COVID Clinic Setup Step 1 of 3: Set Up OP User, Appointment, and Template(s)

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

About

The information below will guide you through the setup in OP to allow COVID vaccine clinic appointments to be scheduled or requested on the InteliChart Patient Portal. Please note, all of the sections below must be completed, as the steps build upon one another to establish all of the items needed for a COVID Clinic.

Create a COVID Clinic User

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

> 📌 **Note**: For a user created for the COVID 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 tab > 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 COVID Clinic, for example, COVID Clinic.
   - **Initials**: Enter initials for the user.
   - **Location(s)**: Add the location(s) that will use this user to schedule COVID 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 Purpose for COVID Clinic

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

   - **Zone Purpose**: Add a zone purpose name for the COVID Clinic, for example, COVID Clinic.
   - **Description**: *(Optional)* Add a description for the Zone Purpose.
   - **Zone ID**: The Zone ID will default to the next number, it is recommended you leave the defaulted numeric value.

4. Click the **Save** button.

Create an Appointment Zone for COVID Clinic

1. Navigate to Appointment Types and Zones: **Practice Management tab > 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 COVID Clinic, for example, COVID 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 the COVID Appointment Zone Purpose.
- **Max Appts**: Enter **0** in this column.

4. Click the **Save** button.

Create an Appointment Type for COVID Clinic

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

1. Navigate to Appointment Types and Zones: **Practice Management tab > 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, COVID CLINIC.
- **Description**: Enter a more detailed description of the type of appointment.
- **Duration**: Select the length of time for the appointment, taking into consideration the time unit used on your Practice's calendar.

> ☆ **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 the COVID Appointment Zone Purpose.
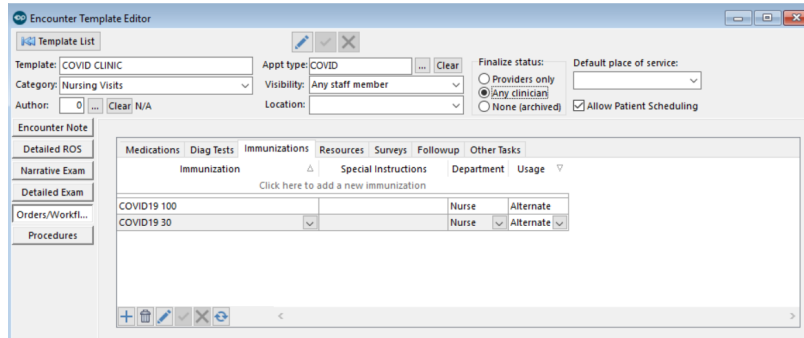
4. Click the **Save** button.

Review COVID Vaccine Templates

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Locate the template(s) you will use for scheduling for the COVID Clinic, and click the **Edit** button.
3. Click the ellipses button for **Appt type** and select the Appointment Type added for the COVID 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 COVID Clinic on the Patient Portal.

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

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

   a. From within the Encounter Templates Editor window, click the **Add** button.
   b. In the **Template** field name, enter the template specific to the COVID Clinic, for example, Patient Portal COVID Clinic.
   c. Click the **Category** drop-down arrow, and select from the list. Typically, this will be Nursing Visits.
   d. Click the ellipses button for **Appt type**, and select the Appointment Type created for the COVID Clinic.
   e. Confirm the visibility is **Any staff member**.
   f. Select the **Any clinician** radio button to allow the Clinical staff to finalize this note.
   g. Select the **Allow Patient Scheduling** checkbox.
   h. To complete the template:

      - Select the appropriate tabs and complete the required fields.

- Click the drop-down for **Copy from template** and select the COVID vaccine template. By selecting the COVID vaccine template, you will have a starting point to make changes.

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

k. Click the **Save** button.
l. Repeat the above steps for all templates that will be available for scheduling on the Patient Portal.