Phreesia: Setup in OP

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About

The instructions in this article are designed to be completed in OP. The information below will allow the practice to:

- Customize the schedule to meet the needs of the practice.
- Allow appointments to be scheduled for selected encounters.
- Set contact rules for appointment reminders.
- Assign staff to receive document messages from Phreesia.

Assign Staff to External Documents Department

Staff will be added to a new department, External Documents, to receive notification in the message center when new Phreesia generated PDF documents are available in OP. The messages will be displayed in the Portal tab of the Message Center. For information on how to assign a staff member to a Department, click **here**.
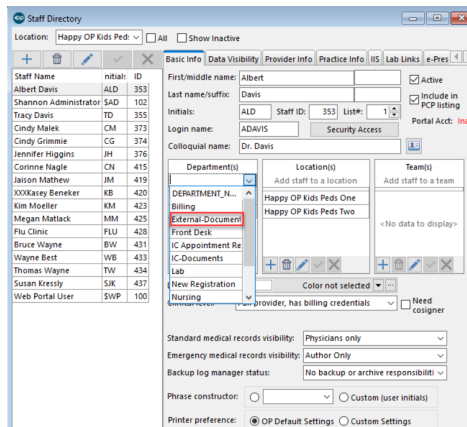
Self-Scheduling Set up

> **General Rules to Self-Schedule in OP:**
> - May only view and schedule in slots that are not protected.
> - An appointment can only be scheduled for an Active OP patient.
> - May not double-book in an appointment slot.
> - Can not force an appointment into a time slot when the appointment type purpose differs.
> - Can not create an appointment outside of the displayed time slots.

Appointment Type, Zone, and Purpose

- **Appointment Type**: The Appointment Type defines the duration and Purpose of an appointment. When a visit template is chosen to schedule an appointment, the Appointment Type will be used to search for or create an appointment.
- **Purpose**: The Purpose categorizes related appointment types. Each zone purpose is associated with a unique ID. The zone purpose and ID have a relationship and if the practice chooses to change the name of a zone purpose the definition of the zone purpose should remain the same.
- **Appointment Zone**: Appointment Zones are set up with a Purpose that will determine which Appointment Types can be booked in those slots. In order to schedule appointments with Phreesia, appointment zones must be used for scheduling. This is accomplished in OP by using Schedule Templates or adding slots to the Calendar. For information on how to create schedule templates, click **here**. If the practice prefers to add slots to the calendar, refer to the article **Creating a**

Encounter Templates

Setup in OP is completed for encounter templates the practice wishes to display in Phreesia. It is recommended the practice considers carefully and selects Symptom vs. Diagnosis templates.

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Select the template to allow self-scheduling and click the **Edit** button. The Encounter Template Editor window displays.
3. Click the **Edit** button.
4. Confirm the Encounter Template has an **Appt type** selected. If there is no Appt type, follow the below instructions.

   a. Click the **ellipses** button
   b. Select an **Appt type** and click the red arrow.

5. Confirm the **Visibility** for the encounter template is **Any staff member**.
6. Select the **Allow Patient Scheduling** checkbox.
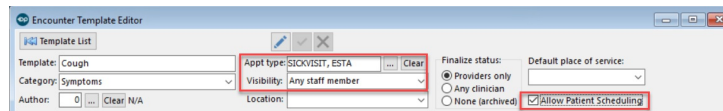
7. Click the **Save** button.
8. Repeat the above steps for all encounter templates that will be available for self-scheduling on Phreesia.

Well Visit Template

Scheduling of a Well Visit is handled using the below information.

- The **Well Visit Placeholder** template must be available in the Well Visit Template Editor.
- The Well Visit Placeholder template must be linked to a **Well Visit, Est** appointment type.
- Only one template containing the word Placeholder can exist in the Well Visit Template Editor.
- The template may not have a sex selected or minimum age in months entered.
- If this template does not exist in your OP system, it will be added by OP during the implementation of Phreesia.

> **Note**: The Well Visit Placeholder template may have been archived. To confirm the template is not available in your system, from the Well Visit Template Editor window, click the **Show archived** checkbox. If the template displays, follow the below instruction to make it active.
> 1. Highlight the template and click the **Edit** button, the Well Visit Template Editor displays.
> 2. Click the **Edit** button.
> 3. Deselect the **Archived** checkbox.
> 4. Click the **Save** button.

Appointment Reminder Contact

During implementation for Phreesia, the practice and Phreesia will determine what is the preferred record to use for appointment reminders. Once the preferred record is selected, it is important for the practice to discuss with staff what will be required information.

> **Important**: The patient and primary family contact will be the only records sent to Phreesia that will be used for appointment reminders.

The below information is required for either the primary family contact record or the patient record.

- In the **Reminders** field, a preferred contact method must be selected.
- Confirm the information is entered for the selected preferred contact method. For example, if Home Email was selected as the preferred contact method verify the record has a home email entered.

Auto-Posting Settings

There may be an instance where inbound payments may get auto-applied to patient responsible balances. It is your responsibility to know and understand the practice setting found in Global Preferences. If you need additional information, please review the article on the Help Center for System Preferences: Billing.

- A practice leverages the auto-post workflow within the Tacking screen for posting charges.
- An RCM practice leverages backend auto-posting automation.

OP Client: Auto-posting Mode

There are 2 settings that may have an effect on whether patient credits are potentially applied automatically when clicking the Auto-post button from the Tracking window.

- **Charges + apply copay only**. Posts charges for a claim and apply credits to an estimated copay amount. This occurs when the visit date and credit date are the same. OP will attempt to apply as much of the credit to the patient's copay amount using the below guidelines.
  - If the credit is less than the visits estimated copay amount, the user will receive a prompt to borrow from a credit card on file to continue paying the copay amount.
  - If the credit is greater than the visits estimated copay amount, the user will receive a prompt to continue to apply the overage to other outstanding patient balances.
- **Charges + apply payments**: Posts charges for a claim and apply credits to an estimated copay amount, coinsurance or deductible. This occurs when the visit date and credit date are the same. OP will attempt to apply as much of the credit to the patient's copay coinsurance, or deductible using the below guidelines.
  - If the credit is less than the visits estimated copay coinsurance, or deductible, the user will receive a prompt to borrow from a credit card on file to continue paying the copay amount.
  - If the credit is greater than the visits estimated copay, coinsurance, or deductible , the user will receive a prompt to continue to apply the overage to other outstanding patient balances.

RCM Client: Auto-posting Mode

RCM practices have the auto-posting service running in the background of their system and will not utilize the auto-post settings found in Global Preferences. The RCM auto-posting service follows the same guidelines as the Charges + apply payments listed in the above section. The difference with the RCM auto-posting service is there is no need to click the Auto-post button on the Tracking window, everything will occur automatically.