



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>

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

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

Patient Scheduling

FEATURE SET

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

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 All Select Schedule Optimizer

Patient Map

Schedule for Wednesday December 25, 2013

Time	Patient	Phone	City	Notes	Edit
6:00am	Confirmed Bill Anderson	928-813-1984	Peoria		
6:00am	Confirmed Denise Boy	623-487-4041	Peoria		
6:00am	Confirmed Denise Dickinson	623-328-8086	Peoria		
6:00am	Confirmed Denise Greenwald	623-116-0208	Peoria		
6:00am	Unconfirmed Jane Inrig	8112712090	Peoria		
6:00am	Unconfirmed Bob Keefe	623-933-1617	Peoria		
6:00am	Unconfirmed Lady Oshaughnessy	480-186-1179	Peoria		
6:00am	Unconfirmed Jane Macdougall	602-176-0772	Chandler		
6:00am	Confirmed Man Olivas	480-238-0916	Chandler		
6:00am	Confirmed Man Perret Jr	480-217-2970	Chandler		
6:00am	Confirmed One Spears		Chandler		

Add Patient to Schedule

Patient: Tyler Adams
Practitioner: Newest Practitioner
Date: 12/25/2013
Time: 6:00 am
Note:

Visit Confirmed
 Notify Facility
 Notify Practitioner

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 Patient to Schedule

Patient

Practitioner

Date

Time

Note

Visit Confirmed

Notify Facility

Notify Practitioner

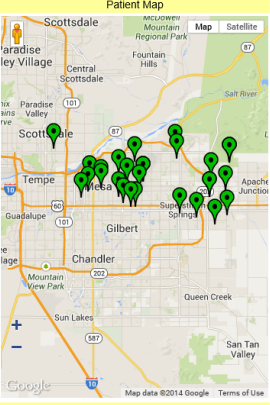
Patient Bulk Scheduling

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..

Bulk Schedule Old Practitioner City Mesa Type Active Patients Last Name All Exclude Scheduled Frequency All Select

Patient Map



Patients to Schedule

Patient	Phone	City	Zip	Frequency	Last	Next	Time	Conf	Notes
<input type="checkbox"/> Man Adrian	602-908-7174	Mesa	85204	Monthly	01/2/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Aros	480-907-1188	Mesa	85205	As Needed	01/2/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Attwood	480-271-2382	Mesa	85215	Monthly	01/2/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bill Behne	480-833-7671	Mesa	85201	Monthly	01/3/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bob Coffey	480-964-8444	Mesa	85213	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bob Cubas	480-924-7777	Mesa	85204	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bob Curvin Jr	480-612-6419	Mesa	85210	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Foster	480-238-1814	Mesa	85201	As Needed	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Gleave	480-264-8640	Mesa	85205	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bill Harms	480-907-1188	Mesa	85209	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Homeier	480-139-0819	Mesa	85204	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Jones	602-761-9499	Mesa	85202	Monthly	01/3/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Journey	480-474-4713	Mesa	85212	As Needed	11/19/2013		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Jane Lee	480-907-1188	Mesa	85209	Monthly	12/22/2013		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Man Levine	480-317-1939	Mesa	85208	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Limb	480-834-0684	Mesa	85201	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise McClin	480-807-4700	Mesa	85208	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady McMiller	480-981-0129	Mesa	85215	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Man Moody	480-208-0123	Mesa	85204	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Munoz	480-373-9823	Mesa	85209	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bill Obermiller	480-3610129	Mesa	85206	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Man Palke	480-641-9767	Mesa	85215	Monthly	01/3/2014		6:00 am	<input type="checkbox"/>	

Add Selected Patients to Schedule

Practitioner Old Practitioner


Date 01/09/2014

Notify Facility

Notify Practitioner

Bulk Schedule

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

Add Recurring Schedule

Patient

Practitioner

Visit Start Time

Visit Duration

Start Date

Recur Frequency

Recur Number of Weeks

Recurring Days

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Schedule Note

Visit Confirmed

Using the Schedule Optimizer

MINIMIZE DRIVING DISTANCE WITH SCHEDULE OPTIMIZER

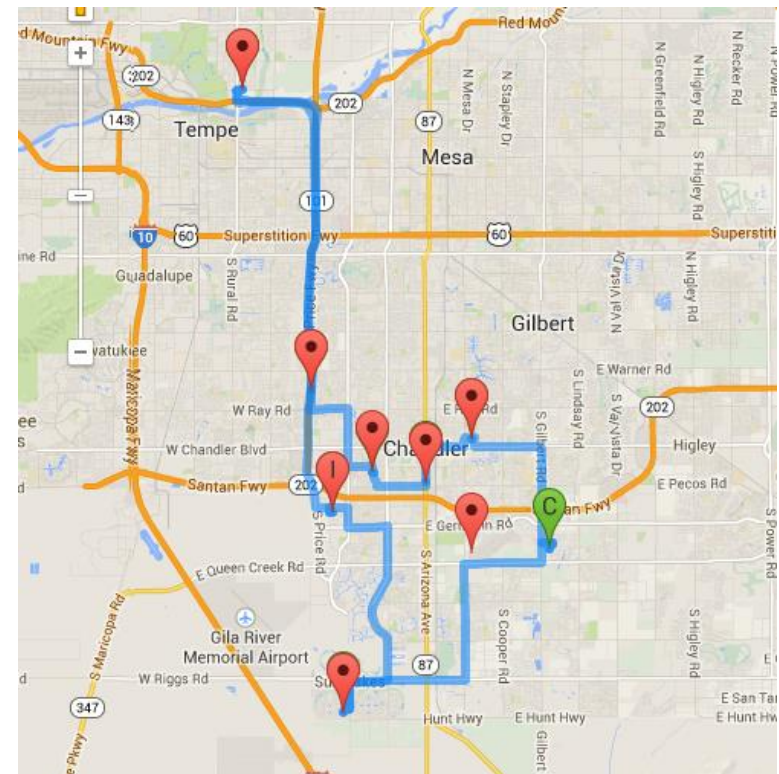
- In schedule page select a date and practitioner with 1 or more patients scheduled
- Schedule Optimizer button will show current schedule and other potential patients to schedule sorted by closest driving distance
- Click and send them to bulk scheduler to complete the scheduling process



Using the Driving Optimizer

MINIMIZE DRIVING DISTANCE WITH DRIVING OPTIMIZER

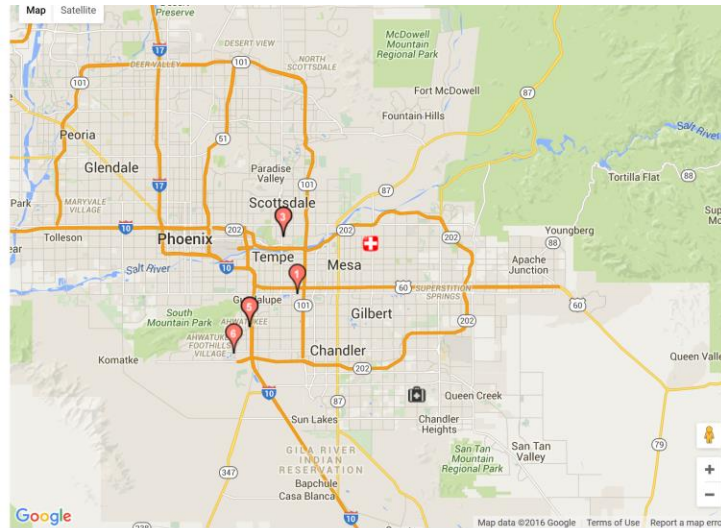
- The Driving Optimizer will show the optimal driving directions for the day's schedule
- Select start and end location and patient stops
- Add practitioners home address to show as start and end point



Appointment Optimizer

SCHEDULE PATIENT APPOINTMENT TIMES BASED ON DRIVING ROUTE

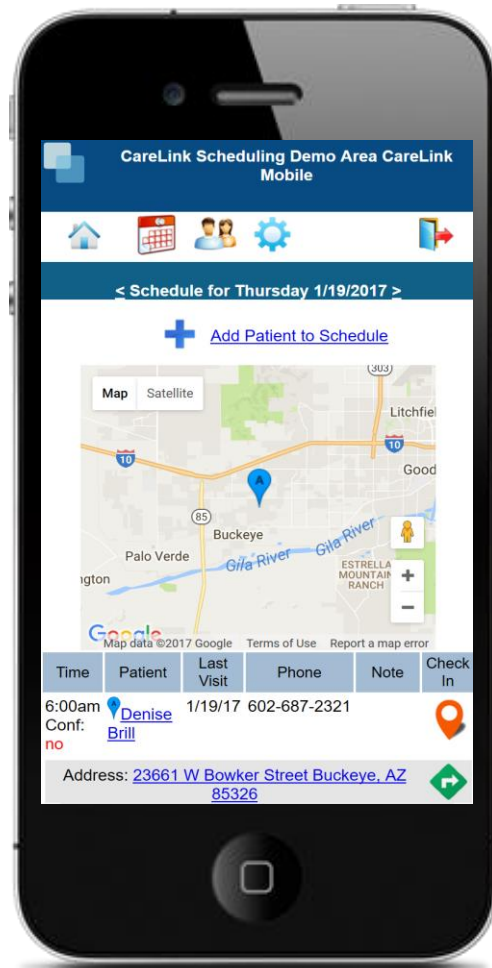
- The Appointment optimizer is found from the driving optimizer and scheduling page
- Shows optimal order to visit patients
- Can update all appointment times to optimal order in one click



Order	Patient	Address	Schedule Note	Current Appointment Time	Duration	Edit Appointment Time
1	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 <input type="button" value="Update"/>
2	B. Oetjen	1002 E. Bluebell Ln. Tempe	Monthly visit/confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
3	S. Thammasack	1002 E Bluebell Ln. Tempe	Monthly visit/confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
4	A. Corbett	5135 E. Halfmoon Dr Phoenix	Incomplete emptying of bladder due to benign prostatic hypertrophy	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
5	S. Packard	5135 E. Halfmoon Dr. Phoenix	Monthly visit/confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
6	P. Watson	3830 E Lakewood Pkwy Phoenix	Monthly visit/confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>

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

USING CARELINK 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

Questions?

