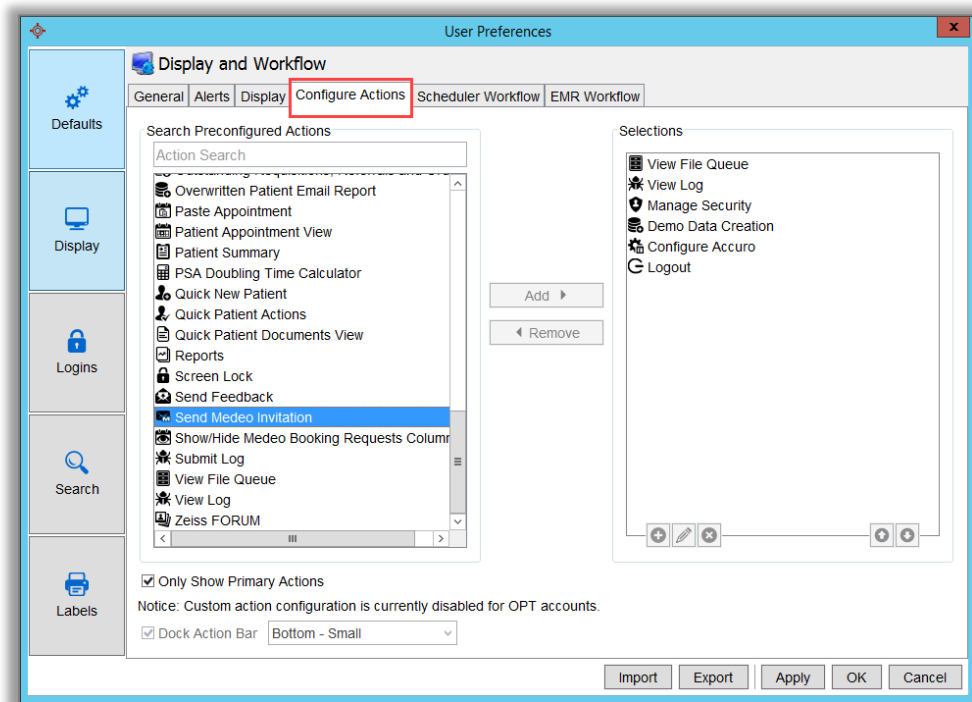
3. Click **Apply**, then **OK**.
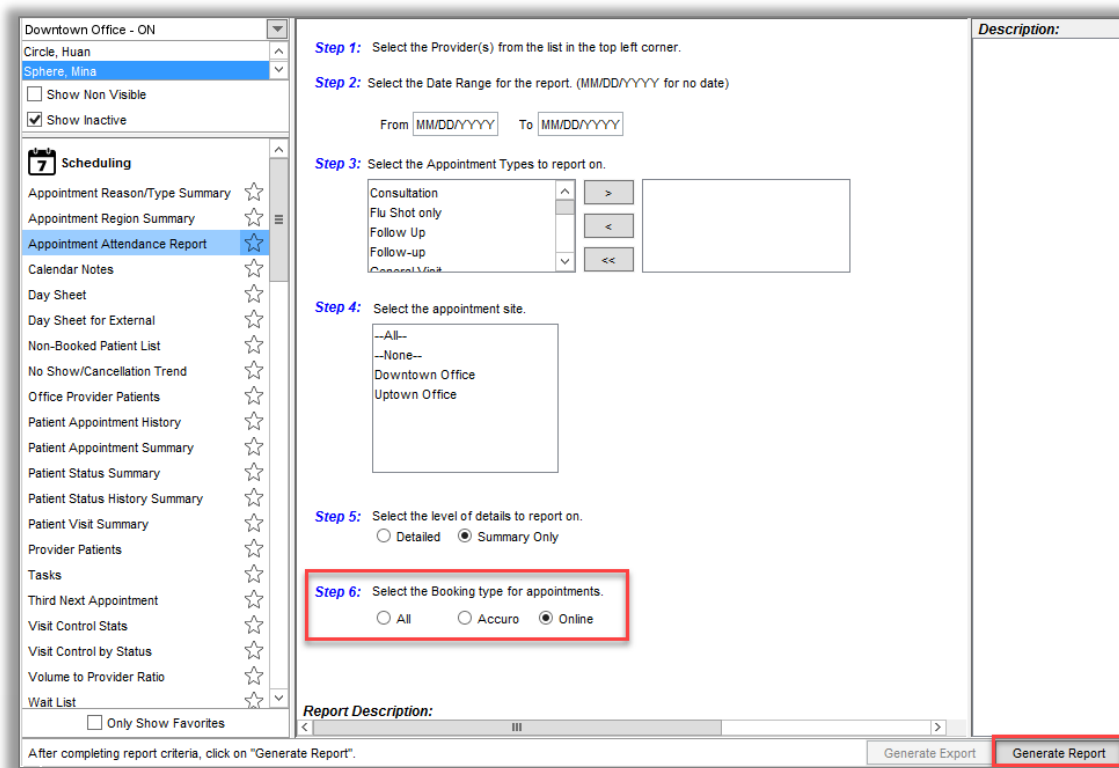
Note: For more details on Quick Action Buttons, search for Configure Actions Overview in the Accuro User Guide (**Accuro Start Menu,** select **Help**, then select the **Accuro User Guide**).

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**.

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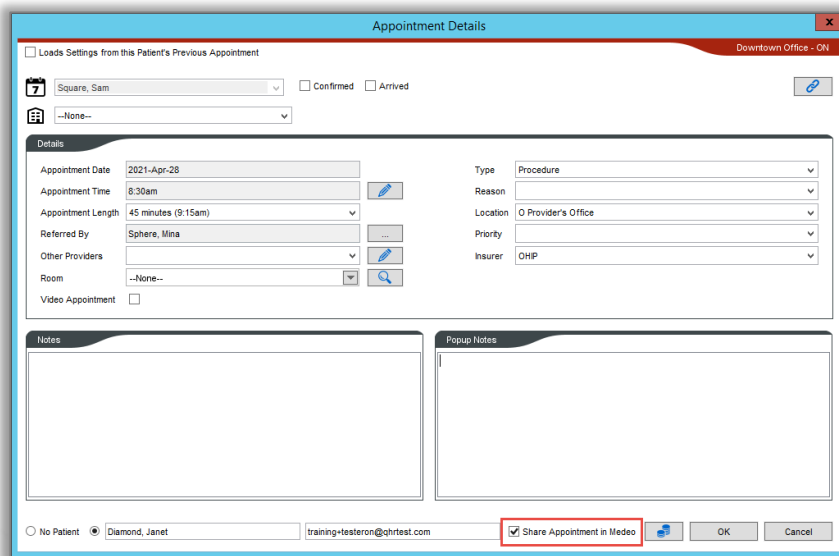
If a patient books an appointment via Medeo Online Booking, they will automatically receive an In-Office Notification 24 hours before their appointment.

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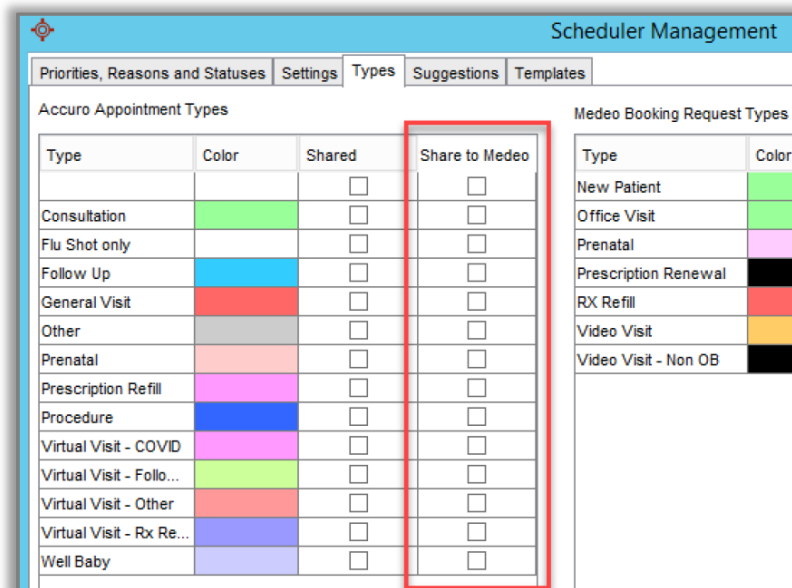
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Note: If the patient does not have a Medeo account connected you will get an error pop-up with an option to invite them to Medeo.

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.

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.

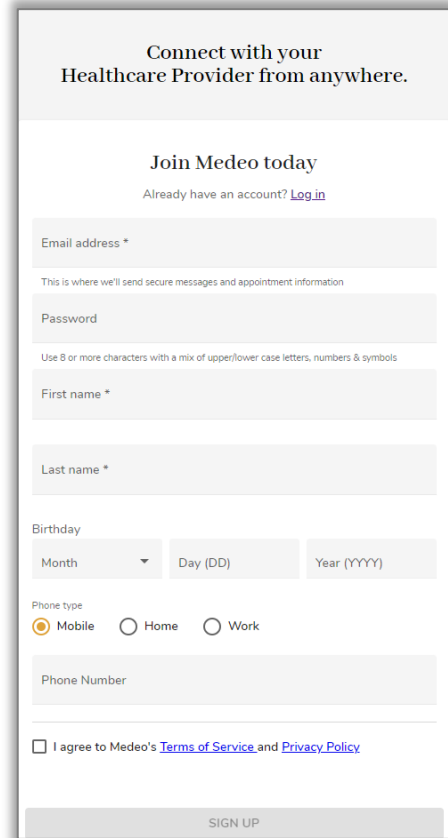3. Next, your patient logs in to their Medeo Account or clicks **Sign Up** to create a Medeo account.
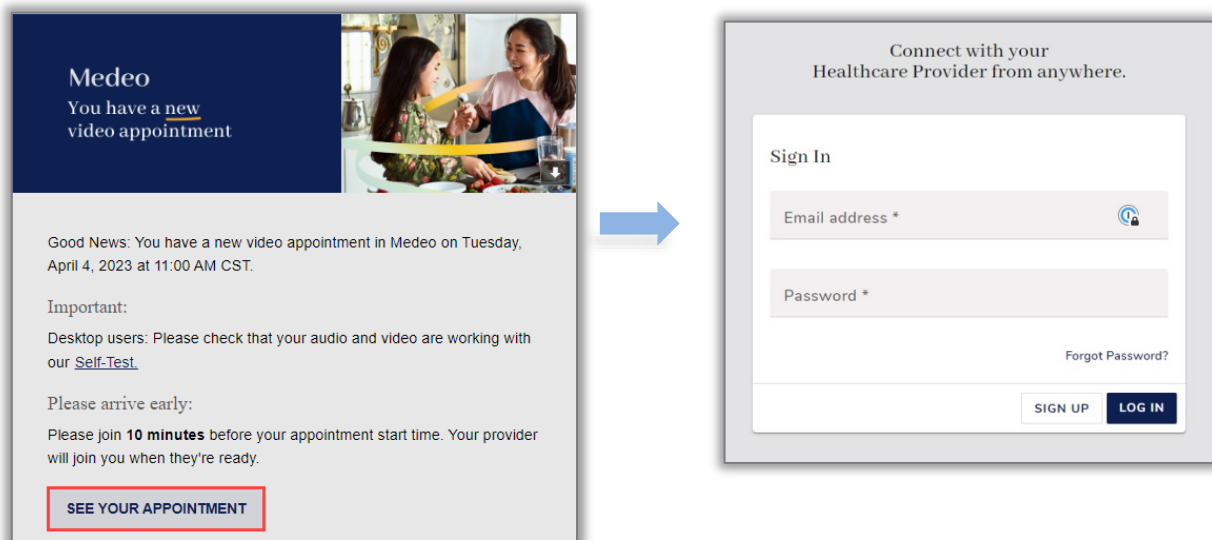
Trainer Tip: For full details on patient workflows, see the Medeo Patient Support Site.

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 Medeo Patient - Get Me Started.

**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 Terms of Service and Privacy Policy

SIGN UP

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**.

Booking Appointments

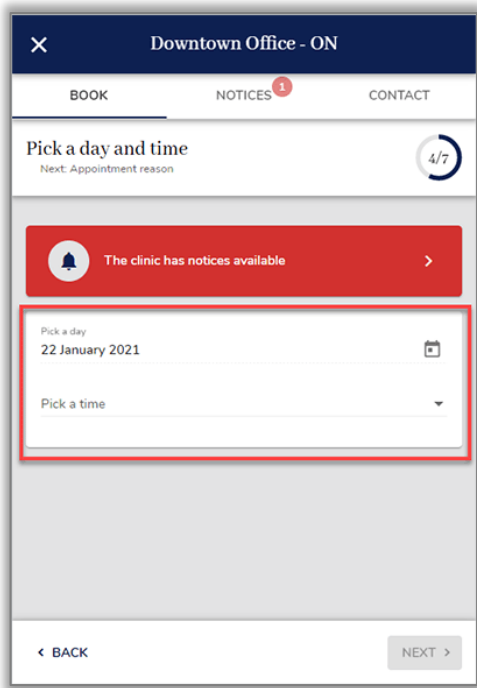Alternatively, patients can also book a healthcare appointment using Medeo:

1. Patients log in to their Medeo Patient account. If your patient does not have a Medeo account, please see Invite Your Patients to Medeo.

2. Patients navigate to **Appointments.**

3. Click **+ BOOK** **BOOK**.
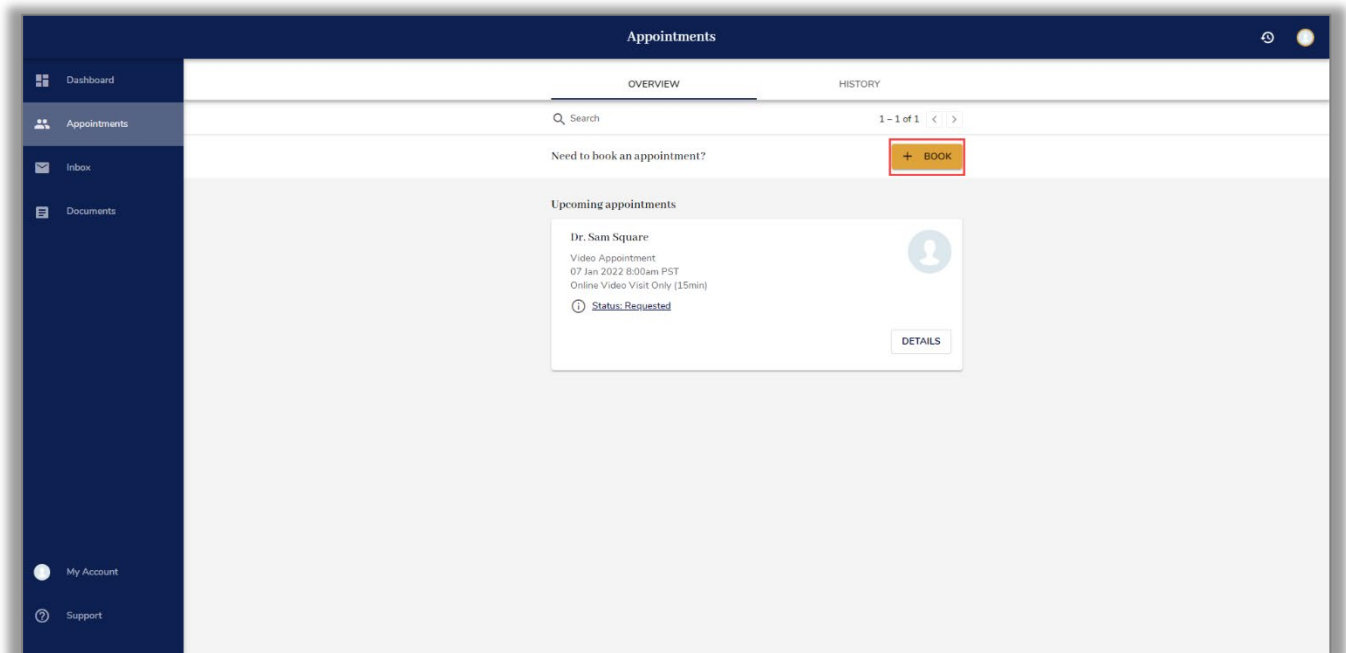
4. Select a clinic, then click **Next**.

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 Applying Suggestions.

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

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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 Responding to Medeo Booking Requests.

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).