

COMMUNICATION GUIDE

OD Online Practice Management and Electronic Health Records

Version 1.0

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SET-UP

RINGCENTRAL CREDENTIALS

1. Select Preference tab from navigation in the dashboard
2. Select Communication from the sub-navigation
3. Enter your RingCentral credentials: Username, extension, and password

The screenshot shows a dashboard with a top navigation bar containing tabs: Calendar, Office, Preferences, Patient Files, EHR, Inventory, Bill & Orders, Insurance, and Patient Engagement. Below this is a sub-navigation bar with icons and labels: E-mail, Appt color code, Gateway EDI, Communication (highlighted), Merchant, Calendar, Form 1500, Drug Alerts, and Clinic. The main content area is titled "All of the following information must be exactly as they are registered with SMS provider." and contains a section labeled "SMS configuration".

Service Provider: RingCentral (dropdown menu)
Communication service provider

Office: Clinic One
The office will use the authorization you enter below

Username: 12818255293 *
RingCentral phone number. System will use this number to call or send text message

Extension: 101
Optional

Password: *
RingCentral password

Appointment online: ☒ Yes ☐ No
Send SMS when patient makes new appointment online

SMS Template:
Hi {patient_name},
Your appointment has been recorded at
{office_name}. Appointment on {appt_date} at
{appt_time}

The template for appointment confirmation SMS. Maximum 128 character. Can use {office_name}, {office_phone}, {patient_name}, {appt_date}, {appt_time} as replacements

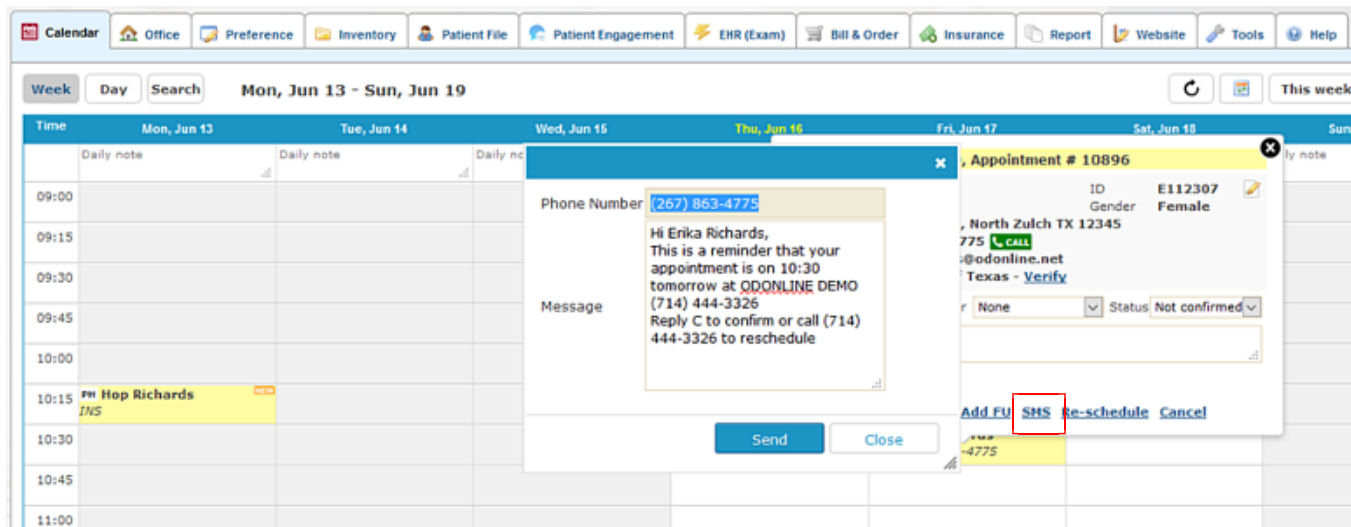
Appointment reminder: ☒ Yes ☐ No

4. Click the Save button at the bottom of the page

TEXT MESSAGING

VIEW, SEND, AND REPLY FROM APPOINTMENT ON CALENDAR

1. Select any appointment on the calendar
2. Click on SMS at the bottom of the pop-up box. As default, the system will display an appointment reminder text message template in the message box as shown below:

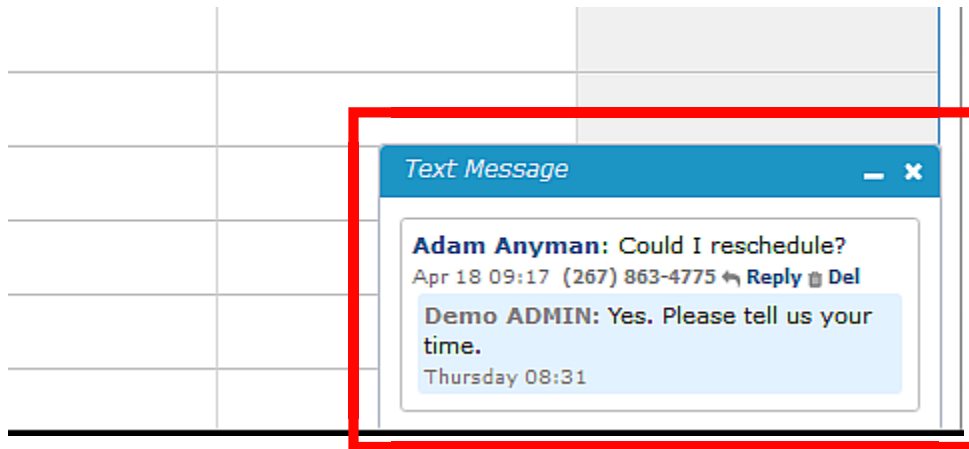


3. Click send

TEXT MESSAGING

REPLY TO TEXT MESSAGE FROM CHAT BOX ON CALENDAR

1. When a patient sends a text message to a number set-up with your RingCentral account, you will receive a text message notification in the chat box in the bottom right corner of the screen.
2. Users can view, reply, or call the patient from this box.



APPOINTMENT CONFIRMATION

AUTOMATED APPOINTMENT CONFIRMATION VIA TEXT MESSAGE

1. OD Online will send an automated reminder to patients 1 day prior to appointment. You can confirm whether a reminder has been sent by the icon that appears next to the patient's name in the calendar.

Fri, Jun 17	Sat, Jun 18	Sun, Jun 19
Daily note	Daily note	Daily note
	<div>Pt Erika Richards INS, (267) 863-4775</div>	

2. If a patient replies with "C", "OK", or other confirmation signal, the system will update the appointment status to "Confirmed" and change the color of the appointment to orange.

Sat, Jun 18, 2016 09:30, Appointment # 10896

Patient Erika Richards ID E112307

DOB 11/23/2007 Gender Female

Address 1234 Payer Rd, North Zulch TX 12345

Phone M:(267) 863-4775

Email erika_richards@odonline.net

Insurance Block Vision of Texas - [Verify](#)

Appt. by Phone Color None Status Confirmed

Note:

[Save](#) [Add exam](#) [Add FU](#) [SMS](#) [Re-schedule](#) [Cancel](#)

Pt Erika Richards
INS, (267) 863-4775

Status of appointment
has changed

Response from the
patient

Changed color indicates
confirmed appointment

SINGLE CLICK TO CALL

A "Call" button will be shown in the patient record if the patient has a phone number on file. Click the "Call" button to make a call.

Patient information	
Demographic	
Patient	Joseph Doe (J091278)
Date of Birth	09/12/1978 (37y9m)
Gender	Male
Race	American Indian or Alaska Native
Ethnicity	Declined to specify
Language	English
SSN	-
Referred by	-
Mother maiden's name	-

Contact information	
Address	55 Center Avenue Houston TX 77089
Mobile phone	(281) 825-5293 CALL
Home phone	-
Email	josephdoe@odonline.net
Prefer contact	Email
Accept method	Reminder, E-mail, SMS, Voice

Thu, Jun 16, 2016 09:15, Appointment # 25

Patient Joseph Doe ID J091278

DOB 09/12/1978 Gender Male

Address 55 Center Avenue, Houston TX 77089

Phone M:(281) 825-5293 **CALL**

Email josephdoe@odonline.net

Insurance Aetna - Institutional claims UB - [Verify](#)

Appt. by Phone

Note:

Trying to reach you...
Calling Joseph Doe (281) 825-5293

HANG UP

[Save](#) [Add exam](#)

Sat, Jun 18

ily note

INS, (281) 825-5293

PICK-UP REMINDERS

When a patient's order is ready, staff can update the order status and OD Online will automatically send a reminder to the patient letting them know that their frames and/or contact lens are ready for pick-up. Messages come pre-defined and can be changed by authorized users. Update order status by:

1. Select Bill & Orders from navigation in the dashboard
2. Select patient
3. Click the "Add order history" button and select status from the drop down menu

BALANCE (\$): 0.00

Add order history

1

Date	Status	Note	Add By	Notify	Signature	Action
06/25/2016	waiting		Demo Doctor		SIGNED	
06/25/2016	reviewed receipt		Demo Staff		SIGNED	
06/25/2016	released spectacle RX		Demo Staff		SIGNED	
06/25/2016	claimed - primary insurance		Demo Staff		SIGNED	
06/26/2016	frames in ABC Lab		Demo Staff		SIGNED	
06/28/2016	glasses in office		Demo Staff	SMS	SIGNED	
06/28/2016	dispensed glasses		Demo Staff		SIGNED	

Order note:

Receipt footer:

Thank you for selecting ODOONLINE as your eyecare provider

Product Consultant:

Demo Staff

Office:

Office 1

☐ Finished

Save and stay

Save and back to order list

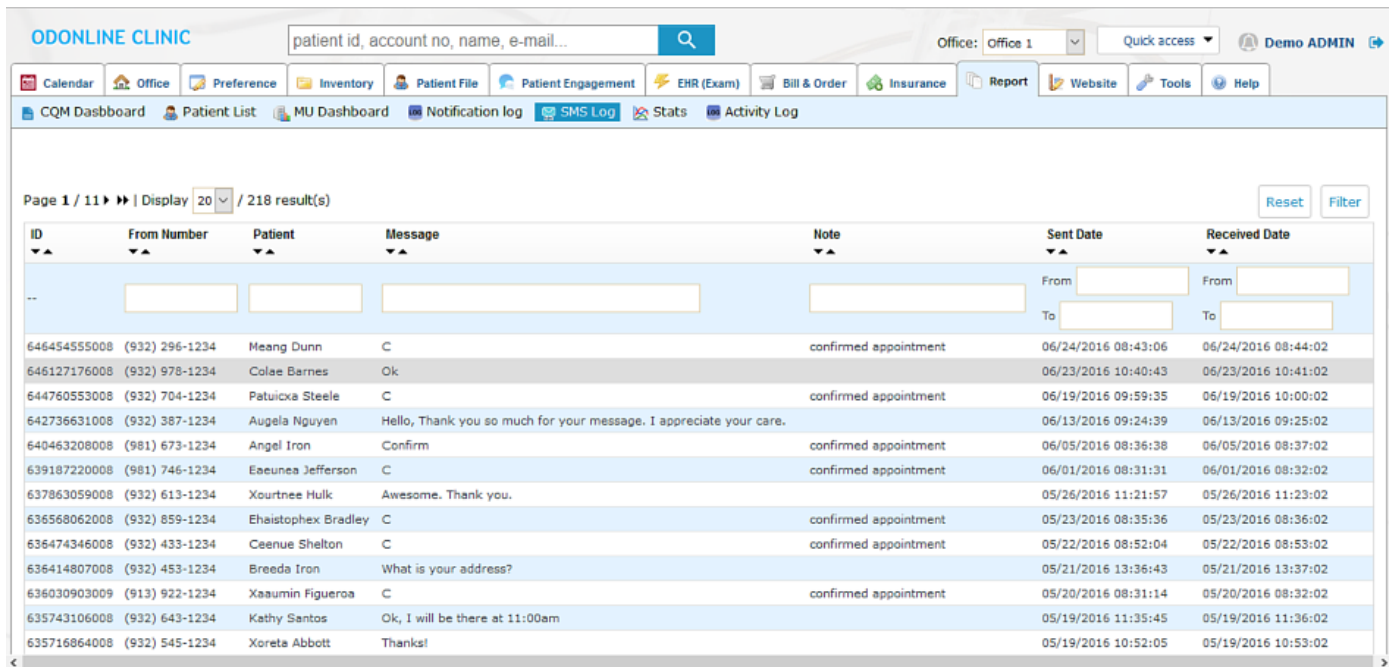
Activity Log

VIEW MESSAGE LOG

TEXT MESSAGE LOG

To access the text message log:

1. Select Report tab from navigation in the dashboard
2. Select SMS Log from the sub-navigation



ODONLINE CLINIC

patient id, account no, name, e-mail...

Office: Office 1 Quick access Demo ADMIN

Calendar Office Preference Inventory Patient File Patient Engagement EHR (Exam) Bill & Order Insurance Report Website Tools Help

CQM Dashboard Patient List MU Dashboard Notification log SMS Log Stats Activity Log

Page 1 / 11 | Display 20 / 218 result(s) Reset Filter

ID	From Number	Patient	Message	Note	Sent Date	Received Date
--					From To	From To
646454555008	(932) 296-1234	Meang Dunn	C	confirmed appointment	06/24/2016 08:43:06	06/24/2016 08:44:02
646127176008	(932) 978-1234	Colae Barnes	Ok		06/23/2016 10:40:43	06/23/2016 10:41:02
644760553008	(932) 704-1234	Patuicxa Steele	C	confirmed appointment	06/19/2016 09:59:35	06/19/2016 10:00:02
642736631008	(932) 387-1234	Augela Nguyen	Hello, Thank you so much for your message. I appreciate your care.		06/13/2016 09:24:39	06/13/2016 09:25:02
640463208008	(981) 673-1234	Angel Iron	Confirm	confirmed appointment	06/05/2016 08:36:38	06/05/2016 08:37:02
639187220008	(981) 746-1234	Eaeunea Jefferson	C	confirmed appointment	06/01/2016 08:31:31	06/01/2016 08:32:02
637863059008	(932) 613-1234	Xourtnee Hulk	Awesome. Thank you.		05/26/2016 11:21:57	05/26/2016 11:23:02
636568062008	(932) 859-1234	Ehaistophex Bradley	C	confirmed appointment	05/23/2016 08:35:36	05/23/2016 08:36:02
636474346008	(932) 433-1234	Ceenue Shelton	C	confirmed appointment	05/22/2016 08:52:04	05/22/2016 08:53:02
636414807008	(932) 453-1234	Breeda Iron	What is your address?		05/21/2016 13:36:43	05/21/2016 13:37:02
636030903009	(913) 922-1234	Xaamin Figueroa	C	confirmed appointment	05/20/2016 08:31:14	05/20/2016 08:32:02
635743106008	(932) 643-1234	Kathy Santos	Ok, I will be there at 11:00am		05/19/2016 11:35:45	05/19/2016 11:36:02
635716864008	(932) 545-1234	Xoreta Abbott	Thanks!		05/19/2016 10:52:05	05/19/2016 10:53:02

VIEW MESSAGE LOG

NOTIFICATION LOG

To access past notification reminders sent to patients:

1. Select Report tab from navigation in the dashboard
2. Select Notification Log from the sub-navigation

ODONLINE CLINIC

patient id, account no, name, e-mail...

Office: Office 1 Quick access Demo ADMIN

Calendar Office Preference Inventory Patient File Patient Engagement EHR (Exam) Bill & Order Insurance Report Website Tools Help

CQM Dashboard Patient List MU Dashboard Notification log SMS Log Stats Activity Log

Send appt reminder Send recall reminder

Page 1 / 75 | Display 20 / 1491 result(s) Reset Filter

Date	Time	Receiver	Account ID	Patient	Reason	Appt. / Recall ID	Method	Status	Auto Jobs	Error
From					--		--	--	--	
To										
06/29/2016	08:35:10	(932) 229-1234	A092276	Ray, Aaouu	Appt reminder	11583	SMS	Sent	✓	--
06/29/2016	08:35:03	(932) 954-1234	M010300	Nguyen, Meuodx	Appt reminder	11433	SMS	Sent	✓	--
06/29/2016	08:15:05	(981) 704-1234	E092947	Wise, Eeaka	Recall	16329	SMS	Sent	✓	--
06/28/2016	10:59:18	(932) 296-1234	M081409	Dunn, Meang	Order status	27765	SMS	Sent		--
06/28/2016	08:20:11	(932) 738-1234	U021960	Moran, Uaiae	Recall	15774	SMS	Sent	✓	--
06/27/2016	12:51:56	(913) 805-1234	N070571	Moran, Natividad	Order status	27742	SMS	Sent		--
06/27/2016	08:35:05	(932) 202-1234	S110486	Luna, Seruao	Appt reminder	11460	SMS	Sent	✓	--
06/26/2016	08:30:04	(932) 385-1234	X091502	Dunn, Xusaah	Appt reminder	11440	SMS	Sent	✓	--
06/26/2016	08:30:03	(932) 385-1234	E121649-1	Kelly, Eanica	Appt reminder	11437	SMS	Sent	✓	--
06/25/2016	12:39:08	(932) 897-1234	M101505	Figuerroa, Mee	Order status	27707	SMS	Sent		--
06/25/2016	12:37:56	(932) 901-1234	J112178	Abbott, Jsuaa	Order status	27693	SMS	Sent		--
06/25/2016	00:27:13	(932) 574-1234	T060570	Xmen, Txenu	Appt confirmation	11531	SMS	Sent		--