eWeb*Extra* OfficeMate Integration User's Guide

April 2014

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Getting Started

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The eWeb*Extra* OfficeMate Integration provides your patients the flexibility of recording their medical information and requesting appointments online, making your practice flow more smoothly and efficiently. With the eWeb*Extra* OfficeMate Integration, you can easily record patient information and schedule appointments in OfficeMate with the information your patients provide through your eWeb*Extra* site.

eWeb*Extra* OfficeMate Integration Overview

The eWeb*Extra* OfficeMate Integration is an integrated group of web-based services and desktop applications that extend your eWeb*Extra* website capabilities. It gives patients online access to your office at their convenience. The eWeb*Extra* OfficeMate Integration consists of these features and functions:

- **Online Patient Forms:** A web-based application for patients to fill out forms prior to their office visit.
- **Online Appointment Requests:** A web-based application for patients to request appointments.
- **Patient Info Inbox:** A local application, integrated with OfficeMate, that receives and displays notifications of patient forms and appointment requests for your practice to process.
- **eWeb Schedule Sync:** A local application that continuously synchronizes the availability of providers and locations from the OfficeMate Scheduler with the provider and location schedule available to patients online.
- **OfficeMate Integration Home:** A web-based tool that configures how Patient Forms and Appointment Request schedules are presented to your patients on your eWeb*Extra* website.

Software Requirements

In order to use the eWeb*Extra* OfficeMate Integration, you must have the following software and web-based applications:

- OfficeMate v10.0 or above, OR OfficeMate Enterprise v2.0.43 or above
- eWeb*Extra*

Opening the OfficeMate Integration Home

The eWeb*Extra* OfficeMate Integration is set up from the OfficeMate Integration Home.

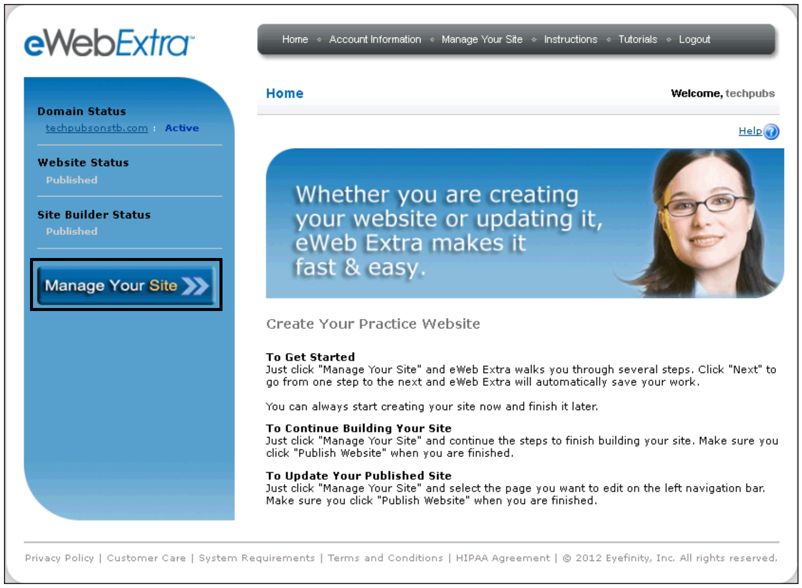
To open the OfficeMate Integration Home, follow the instructions below:

NOTE	After you install the Patient Info Inbox, you can access the OfficeMate Integration Home from the Inbox. For more information, go to "Opening the OfficeMate Integration Home from the Patient Info Inbox" on page 15.

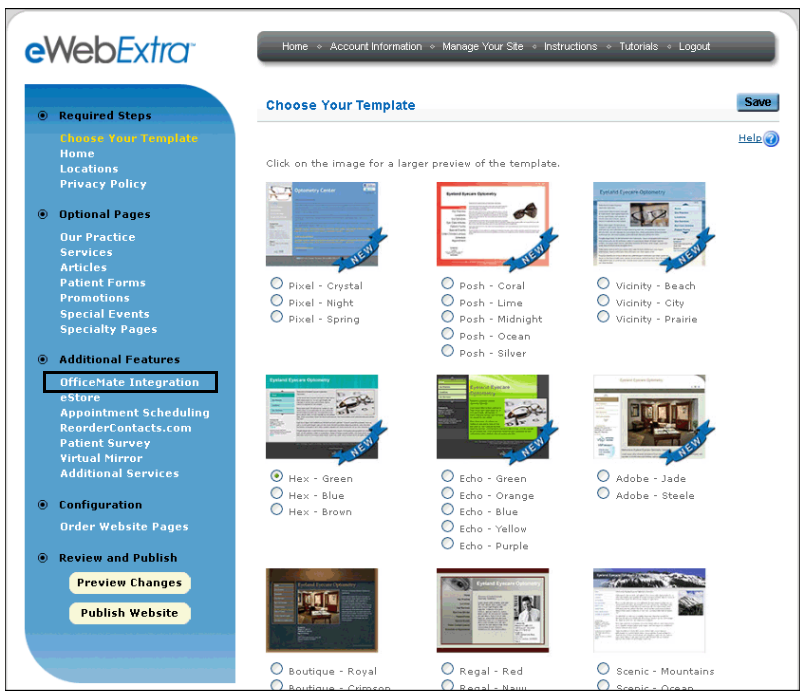
1. In a web browser, log in to http://www.eyefinity.com with your Eyefinity user ID and password.
2. Click the **eWEB** tab on the Eyefinity home page.
3. Click **Manage Your Site**.

Your eWeb*Extra* home page opens.

4. Click **Manage Your Site**.



5. Click **OfficeMate Integration**.



One of the following occurs:

– If you are registered for the eWeb*Extra* OfficeMate Integration but have not set up the integration yet, the OfficeMate Integration page opens and displays a graphic of an exclamation mark.

– If you are not registered for the eWeb*Extra* OfficeMate Integration yet, the page displays the text “Coming Soon.”

– If you have already published the eWeb*Extra* OfficeMate Integration, a graphic of a green check mark appears.

6. Click **Set Up eWeb***Extra* OfficeMate Integration.

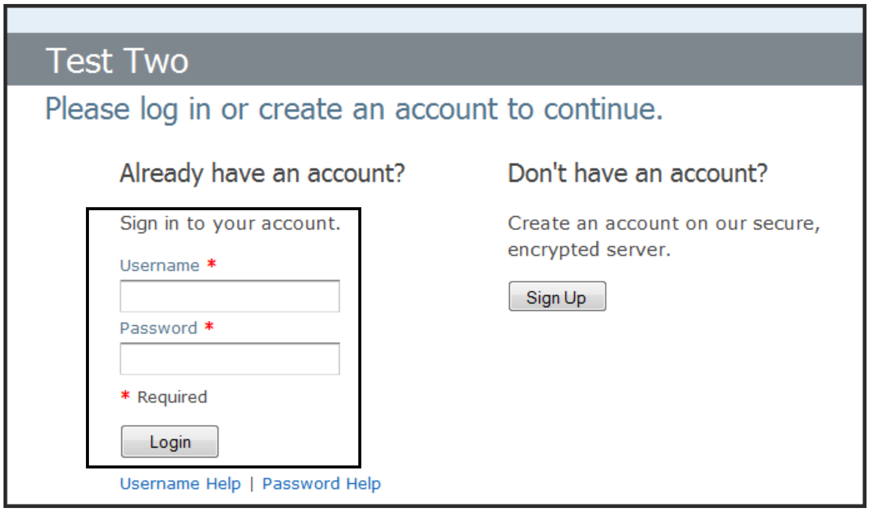
   OR

   If you have already published the eWeb*Extra* OfficeMate Integration, click **Update**.

The login page for the OfficeMate Integration Home opens.

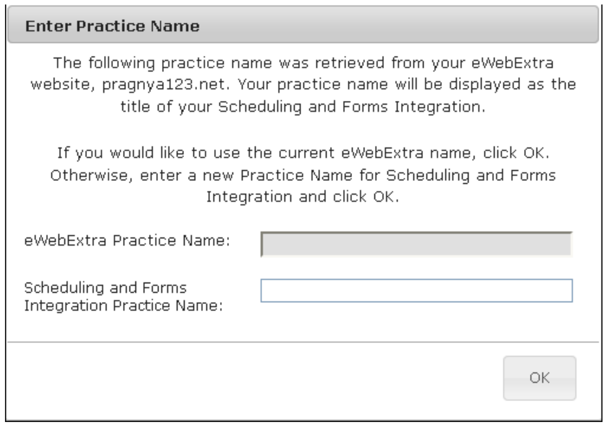
NOTE	Eyefinity recommends that you bookmark the login page so that you can access the OfficeMate Integration Home more quickly in the future.

7. Type your eWeb*Extra* OfficeMate Integration **Username** and **Password** and then click **Login**.

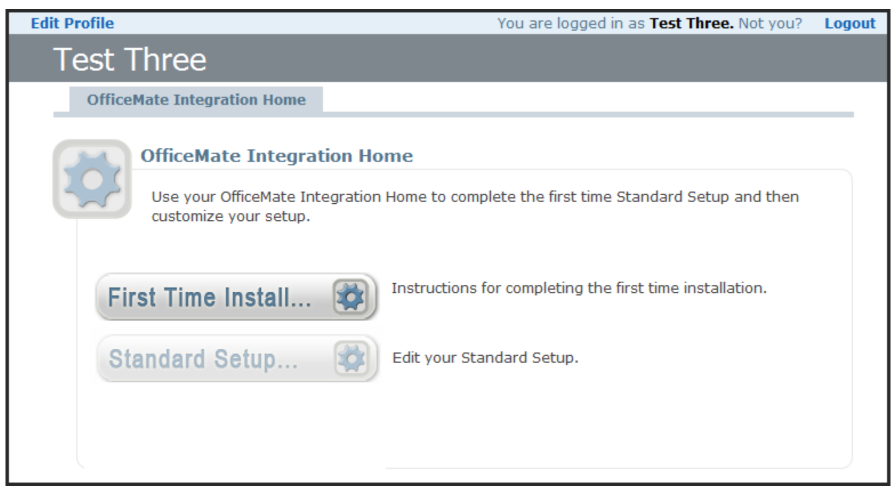


The OfficeMate Integration Home page opens. The first time that you open the OfficeMate Integration Home, the site prompts you to select your practice name as you would like it to appear on your eWeb*Extra* website when patients request appointments or submit forms.

8. To set up your practice name for the first time, perform one of the tasks below:
   – If you would like to keep your current eWeb*Extra* name, click **OK**.
   – If you would like to change your practice name, type the new name in the **Scheduling and Forms Integration Practice Name** text box and click **OK**.



You are now ready to start setting up the eWeb*Extra* OfficeMate Integration.



Setting Up the eWeb*Extra* OfficeMate Integration

2

In this chapter:

This chapter explains how to set up the eWeb*Extra* OfficeMate Integration.

eWeb*Extra* OfficeMate Integration Setup Overview

The OfficeMate Integration Home allows you to control which providers, locations, and reasons for visit are visible to a patient when the patient requests appointments or fills out forms on your eWeb*Extra* website. It also allows you to specify which insurance carriers are supported by those locations and providers.

Setting up the eWeb*Extra* OfficeMate Integration consists of the following steps:

1. Connecting the Patient Info Inbox to OfficeMate. This step includes:
    a. Installing 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 eWeb*Extra* OfficeMate Integration with provider availability.

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

    b. Installing the Patient Info Inbox on all the OfficeMate workstations you will use for scheduling. The Patient Info Inbox application uploads your providers and offices to the eWeb*Extra* OfficeMate Integration.
2. Setting up and publishing the standard schedule and patient forms. In a few moments after publishing, two navigation links appear on your eWeb*Extra* site: Appointment Request and Patient Forms. Patients can click these links to submit appointment requests and patient forms online.

3. Completing the advanced settings, which includes:
   - Setting up practice locations.
   - Setting up reasons for visits.
   - Setting up and assigning insurance carrier schedule categories.
   - Setting up and assigning schedule templates.
   - Setting up e-mail notification addresses.

NOTE	You do not need to complete all of the setup steps at once. The OfficeMate Integration Home saves all completed changes.

Connecting the Patient Info Inbox to OfficeMate

This section tells you how to install the Schedule Sync and Patient Info Inbox applications so that OfficeMate and the Patient Info Inbox can exchange data.

Installing the Schedule Sync Application

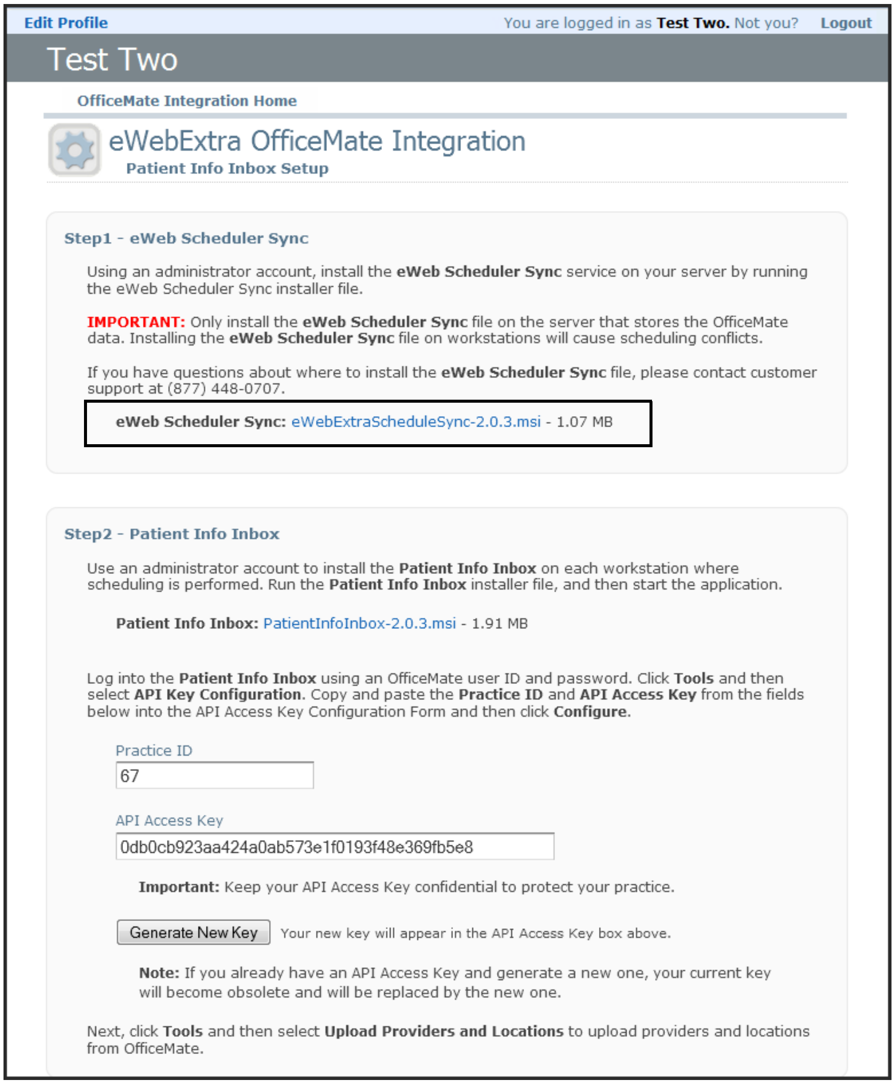
This section tells you how to set up the Schedule Sync application. The Schedule Sync application is a program that runs in the background and syncs the schedule on your eWeb*Extra* website with the OfficeMate Appointment Scheduler every ten minutes.

All changes made to the availability of providers and locations in OfficeMate is reflected in your online schedule on your eWeb*Extra* site after the eWeb*Extra* OfficeMate Integration is published. The Schedule Sync application prevents patients from requesting appointments for time slots that are unavailable.

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

To install the Schedule Sync application on the server, follow the instructions below:

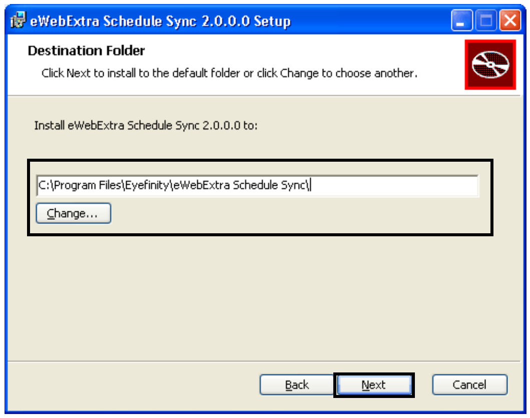
1. From the OfficeMate Integration Home page, click **First Time Install**.
2. On the Patient Info Inbox Setup page, click the **eWeb Scheduler Sync** hyperlink and save the Windows installer package to the server.



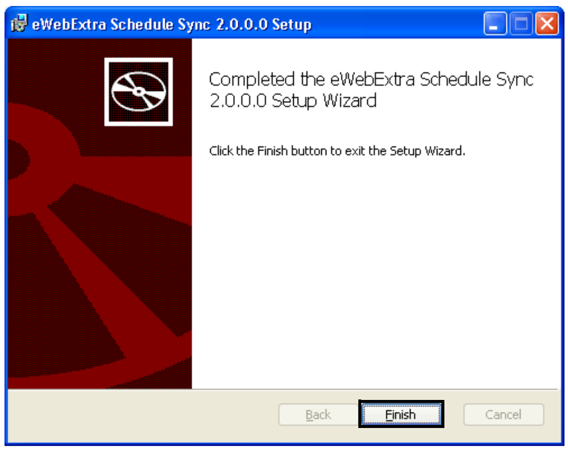
3. Run the eWeb Schedule Sync file you downloaded in the previous step.

   The eWeb*Extra* Schedule Sync Setup Wizard opens.
4. Click **Next**.
5. Install the Schedule Sync in this folder: **C:\Program Files\Eyefinity\eWebExtra Schedule Sync**.

6. Click **Next** and follow all the instructions in the wizard to install the Schedule Sync application.



7. After the installation is complete, click **Finish** to exit the wizard.



The Schedule Sync application is now running on your server and will continuously sync the availability of providers and locations in the OfficeMate Scheduler with your online schedule on your eWeb*Extra* site after the eWeb*Extra* OfficeMate Integration is published.

8. To proceed with setting up the Patient Info Inbox, go to “Installing the Patient Info Inbox” on page 11.

Installing the Patient Info Inbox

The Patient Info Inbox is the application that receives and displays notifications of patient appointment requests and patient forms. You can set up as many Patient Info Inboxes as needed.

NOTES	
	• You must install the Patient Info Inbox on the same computer that has OfficeMate installed. • After installing the Patient Info Inbox, you can add it to the Add-Ins drop-down menu in OfficeMate. For more information on setting up add-ins, see the *OfficeMate User's Guide*.

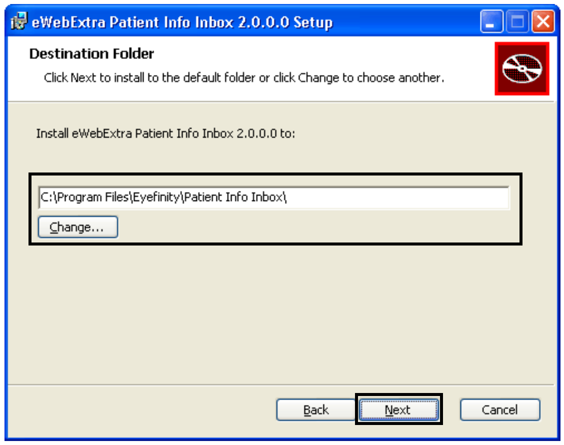
To install the Patient Info Inbox, follow the instructions below:

1. On the Patient Info Inbox Setup page, click the **Patient Info Inbox** hyperlink and save the Windows installer package to your computer.

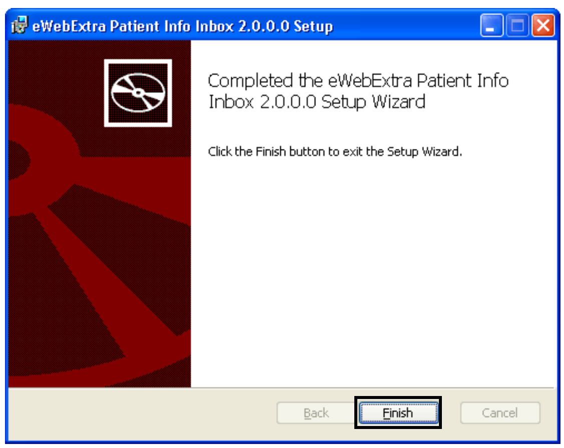
2. Run the Patient Info Inbox file you downloaded in the previous step.

   The eWeb*Extra* Patient Info Inbox Setup Wizard opens.

3. Click **Next**.
4. Install the Patient Info Inbox in this folder: **C:\Program Files\Eyefinity\Patient Info Inbox**.
5. Click **Next** and follow all the instructions in the wizard to install the Patient Info Inbox.



6. After the installation is complete, click **Finish** to exit the wizard.



7. To proceed with setting up the eWeb*Extra* OfficeMate Integration, go to "Connecting the Patient Info Inbox to OfficeMate" on page 13.

Connecting the Patient Info Inbox to OfficeMate

The Patient Info Inbox requires a database connection with OfficeMate in order to be able to share information about patients, locations, schedules, and providers. You establish the connection with a Practice ID and API Access Key.

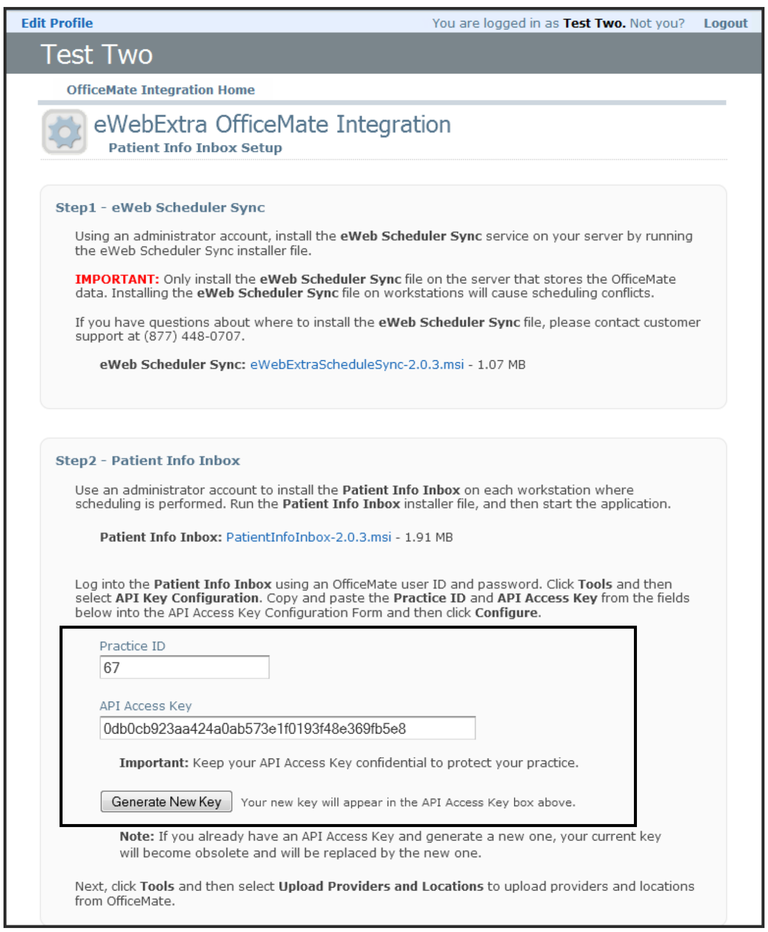
Any providers and locations that you want to be visible to a patient when the patient requests appointments or fills out forms on your eWeb*Extra* website must first be set up in OfficeMate.

To connect OfficeMate to the Patient Info Inbox, follow the instructions below:

NOTE	Repeat this procedure for each Patient Info Inbox you are running.

1. On the Patient Info Inbox Setup page, locate the **Practice ID** and **API Access Key**. Copy or write down this information.

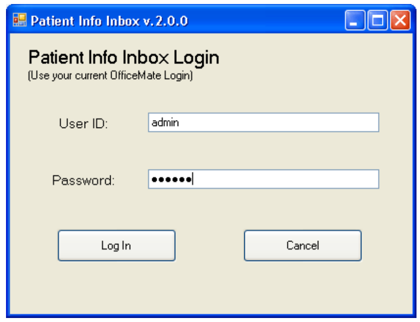
NOTE	If you think that security has been compromised, or you want a new API Access Key, click **Generate New Key** and your new key will appear in the API Access Key field.



2. Open the Patient Info Inbox by clicking the Windows **Start** button, selecting **All Programs**, and selecting **Patient Info Inbox**.

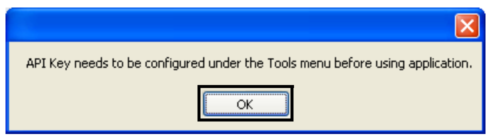
   The Patient Info Inbox Login window opens.

3. Type your OfficeMate user ID and password in the **User ID** and **Password** text boxes and click **Log In**.



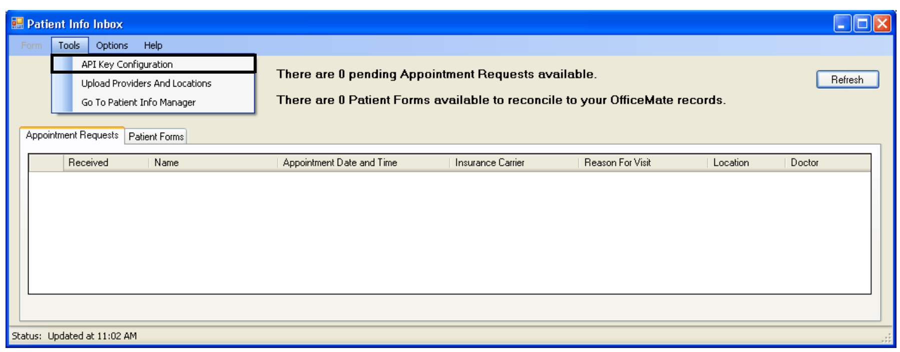
If you are logging in for the first time, a dialog box appears, notifying you that the API Key needs to be configured.

4. Click **OK** to close the dialog box.



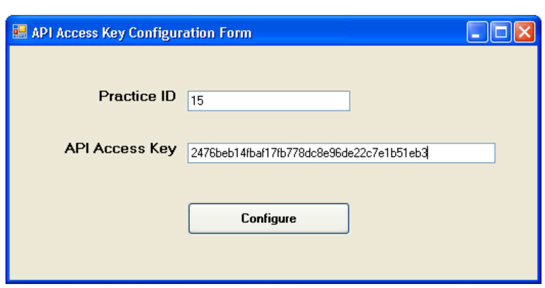
The Patient Info Inbox opens.

5. From the Patient Info Inbox window, click **Tools** and select **API Key Configuration**.



The API Access Key Configuration Form page opens.

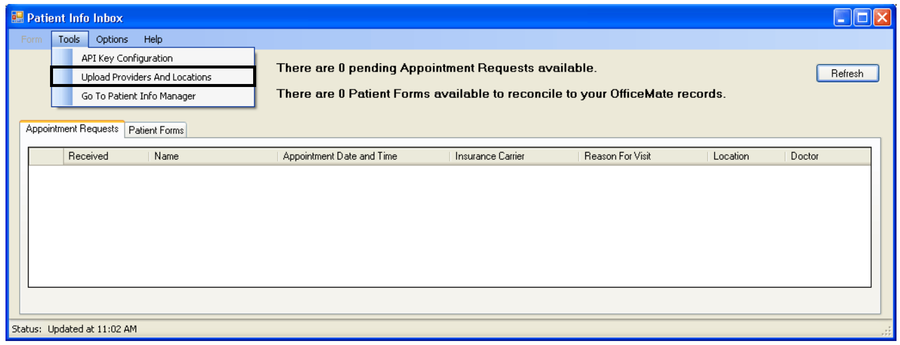
6. Paste or type the **Practice ID** and **API Access Key** values that you copied in step 1 into the corresponding text boxes on the API Access Key Configuration Form page.
7. Click **Configure**.



The Patient Info Inbox and OfficeMate are now configured to exchange data with each other.

8. From the Patient Info Inbox window, click **Tools** and select **Upload Providers and Locations**.

NOTE	Repeat this step each time you change providers or locations in OfficeMate.



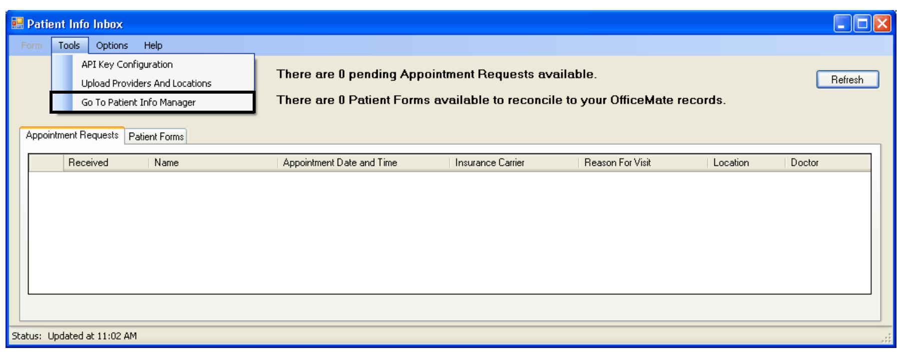
A dialog box opens confirming that Providers and Locations are updated.

9. Click **OK** to close the dialog box.

Opening the OfficeMate Integration Home from the Patient Info Inbox

After you install the Patient Info Inbox, you can open the OfficeMate Integration Home directly from the Patient Info Inbox.

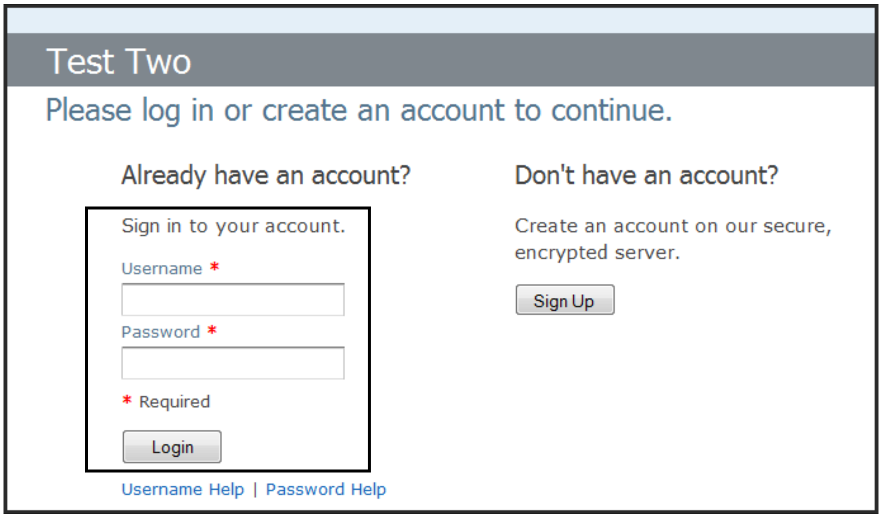
1. Open the Patient Info Inbox.
2. Click **Tools** and select **Go to OfficeMate Integration Home**.



The OfficeMate Integration Home login page opens.

NOTE	Eyefinity recommends that you bookmark the login page so that you can access the OfficeMate Integration Home more quickly in the future.

3. Type your eWeb*Extra* OfficeMate Integration **Username** and **Password** and click **Login**.



The OfficeMate Integration Home opens.

Setting Up the Standard Schedule and Patient Forms

Once you have installed the Patient Info Inbox and eWeb Schedule Sync, you are ready to set up the standard schedule and patient forms.

1. From the OfficeMate Integration Home page, click **Standard Setup**.

   The Standard Schedule Setup page opens.

2. To include the standard schedule on the website, click the **Schedule** checkbox.

3. If you want to have patient forms available on the website, select the **Patient Forms** checkbox.

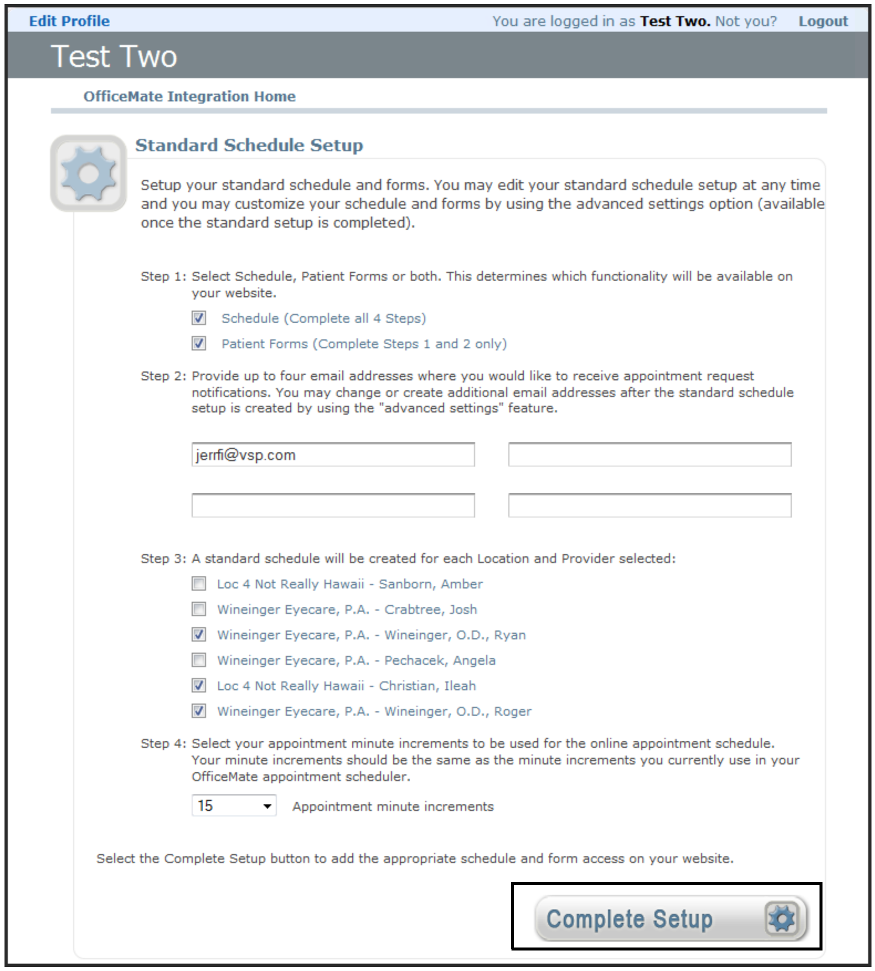
4. Provide up to four email addresses where you would like to receive appointment request notifications. You must enter at least one email address. All appointment requests are also sent to the Patient Info Inbox.

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.

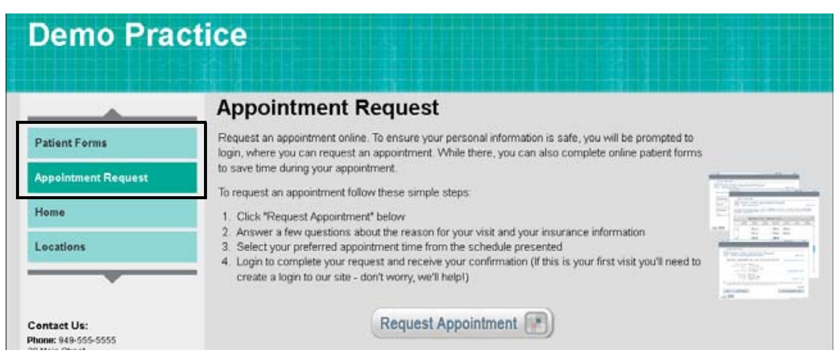
5. If you chose to include the schedule on the website, select the locations and providers that will use the standard schedule. If you did not choose to include the schedule, go to step 7.

6. Select the appointment minute increments to use on the standard schedule.

7. Click **Complete Setup** to add the standard schedule and/or patient forms to your website.



In a few moments after completing the setup, new navigation links appear on your eWeb*Extra* site: Appointment Request and/or Patient Forms. Patients can click these links to submit appointment requests and patient forms online.



8. You can change the order of the navigation links from your eWeb*Extra* Site Builder.

NOTE	After you complete the eWeb*Extra* OfficeMate Integration, be sure to update the Patient Info Inbox, as needed.

Completing the Advanced Settings

After you have completed the standard setup, you can click the **Advanced Settings** links to set up additional eWeb*Extra* OfficeMate Integration features.

- Setting Up Practice Locations, 18
- Setting Up Reasons for Visit, 20
- Setting Up Insurance Carrier Schedule Categories, 23
- Setting Up and Assigning Schedule Templates, 27
- Setting Up E-mail Notification Addresses, 36

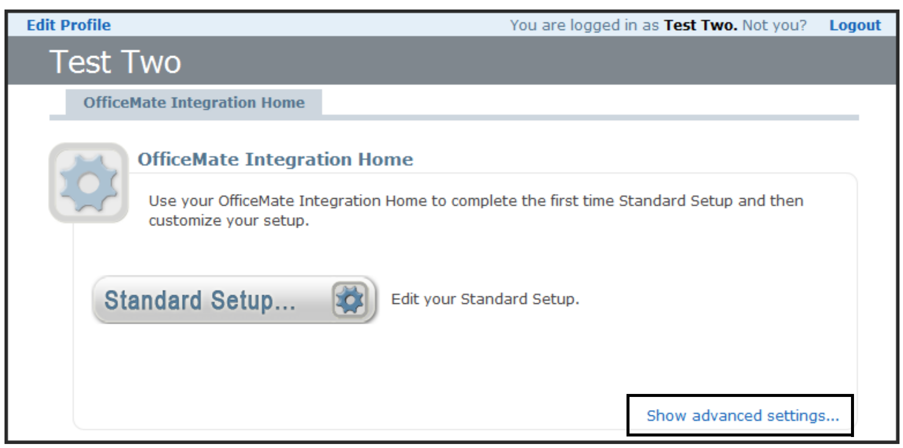
Setting Up Practice Locations

This section tells you how to set up the office locations that you uploaded from OfficeMate so that they display correctly when a patient requests appointments or fills out forms on your eWebExtra website.

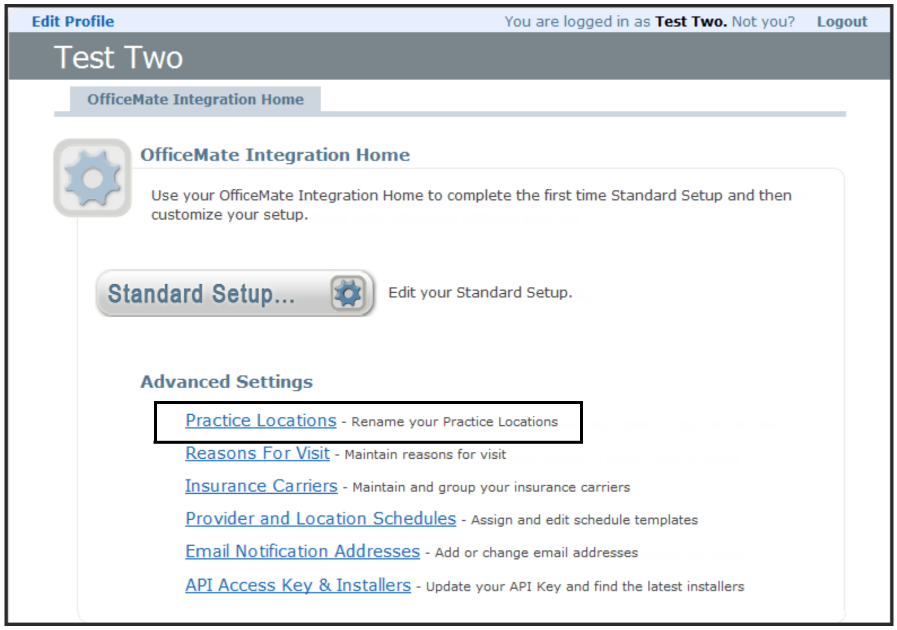
NOTE	If you add or remove offices from OfficeMate, update the Patient Info Inbox with the current offices. For more information on updating offices, go to "Connecting the Patient Info Inbox to OfficeMate" on page 13.

Follow the instructions below to set up office locations for the eWeb*Extra* OfficeMate Integration:

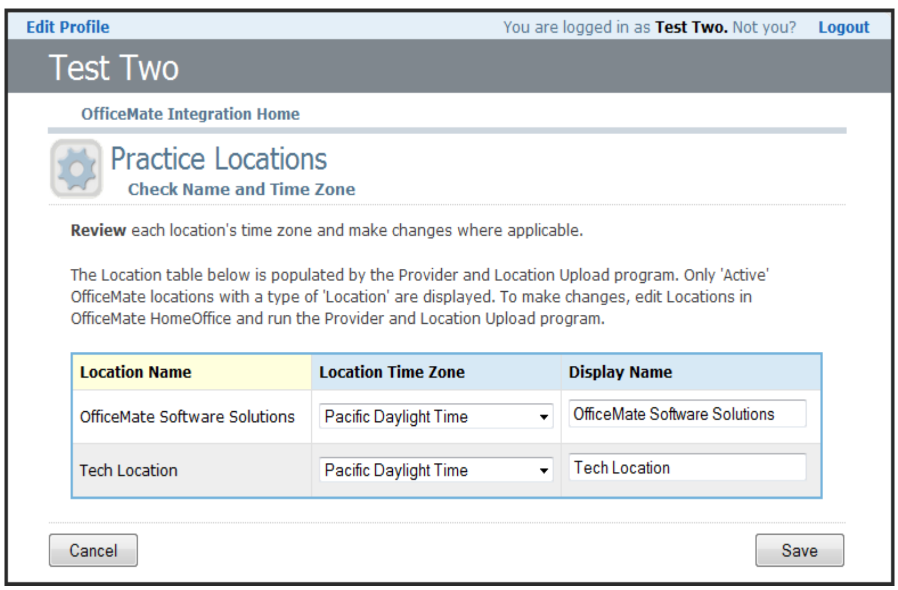
1. From the OfficeMate Integration Home page, click the **Show advanced settings...** hyperlink.



2. Click the **Practice Locations** hyperlink.



The Practice Locations page opens.



3. For each location, select the correct time zone for that location from the **Location Time Zone** drop-down menu.

NOTE	If your server is in one time zone but an office is in another, select the time zone of the office.

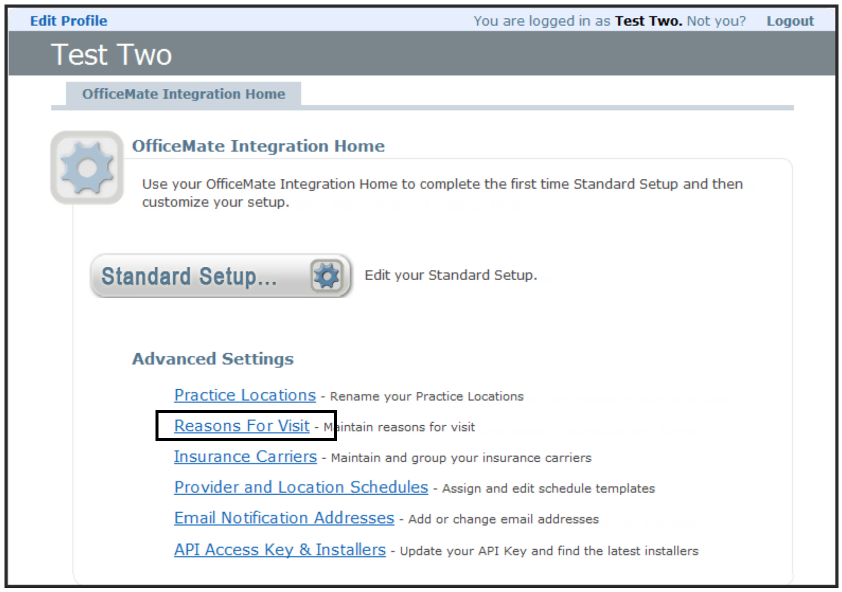
4. For each location, type the office name you want patients to see in the **Display Name** text box. This is the name that will be displayed on your eWeb*Extra* website and the Patient Info Inbox.
5. Click **Save**.

Setting Up Reasons for Visit

This section tells you how to set up Reasons for Visit. Patients choose from these reasons when requesting appointments from your eWeb*Extra* website.

To set up the Reasons for Visit, follow the instructions below:

1. From the OfficeMate Integration Home page, click the **Show advanced settings...** hyperlink.
2. Click the **Reasons for Visit** hyperlink.

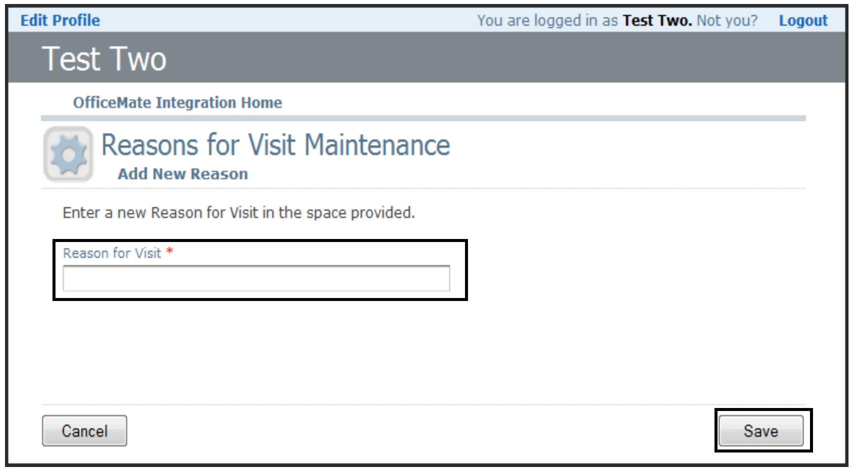


The Reasons for Visit page opens.

3. To add a new reason, perform the following steps.
   a. Click the **Add a Reason for Visit** hyperlink.

The Add New Reason page opens.

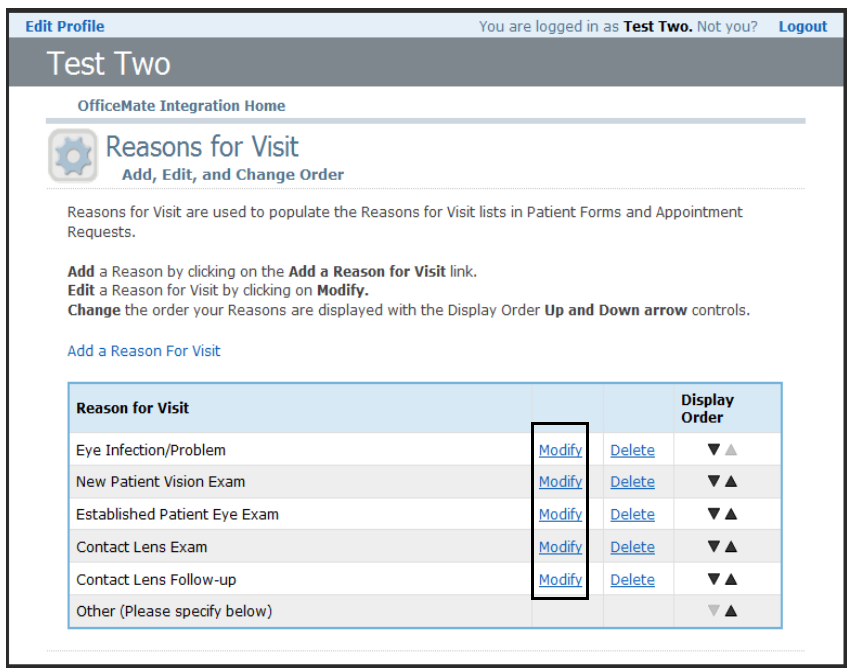
b. Type a reason in the **Reason for Visit** text box.



c. Click **Save**.

4. To change the name of a Reason for Visit, perform the following steps.

a. Click the **Modify** hyperlink next to the reason you want to modify.

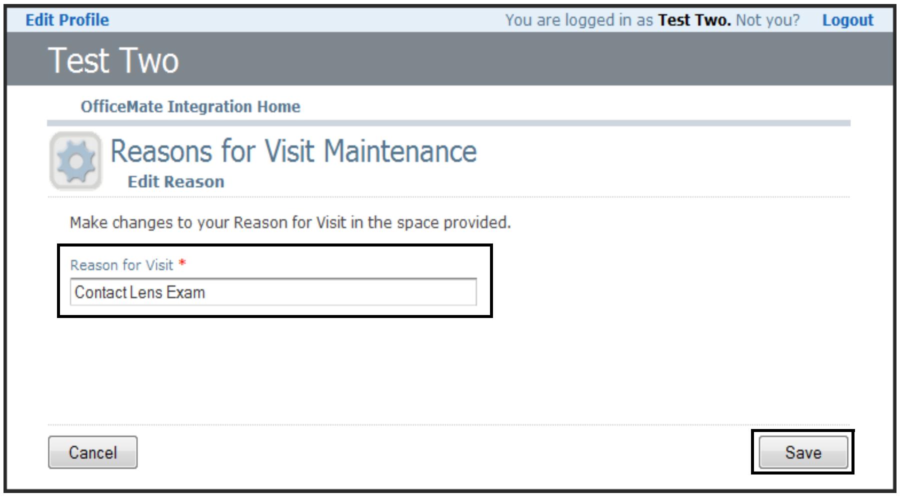


The Edit Reason page opens.

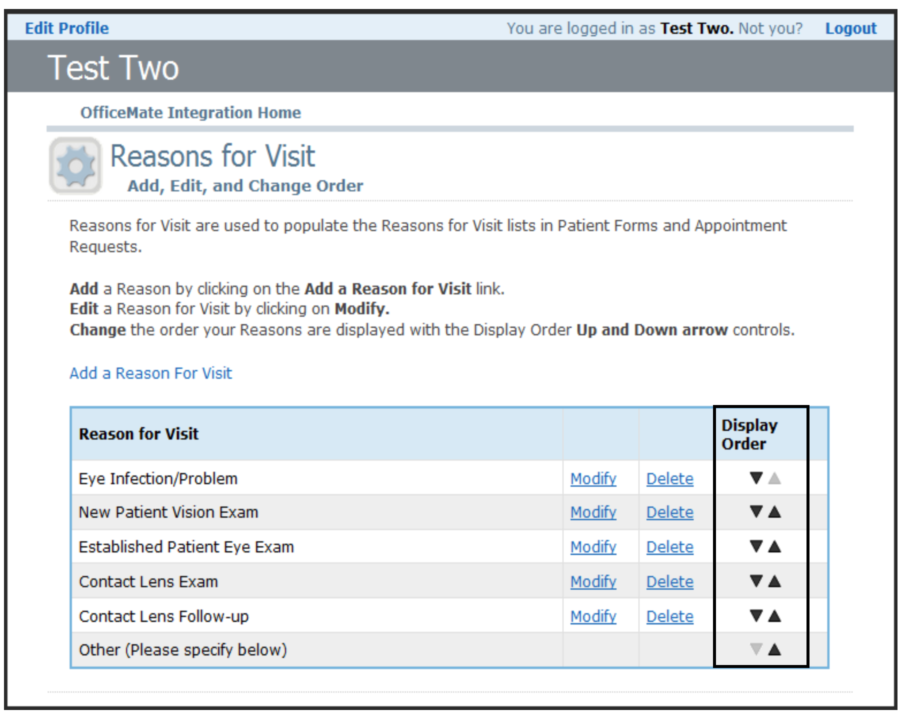
b. Type the new name in the **Reason for Visit** text box

c. Click **Save**.

> **NOTE** You cannot modify the **Other (Please specify below)** reason. When a patient requests an appointment, a blank text box displays below this reason so that the patient can type his or her own reason.



5. To change the display order, click the arrow buttons in the **Display Order** column.



Setting Up Insurance Carrier Schedule Categories

This section tells you how to set up insurance carriers so that they display correctly on your eWeb*Extra* website.

Understanding Insurance Carrier Schedule Categories

Each insurance carrier that a patient can select must be assigned to a schedule category. A schedule category determines which appointment times a patient with a specific insurance carrier sees when he or she requests an appointment.

By default, each carrier is assigned to Schedule Category 1. You can assign a different number to a specific carrier or a group of carriers. You can assign up to four schedule categories.

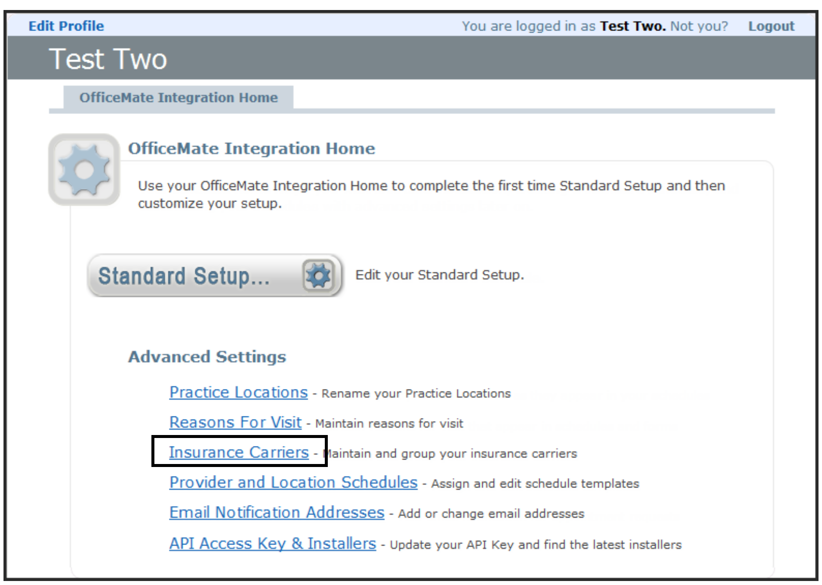
NOTES For example, if you only want patients with VSP and Medicaid to make appointments for Mondays and Tuesdays:

- Assign Category 2 to VSP and Medicaid.
- When creating a schedule template, assign Category 2 to Monday and Tuesday. For more information on creating and assigning schedule template, go to "Setting Up and Assigning Schedule Templates" on page 27.

Assigning Schedule Categories to Insurance Carriers

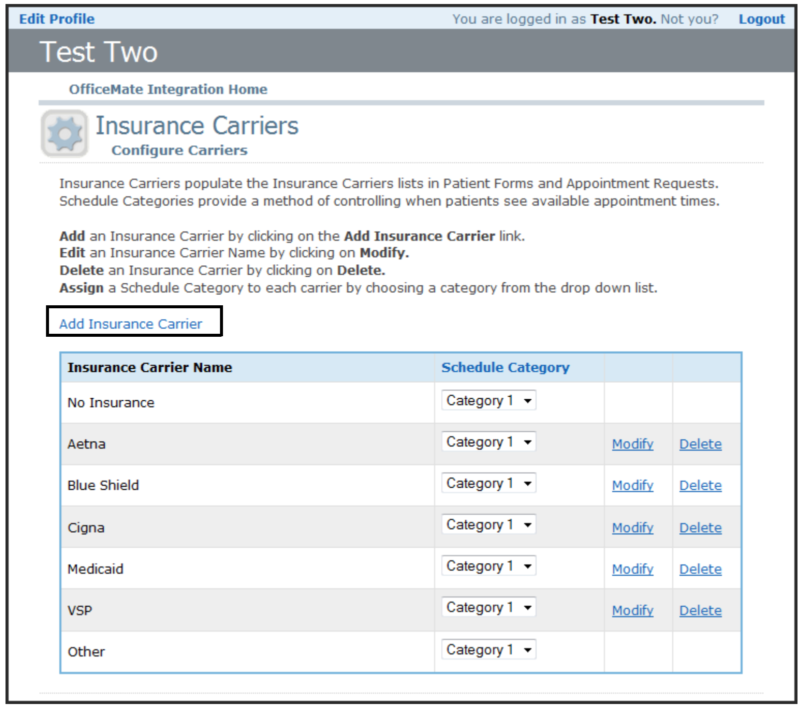
Follow the instructions below to assign schedule categories to insurance carriers:

1. From the OfficeMate Integration Home page, click the **Show advanced settings...** hyperlink.
2. Click the **Insurance Carriers** hyperlink.



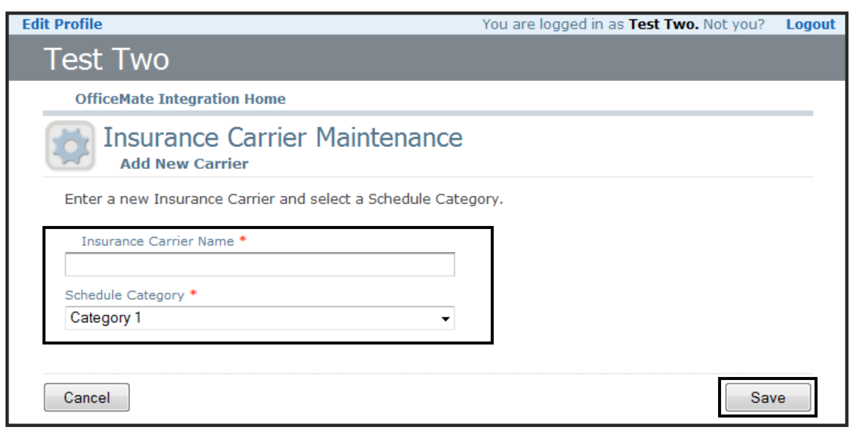
The Insurance Carriers page opens.

3. To add an insurance carrier, perform the following steps.
   a. Click the **Add Insurance Carrier** hyperlink.

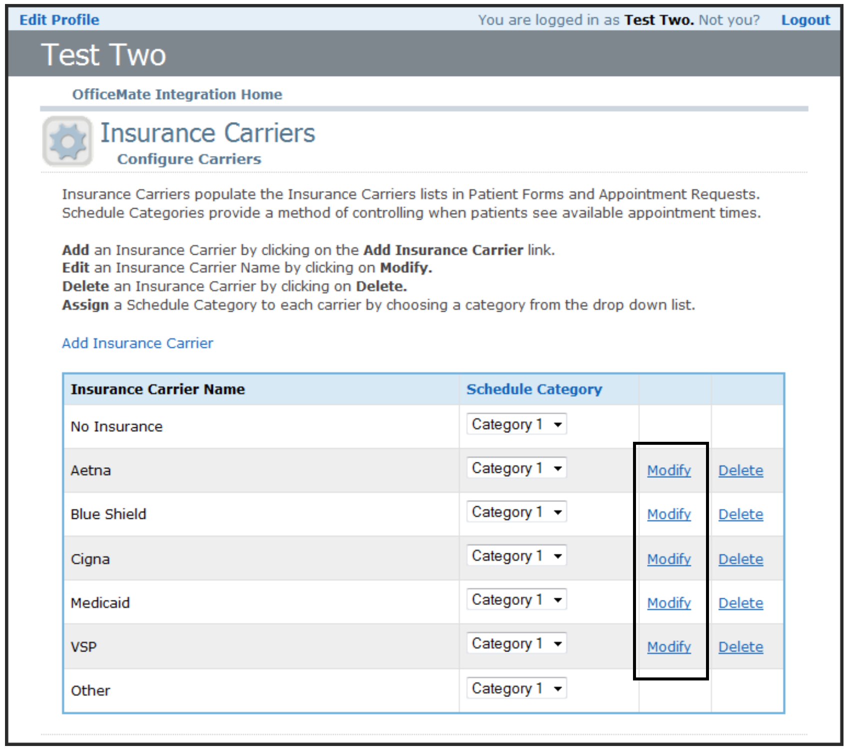


   The Add New Carrier page opens.

   b. Type the insurance carrier name in the **Insurance Carrier Name** text box.
   c. Select a category from the **Schedule Category** drop-down menu.
   d. Click **Save**.

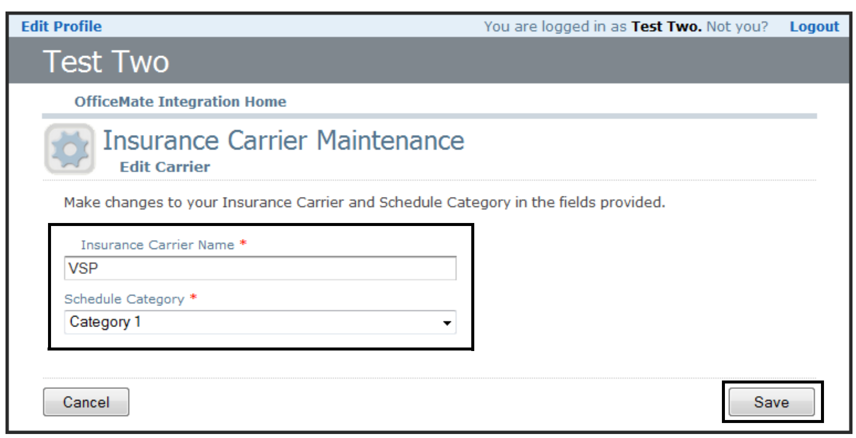


4. To modify an insurance carrier, perform the following steps.
   a. Click the **Modify** hyperlink next to the carrier you want to modify.

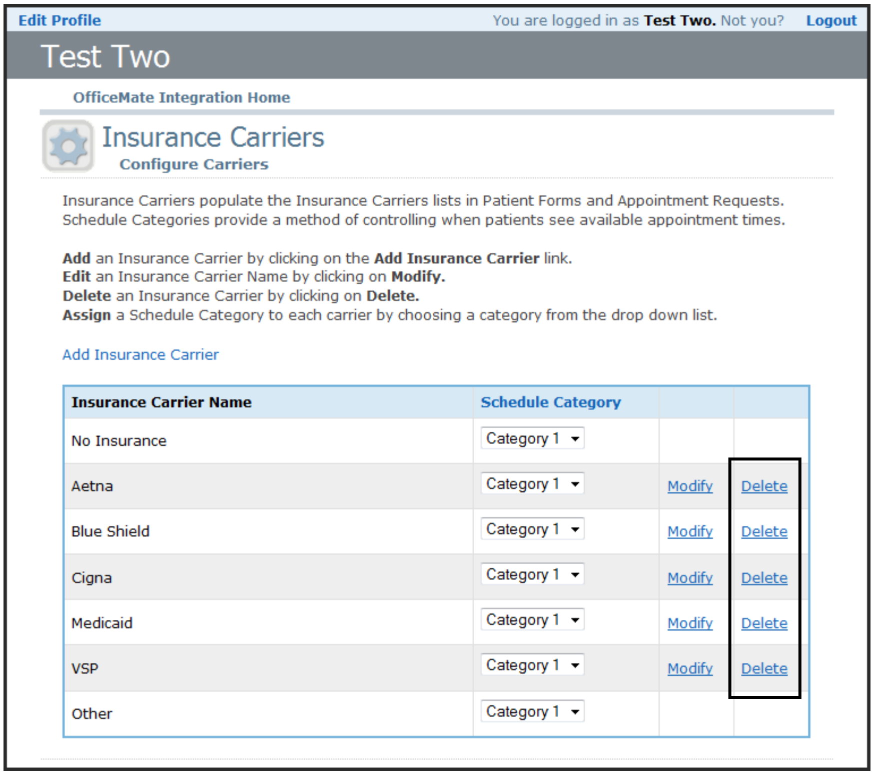


   The Edit Carrier page opens.

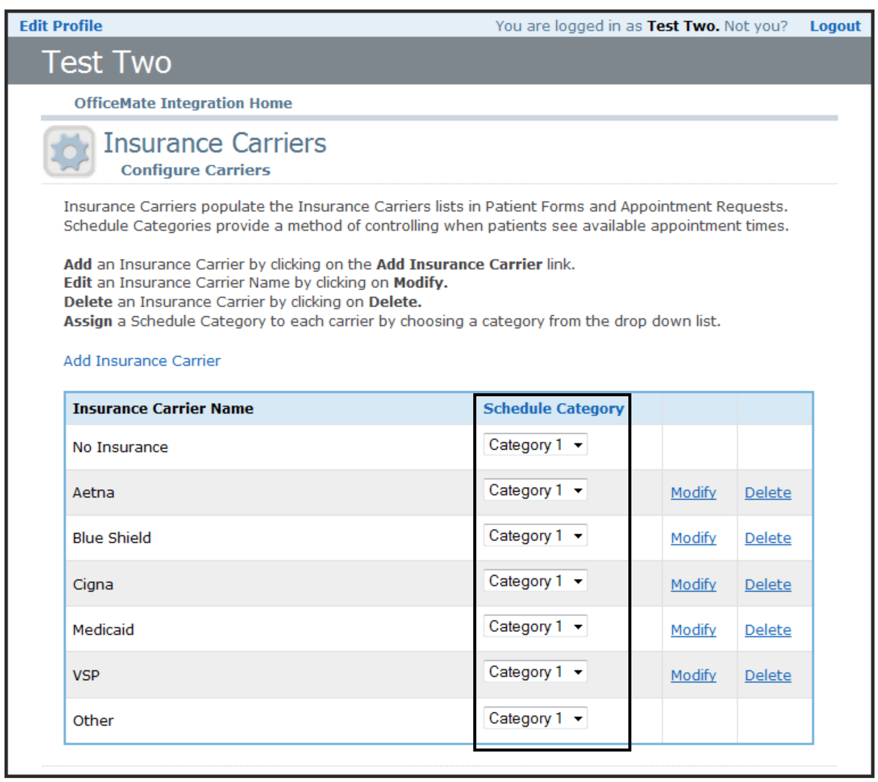
   b. Type the new name in the **Insurance Carrier Name** text box.
   c. Select a category from the **Schedule Category** drop-down menu.
   d. Click **Save**.



5. To delete an insurance carrier, click the **Delete** hyperlink next to the carrier you want to delete.



6. To assign a Schedule Category to an insurance carrier, select the category from the **Schedule Category** drop-down menu next to the carrier.



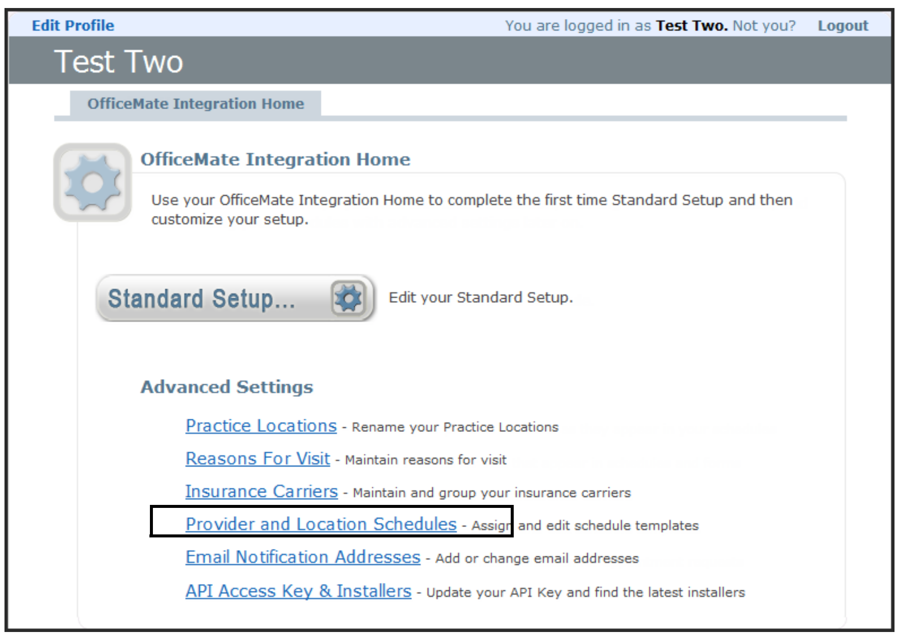
Setting Up and Assigning Schedule Templates

This section tells you how to set up provider and location schedules that are displayed to patients on your eWeb*Extra* website.

NOTE	To display the correct schedules on your eWeb*Extra* website, make sure that all locations, providers, and provider schedules are set up correctly in OfficeMate.

Opening the Provider and Location Schedules Page

1. From the OfficeMate Integration Home page, click the **Show advanced settings...** hyperlink.
2. Click the **Provider and Location Schedules** hyperlink.



The Provider and Location Schedules page opens.

Assigning and Publishing Schedule Templates

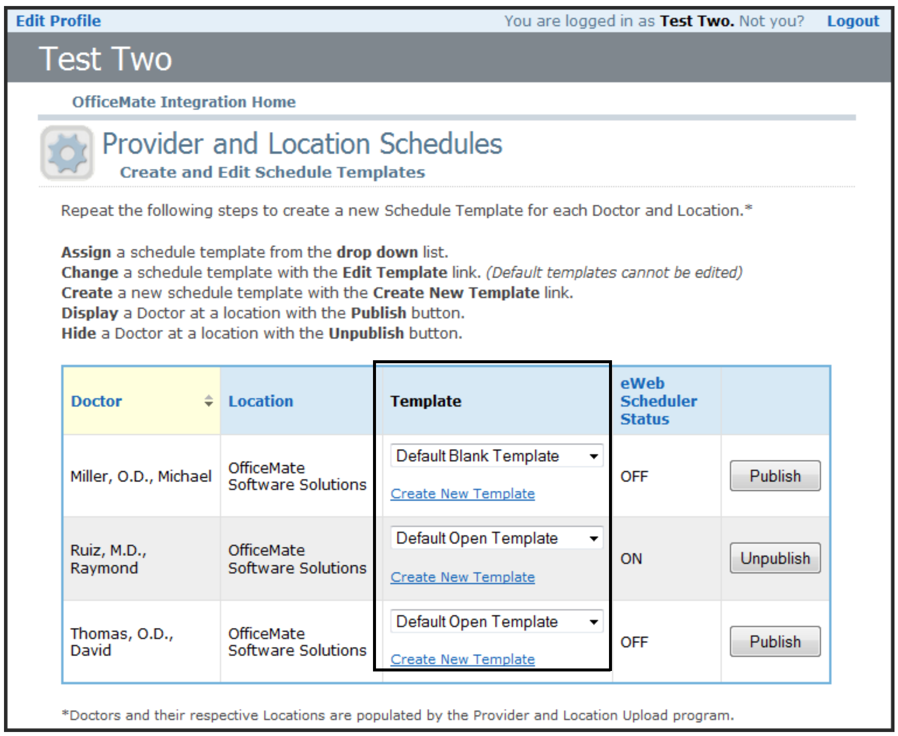
You need to assign a schedule template to each provider that practices at each location that you want available to patients online. You can use the pre-loaded templates, or you can create and assign your own templates.

Each schedule template determines when a patient can schedule appointments based on his or her insurance and reason for the appointment.

Follow the instructions below to assign a template to each provider at each location:

1. Open the Provider and Location Schedules page. For more information on opening the page, go to "Opening the Provider and Location Schedules Page" on page 27.
2. For each row, select a template from the **Template** drop-down menu.

NOTE	If you do not see a template you want, you can create a new template or modify an existing one. For more information on creating new templates, go to "Creating a New Schedule Template" on page 29. For more information on modifying a schedule template, go to "Modifying an Existing Schedule Template" on page 30.



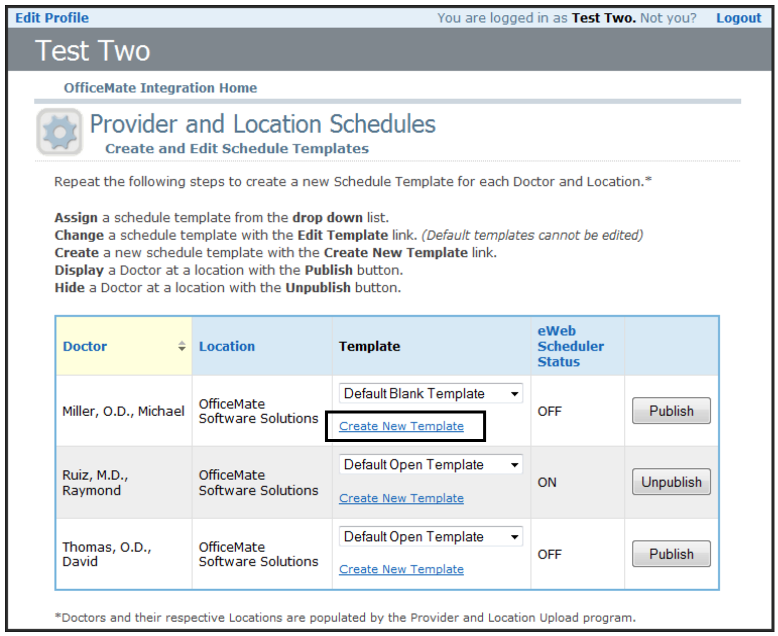
3. Click **Publish** to publish a provider's schedule at a location on your eWeb*Extra* website. This schedule will be available online after you publish the eWeb*Extra* OfficeMate Integration. For more information on publishing the eWeb*Extra* OfficeMate Integration, go to "Setting Up the Standard Schedule and Patient Forms" on page 16.

NOTE	To remove a provider's schedule, click **Unpublish** next to the schedule you want to remove.

Creating a New Schedule Template

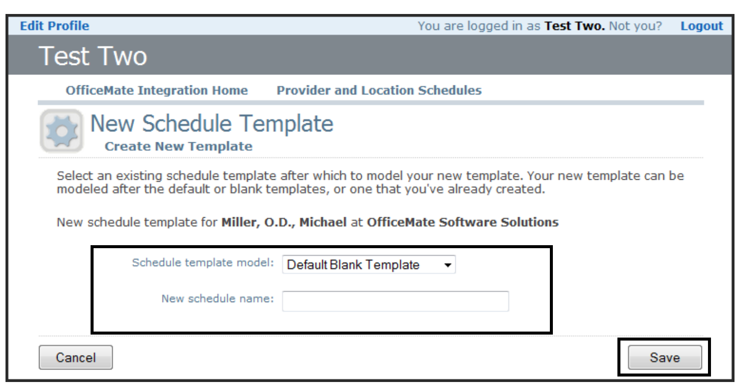
You may want to create a new and uniquely-named template for each provider and location combination that requires a unique schedule. You create a new schedule template by basing it on an existing template. You can use any existing template as a base template.

1. Open the Provider and Location Schedules page. For more information on opening the page, go to "Opening the Provider and Location Schedules Page" on page 27.
2. Click the **Create New Template** hyperlink in the Template column for the provider and location for which you want to create the template.



The New Schedule Template page opens.

3. Select a template to base the new template on from the **Schedule template model** drop-down menu.
4. Type a name for the new template in the **New schedule name** text box.
5. Click **Save**.

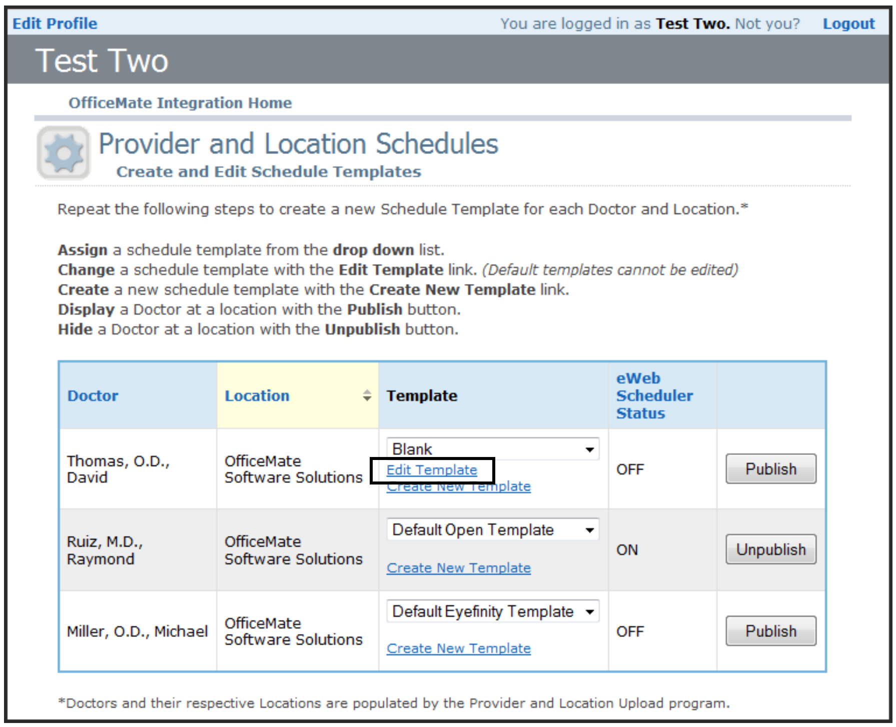


The new template is assigned to the provider and location for which you created the template. The new template name also appears in the Template drop-down menu for all providers at all locations.

Modifying an Existing Schedule Template

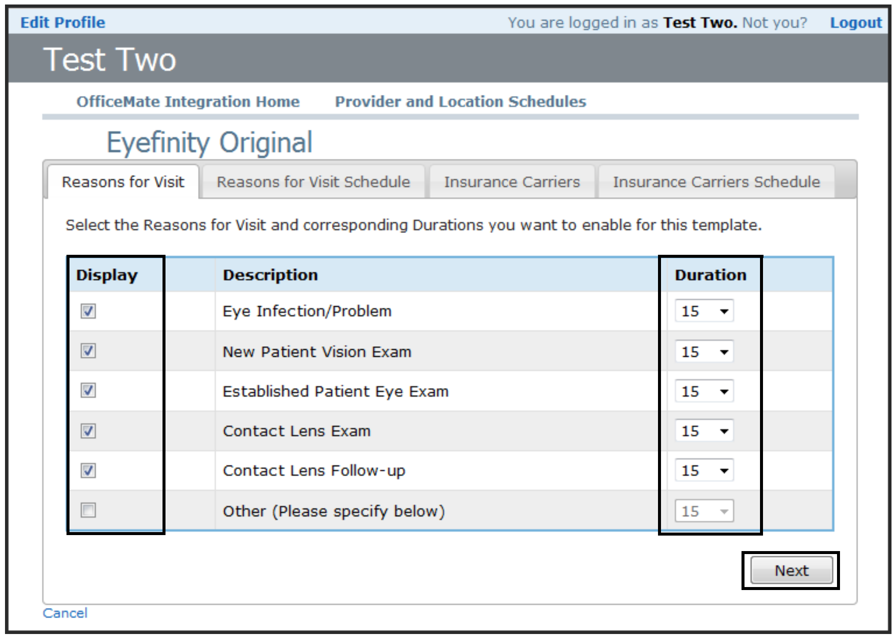
Modifying a template modifies that template for all providers and locations to which the template is applied. You may want to create a new and uniquely-named template for each provider and location combination that requires a unique schedule.

1. Open the Provider and Location Schedules page. For more information on opening the page, go to "Opening the Provider and Location Schedules Page" on page 27.
2. Select a template from the **Template** drop-down menu.
3. Click the **Edit Template** hyperlink.



The selected template opens with the Reasons for Visit tab active.

4. Select the check box in the **Display** column for each Reason for Visit you want to appear on your eWeb*Extra* website.
5. Select the duration (in minutes) allowed per appointment for each type of visit in the **Duration** column.
6. Click **Next**.



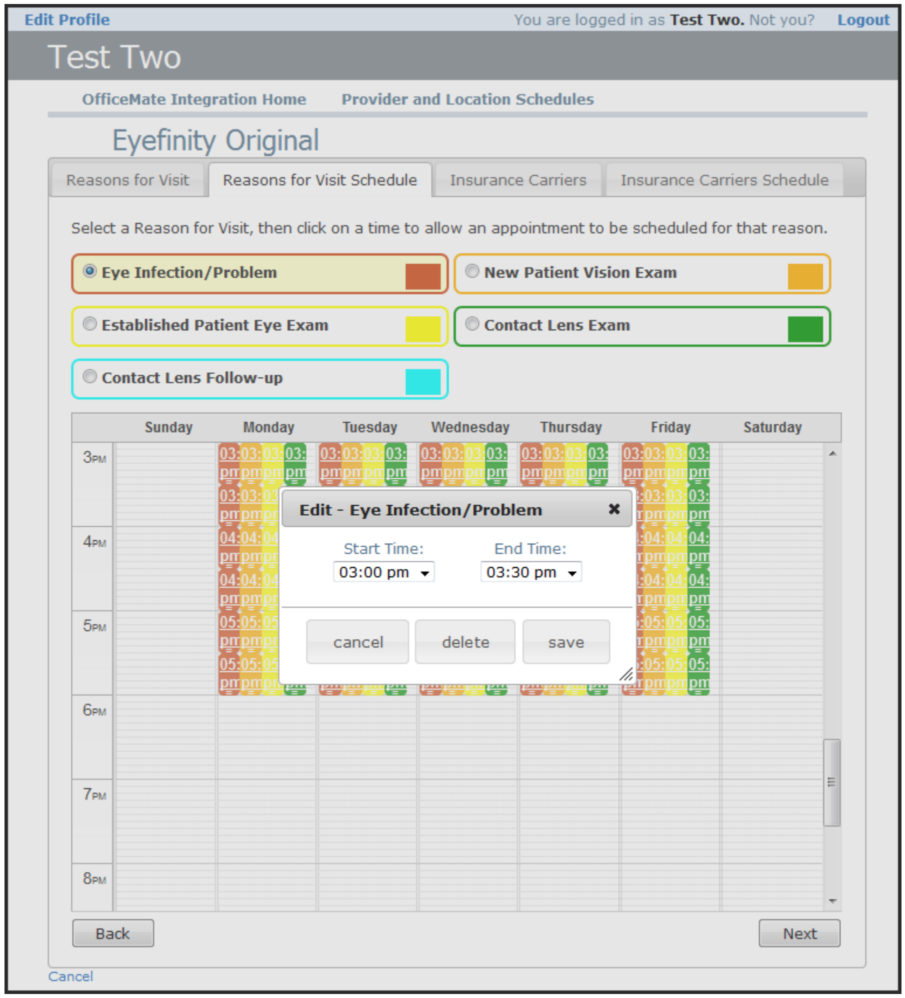
The Reasons for Visit Schedule tab opens.

7. Select the radio button for the **Reason for Visit** for which you want to create a schedule.
8. In the Appointment Scheduler, click the time slots that you want to be available for the selected Reason for Visit.

9. Repeat steps 7–8 for each Reason for Visit you want to add to the template.

NOTE	To assign a Reason for Visit during the same time slot as another Reason for Visit, click the white grid space next to the existing Reason for Visit.

10. To edit a specific Reason for Visit appointment time slot, click the time slot and modify the time slot as needed.

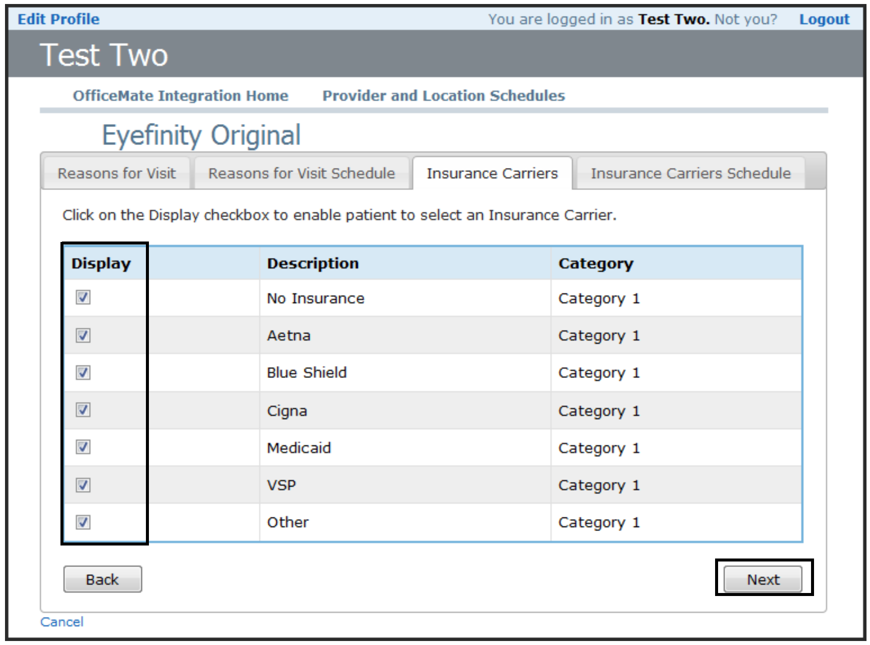


11. After scheduling all of the Reasons for Visit, Click **Next**.

    The Insurance Carriers tab opens.

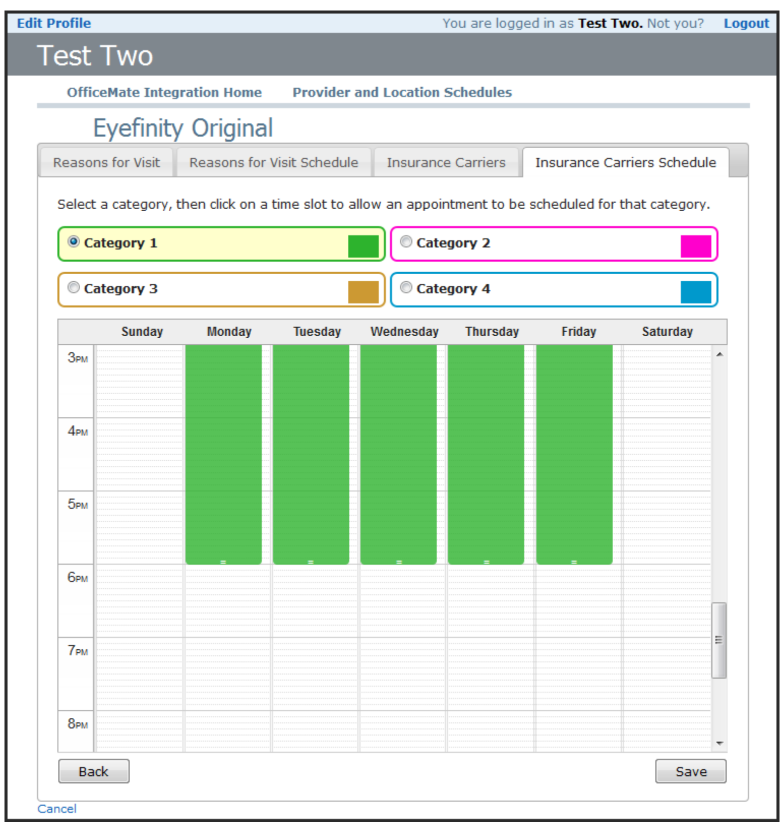
12. Select the check box in the **Display** column for each insurance carrier you want visible to a patient when the patient requests appointments or fills out forms on your eWeb*Extra* website.

13. Click **Next**.



The Insurance Carriers Schedule tab becomes active.

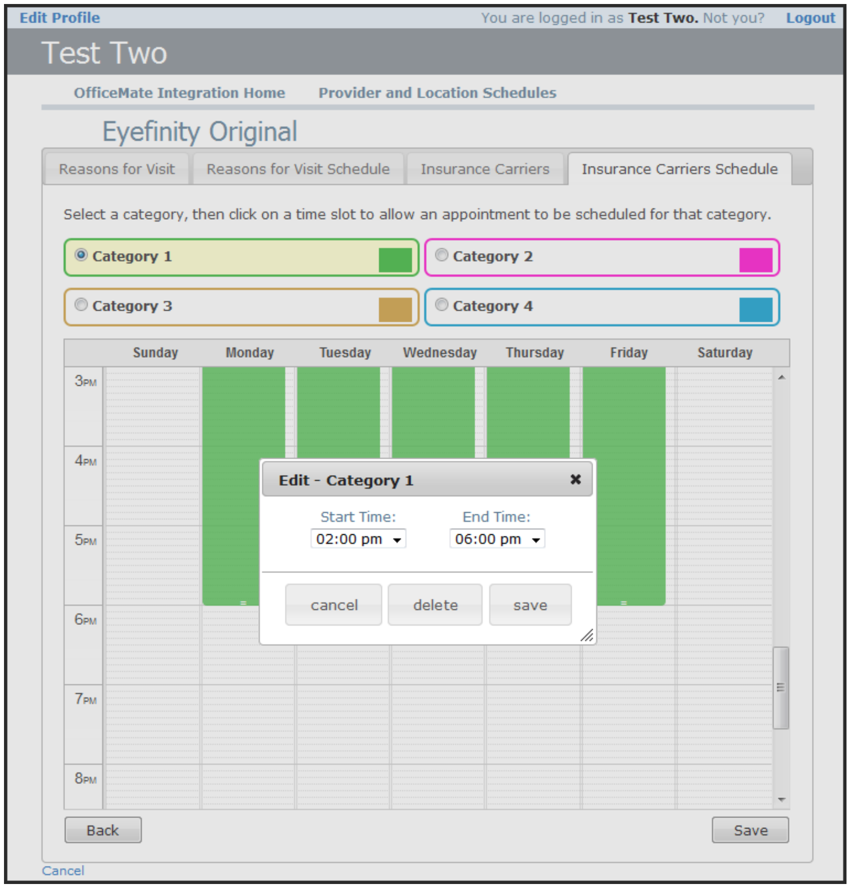
14. Select the radio button for the **Category** for which you want to create a schedule.
15. In the Appointment Scheduler, click the time slots that you want to be available for the selected Category.



16. Repeat steps 14–15 for each Category you want to add to the template.

NOTE	To assign a Category during the same time slot as another Category, click the white grid space next to the existing Category.

17. To edit a specific Category appointment time slot, click the time slot and modify the time slot as needed.



18. After scheduling all Categories, click **Save**.

    The Provider and Location Schedules page opens. If the template has already been published, the changes take effect immediately.

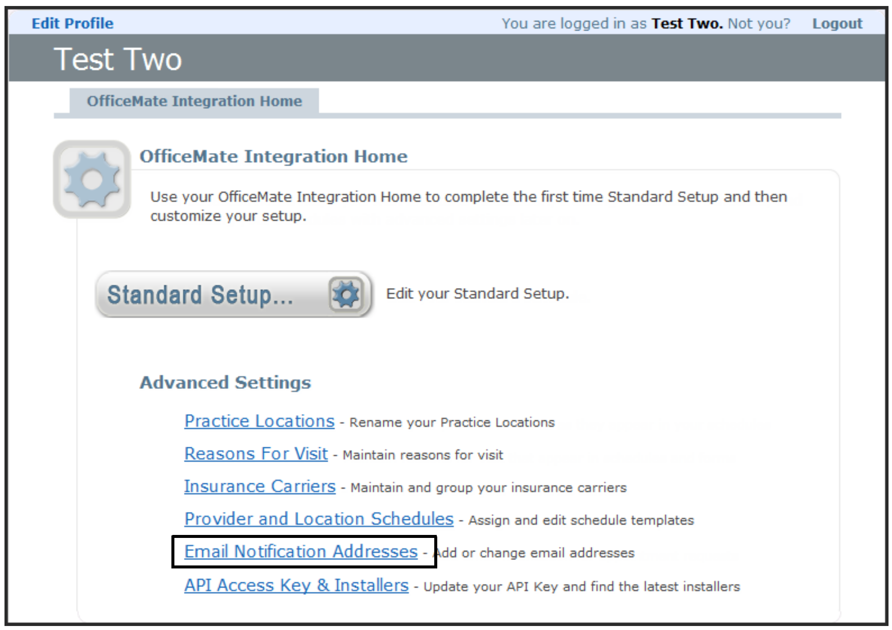
Setting Up E-mail Notification Addresses

This section tells you how to add e-mail addresses so that notifications of submitted appointment requests can be sent directly to office staff.

Adding e-mail addresses is optional. All appointment requests are sent to the Patient Info Inbox, regardless of whether e-mail addresses are set up or not.

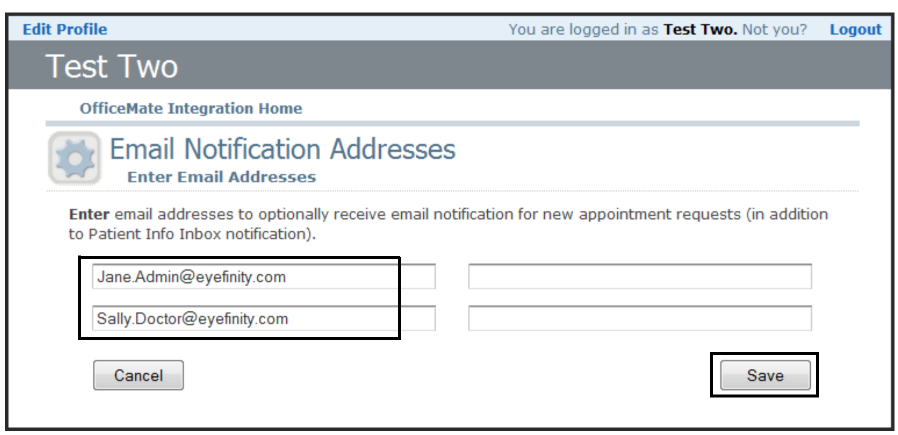
To add e-mail addresses to the eWeb*Extra* OfficeMate Integration, follow the instructions below:

1. From the OfficeMate Integration Home page, click the **Show advanced settings...** hyperlink.
2. Click the **Email Notification Addresses** hyperlink.



The Email Notification Addresses page opens.

3. Type up to ten e-mail addresses in the text boxes.
4. After adding e-mail addresses, click **Save**.



Processing Online Appointment Requests and Patient History Forms

3

In this chapter:

This chapter explains how to process appointment requests and patient forms that arrive in the Patient Info Inbox from your eWeb*Extra* website.

Patient Info Inbox Overview

After a patient submits an appointment request or fills out a form online, the Patient Info Inbox receives and displays the item in a similar way to an e-mail inbox.

Keep the following in mind when using the Patient Info Inbox:

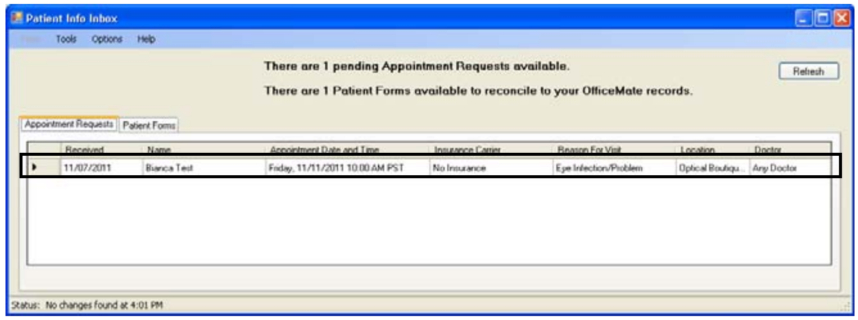
- The Patient Info Inbox displays requests and forms for *all* offices.
- Each row in the Patient Info Inbox represents an online appointment request or history form.
- The Inbox is refreshed at regular, frequent intervals. To manually refresh the list, click the **Refresh** button.
- To keep the Patient Info Inbox window on top of all other windows on your screen, click **Options**, and select **Always on Top**.
- To open the OfficeMate Integration Home, click **Tools** and select **Go to OfficeMate Integration Home**.

Processing Appointment Requests

After a patient submits an appointment request from your eWeb*Extra* website, the request appears in the Patient Info Inbox for processing. The appointment will not appear in the OfficeMate Scheduler until you process the request from the Patient Info Inbox.

To process a pending patient appointment request, follow the instructions below:

1. In the Patient Info Inbox, click the **Appointment Requests** tab.
2. Double-click the request you want to process.



   The Appointment Request for Patient window opens.

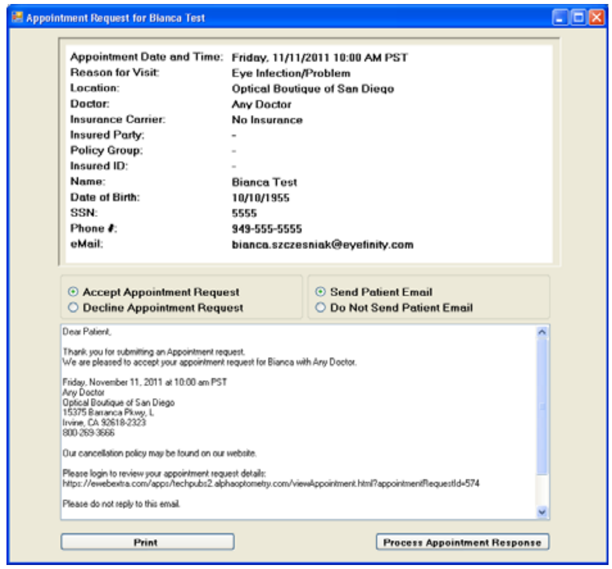
3. Review the appointment request.
4. Accept or decline the appointment by selecting the **Accept Appointment Request** or **Decline Appointment Request** radio button.
5. Choose to send or not send the patient an e-mail regarding the appointment request by selecting the **Send Patient Email** or **Do Not Send Patient Email** radio button.

   When you select **Send Patient Email**, a pane opens in the bottom half of the window with the default e-mail text that you can modify.

6. To print the appointment request details, click **Print**.
7. To schedule the appointment, record the appointment in the OfficeMate Scheduler.

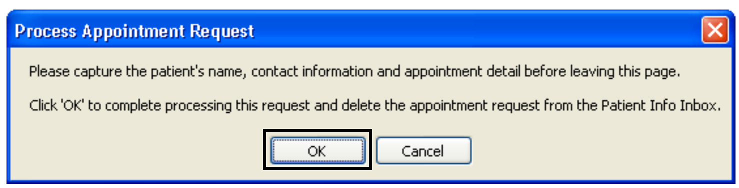
NOTE	Eyefinity recommends recording the appointment in the Scheduler *before* clicking Process Appointment Response because clicking Process Appointment Response permanently removes the request from the Patient Info Inbox.

8. Click **Process Appointment Response**.



The Process Appointment Request dialog box opens reminding you to capture or record the patient's name, contact information, and appointment details.

9. Click **OK**.



The Process Appointment Request dialog box closes. The appointment request is removed from Patient Info Inbox. If you chose to send an e-mail, the e-mail is sent to the patient.

Processing Patient History Forms

After a patient submits a form from your eWeb*Extra* site, the form appears in the Patient Info Inbox for processing. Both new and existing patients can submit a form from your practice's eWeb*Extra* site. Any new or modified patient demographic data will not appear in OfficeMate until you process the form.

This section includes the following topics:

- Patient Matching Overview, 40
- Searching for a Patient Match, 41
- Creating a New Patient, 42
- Reviewing Patient Forms, 43

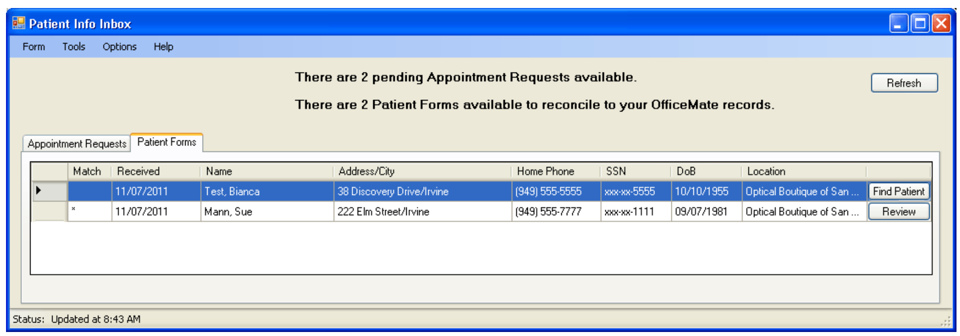
Patient Matching Overview

When a patient form arrives in the Patient Info Inbox, the eWeb*Extra* OfficeMate Integration automatically attempts to match the patient with a patient in the OfficeMate database using all of the following criteria:

- First three characters of the first name
- Entire last name
- Date of birth

If there is an exact match of all criteria, an asterisk (*) appears in the Match column and the Review button displays.

If there is no automatic match, the Match column is blank and the Find Patient Button displays.



This flowchart illustrates the process of matching forms to patients:

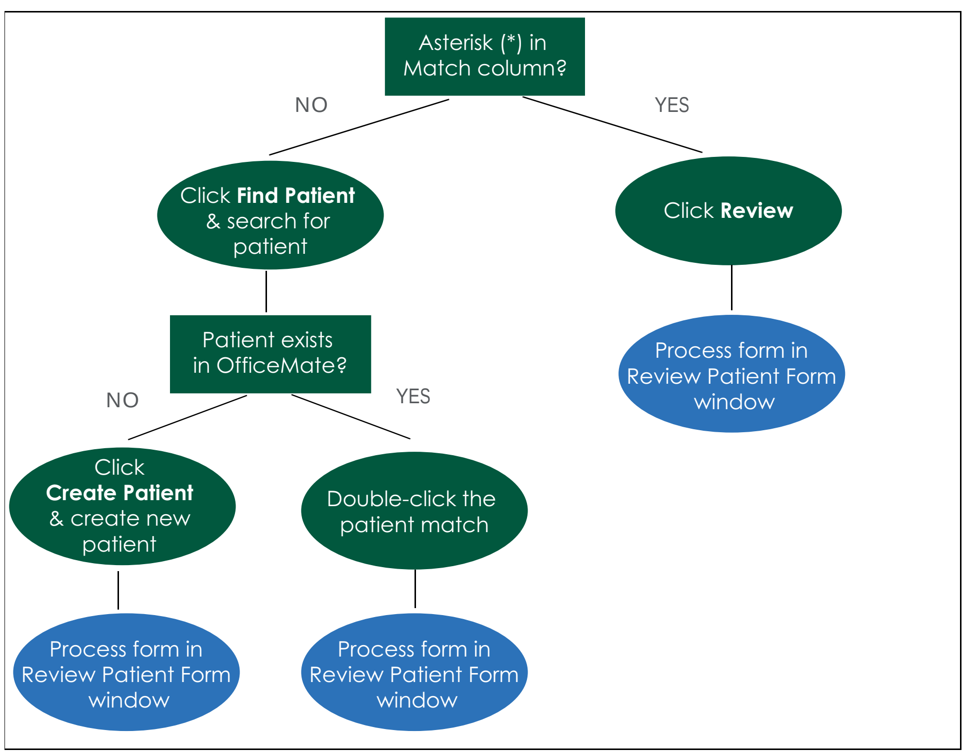


Figure 3-1: Matching Patients and Processing Patient Forms

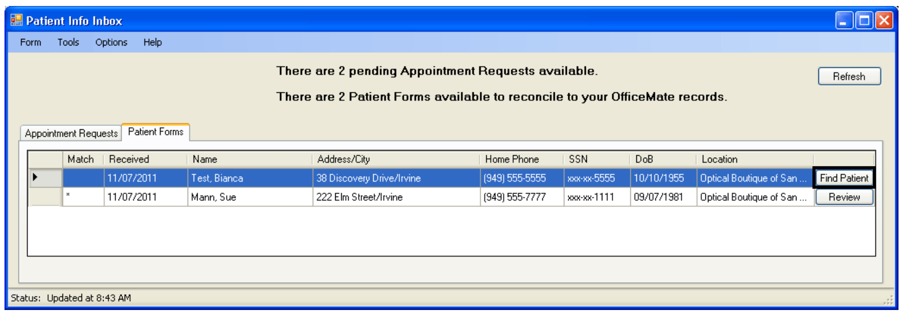
Searching for a Patient Match

1. In the Patient Info Inbox, click the **Patient Forms** tab.

   The Patient Forms tab becomes active and displays any pending patient forms.

NOTE	To update the list of patient forms, click **Refresh**.

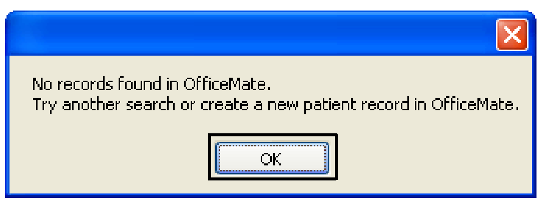
2. If an asterisk (*) displays in the Match column, click **Review** and go to “Reviewing Patient Forms” on page 43; otherwise, go to step 3.
3. Click **Find Patient**.



   The Patient Search window opens.

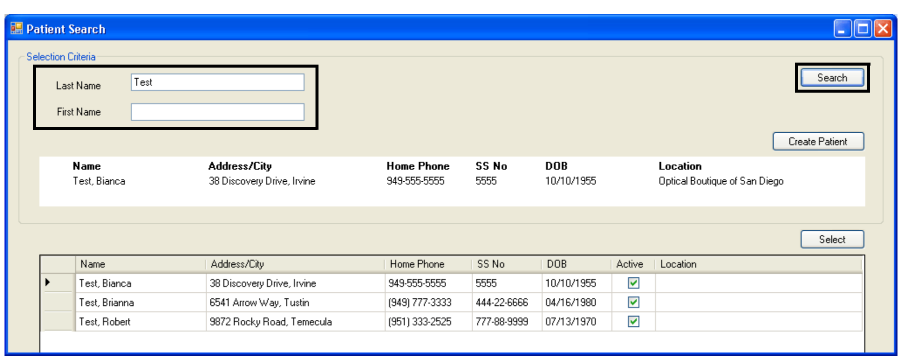
   If there are no existing patient records in OfficeMate with the same name, a dialog box opens, prompting you to perform another search or create a new patient.

4. If the dialog box for no records found in OfficeMate opens, click **OK** to close the dialog box.



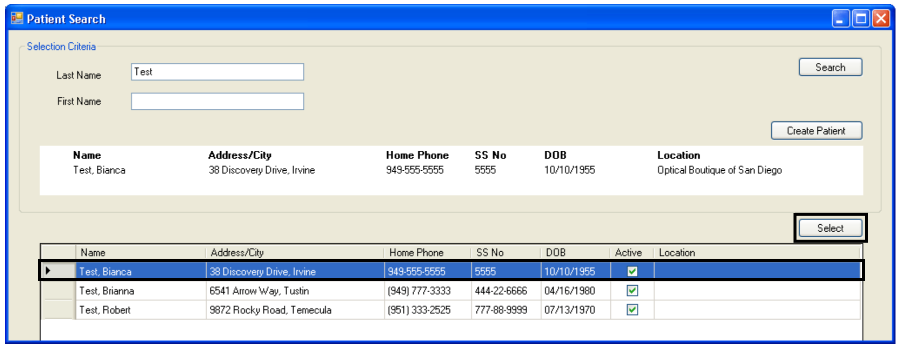
5. Search for a patient match by typing variations or shortened versions of the patient name in the **Last Name** and **First Name** fields and clicking **Search**.

   All patient names in OfficeMate that meet the search criteria are displayed.



6. If you still cannot find a patient match, go to “Creating a New Patient” on page 42; otherwise, go to step 7.

7. If you see that the patient already exists in OfficeMate, click the patient in the search results and click **Select**, or simply double-click the patient.

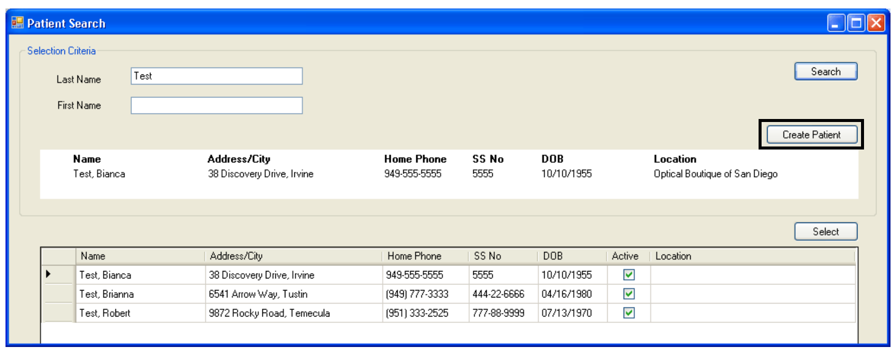


The Review Patient Form window opens.

8. To continue processing the patient form, go to "Reviewing Patient Forms" on page 43.

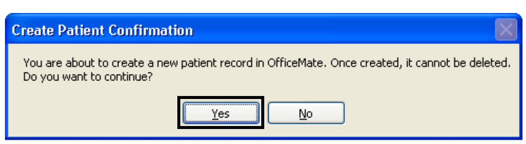
Creating a New Patient

1. Search for a patient match in the OfficeMate database. For more information, go to "Searching for a Patient Match" on page 41.
2. In the Patient Search window, click **Create Patient**.



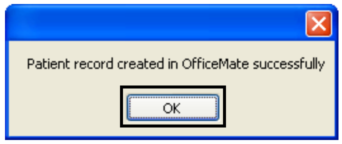
The Create Patient Confirmation dialog box opens, reminding you that you are about to create a new patient record.

3. Click **YES** to create a new patient.



A confirmation box opens confirming that a new patient was created in OfficeMate.

4. Click **OK**.



The Review Patient Form window opens with the Insurance tab active.

5. To continue processing the patient form, go to "Reviewing Patient Forms" on page 43.

Reviewing Patient Forms

After you match a patient in the Patient Info Inbox to a patient in OfficeMate or create a new patient, you are able to review and process the patient's form.

NOTES

- Patient medical history is not displayed during processing. After you submit the form for processing, medical history is included in the PDF that is created and attached to the patient's record. It is expected that the provider will enter this information in ExamWRITER.
- In order to open the Review Patient Form window, you must first complete one of the following procedures:
  - "Searching for a Patient Match" on page 41
  - "Creating a New Patient" on page 42

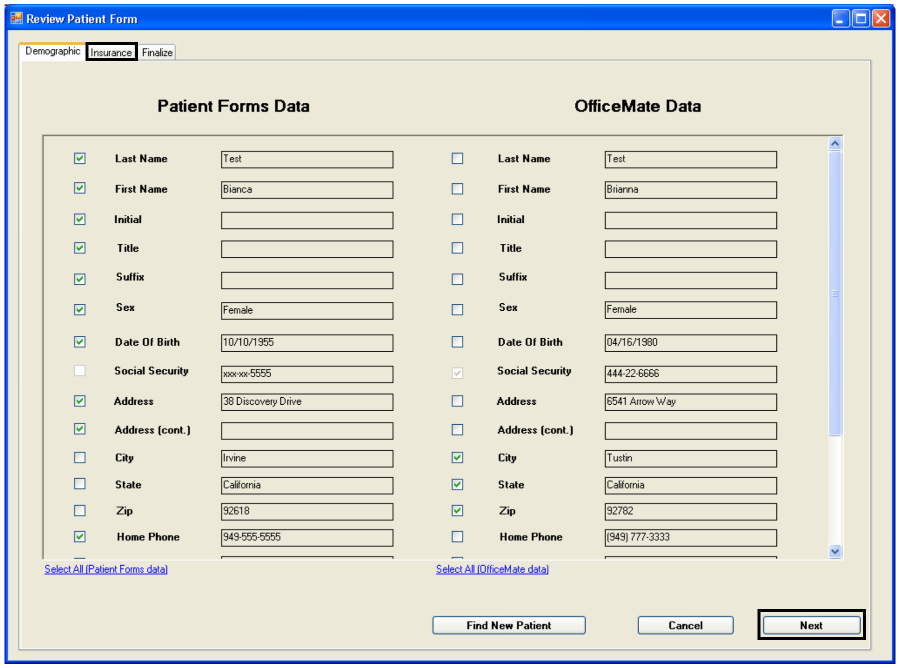
To review and process a patient form after linking it to a patient, follow the instructions below:

1. If you have just created a new patient, the Review Patient Form window opens with the Insurance tab active. Click **Back** or the **Demographic** tab to make the Demographic tab active.
2. With the Demographic tab active, select the check boxes for the patient data you want to appear on the patient form and in the OfficeMate database.
   - To select only information from the patient form, click the **Select All (Patient Forms data)** hyperlink.
   - To select only information from the OfficeMate database, click the **Select All (OfficeMate data)** hyperlink.

   NOTES

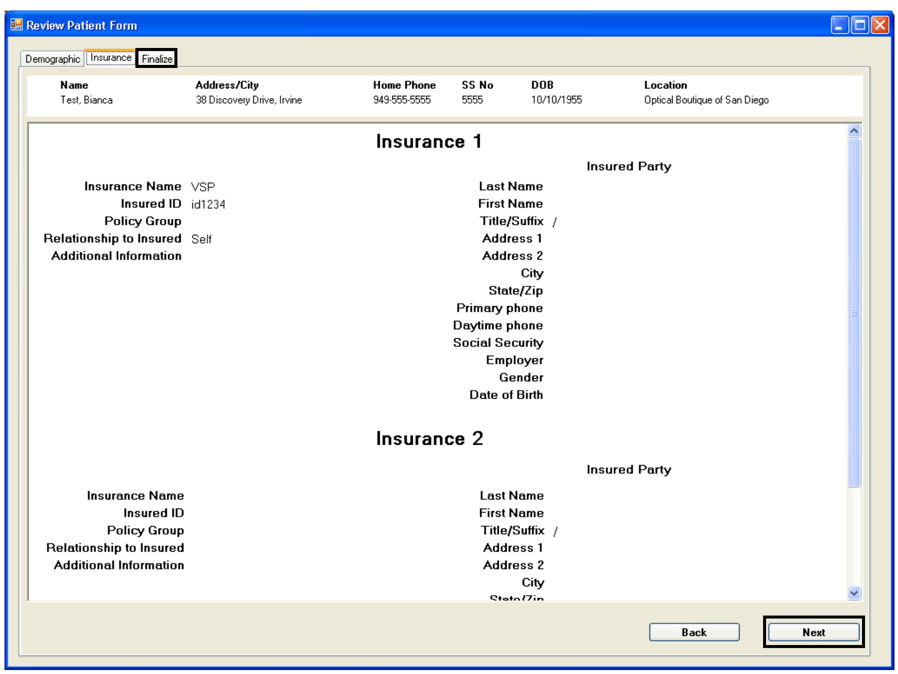
   - The social security number recorded by the patient online is not transferred to OfficeMate; you must manually change or add the social security number.
   - Any demographic information not displayed in the Review Form window, including information for Meaningful Use, is not transferred to OfficeMate; you must manually add this information to OfficeMate.
   - If you decide the patient you selected is not the correct patient, you can click **Find New Patient** to return to the Patient Search window.

3. Click **Next** or the **Insurance** tab.



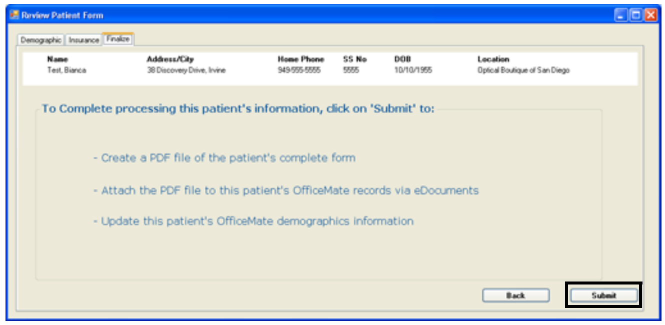
The Insurance tab becomes active and displays the insurance data the patient recorded on the online patient form.

4. Manually record the patient's insurance information in the patient's record in OfficeMate, since insurance information is not automatically transferred into OfficeMate.
5. Click **Next** or the **Finalize** tab.



The Finalize tab becomes active.

6. Click **Submit** to finalize patient form processing.



A dialog box opens, confirming that patient form processing is about to be completed and that the form will be removed from the Patient Info Inbox.

7. Click **OK** on all confirmation dialog boxes to complete form processing.

   The Review Patient Form window closes. The Patient Info Inbox does the following:

   – Creates a PDF of the patient form.

   – Attaches the PDF of the patient form to the patient record via eDocuments.

   – Removes the patient from the Patient Info Inbox.

Getting Support

4

In this chapter:

Eyefinity considers our Customer Care department the backbone of a successful, positive relationship between our company and you, our client. Our goal is to continually enhance the level of service provided by our Customer Care department. Eyefinity offers reasonable annual software maintenance agreement fees and, simultaneously, must establish and enforce our service guidelines in order to keep these fees equitable. This chapter outlines our service guidelines and policies.

Phone Support

Eyefinity offers toll-free customer care from 6:00am to 5:00pm Pacific Time. Dial 877.448.0707 to reach our Customer Care team. Customer Care is closed on Saturdays and Sundays, and the following major US holidays: Christmas Day, Thanksgiving Day, Memorial Day, Labor Day.

Your calls are answered live by our knowledgeable Customer Care team who will assist you with your support issues. Eyefinity's service levels are equal to or better than the best service levels provided by any competitive help desk service in our industry today.

Online Support

For more support information on the eWeb*Extra* OfficeMate Integration, go to the Eyefinity support web page at http://www.eyefinity.com. You can e-mail your support questions to the Eyefinity Customer Care department at customercare@eyefinity.com

Eyefinity also maintains an extensive online knowledge base that is full of helpful articles and answers to frequently asked questions about the OfficeMate practice management solution. We highly encourage you to seek out answers to your questions and submit new questions using this knowledge base at http://www.officemate.net/omkb/.

Index

Symbols

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