CareLink Mobile Practice Manager

SCHEDULING QUICK START GUIDE

CareLink Scheduling Quick Start

- Portal Areas and Functions

- Menu Bar and User Roles

- Scheduling Module

- Practitioner Mobile Site

- CareLink Workbooks

See our scheduling how to video at

https://www.youtube.com/watch?v=A8ZN8dt0LYo

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Getting Started with CareLink

PORTAL AREAS AND FUNCTIONS

Administrator Portal Logon

- Managing patients
- Patient Scheduling
- New Patient and Reminder Workbooks
- Reports

Mobile Practitioner Site

- Mobile Phone Version of CareLink optimized for Practitioners on the Go
- View Practitioner schedule for day
- Turn by Turn Directions
- Appointment check in

Administrator Logon*
https://domain.mymobilepracticemanager.com/carelink/admin/

Practitioner Mobile Site Logon*
https://domain.mymobilepracticemanager.com/mobile/

*replace domain with link provided during your account set-up

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Getting Started with CareLink

MENU BAR AND USER ROLES

The menu bar contains links to all pages within CareLink

Click on Heading to View Page Details

cspears sysadmin |	Workbooks	Patients	Schedule	Maps	Reports	Practitioners	Users	Configuration	Logs

Different Roles have different access rights

Currently there are 5 Roles:

Sysadmin: Access to all functions and site configuration settings. Can create, edit, and delete users, export patients, system logs

Practitioner: Access to patient functions, scheduling, mobile site

Office: Access to all patient and scheduling functions only

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Patient Scheduling

CareLink has the following patient scheduling features

- Map driven patient scheduling
- Minimize driving distance with schedule optimizer
- One click bulk patient scheduling
- Set patient visit frequency
- View reports of patients overdue or soon overdue for visit
- Confirm scheduled visits and notify facility or patients electronically about an upcoming visit
- Add visits to your Outlook calendar
- Mark visits as "no shows"
- Monthly visits report by provider

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Patient Scheduling

SCHEDULING BASICS

- To view schedule or add patient to schedule go to Schedule Tab
  - Add patients to schedule
  - Change schedule and confirm appointments
  - View and print practitioners daily schedule
  - View patients overdue for a visit based on patient visit frequency

Patient Scheduling

HOW TO SCHEDULE A PATIENT

- Schedule includes practitioner, patient, date, time
- Scheduled visits can be confirmed or downloaded to a providers Outlook calendar
- You can also include notes related to a visit
- Notify Facility or Practitioner of visit

Add Patent to Schedule

Patient [Tyler Adams ▾]

Practitioner [Newest Practitioner ▾]

Date [01/09/2014]

Time [6:00 am ▾]

Note [   ]

☐ Visit Confirmed

☐ Notify Facility

☐ Notify Practitioner

[Submit]

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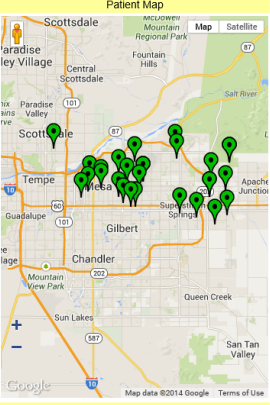
Patient Bulk Scheduling

SCHEDULE MANY PATIENTS AT ONCE FOR THE SAME DAY

- Schedule more than 1 patient at a time for a practitioner using the 'Bulk Scheduler'

- Click patients you wish to schedule and date

- Can use filters to view patients by city, practitioner, etc..

Recurring Scheduling

- You can set patients up for recurring scheduling if you wish and schedule them up to 52 weeks out

- Click on the ⟳ icon on the patient page or schedule-> recurring

- Fill in details of recurring scheduling event

Using the Schedule Optimizer

MINIMZE DRIVING DISTANCE WITH SCHEDULE OPTIMIZER

- In schedule page select a date and practitioner with 1 or more patients scheduled
- Schedule Optimizer button will show current schedule and other potential patients to schedule sorted by closest driving distance
- Click and send them to bulk scheduler to complete the scheduling process

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Using the Driving Optimizer

MINIMZE DRIVING DISTANCE WITH DRIVING OPTIMIZER

- The Driving Optimizer will show the optimal driving directions for the day's schedule
- Select start and end location and patient stops
- Add practitioners home address to show as start and end point
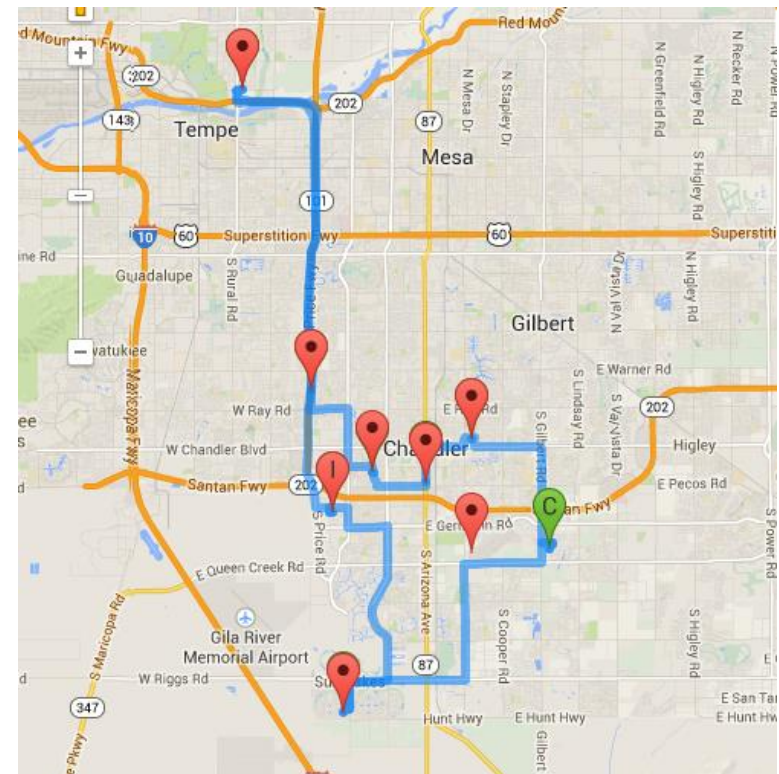
Appointment Optimizer

SCHEDULE PATIENT APPOINTMENT TIMES BASED ON DRIVING ROUTE

- The Appointment optimizer is found from the driving optimizer and scheduling page
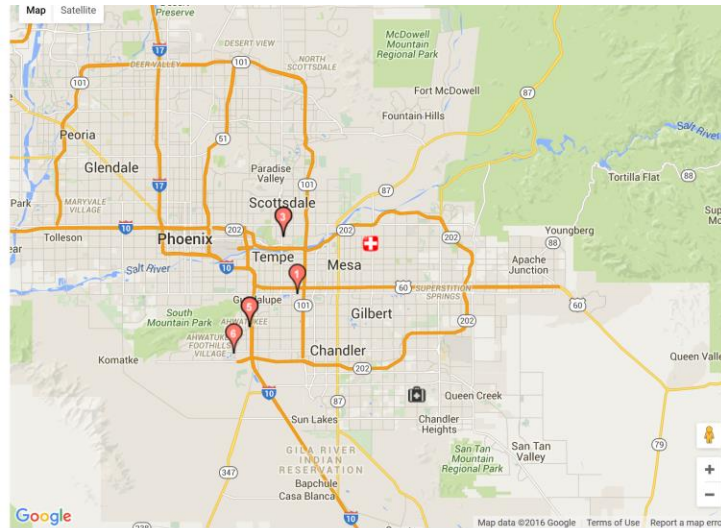
- Shows optimal order to visit patients

- Can update all appointment times to optimal order in one click

Order	Patient	Address	Schedule Note	Current Appointment Time	Duration	Edit Appointment Time
	D. Thicklin	1958 East Duke Drive Tempe	Monthly visit//left message, patient in hospital. will call first thing Tuesday to see if patient home RB	6:00am	1 Hour	6:00 am Update
	B. Oetjen	1002 E. Bluebell Ln. Tempe	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am Update
	S. Thammasack	1002 E Bluebell Ln. Tempe	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am Update
	A. Corbett	5135 E. Halfmoon Dr Phoenix	Incomplete emptying of bladder due to benign prostatic hypertrophy	6:00am	1 Hour	6:00 am Update
	S. Packard	5135 E. Halfmoon Dr. Phoenix	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am Update
	P. Watson	3830 E Lakewood Pkwy Phoenix	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am Update

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Practitioner Mobile Site

MOBILE SITE FOR PRACTITIONERS ONLY
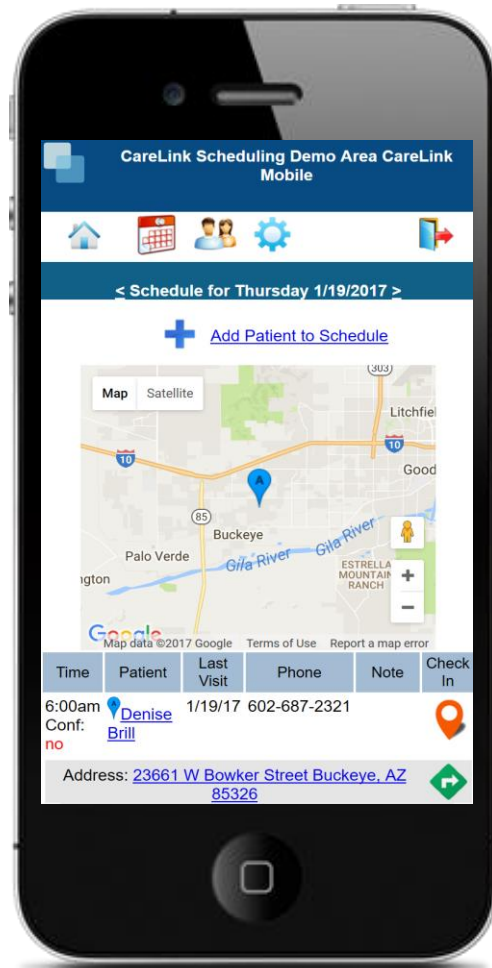
Mobile Scheduling Page Functions

- View Today's schedule ordered by patient appointment time
- See Today's schedule on a map
- "Check in" to an appointment lets office staff know you have arrived
- Get Driving Directions from your current location
- Add patients to your schedule

Using Workbooks

Schedule Module Workbooks

1. **New Patient Workbook:** Manage eligibility, referral source and scheduling of new patients

2. **Reminder Workbook :** Set reminders for future events for a given patient

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Questions?