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**Online Patient Scheduling and  
Registration through  
RevolutionPHR**

**Release Date 11/28/2012**

## Overview

This document highlights several new RevolutionPHR features released on November 28<sup>th</sup> 2012 including online scheduling, patient registration, demographics update, and staff notifications.

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## 1. Online Scheduling and New Patient Registration

### 1.1 Online Scheduling

#### 1.1.1 Overview of Online Scheduling

New and Existing Patients now have the ability to schedule an appointment through RevolutionPHR.com without calling or emailing the office. Once logged in to RevolutionPHR, the patient has a real-time view of availability based on provider, location, or the patient's day/time preferences.

If the patient selects an available appointment through the patient portal, the corresponding appointment slot is immediately updated in the practice schedule and certain staff can be notified when an appointment has been scheduled.

Online scheduling can be enabled or disabled by location as well as specific appointment times, encounter types, or patients if needed.

**Please note that your practice must be using the appointment slots feature in the schedule to display availability to the patient.**

#### 1.1.2 Patient Steps to Schedule an Appointment

A patient can schedule an appointment with the practice in a few simple steps.

1. A patient with an existing RevolutionPHR login can go straight to <http://www.revolutionphr.com> and login with their credentials. A new patient can click a specific link to RevolutionPHR generated in section 1.2 of this document.
2. Once the patient is logged in or registered, the portal home screen will invite the patient to schedule an appointment. If the patient has a recall entered in RevolutionEHR, the recall information will be displayed to the patient.



<b>Reminders</b>	<p><u>Your Doctor Recommends:</u></p> <p><b>Glaucoma Encounter with Visual Field</b></p> <p><b>On or after:</b> Wed Dec 26, 2012</p> <p><a href="#">book it</a></p> <p><a href="#">show all recalls</a></p>
<b>Next Appointment</b>	<p><b>December 06, 2012, 10:30AM</b></p> <p>Steve's Eyecare with: A Doctor</p> <p><a href="#">confirm</a></p> <p><a href="#">take interview</a></p> <p><a href="#">book new visit</a></p>

- After clicking the 'Book New Visit' button, the patient has the option to select their preferred location, doctor or appointment times for their search. The day and time preferences are automatically pulled from the patient's file in RevolutionEHR.



**Find Appointments:**

**When**  **Next Available (on or after 11/27/2012)**  
 **Between** 11/27/2012 and 12/11/2012

**Reason** Annual Eye Exam

**Office** RevolutionEHR East

**Doctor** Jens, Scott

**Preferences**

**Sunday** Anytime

**Monday** Anytime

**Tuesday** Anytime

**Wednesday** Afternoon ( 1:00PM - 4:00PM )

**Thursday** Anytime

**Friday** Anytime

**Saturday** Anytime

**search** **cancel**

- Once the patient selects their preferences and clicks the 'Search' button, a list of the first 10 available openings will be displayed for the patient.

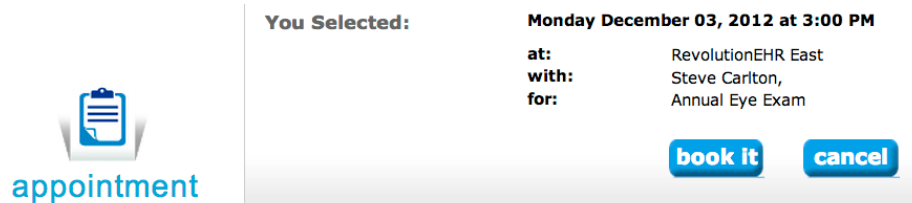
**Available Appointments**

These are the next 10 appointment openings available at **Steve's Eyecare** for a **Annual Eye Exam**:

date	time	with	
Thu Dec 6, 2012	9:00AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	9:30AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	10:00AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	10:30AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	11:00AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	1:00PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	1:30PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	2:00PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	2:30PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	3:00PM	B Doctor	<a href="#">select</a>

[next page](#)

- The patient can select their preferred appointment time by clicking the 'Select' button. The patient is then asked to confirm their selection.

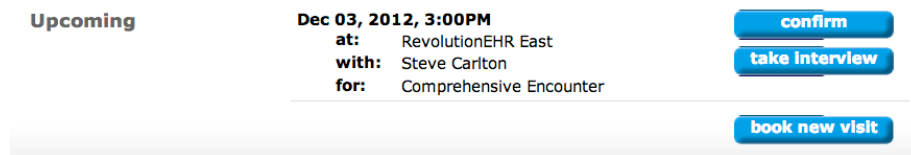


**You Selected:** **Monday December 03, 2012 at 3:00 PM**

**at:** RevolutionEHR East  
**with:** Steve Carlton,  
**for:** Annual Eye Exam

**book it** **cancel**

- Once the patient confirms their selection by clicking the 'Book it' button, the appointment is immediately added to the practice schedule in RevolutionEHR. Specific practice staff can also be notified via Tasks for each patient that schedules online, these preferences are covered in section 1.4 of this document.
- The patient also has the option to immediately begin the online interview for the type of visit booked by clicking the 'Take Interview' button.



**Upcoming** **Dec 03, 2012, 3:00PM**

**at:** RevolutionEHR East  
**with:** Steve Carlton  
**for:** Comprehensive Encounter

**confirm**  
**take interview**  
**book new visit**

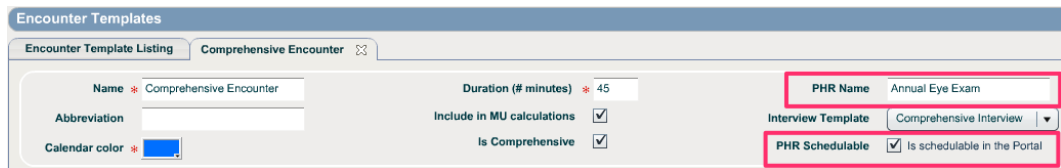
### 1.1.3 Taking Steps to Enable Online Scheduling

To enable online scheduling through RevolutionPHR, the following steps should be taken:

- As previously noted, ensure that each location to be enabled is utilizing appointment slots in the schedule. For more information on the schedule and setting up appointment slots, a previously recorded webinar has been made available on Insight at <http://insight.revolutionehr.com/?p=1390>
- The online scheduling feature must first be enabled for each encounter type in RevolutionEHR. This allows each practice to limit what types of appointments can be scheduled online.

To enable online scheduling for an encounter type, navigate to More -> Administration -> Encounter/Interviews -> Encounter Templates. Open the encounter template to be enabled and look for the PHR Schedulable Checkbox.

Click the 'PHR Schedulable' Checkbox to enable online scheduling and click the 'Update' button to save all changes.



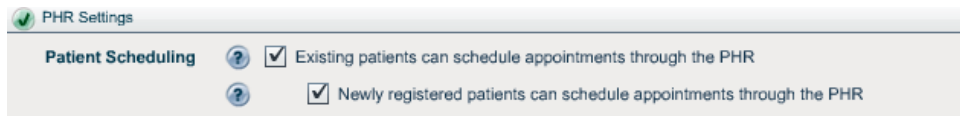
The screenshot shows the 'Encounter Templates' interface. The 'Comprehensive Encounter' template is selected. The 'PHR Name' field is set to 'Annual Eye Exam'. The 'PHR Schedulable' checkbox is checked, and the 'Is schedulable in the Portal' checkbox is also checked. Other fields include 'Name' (Comprehensive Encounter), 'Duration (# minutes)' (45), 'Abbreviation', 'Calendar color', 'Include in MU calculations', and 'Is Comprehensive'.

**NOTE** Now is also a good time to make sure that the 'PHR Name' field for the encounter type is set to something that the patient would understand.

For example some practices may use 'Comprehensive Encounter' for internal scheduling but may want to display this type of visit as an 'Annual Eye Exam' to the patient online.

3. Once individual encounters are enabled, the final step is to enable each location for online scheduling.

To enable a location for online scheduling, navigate to More -> Administration -> General -> Locations. Open the Location to be enabled and look for the PHR Settings slider.



The screenshot shows the 'PHR Settings' slider. Under the 'Patient Scheduling' section, the checkbox 'Existing patients can schedule appointments through the PHR' is checked. The checkbox 'Newly registered patients can schedule appointments through the PHR' is also checked.

On the PHR Settings slider, online scheduling can be enabled by clicking the 'Existing patients can schedule appointments through the PHR' checkbox.

Note that the checkbox for newly registered patients is not taken into account with this release, this feature will come in a future update.

To make changes to this screen, click the 'Edit' button. Make sure to click the 'Update' button when finished to save all changes.

For more information on enabling new patients to schedule online, please refer to section 1.2 of this document.

4. Specific office staff can be notified in the form of a task for patients that have scheduled online or other PHR activities. Read more about this feature in section 1.4 of this document.

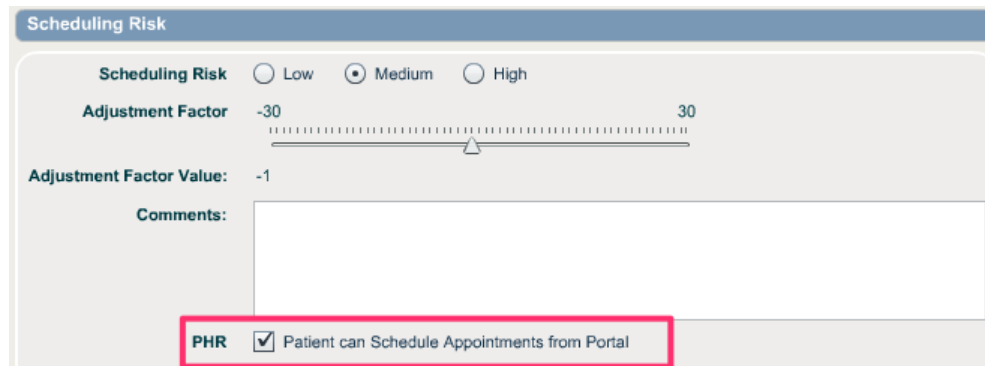
5. Patients are now able to book appointments for the selected encounters and locations through RevolutionPHR.com. For more information on limiting this feature by patient or appointment slot please read the **Limiting Access to Online Scheduling** section.

#### 1.1.4 Limiting Access to Online Scheduling

Once online scheduling is enabled, some practices may want to limit availability of this feature to specific appointment times or specific patients to avoid potential scheduling issues.

##### Disabling Online Scheduling for a Specific Patient

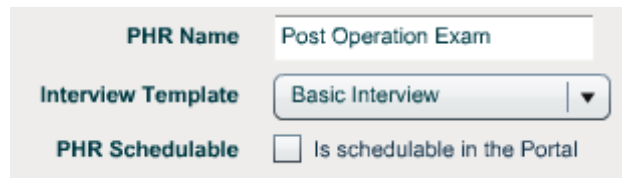
To disable a patient’s ability to schedule online, open a patient’s chart and navigate to Show More -> Preferences and look for the PHR checkbox in the Scheduling Risk section. Click the ‘Edit’ button and uncheck the ‘Patient can Schedule Appointments from Portal’ field. Make sure to click the ‘Update’ button to save all changes.



##### Disabling Online Scheduling for a Specific Encounter Type

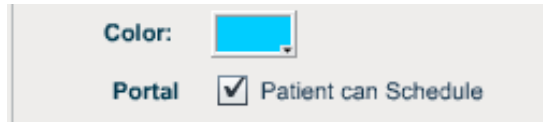
To disable online scheduling for a specific encounter type, navigate to More -> Administration -> Encounters/Interviews -> Encounter Templates and open the encounter template to be disabled.

Click the Edit button then uncheck the ‘PHR Schedulable’ checkbox to disable this specific encounter type. As a reminder, all encounter types are disabled for online scheduling by default and can be enabled or disabled with this checkbox. Make sure to click the Update button to save all changes.

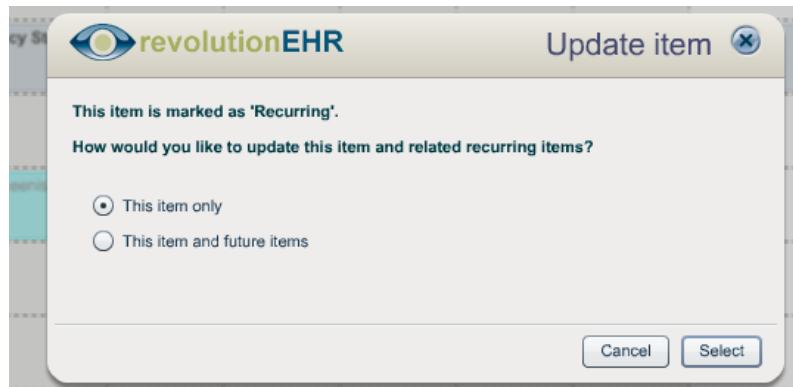


### Disabling Online Scheduling for a Specific Appointment Slot

To disable online scheduling for a specific appointment slot, navigate to the schedule within RevolutionEHR and select the appointment slot to be disabled. Click the Edit button to make changes to the appointment slot and uncheck the 'Patient can Schedule' checkbox.



Make sure to click the Save button to save all changes. If this appointment slot is recurring in the schedule, RevolutionEHR will ask if you would like to make changes to just this appointment slot or all future related appointment slots.





## 1.2 Patient Registration Overview

### 1.2.1 New Patient Registration via RevolutionPHR

This new feature of RevolutionPHR allows new patients visiting your practice website to enter demographic and contact information which is then automatically pushed to your practice system in real-time. Once registered the new patient will have the ability to book an appointment directly within the patient portal without contacting the office.

#### Overview of the Registration Process

New patients can complete the registration process in just a few simple steps:

1. The patient will need to click your practice specific link generated in section 1.2.2 of this document. Upon clicking this link, the patient will first be asked to enter a simple human verification string to continue.

Please Enter the Captcha to continue



[continue](#) [cancel](#)

2. The patient is now able to search for the first available appointment based on their preferred location, doctor, or appointment times. The patient will be presented with the first 10 available openings based on their preferences.



Find Appointments:

When:  Next Available (on or after 11/27/2012)  Between 11/27/2012 and 12/11/2012

Reason:

Office:

Doctor:

Preferences

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

[search](#) [cancel](#)

**Available Appointments**

These are the next 10 appointment openings available at **Steve's Eyecare** for a **Annual Eye Exam**:

date	time	with	
Thu Dec 6, 2012	9:00AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	9:30AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	10:00AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	10:30AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	11:00AM	A Doctor	<a href="#">select</a>
Thu Dec 6, 2012	1:00PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	1:30PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	2:00PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	2:30PM	B Doctor	<a href="#">select</a>
Thu Dec 6, 2012	3:00PM	B Doctor	<a href="#">select</a>

[next page](#)

3. Once the patient selects an available appointment, the patient will be asked to either login with their existing credentials or register as a new patient.



**You Selected:** **Tuesday November 27, 2012 at 9:00 AM**

**at:** RevolutionEHR East  
**with:** Steve Carlton,  
**for:** Annual Eye Exam

**To complete your appointment...** You must either log in (above) or register to complete making your appointment.

[register](#) [cancel](#)

4. If the 'Register' option is chosen, the patient will be required to enter their demographics information and choose a username and password to continue the process.



**Enter Required Information**

**First Name \***

**Last Name \***

**Date of Birth \***

---

**Phone/Email** ONE PHONE NUMBER IS REQUIRED

**Home \***

**Work \***

**Cell \***

**Email \***

---

**Login**

**Username \***


**Password \***

**Confirm Password \***

[register](#) [cancel](#)

5. After the patient has entered demographics, the patient will then be asked to confirm their email address. The patient is asked to enter the confirmation code that was sent to them via email to finalize the appointment.

**Please Note** that the patient's appointment request will not be entered into the practice schedule until the patient confirms their email address. This is also specifically mentioned in the confirmation email to the patient.



New Patient

**Enter Code**

Please check your email for the code to complete your registration. Please enter your code and you can complete scheduling your appointment.

Code

**finish** **cancel**

6. Once the confirmation code has been entered, the appointment is booked and entered into the practice schedule. The patient also has the option to enter additional demographic information and take their online interview prior to visiting the office.

### 1.2.2 Taking Steps to Enable New Patient Registration

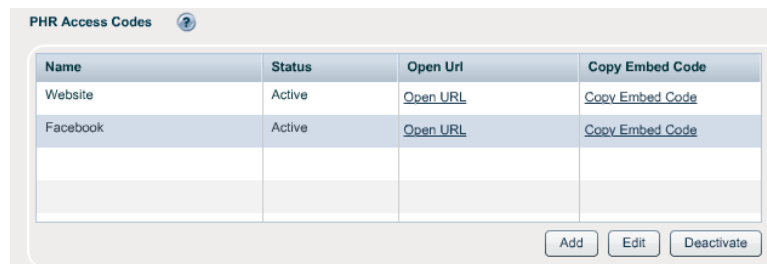
New patient registration is achieved by generating a practice specific website link to RevolutionPHR so that registrations are directed to the correct practice.

This section will cover enabling the patient registration feature and generating a unique website link for your practice that can then be posted on your practice website or social media pages.

#### Enabling Patient Registration

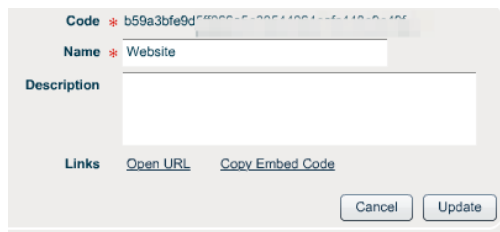
The patient registration feature can be enabled by navigating to More -> Administration -> General -> Locations and opening the location where you wish to enable this feature. Click on the PHR Settings slider for the location and look for the PHR Access Codes section.

New patient registration can be enabled by generating an access code for each location. The access code is a unique web URL that can be posted on any website or email message.



Name	Status	Open Url	Copy Embed Code
Website	Active	<a href="#">Open URL</a>	<a href="#">Copy Embed Code</a>
Facebook	Active	<a href="#">Open URL</a>	<a href="#">Copy Embed Code</a>

To create a PHR Access Code, click the Add button. Enter a Name and Description for the code and click the Update button. Make sure to click the second Update button at the bottom of the page to save all changes and activate the access codes.



Code \* b59a3bfe9d

Name \* Website

Description

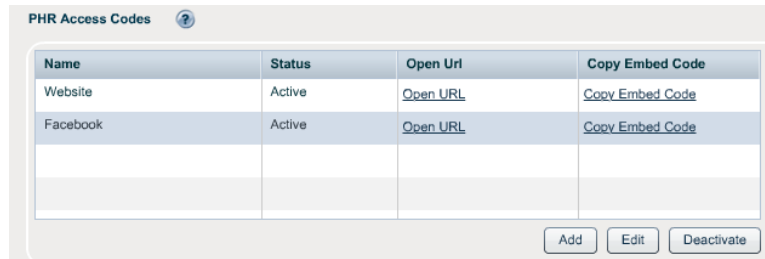
Links [Open URL](#) [Copy Embed Code](#)

Please note that multiple codes can be generated for specific marketing campaigns in your practice, but this information is not currently available for reporting within RevolutionEHR.

## Sharing the Registration Links with Patients

Once the registration feature has been enabled for a location, the next step is to share the registration links with your patients. New patients will not be able to register online without clicking this unique registration link.

In the PHR Access Codes section, all links available for the location will be displayed in the grid.



Name	Status	Open Url	Copy Embed Code
Website	Active	<a href="#">Open URL</a>	<a href="#">Copy Embed Code</a>
Facebook	Active	<a href="#">Open URL</a>	<a href="#">Copy Embed Code</a>

The [Open URL](#) link will open a new browser window to the registration page.

The [Copy Embed Code](#) link will copy the registration link to your computer's clipboard in HTML format. The HTML code can then be pasted into a webpage to be displayed as a link on the page.

If you no longer wish to utilize a specific registration link, clicking the Deactivate button will deactivate the link. Please note that if a deactivated link is still posted on any webpage, patients clicking that link will no longer be able to register.

## 1.3 Patient Demographics Update

### 1.3.1 Existing Patient Demographics Update

Existing patients with RevolutionPHR access now have the ability to login and update their demographics information directly through the patient portal.

Once logged in to RevolutionPHR.com, the patient can navigate to the About Me page and click on the 'edit my information' link.

[edit my information >](#)

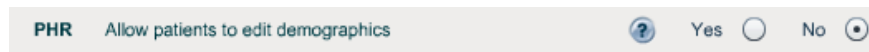
The patient then has the ability to update:

- Home Address
- Phone / Email
- Demographics (Salutation, Middle Name, Suffix, Nickname, Credentials, Gender, Preferred Language, Race and Ethnicity)
- Scheduling Preferences (Preferred Days and Times)
- Communication Preferences

The updated information is then pushed in real-time to the practice and is immediately visible in RevolutionEHR.

To enable this feature as a practice preference, navigate to More -> Administration -> General -> Practice Preferences -> Additional Preferences.

Look for the 'Allow patients to edit demographics' option. Click Yes to enable this feature, make sure to click the Update button at the bottom of the page to save all changes.



## 1.4 Staff Notification of PHR Activities

### 1.4.1 Enabling Staff Notifications

With new options available to patients through RevolutionPHR, many practices prefer staff to be notified of patient updates, registrations, and scheduled appointments.

RevolutionEHR can notify specific staff members with a new task based on the activity.

To enable this feature, navigate to More -> Administration -> General -> Locations. Open a location and click on the PHR Settings Slider.

In the PHR Notifications area, click on the link next to each type of notification to specify staff in the practice that will receive a notification for that specific activity. The notification will be in the form of a task sent to each of the selected staff's task inbox.



**Registration Notification** will notify selected staff of a new patient that has registered for the practice through the patient portal.

**Patient Update Notification** will notify selected staff when a patient has updated their demographic information through the patient portal.

**Patient Schedule Notification** will notify selected staff when an existing patient has scheduled an appointment through the patient portal.

**Registration Schedule Notification** will notify selected staff when a new patient has scheduled an appointment within the first 5 days of registering through the patient portal.