Flu Clinic: OP Setup

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

Overview

The information below will guide you through the setup, in OP, to allow flu clinic appointments to be scheduled or requested on the InteliChart Patient Portal.

> To view the video instruction for the Flu Clinic Setup in OP, click 🎥

OP Flu Clinic Setup

Create a Flu Clinic User

The below steps are only required if the practice wishes to schedule patients for the flu clinic using a unique staff member specific to the flu clinic. If the practice will add the flu clinic to an established user, such as, a provider or nurse, please move to the next section of the instruction.

> 📌 **Note**: For a user created for the flu clinic, that is not a provider, the Clinical level must be set to **Clinical staff (nurse, MA, vaccinator)** in the Staff/Provider directory.

1. Navigate to the Staff Directory: **Practice Management > Staff/Providers**.
2. Click the **Add** button and complete the below information.

   - **First name/Last name**: Enter the first and last name that will be used for the flu clinic, example Flu Clinic.
   - **Initials**: Enter initials for the user.
   - **Location(s)**: Add the location(s) that will use this user to schedule flu clinic appointments.
   - **Clinical level**: Clinical staff (nurse, MA, vaccinator)
   - **Standard/Emergency medical record visibility**: Any staff member.

3. Click the **Save** button once the *Basic Info* tab is complete.

Create an Appointment Zone for Flu Clinic

1. Navigate to Appointment Types and Zones: **Practice Management > Appointments**.
2. Click the **Appointment Zones** tab.
3. Click the **Add** button and complete the below information.

   - **Appointment Zone**: Add a zone name that would be used for the flu clinic, example FLU CLINIC.
   - **Zone Color**: Select a color to be displayed on the schedule.
   - **Protection Status**: Click the drop-down and select **Not Protected**.
   - **Purpose**: Click the drop-down and select **Flu Clinic**.
   - **Max Appts**: Enter **0** in this column.

4. Click the **Save** button.

Create an Appointment Type for Flu Clinic

If the practice has already established an Appointment Type for Flu Clinic, proceed to the next section.

1. Navigate to Appointment Types and Zones: **Practice Management > Appointments**.
2. Click the **Appointment Types** tab.
3. Click the **Add** button and complete the below information.

   - **Visit Type**: Indicates the name of the type of appointment, for example, FLU CLINIC
   - **Description**: Enter a more detailed description of the type of appointment.
   - **Duration**: Enter the length of time for the appointment.

> ⭐ **Example**: If you want to be able to see 3 patients in the same time slot and your Practice's appointments are scheduled in 15 minutes blocks, enter 5 here so that 3 spots are made available for patient scheduling.

   - **Sort**: Indicates the order that the appointment types will appear in on a drop-down list.
   - **Appt Line Color**: Displays the color that will appear on the left-hand side of the appointment box. Click the drop-down or ellipses button and select a color.
   - **Department**: Lists the department for the type of appointment. Click the drop-down and select from the list.
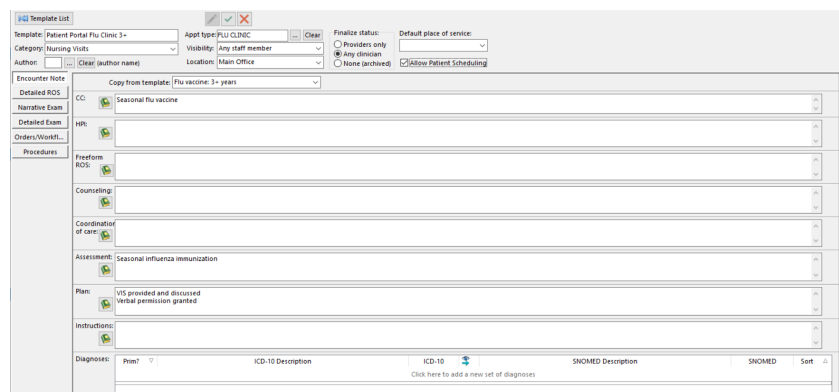   - **Purpose**: Click the drop-down and select Flu Clinic.

4. Click the **Save** button.
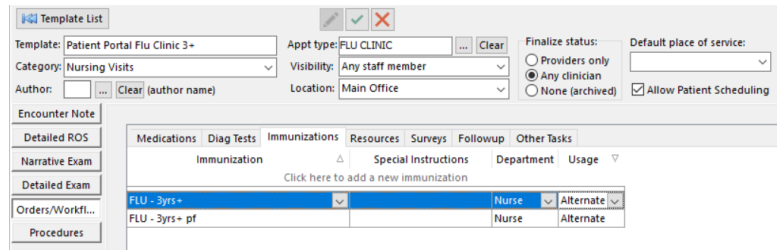
Review Flu Vaccine Templates

1. Navigate to Encounter Template Editor: Clinical > Encounter Templates.
2. Locate the template(s) you will use for scheduling for the Flu Clinic, click the **Edit** button.
3. Click the ellipses button for *Appt type* and select **Flu Clinic**.
4. Click the **Allow Patient Scheduling** checkbox.
5. Click the **Save** button.
6. Repeat for all templates that will be available for scheduling for the Flu Clinic on the Patient Portal.

(*Optional*) Create Flu Clinic Templates for Scheduling on the Patient Portal

1. Follow the below steps to create templates specific to the Flu Clinic on the Patient Portal.

   a. Click the **Add** button.
   b. In the Template field name the template specific to the flu clinic, example *Patient Portal Flu Clinic 3+*.
   c. Click the drop-down arrow for *Category* and select from the list, typically this will be Nursing Visits
   d. Click the ellipses button for *Appt type* and select **Flu Clinic**.
   e. Confirm the visibility is **Any staff member**.
   f. Select **Any clinician** radio button to allow the Clinical staff to finalize this note.
   g. Click the **Allow Patient Scheduling** checkbox.
   h. Click the drop-down for *Copy from template* and select the flu vaccine template that will be used to schedule in OP.

i. A Warning dialog box displays, click the **OK** button.

j. Click the **Immunizations** tab in the *Orders/Workflow* window and add the flu vaccine(s) that will be available with this template.

k. Click the **Save** button.

l. Repeat the above steps for all flu templates that will be available for scheduling on the Patient Portal.