

# Appointment Type Cleanup for OP Patient Portal Readiness

Last Modified on 06/03/2024 11:42 am EDT

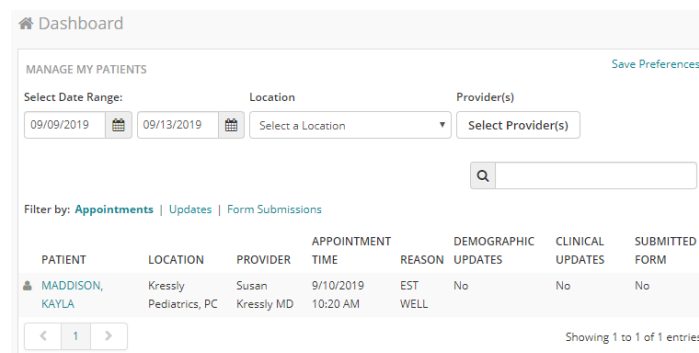


OP sets **all defaults to share all information** Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

The content in this article is relevant to the OP Patient Portal, powered by IntelliChart.

## About

The Appointment Types located in the Appointment Types table of OP **Practice Management > Appointments > Appointment Types tab**) are used to create the Appointment List located in the **Dashboard** of the Practice Portal. Additionally, the Appointment Types are used for appointment reminder notifications with OP Notify. If an Appointment Type was changed in this table in OP, there is a chance the previous Appointment Type is still attached to a scheduled appointment, visit template, or patient chart which would prevent appointments from displaying in the Practice Portal and appointment reminder notifications sent using OP Notify.



Dashboard

MANAGE MY PATIENTS [Save Preferences](#)

Select Date Range: 09/09/2019 09/13/2019 Location: Select a Location Provider(s): Select Provider(s)

Filter by: **Appointments** | Updates | Form Submissions

PATIENT	LOCATION	PROVIDER	APPOINTMENT TIME	REASON	DEMOGRAPHIC UPDATES	CLINICAL UPDATES	SUBMITTED FORM
MADDISON, KAYLA	Kressly Pediatrics, PC	Susan Kressly MD	9/10/2019 10:20 AM	EST WELL	No	No	No

Showing 1 to 1 of 1 entries

## What To Do

Simply run the provided SQL reports in Database Viewer to query your database to find any Appointment Types that may be "orphaned", or attached to an Appointment Type that no longer exists in the table. These SQLs target the three areas of your system where Appointment Types are used:

- [Scheduled Appointments](#)
- [Visit Templates](#)
- [Patient Chart \(Default Visit Types\)](#)

If you are not familiar with utilizing Database Viewer, review the [Run a Query](#) section of [OP Database Viewer Basics](#)

**Note:**

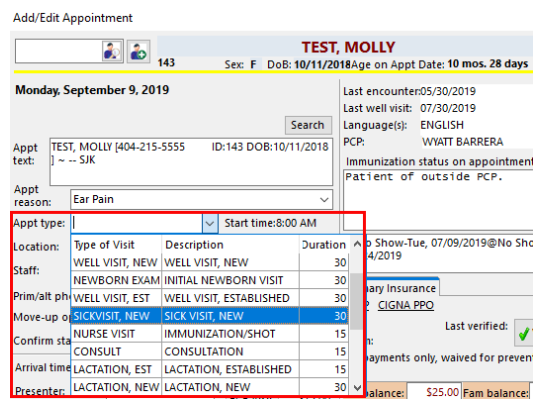
These SQLs may already be saved in your Database Viewer under Query names:

- *OPN\_Appointment Type* (for scheduled appointments)
- *OPN\_Appointment Template* (for visit templates)
- *OPN\_Appointment Default* (for patient chart default visit type)

If they are not already saved in your Database Viewer, follow the [Click here](#) link in the following sections to access the appropriate SQL Reports.


### Scheduled Appointments

1. Click [here](#) to access an SQL Report that displays orphaned Appointment Types for Scheduled Appointments
2. Using the report results, navigate to the patient's appointment(s) on the schedule (**Clinical, Practice Management, or Billing tab > Schedule button**) to edit the Appointment Type so that it matches a type in the Appointment Types table:



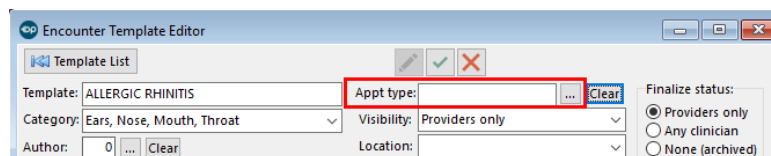
Appt type: [SICK VISIT, NEW] Start time: 8:00 AM

Location	Type of Visit	Description	Duration
	WELL VISIT, NEW	WELL VISIT, NEW	30
	NEWBORN EXAM	INITIAL NEWBORN VISIT	30
	WELL VISIT, EST	WELL VISIT, ESTABLISHED	30
	SICK VISIT, NEW	SICK VISIT, NEW	30
	NURSE VISIT	IMMUNIZATION/SHOT	15
	CONSULT	CONSULTATION	15
	LACTATION, EST	LACTATION, ESTABLISHED	15
	LACTATION, NEW	LACTATION, NEW	30



- a. Double-click on the appointment.
- b. Use the Appointment Type drop-down to select the new appointment type.
- c. Click the **Save** button .
- d. Repeat these steps to edit the Appointment Type for all appointments on the report.

### Visit Templates

1. Click [here](#) to access an SQL Report that displays orphaned Appointment Types for Visit Templates
2. Using the report results, navigate to the Encounter and Well Visit Template Editors (**Clinical tab > Encounter Templates or Well Visit Templates**) to edit the Appointment Type so that it matches a type in the Appointment Types table:



Appt type: [ ] [Clear]

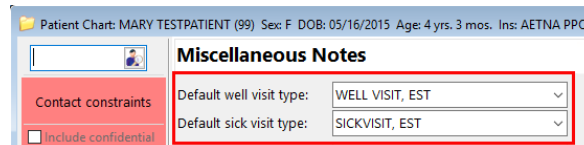
- a. Select the template and click the **Edit** button.
- b. Click the ellipsis button  located to the right of the Appt Type field to open the Choose Type of Appointment window.
- c. Select the Appointment Type for the template.
- d. Click the Red Back Arrow to return to the Encounter Template Editor window.
- e. Click the **Save** button .
- f. Click the **Template List** button to return to the list of Templates.
- g. Repeat these steps to edit the Appointment Type for all templates on the report.



**Note:** The query results include *archived* Visit Templates. For these templates, the practice can choose to either ignore them or correct them by choosing a valid Appointment Type. Correcting the Appointment Type on archived templates will prevent issues going forward should the archived template be reactivated.

### Patient Chart (Default Visit Types)

1. Click [here](#) to access an SQL Report that displays orphaned Appointment Types for the Default Exam Types as selected in the Patient Chart.
2. Using the report results, navigate to the patient's chart to edit the Default Well Visit and Default Sick Visit type **Clinical, Practice Management, or Billing tab > Patient Chart button > search for and select patient > Notes/Addl Info** so that it matches a type in the Appointment Types table:



The screenshot shows a patient chart interface for 'MARY TESTPATIENT (99)'. The 'Miscellaneous Notes' section is highlighted with a red box. It contains two dropdown menus: 'Default well visit type:' set to 'WELL VISIT, EST' and 'Default sick visit type:' set to 'SICKVISIT, EST'. To the left of the dropdowns are two red buttons: 'Contact constraints' and 'include confidential' (with an unchecked checkbox).

- a. Use the Default Well Visit Type or Default Sick Visit Type drop-down menu to select the Appointment Type.
- b. Click the **X** to close the patient's chart.
- c. Click **Yes** to save your changes.
- d. Repeat these steps to edit the Default Visit Type for all patients on the report.