

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. Clickhere for information on collecting copayments.
- (Optional) To clearly see Curbside visits, add a color to the Tracking Stage, clickhere 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.

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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.



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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 textHere.
- 2. The Visit Status, on the Tracking window, will update to **Curbside**.

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3. Message sent with the following instruction:





• If no room number assigned when parent/patient responds withHere.

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

• If a room has been assigned when the parent/patient responds withHere.

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:

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Important: If the practice is unable to use Curbside, please contact OP Support using theChat with Support button.

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- 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.
- 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.

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- 3. Click the Resend Curbside Message button.





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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

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.







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