Appointment Type Cleanup for OP Patient Portal Readiness

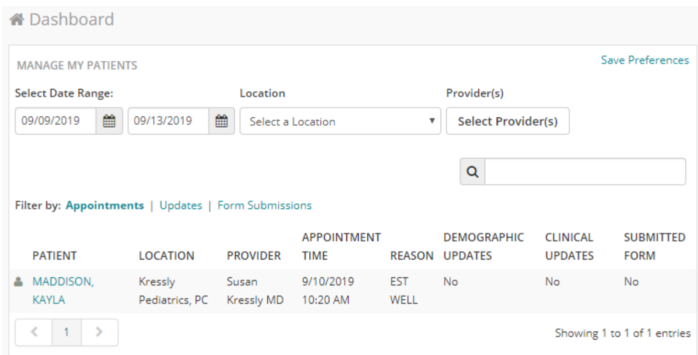
Last Modified on 06/03/2024 11:42 am EDT

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 InteliChart.

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.



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:

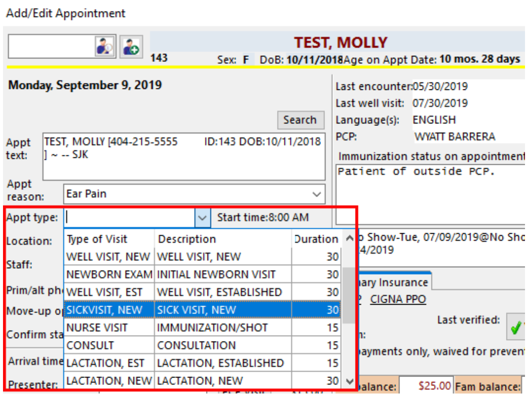
- Scheduled Appointments
- Visit Templates
- Patient Chart (Default Visit Types)

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

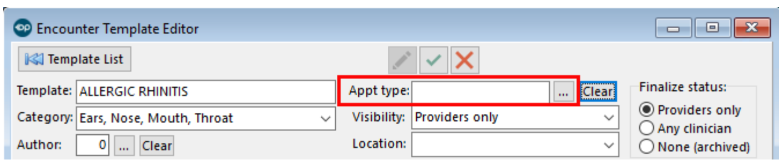
1. Click **here** to access an SQL Report that displays orphaned Appointment Types for Scheduled Appointments
2. Using the report results, navigate to the patient's appointment(s) on the schedule (**Clinical, Practice Management, or Billing tab > Schedule button**) to edit the Appointment Type so that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



   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:

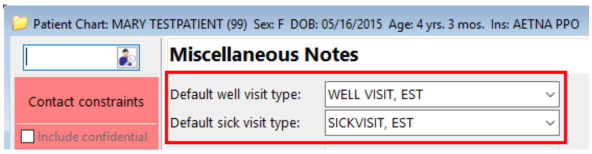


   a. Select the template and click the **Edit** button.
   b. Click the ellipsis button ... located to the right of the Appt Type field to open the Choose Type of Appointment window.
   c. Select the Appointment Type for the template.
   d. Click the Red Back Arrow to return to the Encounter Template Editor 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:



   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.