

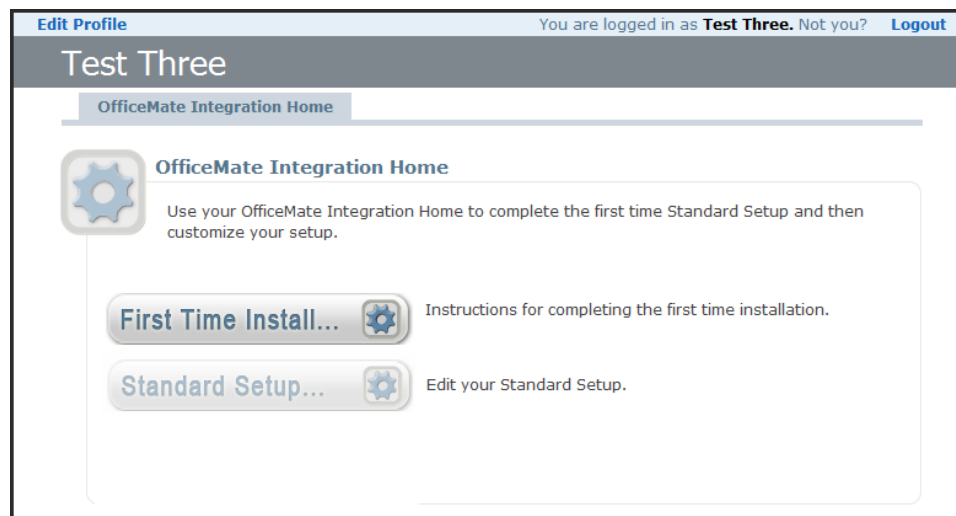
Setting Up the eWebExtra OfficeMate Integration

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This document is a short guide that explains how to set up the eWebExtra OfficeMate Integration. For more detailed instructions on setting up and using the eWebExtra OfficeMate Integration and the Patient Info Inbox, see the *eWebExtra OfficeMate Integration User's Guide*.

The OfficeMate Integration Home allows you to set up the eWebExtra OfficeMate Integration.



Setting up the eWebExtra OfficeMate Integration consists of connecting the Patient Info Inbox to OfficeMate and setting up the standard schedule and forms. You do not need to complete all of the setup tasks at once. The OfficeMate Integration Home saves all completed changes.

Connecting the Patient Info Inbox to OfficeMate

Click **First Time Install** to install the files needed to connect the Patient Info Inbox to OfficeMate.

The screenshot shows the 'OfficeMate Integration Home' page for a user named 'Test Two'. The page is titled 'eWebExtra OfficeMate Integration Patient Info Inbox Setup'. It contains two main steps:

Step1 - eWeb Scheduler Sync
 Using an administrator account, install the **eWeb Scheduler Sync** service on your server by running the eWeb Scheduler Sync installer file.
IMPORTANT: Only install the **eWeb Scheduler Sync** file on the server that stores the OfficeMate data. Installing the **eWeb Scheduler Sync** file on workstations will cause scheduling conflicts.
 If you have questions about where to install the **eWeb Scheduler Sync** file, please contact customer support at (877) 448-0707.
eWeb Scheduler Sync: [eWebExtraScheduleSync-2.0.3.msi](#) - 1.07 MB

Step2 - Patient Info Inbox
 Use an administrator account to install the **Patient Info Inbox** on each workstation where scheduling is performed. Run the **Patient Info Inbox** installer file, and then start the application.
Patient Info Inbox: [PatientInfoInbox-2.0.3.msi](#) - 1.91 MB

Log into the **Patient Info Inbox** using an OfficeMate user ID and password. Click **Tools** and then select **API Key Configuration**. Copy and paste the **Practice ID** and **API Access Key** from the fields below into the API Access Key Configuration Form and then click **Configure**.

Practice ID

API Access Key

Important: Keep your API Access Key confidential to protect your practice.

Your new key will appear in the API Access Key box above.

Note: If you already have an API Access Key and generate a new one, your current key will become obsolete and will be replaced by the new one.

Next, click **Tools** and then select **Upload Providers and Locations** to upload providers and locations from OfficeMate.

1. Install the eWeb Schedule Sync application on the server that stores your OfficeMate data. The eWeb Schedule Sync is an application that runs in the background and updates the eWebExtra OfficeMate Integration with provider availability.

NOTE Only install the eWeb Scheduler Sync file on the server that stores the OfficeMate data. Installing the eWeb Scheduler Sync file on workstations will cause scheduling conflicts.

2. Install the Patient Info Inbox on all the OfficeMate workstations you will use for scheduling and then perform the following steps at each workstation:
 - a. Log into the Patient Info Inbox using an OfficeMate user ID and password.
 - b. Click **Tools** and then select **API Key Configuration**.
 - c. Either copy and paste or type in the **Practice ID** and **API Access Key** numbers from the OfficeMate Integration Home into the API Access Key Configuration Form.
 - d. Click **Configure**.
 - e. Click **Tools** and select **Upload Providers and Locations** to upload provider and location information from OfficeMate.

Setting Up the Standard Schedule and Patient Forms

Once you have installed the Patient Info Inbox and eWeb Schedule Sync, you are ready to setup and publish the standard schedule and patient forms. Click **Standard Setup** and perform the following steps.

1. Select whether to include the schedule and patient forms on the website.
2. Provide up to four email addresses where you would like to receive appointment request notifications. You must enter at least one email address. All appointment requests are also sent to the Patient Info Inbox.


NOTE If you would like appointment request notifications to go to more than four email addresses, create an email distribution list and enter it here.

3. If you chose to include the schedule on the website, select the locations and providers that will use the standard schedule. If you chose to include only forms, go to step 5.
4. Select the appointment minute increments to use on the standard schedule.
5. Click **Complete Setup** to add the standard schedule and forms to your website and complete the integration with OfficeMate. In a few moments after completing the setup, two navigation links appear on your eWebExtra site: Appointment Request and Patient Forms. Patients can click these links to submit appointment requests and patient forms online.

Edit Profile
You are logged in as **Test Two**. Not you? [Logout](#)

Test Two

OfficeMate Integration Home



Standard Schedule Setup

Setup your standard schedule and forms. You may edit your standard schedule setup at any time and you may customize your schedule and forms by using the advanced settings option (available once the standard setup is completed).

Step 1: Select Schedule, Patient Forms or both. This determines which functionality will be available on your website.

Schedule (Complete all 4 Steps)

Patient Forms (Complete Steps 1 and 2 only)

Step 2: Provide up to four email addresses where you would like to receive appointment request notifications. You may change or create additional email addresses after the standard schedule setup is created by using the "advanced settings" feature.

Step 3: A standard schedule will be created for each Location and Provider selected:

Loc 4 Not Really Hawaii - Sanborn, Amber

Wineinger Eyecare, P.A. - Crabtree, Josh

Wineinger Eyecare, P.A. - Wineinger, O.D., Ryan

Wineinger Eyecare, P.A. - Pechacek, Angela


Loc 4 Not Really Hawaii - Christian, Ileah

Wineinger Eyecare, P.A. - Wineinger, O.D., Roger

Step 4: Select your appointment minute increments to be used for the online appointment schedule. Your minute increments should be the same as the minute increments you currently use in your OfficeMate appointment scheduler.

Appointment minute increments

Select the Complete Setup button to add the appropriate schedule and form access on your website.

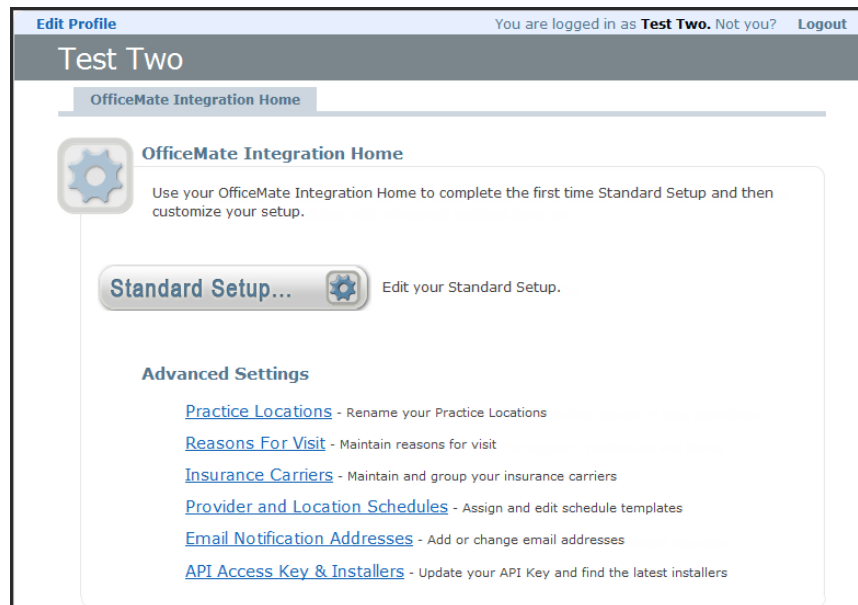
Complete Setup 

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Using the Advanced Settings

Once you have completed the standard setup, your OfficeMate Integration is fully functional. In the future, if you need to adjust your setup, you may want to review and edit the optional **Advanced Settings**.



Practice Locations

Determine under which name and time zone each practice appears on your eWebExtra website.

Reasons for Visit

Set up the reasons patients can select when requesting appointments online.

Insurance Carriers

First, determine which insurance carriers a patient can select when requesting an appointment online. Then, assign a schedule category to each insurance carrier. A schedule category determines which appointment times a patient with a specific insurance carrier sees when he or she requests an appointment.

Provider and Location Schedules

Select a default schedule template or copy a template to create a new one. You must assign a schedule template to each provider at each location that you want available to patients online. Schedule templates define when a patient can schedule appointments based on his or her insurance and reason for visit.

E-mail Notification Addresses

You can edit the email addresses you entered when you set up the standard schedule and forms. For more information, see "[Setting Up the Standard Schedule and Patient Forms](#)" on page 3

API Access Key and Installers

Click this link to update your API Key and locate the most recent installers.