How to Manage a Clinic

How to Manage a Clinical Event

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Introduction to Managing Appointments

The following slides demonstrate how an Ncompass Clinical Scheduler can manage a patient's appointment.

* Remember that you will also need to ensure that the process of communicating the patient's information and confirmation of the appointment is agreed upon before updating the Clinical Event details.

Updating Appointment Status

When you create a new patient appointment in your clinic, its status will appear as "Pending", which is short for "Pending Patient Confirmation." Depending on prior agreement, this checkbox can be used by the reciprocating site to confirm a patient's availability.

[1 – 2] You can confirm the patient's participation in your clinic by clicking on the checkbox that appears under the "Patient Confirmation" heading, and then click on the "Update Associated Clinical Events" button. To move the status back to a "Pending" state, follow the same steps.

Slide 4

Updating Appointment Status

[3] If a patient appointment hasn't been confirmed, you'll see a marker next to the View My Events link as reminder. The marker provides the specific number of patient appointments or events that have not been Approved or Scheduled in Ncompass. Click the View My Events link to view outstanding events.

[4] The unapproved events are marked with a red dot and contain buttons that will enable you to more easily approve and confirm an event or appointment. Clicking each specific button confirms a step in the approval process.

Notifying Relevant Persons

[3] Once a patient is confirmed, it is important for this information to be shared with the participating sites. The sites associated with this clinic may need to print the information in order to pre-register the patients. There is no automated notification to the other site so the onus is on the individual that confirms the appointment to notify others involved. This communication can be done with the "Notify Participants" button at the clinical frame level.

Status: Scheduled **3**

Created By:
larry learner

Creation Date:
29-06-2010

Copy

Print

Show Full Log

Cancel

Generate Patient Letter

Notify Participants
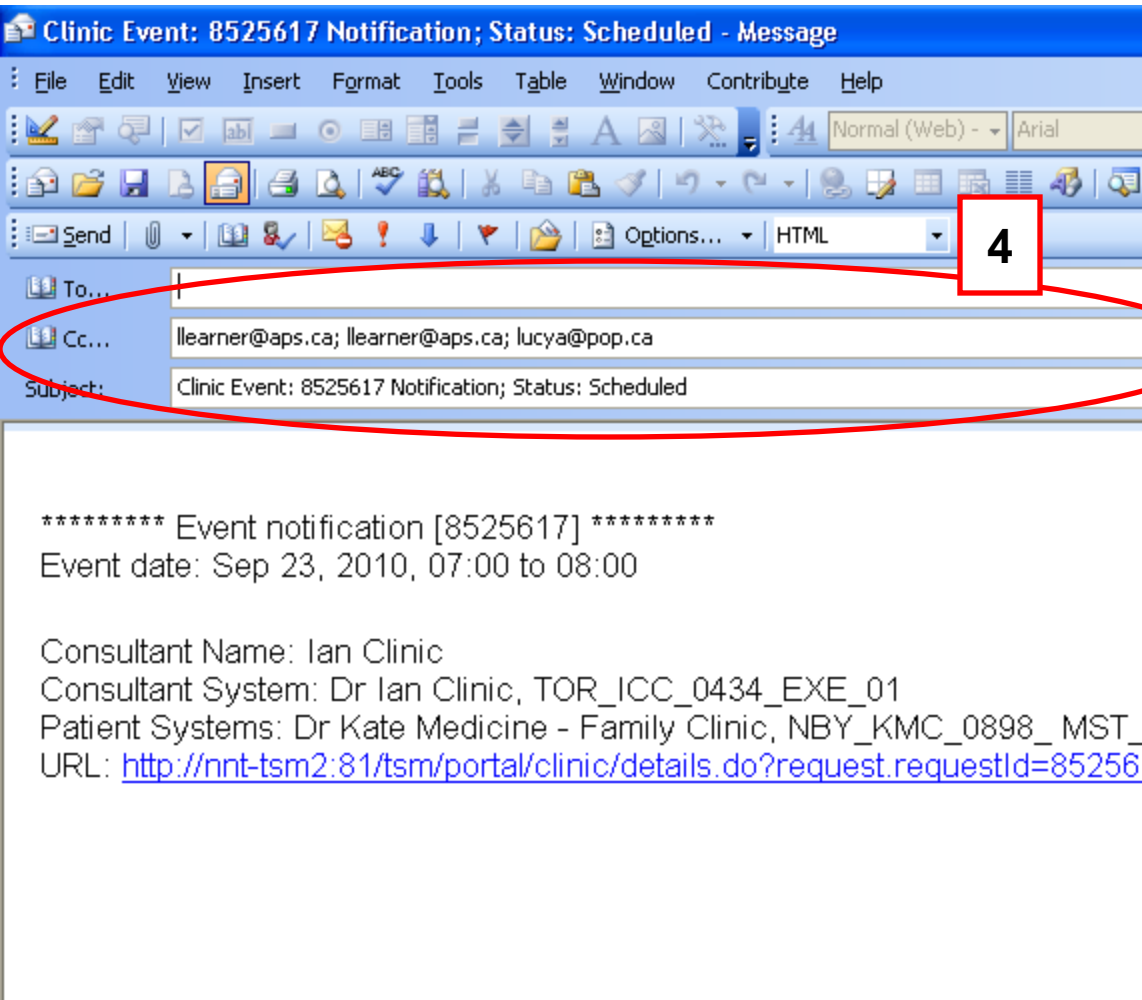
Event Approval

Patient System Approval ☑

Consultant System Approval

Patient Has Been Contacted?

Revise

7:00 to 07:30 (no setup time)

ardiology

Ontario

Click here for help with this section ❓

Notifying Relevant Persons

[4] When you click on the "Notify" button, MS Outlook or any other type of email-based application will launch. In the body of the email is a link to the patient's appointment. You should never provide information that can identify a patient within the email. If you had included site coordinators' email addresses when scheduling the Ncompass Clinic, you will notice that their email addresses will appear in the "CC" line along with your own email address. You can remove or add additional email addresses as required.

Generating a Patient Letter
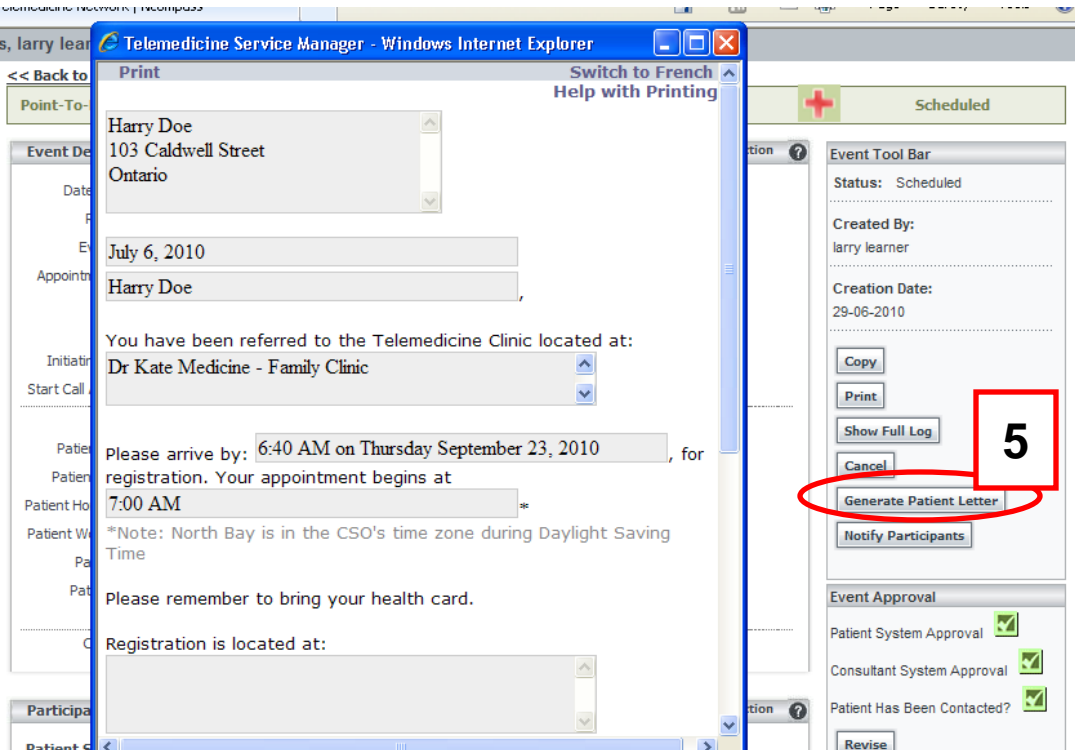
[5] On the patient appointment screen, you may click the "Generate Patient Letter" button to create editable patient letters. This letter can be mailed to the patient with details of their appointment. For instance, the consulting site could use the letter to notify the patient of the date/time of the appointment as well as the directions to this studio. Please ask the patient if they would like to receive a letter from you before doing so, as some patients do not want family members to know about their appointments.

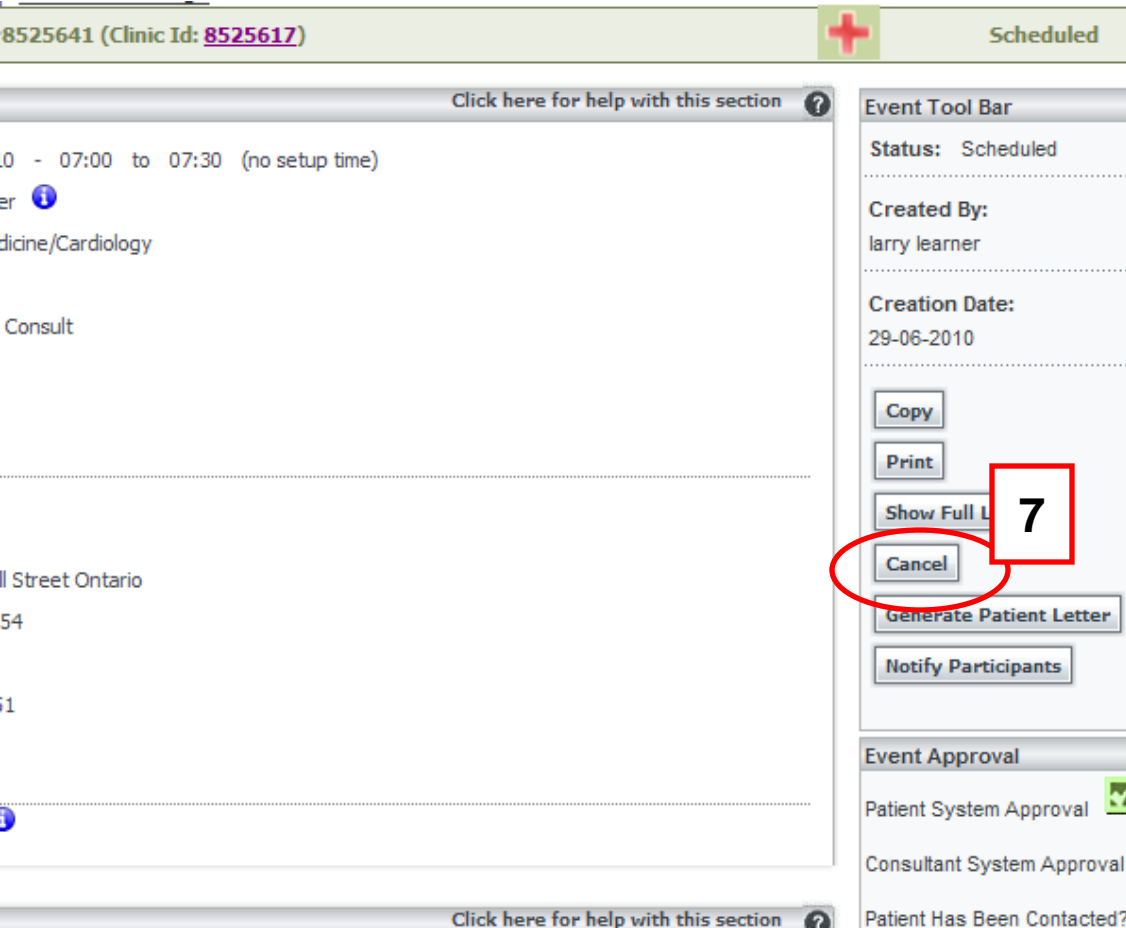# Cancelling a Patient Appointment

[6] If a patient is unable to attend their appointment, you can cancel their appointment from the clinical event and they will remain visible for future reference.

To cancel the individual patient, select the corresponding event ID number for that specific patient. By clicking on the hyperlink, you will be brought to the individual patient appointment page.

Cancelling a Patient Appointment

[7] Click on the "Cancel" button located to the right of the screen in the tool bar.

Please note, you will not be able to cancel patients participating in your multipoint clinics. In this case, you will need to contact OTN Scheduling for assistance.

You can reach OTN Scheduling by dialing 1 866 454 6861 and choosing option 2 or saying "Scheduling." Alternatively, you can email OTN Scheduling at: scheduling@otn.ca

Cancelling a Patient Appointment

[8] Select the appropriate reason for the cancellation from the drop down menu. You are able to add specific comments regarding the cancellation in the "Log" field.

[9] Click on the "Save Changes" button to finalize the patient's cancellation. If you click the "Cancel Changes" button, you will return to the patient's appointment page, and the event will still be scheduled.

Cancelling a Patient Appointment

[10] Once you have successfully cancelled the appointment, return to the "Patient's Appointment" page. The status for the event should be changed to "Cancelled." You can return to the clinic by clicking the ID hyperlink located at the top of the page.

Cancelling a Patient Appointment

[11] When you return to the clinical frame, the cancelled appointment will be removed from the 'Associated Clinical Events" section, but will remain on the page just below the patients in a cancelled state. Remember that you will need to reduce the number of patients due to the cancellation. It is also important to emphasize that you have only cancelled the patient's appointment and not the actually videoconference event.

Refresh This Page

#8525641 (Clinic Id: 8525617)

➕ Cancelled - Patient un...

Click here for help with this section ❓

010 - 07:00 to 07:30 (no setup time)
ner ⓘ

edicine/Cardiology

e Consult

t

ell Street Ontario

454

951

ⓘ

Event Tool Bar

Status: Cancelled - Patie...
unavailable

Created By:
larry learner

Creation Date:
29-06-2010

[Copy]

[Print]   **12**

[Show Fu...]

(Un-Cancel)

[Generate Patient Letter...]

[Notify Participants]

Event Approval

Patient System Approval

[12] To revoke a cancellation, select it from your calendar's "My Events" page or from the clinic page directly, and click on the "Un-cancel" button that now appears. Click the "Un-cancel" button and you will see that the patient's appointment now has a tentative status.

[13] Click on the "Confirm" button to change the patient's appointment to a "Scheduled" status.

Please note that it is essential to agree upon an approval process with the other site to ensure that that scheduling of clinical events is managed properly. If you have any questions on implementing a suitable process, please contact your OTN Regional Manager for assistance.

Editing a Patient Appointment

[14 - 15] You can modify appointment times for the associated patients by simply typing over the existing time and then clicking on the "Update Associated Clinical Events" button.

[16] Before you can make any alterations to a specific patient's details and appointment, you will need to change the appointment to a "Pending" status. If you need to edit the patient's details, click on the "Event ID" to open that patient's appointment.

Editing a Patient Appointment

[17] Once you are viewing the patient appointment you can click on the "Edit" button to make changes. At the patient level you will only be able to change the following information: Patient demographics, Appointment Type, Priority, Purpose, Patient Contact and Event Type.

Remember, that the event must be in a 'Pending" status in order for the "Edit" button to be available

Editing a Patient Appointment

[18] Once the changes are made, click the "Save" button to update and store the changes. When you go back to the main clinical frame, you will notice that your patient appointment is still in a "Pending" status. Depending on the approval process, either you or the reciprocating site will now need to confirm the patient's appointment in order for it to move back to a "Scheduled" status.

Remember that you can always notify the other site of changes and alterations by using the ""Notify Participants" button on the Event Toolbar. Failure to approve all the systems and patients will mean that your event will not appear in any reports.

Managing the Clinical Frame

The following slides demonstrate how an Ncompass Clinical Scheduler can manage the Clinical Frame.

The Clinic Frame is the actual scheduled videoconference event which contains all the details regarding the video call and includes the: date, start and end times as well as the systems involved.

Editing the Clinical Frame

[1] When you click the "Edit" button from the Event Toolbar, you will be taken to the "Edit" page and your clinic's status will become "Unscheduled" . Please make sure to re-schedule your clinic when you are finished making your changes.

Unscheduled clinics will not appear on your activity reports, multipoint or auto-started events will not initiate and portal-calling features such as click-to-call will be unavailable. The changes you make will filter down to your patients as long as those patients have not been cancelled.

Copying the Clinical Frame

[2] If you need to create a similar appointment for the same physician or allied health professional use the "Copy" button which is available in the Event Tool bar. By clicking on the "Copy" button, a new page will appear.

Copying the Clinical Frame

Copy Request #8525617

Reservation Details   Click h

Date: Sep 23, 2010

Event Time: 07:00 to 08:00

Clinic Type: Serial

Consultant: Ian Clinic

Event type: Internal Medicine/Cardiology

Copy Details   Click h

New Clinic Date : [   ] 📅 m-yyyy

Copy Associated Clinical Yes ○ No ◉

Events?   ☐ Include Cancelled Event
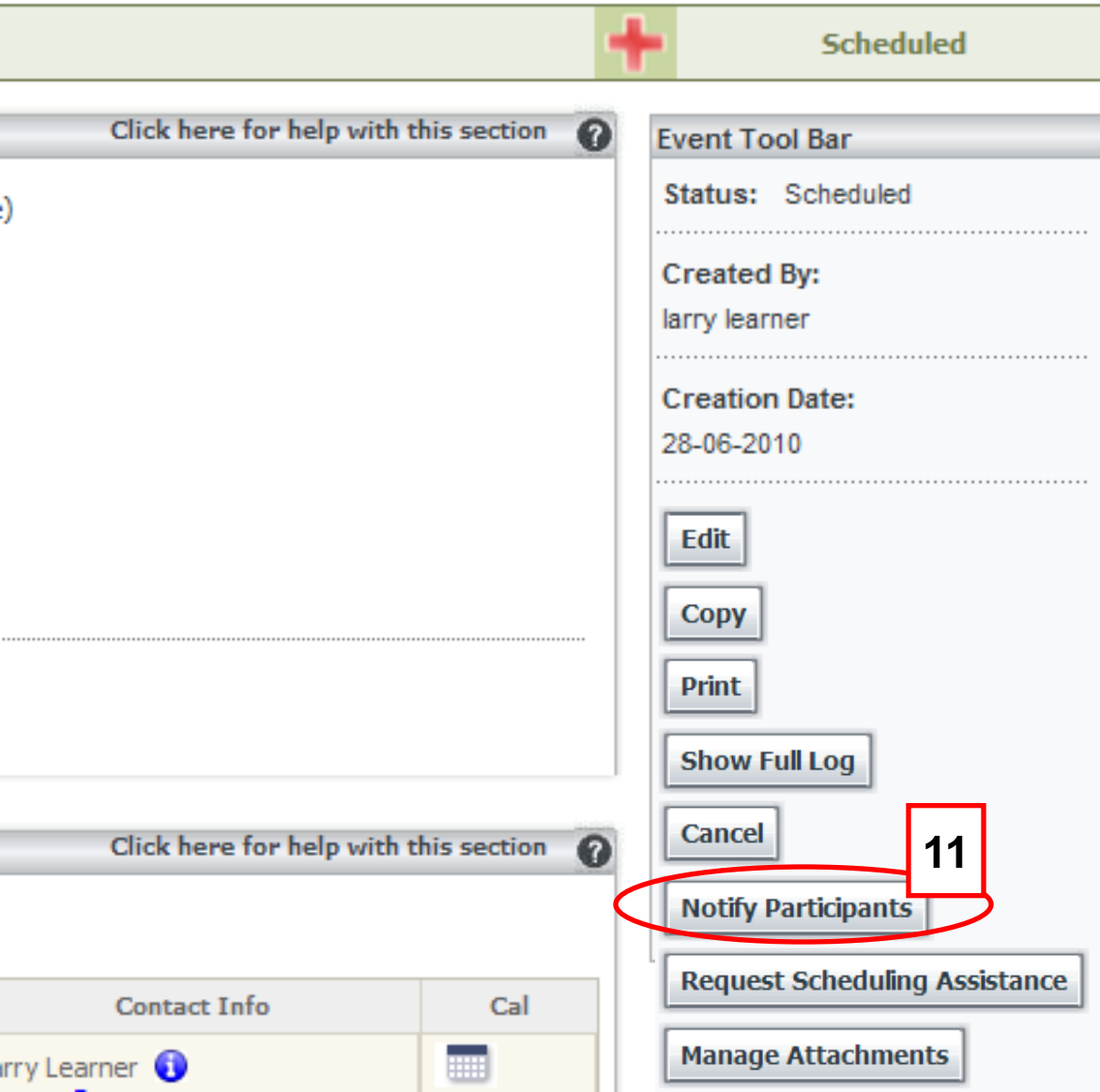
Note: Please ensure that you notify all those involved of the creation

[3] Provide a new date for the event by either clicking the date lookup icon or manually typing the date using the convention dd-mm-yyyy

[4] The "Copy Associated Clinical" option determines whether the associated patient appointments will be copied. In order to copy the clinical frame alone, leave the default selection to "No".

[5] If you need to copy appointments that were cancelled so that they can be re-scheduled check the "Include Cancelled Events" option.

Copying the Clinical Frame

[6] Click the "Copy" button, and Ncompass will create a copy of the event immediately. Please note, that the "Cancel Copy" button will disregard the information you have inputted and take you back to the previous event page.

Copying the Clinical Frame

[7] You will notice a message across the top of the screen indicating that the event was successfully copied and has been saved in a tentative status. Your new event will be assigned its own event number. Remember that the event ID is useful to keep as it tracks that specific event.

Your patient appointments will be assigned its own ID numbers. The status of your event will remain "Tentative" until you have made the necessary alterations and schedule the clinical event.

[8] To cancel a videoconference, click on the "Cancel" button on the Event Tool Bar located at the right of the screen.

Cancelling the Clinical Frame

[9] You will be presented with a "Cancel Request" screen. Select the reason for the cancellation from the dropdown menu as well as enter any additional information if required in the "Log" field.

[10] Click on the "Save Changes" button to finalize the cancellation. Please note, that the "Cancel Changes" button disregards the cancellation.

Once you save your changes, you will notice a message at the top of the screen indicating that your event has been cancelled.

Notifying Functionality

The Notify Participants button is useful when corresponding with other coordinators and schedulers involved in the event

[1] When the Notify Participants button is clicked, MS Outlook or any other type of Email based application will be launched.

Notifying Functionality

To...

Cc... | rkenchington@otn.ca; hkellam@otn.ca; newtester@otn.ca

Subject: | Clinic Event: 22219509 Notification; Status: Completed

Send

********* Event notification [22219509] *********
Event date: Feb 27, 2014, 13:00 to 14:00

Consultant Name: OTN Tester
Consultant System: OTN - Toronto, TOR_OTN_0099_TRNG_01
Patient Systems: OTN - Ottawa, OTT_OTN_0272_OTN_12: 2Patients
URL: http://tsm-iam-test.testdev.otn/tsm/portal/clinic/details.do?
request.requestId=22219509

The "subject" line contains the event number and the status of the event. The Cc field
include email addresses pulled from coordinator information from Ncompass. The body of
the email includes pertinent details regarding the event. Nearer the bottom of the email is a
URL link that Ncompass Users can use to locate the event.

Manage Attachments
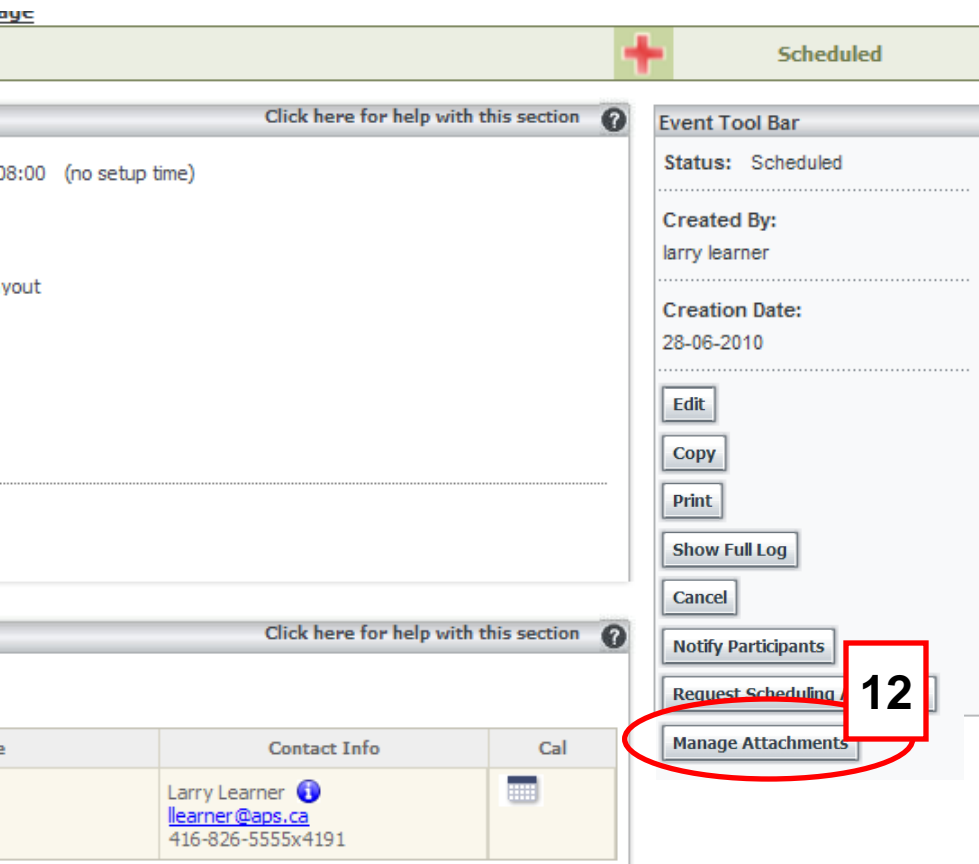
Communication as well as following established clinical protocols is an important component of ensuring that a clinical telemedicine consultation is a success.

[12] To facilitate the communication process between consultant and patient sites, Ncompass enables users to attach supporting material to clinical events such as clinical protocols and supporting documentation. All attachments are made on the clinical frame level. To attach documentation to the event, please click on the manage attachment button.

Manage Attachments

This takes you to the manage attachment page. **[13]** Click the Add File in the Supporting Materials section for each file you want to attach. A new set of fields appear each time you click Add File. **[14]** To locate and select an attachment, click Choose File and then navigate to the file location. Double click on the document that you would like to attach from your computer. **[15]** To ensure that users understand the subject and purpose of the attachment, type a label in the description field.
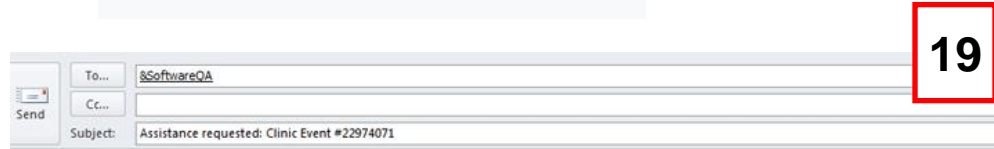
Manage Attachments

[16] To attach the file, click save changes in the event tool bar. Please note that Personal Health Information or imagery is not permitted and attachments are limited to 50 MB total. One attachment cannot be more than 10 MB

[17] At any time you can return to this page to remove or attach documents by clicking the Manage Attachments button.
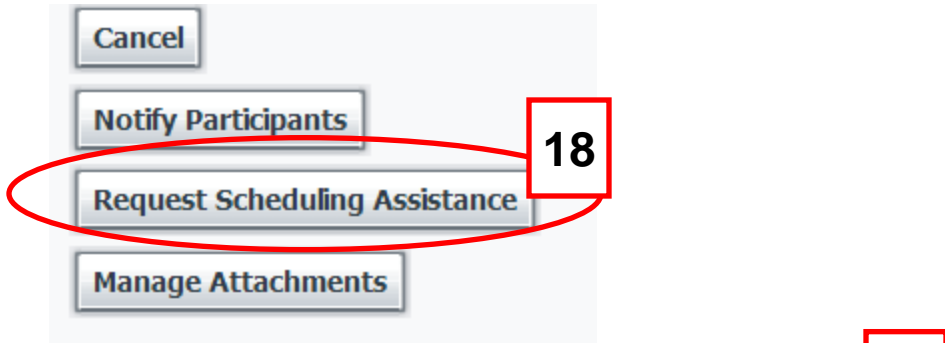
[18] There might be times when you require OTN's Customer Care support to assist in scheduling and coordinating an event. If you do require assistance, please click the Request Scheduling Assistance button.

[19] This will launch MS Outlook or any other type of Email based application. You'll notice that in the body of the email are questions to prompt you in determining the specific assistance that you require.

Ncompass Terminology

Auto Initiate	An Ncompass feature that enables events to start and end automatically without manual intervention. This means that if you schedule an event to start at 8:00 AM, the systems involved will automatically connect at that time, provided the videoconferencing systems have been turned on.
Clinical Event	An event that directly or indirectly discloses patient information.
Clinic Frame	The actual scheduled videoconference event which contains all the details regarding the video call and includes the: date, start and end times as well as the systems involved.
Multipoint	An event that involves more than three sites in the videoconferencing. Any multipoint event requires a bridge. A bridge acts like the hub of a wheel, bringing together the spokes or in this case the individual sites, in a videoconference. All multipoints have a clearly defined start and end time and must be scheduled at least 30 minutes before they are to occur.

Ncompass	Ncompass is an online scheduling tool designed for OTN Members to schedule and manage videoconferencing events. It's simple to use, secure and gives OTN Members access to the same scheduling information as OTN Scheduling.
Patient Appointment	An optional component which allows the clinical scheduler to add details such as the start and end time of an patient's appointment, the patient name, contact information as well as any particulars regarding the appointment. Please note, you will not be able to add patient appointment information if your clinic is a multipoint event. To do this you will need to contact OTN Scheduling.
Point-to-point	An event that takes place between two videoconference systems and do not require the involvement of a bridge. Consequently, point-to-point calls can be scheduled at any time. Futhermore, point-to-point events provide users with portal calling features.