

COVID Clinic Setup Step 3 of 3: IntelliChart Practice Portal Setup

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

About

The information below will guide you through the setup in IntelliChart to allow COVID Clinic appointments to be scheduled or requested on the IntelliChart Patient Portal. This setup consists of two parts where you will:

Add the OP COVID Clinic User

1. Log in to the IntelliChart Practice Portal.
2. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**
3. Add the COVID Clinic User following the below steps.
 - a. Click the **Add Provider** button and complete the information for the COVID clinic provider, for example, COVID Clinic. If you require additional information on adding a provider, refer to [OP Practice Portal Start Here Quick Reference Guide](#)
 - b. Locate the **Associated Users** section, and select the user added for the COVID Clinic in OP by clicking the **right arrow** to move the user to the right panel.
 - c. In the Appointment Resources section, select the **Live Scheduling** checkbox.



Note: The Appointment Request checkbox will be selected and cannot be unchecked to use Live Scheduling.

4. Click the **Save** button.

Complete the Reason for Appointment Mapping

1. Navigate to Scheduling window: **Main Navigation Panel > Portal Management > Patient Interface > Scheduling**
2. Select the **Live Scheduling** checkbox, for all COVID templates, where the checkbox was selected to *Allow Patient Scheduling* in OP.
3. (Optional) Select the **Appointment Requests** checkbox, for all COVID templates, where the checkbox was selected to *Allow Patient Scheduling* in OP.
4. Click the **Save** button.

Confirm Scheduled Appointments Display

1. Access Appointment Types: **Navigation Panel > Portal Management > Code Management > Appointment Types tab**
2. The window displays the following information:
 - **Description:** The appointment description which populates from OP.
 - **Publish:** Checkbox indicating whether the Appointment Type is published to the Patient Portal.
3. Select the checkbox in the **Publish** column for the COVID appointments.
4. Click **Save Settings** once you have finished making selections. The Save Selection window displays.
5. Click the **Apply** button.