

Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

Curbside: Scheduling and Workflow

Last Modified on 12/11/2020 3:54 pm EST

Version 20.10

Overview

Curbside is a feature that will assist practices in reducing foot traffic and exposure during the COVID-19 pandemic. The tool will allow parents to notify from their cars (remotely) that they have arrived for a scheduled appointment and pay their copay without the need to involve staff.

The Curbside scheduling workflow is most successful when the following are in place:

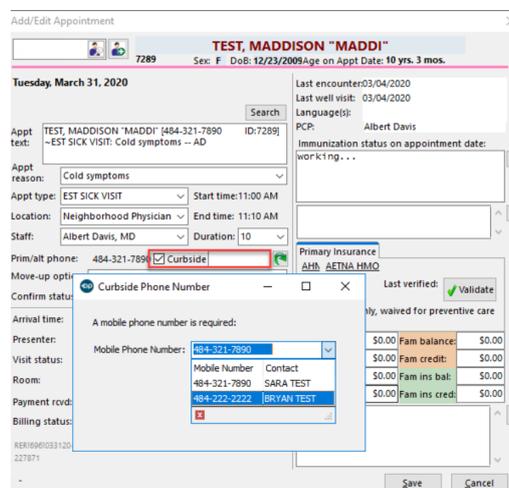
- Insurance was validated/verified when scheduling the appointment.
- Demographics were verified when scheduling the appointment.
- Contact record(s) have a cell phone number.
- The practices uses Instamed Merchant Services or a method to collect copayments. [Click here](#) for information on collecting copayments.
- (*Optional*) To clearly see Curbside visits, add a color to the Tracking Stage, [click here](#) for instruction.



Important: If the practice is unable to use Curbside, please contact OP Support using the [Chat with Support](#) button.

Create a Curbside Appointment

1. Navigate to the Calendar: **Clinical, Practice Management or Billing tab > Schedule > Calendar radio button**
2. Double-click on the time slot to add an appointment. The Add/Edit Appointment window is displayed.
3. Search for and select the patient.
4. Select an **Appt reason** from the drop-down menu.
5. Select an **Appt type** from the drop-down menu.
6. Click the **Curbside** checkbox. The Curbside Phone Number window displays.
7. Enter a cell phone number in the **Mobile Phone Number** field, or click the drop-down and select a cell phone number.

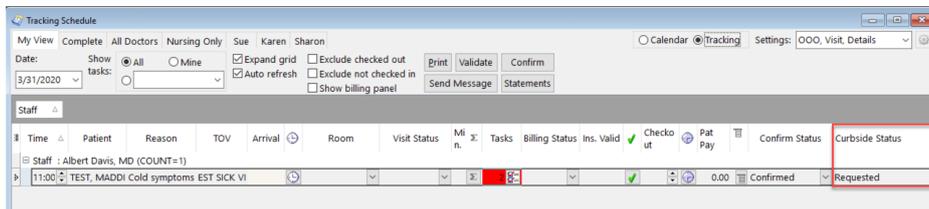


The screenshot shows the 'Add/Edit Appointment' window for patient TEST, MADDISON "MADDI". The appointment is scheduled for Tuesday, March 31, 2020, at 11:00 AM. The 'Curbside' checkbox is checked. A 'Curbside Phone Number' dialog box is open, displaying a list of mobile phone numbers for contacts: 484-321-7890 (SARA TEST) and 484-222-2222 (BRYAN TEST). The 'Curbside' checkbox is also checked in this dialog. The background window shows various appointment details, including location (Neighborhood Physician), staff (Albert Davis, MD), and insurance information (Aetna HMO).

8. Click the **Save** button on the Curbside Phone Number window.

9. Click the **Save** button on the Add/Edit Appointment window.
10. Review the **Curbside Status** from the Tracking window:

- **Requested:** A request is sent that the scheduled appointment is for Curbside. The status will remain as Requested until the message is sent 20 minutes prior to the scheduled appointment time.

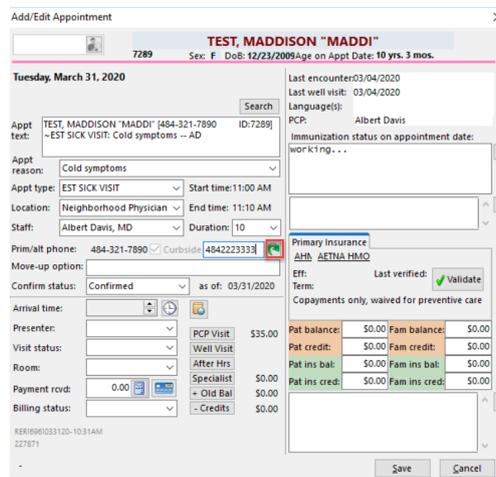


 **Note:** It is important to inform parents when they make the appointment that they should not try to call or text the number received for the Curbside appointment notification. **This is not a direct line to the practice**

Resend a Curbside Notification

If the text message fails to be sent for a Curbside appointment, the cell number is incorrect, or the original text message was deleted or not received, you can resend the message from the Add/Edit Appointment window. Follow the below steps to resend the text message.

1. Double-click on the appointment. The Add/Edit Appointment window is displayed.
2. Navigate to the Curbside mobile (cell) number field. If the number is incorrect, backspace and enter the correct number. If no change to the number, proceed to the next step.
3. Click the **Resend Curbside Message** button.



Mobile Notifications

When a Curbside appointment is made, the text message is scheduled to be sent to the cell phone 20 minutes prior to the appointment. If an appointment is scheduled less than the 20 minutes, the text message will immediately be sent. From the Tracking Window, the Curbside Status will be updated to **Sent** if the message was delivered to the mobile number successfully or **Failed** if the text message could not be delivered to the cell number. If you need to resend the notification, follow the above instruction to **Resend a Curbside Notification**.

- **Sent:** The text message for the curbside appointment has been delivered to the cell number entered.
- **Failed:** The text message for the curbside appointment has failed to be delivered using the cell number entered.

Below are examples of the text message that is received 20 minutes prior to an appointment or when an appointment is scheduled less than the 20 minutes. The message will begin with the practice location that the appointment is scheduled at.

- **Initial message without link to Instamed Merchant Services** This is the message that is sent when the IMD Correspondent record in OP has a status of Test or Inactive.

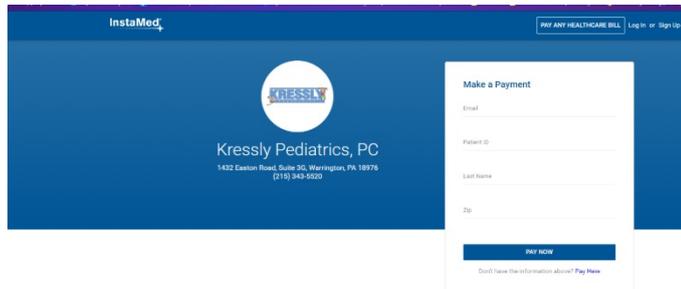
This is Alpha Peds, Inc, your appointment is today at 1:40 PM. Reply 'Here' when you arrive at the practice. If you do not receive a response within 5 minutes please call the office.

Initial message with link to Instamed Merchant Services This is the message that is sent when the IMD Correspondent record in OP has a status of Production or if the status field is blank.

This is Alpha Peds, Inc, your appointment is today at 1:40 PM. Reply 'Here' when you arrive at the practice. If you do not receive a response within 5 minutes please call the office. Patient ID: 7390 has a copay of \$20.00 please pay here <https://pay.instamed.com/Form/PaymentPortal/Default?id=TEST>

Note: The Instamed link will not be present in the text if the patient has an appointment type that contains the words "Nurse," "Flu," or "Well."

Tip: It is recommended, as a temporary solution, to modify the Make a Payment window to contain only necessary information to allow a parent to make the copayment. This is suggested due to the parent completing the payment information using their mobile phone.



Workflow for Arrival

1. Parent/patient arrive in the parking lot and text **Here**.
2. The Visit Status, on the Tracking window, will update to **Curbside**.

Staff	Time	Patient	Reason	TOV	Arrival	Room	Visit Status	Mi n.	Tasks	Billing Status	Ins. Valid	Check out	Pat Pay	Confirm Status	Curbside Status
Staff : REED FOWLER (COUNT=4)															
	09:00	CHAN, JACKIE	Fever	EST SICK VI 09:07 AM	WAITING R	209	Waiting Room	289					0.00	Confirmed	
	09:30	TEST, JOEL	ACNE	EST SICK VI 09:09 AM	WAITING R	289	Waiting Room	289					0.00	Confirmed	
	10:20	TEST, CHRIS	Fever	EST SICK VI 09:24 AM	WAITING R	274	Waiting Room	274					0.00	Confirmed	
	10:40	TEST, MARIAN	Cough	EST SICK VI 09:25 AM	In Progress	273		273					0.00	Confirmed	
Staff : UMBER FROST (COUNT=2)															
	11:00	TEST, MADDISON T	Cough	EST SICK VI 12:13 PM	Curbside	105		105					0.00	Confirmed	Sent
	11:30	TEST, JIM	ACNE	EST SICK VI 12:16 PM	Curbside	102		102					0.00	Confirmed	Sent

3. Message sent with the following instruction:

- If no room number assigned when parent/patient responds with **Here**.



Example: Thank you, please wait in the car for further instructions.

- If a room has been assigned when the parent/patient responds with **Here**.



Example: Thank you, please proceed to room ROOM 1.

- If a room has been assigned after their status has been updated to **Curbside**, a second message will be sent to proceed to the assigned room.



Example:

- **Message 1:** Thank you, please wait in the car for further instructions.
- **Message 2:** Thank you, please proceed to room ROOM 1.

FAQ

"How long do I have to send the message to proceed to a room?"

Room assignments may be sent up to 15 minutes after the appointment time. This will only occur when the initial text and **Here** response is sent before the appointment.

4. Proceed with your decided workflow on handling the Visit Status for Curbside visits. For information on handling a parent/patient late arrival, click [here](#).

Version 20.8

Overview

Curbside is a feature that will assist practices in reducing foot traffic and exposure during the COVID-19 pandemic. The tool will allow parents to notify from their cars (remotely) that they have arrived for a scheduled appointment and pay their copay without the need to involve staff.

The Curbside scheduling workflow is most successful when the following are in place:

- Insurance was validated/verified when scheduling the appointment.
- Demographics were verified when scheduling the appointment.
- Contact record(s) have a cell phone number.
- The practice uses Instamed Merchant Services or a method to collect copayments. Click [here](#) for information on collecting copayments.
- (Optional) To clearly see Curbside visits, add a color to the Tracking Stage, click [here](#) for instruction.

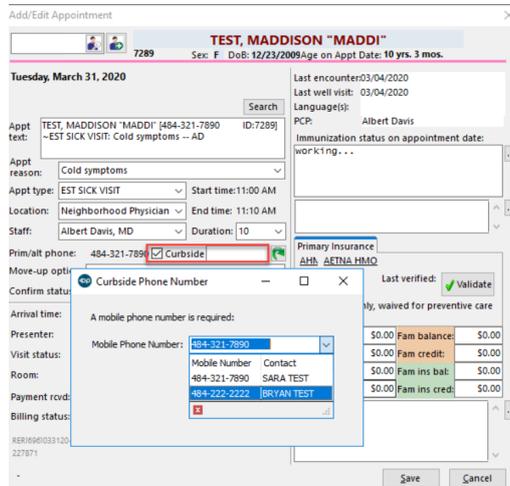


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Create a Curbside Appointment

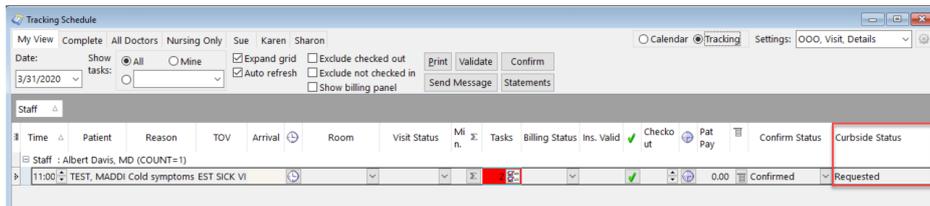
1. Navigate to the Calendar: **Clinical, Practice Management or Billing tab > Schedule > Calendar radio button**
2. Double-click on the time slot to add an appointment. The Add/Edit Appointment window is displayed.
3. Search for and select the patient.
4. Select an **Appt reason** from the drop-down menu.

5. Select an **Appt type** from the drop-down menu.
6. Click the **Curbside** checkbox. The Curbside Phone Number window displays.
7. Enter a cell phone number in the **Mobile Phone Number** field, or click the drop-down and select a cell phone number.



8. Click the **Save** button on the Curbside Phone Number window.
9. Click the **Save** button on the Add/Edit Appointment window.
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Time	Patient	Reason	TOV	Arrival	Room	Visit Status	Mi n.	Tasks	Billing Status	Ins. Valid	Checko ut	Pat Pay	Confirm Status	Curbside Status
11:00	TEST, MADDI	Cold symptoms	EST SICK VI									0.00	Confirmed	Requested



Note: It is important to inform parents when they make the appointment that they should not try to call or text the number received for the Curbside appointment notification. **This is not a direct line to the practice**

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1. Double-click on the appointment. The Add/Edit Appointment window is displayed.
2. Navigate to the Curbside mobile (cell) number field. If the number is incorrect, backspace and enter the correct number. If no change to the number, proceed to the next step.
3. Click the **Resend Curbside Message** button.

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Below are examples of the text message that is received 20 minutes prior to an appointment or when an appointment is scheduled less than the 20 minutes.

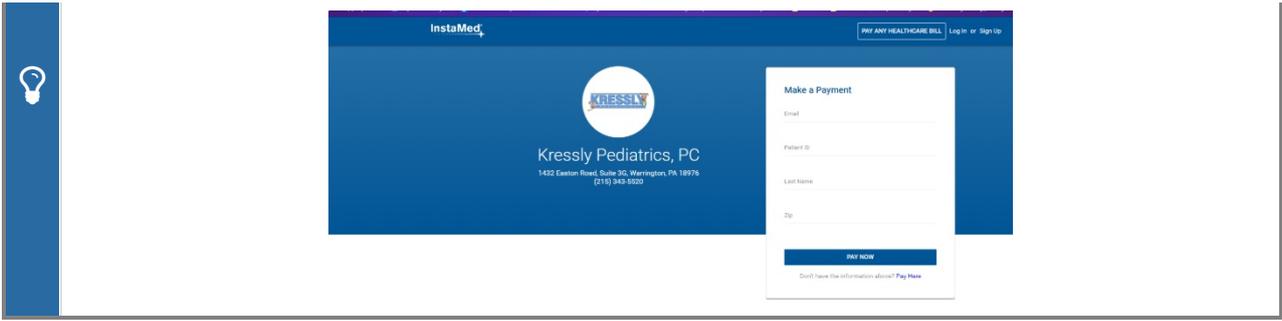
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	10:40	TEST, MARIAN	Cough	EST SICK VI 09:25 AM		In Progress		273					0.00	Confirmed	
Staff : UMBER FROST (COUNT=2)															
	11:00	TEST, MADDISON T	Cough	EST SICK VI 12:13 PM		Curbside		105					0.00	Confirmed	Sent
	01:30	TEST, JIM	ACNE	EST SICK VI 12:16 PM		Curbside		102					0.00	Confirmed	Sent

3. Message sent with the following instruction:

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Example: Thank you, please wait in the car for further instructions.

- If a room has been assigned when the parent/patient responds with **Here**.



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