

# ESTRE

# **User Guide**

# **Avel eCare Specialty Clinic Contact Information**



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**To Learn More:** https://www.avelecare.com/services/specialty-clinic/



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# **Initial Login**

For initial login, user will receive an email from 'no-reply@avel-erx.com' with subject 'Avel Specialty Clinic eSync Application Invitation.' User will click on the link in the email, follow prompts and create a password. Username for future log-ins will be the user's email address.

#### **eSYNC** Navigation

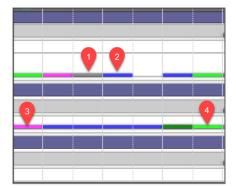
#### **Home Screen**

- 1. Event Calendar Main calendar view
- 2. Dashboard
- 3. Patient Profile patient demographics, past appointments etc.
- 4. Site Site list
- 5. Calendar calendar with provider schedules and appointments
- 6. Queue launch point for the list of queued appointments



#### Appointment Color Code Guide

- 1. Black/Dark Grey Scheduled Appointment
- 2. Blue Complete
- 3. Fuscia No Show
- 4. Green Canceled





# Collapse/Expand

- A. Collapse all by selecting the "-" sign
- B. Expand all by selecting the "+" sign

Ŧ	Events	Calenda	r Shifts	Specialties	Dispositions			۴ ک	Thu, February 15, 2	2024 CST-6 🛍
t	> < 8:00		9:00		10:00		11:00	A	Q Filter location	s Q Filte
		<b>&lt;</b> 8:00			9:00			10:00		11:00
	в	•	Test	Site						
		Ŧ	Test	Site						
					Ð	Test	Site			
		<b>E</b>	Test	Site						

#### **Calendar Filters**

#### Search filter:

Search for the desired location, specialty, provider, or patient by typing in the free text field. This is a type ahead search meaning once you start typing the system will start filtering.

Tue, Mare	ch 5, <u>2024</u> CST - 6				
<b>e</b> Q	Filter locations	Q Filter specialties	Q Filter providers		Q Filter patient
:00	14:00	15:00	16:00 17	7-00	18.00

#### Filter dropdown:

Select Filter, the default is to show all locations, specialties, and providers. If you would like to filter down uncheck the box next to the applicable field. This will pull up the filter overlay with all sites selected. Within this overlay there are options to deselect all locations/select all locations.



#### **Calendar Views**

To change your calendar view, select the view filter, go to the dropdown on the bottom and select from the following options.

Or use the hot keys:

- type "h" to get to the hour view
- type "m" to get to the month view
- type "I" to get to the list view

▼ Filter ▼ View ▼
✓ Location
Specialty
Provider
Change Calendar View
Hour (H) 🗸 🗸
Hour (H)
Month (M)
List (L)

Hour - default view showing provider's schedule and appointments by date and hour.

					•	Q Fib	er locations	Q Filter specialties	Q Filter providers
8:00	9:00	10.00	11:00	12:00	13:00		14:00	15:00	16:00
te	Test Site								
🗉 🕽 Beha	avioral Health Therapy								
Test	Cart								
Test (	Cart						-		
	Adrienne Highhouse, N	ISW	UNAVAILABLE		Adrienne Highhous	e, MSW			-
		Oswald BA123					Test, 🎐 SA093		

**Month** – shows Provider's schedule for the month listing the number of appointments for the day.

• In Provider field, remove auto-populated name and enter specific provider name

Events Calendar Qu	ieue	4	March 20	024 🛍 🎽		
>					Pr	rovider: 🗙 Kim Wilde, MD 🏹 View 🗸
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
February 25	February 26	February 27 • 09:00 - 17:00 Appls: 1	February 28	February 29 • 09:00 - 17:00 Appts. 2	1	2
3	4	<ul> <li>5</li> <li>09:00 - 17:00</li> <li>Appts. 7</li> </ul>	6	7 • 09.00 - 17:00 Appts. 6	8	9
10	11	12 • 09:00 - 17:00 Appts. 1	13	14 • 09:00 - 17:00	15	16
17	18	19 • 09:00 - 17:00	20 Appts. 1	21 • 09:00 - 17:00 Appts. 1	22	23



#### **Calendar Views**

List - shows Provider's list of patients for the selected day.

• In Provider field, remove auto-populated name and enter specific provider name

Events Calendar Queue	Tue, March 12, 2	024 🛍 ≥
Swap View Provider View KHana	n Fahmy, MD	Display Info Appointments
Time 8:30 AM - 9:00 AM	Appointment Details Morning. Good (01/03/1982) Reason for visit: testing (N) No Show	Test.Site Nephrology LameDeer-MT-IHS-CartA-SC
1:00 PM - 2:00 PM	Oswaldtest, Birdie (05/10/2023) Reason for visit testing (E) Cancelled	<u>Test Site</u> Nephrology LameDeer-MT-IHS-CartA-SC
1:00 PM - 1:30 PM	Man, Super (05/01/2000) Reason for visit test (C) Completed	Test Site Nephrology LameDeer-MT-IHS-CartA-SC
3:30 PM - 4:00 PM	Test, Patient (01/01/1951) Reason for visit: nephro t/u (A) Scheduled	Test Site Nephrology LameDeer-MT-IHS-CartB-SC



#### **Patient Profile General Navigation**

- 1. Select the patient silhouette on the blue navigation bar.
- 2. Search for existing patients by name and/or date of birth. Need at least the first three letters of either the first or last name.
- 3. Existing patients that match the search will start populating in a dropdown. Select the correct patient.

Bpecialty Clinic UAT	oswald
F Search Patient	Oswaldtest, Adam (05/31/1977, age 46)  MRN: 4365247543 BA - Browning, MT - Blackfeet Service Unit
Hohn Doe OR mm/dd/yyyy	Oswaldtest, Adam (05/31/1977, age 46) BA - Harlem, MT IHS - Fort Belknap Service Unit
<b>A</b>	Oswaldtest, Andrew (07/14/2001, age 22) BA - Browning, MT - Blackfeet Service Unit
	Oswaldtest, Birdie (05/10/2023, age 0) BA - Browning, MT - Blackfeet Service Unit
	Oswaldtest, Eva (05/05/1997, age 26) MRN: 15550TM GPA - Belcourt, ND - Turtle Mountain Service Unit

- 4. Upon selecting the patient, you will default to the patient demographics screen.
- 5. To edit demographics select Enable Inputs and update fields accordingly.
  Able to add a new MRN number and site in the MRN Table
- 6. Select Add to add a note to the patient profile.
- 7. When finished select Close Patient.
- 8. To see a full list of appointments select "Appointments". This will pull in the patient's appointments.

Patient Provider Encounter Notes Longitudinal Graphs Note Tags	Appointments			
Oswaldtest, Birdie (Date of Birth 05/10/2023, age 0)	@		Enable Inputs Add	Close Patient
First Name Birdie	Last Name Oswaldtest		Note	1e Suffix
Address Line 1234 Test ave		City Test City	State SD	
Work Phone Home Phone		Cell Phone 6055551234	Email	]
Patient DOB (5/10/2023	Patient Gender Female	v)	Are they deceased?	
Parent/Guardian Name Parent/Guardian Relationship Molly Oswaldtest Mother		۷	Parent/Guardian Phone Number 6055551234	
MRN Table EMR Patient ID 56666	EMR Patient Location	v[	ЕМП Арр Н.7	



9. Able to edit scheduled and queued appointments from the patient profile Appointments view.

Patient Provider EncounterNotes Longitudinal Graphs Note Tags Appointments	
Shortcake, Strawberry (Date of Birth 06/06/1954, age 69) @ BA - Browning, MT - Blackfeet Service Unit	Exable Inputs Add • Set Site Merge Close Patient
Display Queued Appt(s) First     O Provisos     Nuct      Page     1     of 1	Q Bearch appaintments
MRN(s): June, 10 2024, 08:30 - 09:30 Reason for visit: lest (A) Scheduled	Sile: 0 Clinic: Behavioral Health Therapy Provider: Collin Block, MSW
MRN(s) Appointment in queue. Target date of: August 01, 2023 Reason for visit: Patient was seen 08/01/2023 (A) Scheduled	Ste:: Clinic: Behavioral Health Therapy Provider: Collin Block, MSW
MRN(s): May, 30 2024, 13:00 - 13:30 Reason for visit: test (A) Scheduled	Sile:  Clinic: Neurology Provider: Teresa Mangin, MD
MRN(s). May, 21 2024, 16:00 - 17:00 Reason for visit: test (A) Scheduled	Sile:0 Clinic: Behavioral Health Therapy Provider: Collin Block, MSW



#### **Create New Patient**

- 1. Navigate to the patient profile in the blue navigation bar.
- 2. Search for the patient .
- 3. If patient is not populating in search, select new in the right-hand corner.

Ŵ	Specialty Clinic UA	T		<b>*</b>
Ŧ	Search Patient			Add New
<b>*</b>	John Doe OR m	m/dd/yyyy		
4		Create Patient		
•		Firstname:		
*		Lastname:		
		Gender:	~	
		Date of Birth mm/dd/yyyy		
		Cancel	Create	

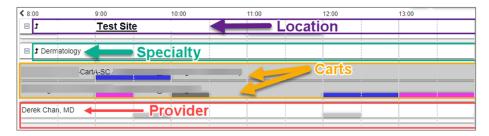
- 4. The Create Patient overlay will launch.
- 5. Enter First and last name, gender, and date of birth.
- 6. Select Create.
- 7. Enter patient demographics, MRN (EMR Patient ID field) and Site (EMR Patient Location dropdown) then close patient.



## **Scheduling Appointment**

#### **Clinic Appointment**

- 1. Select event calendar and navigate to the desired location.
- 2. Verify you are within the correct location (Purple).
- 3. Verify you are within the correct specialty (Green).
- 4. Review cart(s) for openings (Orange).
- 5. Compare to providers schedule (**Red**).



- 6. Double click or right click> schedule event on the desired time within the provider bar to schedule an appointment.
- 7. This will launch the appointment summary overlay.
- 8. Verify the correct site is listed.
- 9. Search for patient.
- 10. Verify the correct specialty is listed.
- 11. Verify the correct provider is listed.
- 12. Verify/change appointment date/time.
  - \*\* Software recognizes new and existing patient and will apply the below timeframes. \*\*
    - Initial/New Patent appointments:
      - Peds Psych 90 min
      - All other Specialties 60 min
    - Existing/Follow-up appointments:
      - BH Therapy 60 min
      - All other Specialties 30 min
  - \*\* Site Time Zone is listed under Appointment time.

Appointment Time: 5/30/2024 at 13:00 until 14:00 ② 🖄 Site Time: 5/30/2024 at 12:00 until 13:00 MDT



## **Scheduling Appointment**

#### **Clinic Appointment**

- 13. Select cart from the dropdown menu.
- 14. Enter Reason for Visit.
- 15. Under patient summary, verify or enter the patient's MRN number and demographics.
  - For Pediatric patients, enter Parent/Guardian information.
  - Can enter a patient alias. Also able to search by this alias.
- 16. Select appointment history to view past appointments.
- 17. Select patient notes to view any notes unique to this patient.
- 18. Future appointments will be displayed on the right-hand panel to review.
- 19. Select Create Appointment when finished.



#### Info icons (Audit info):

Reason for visit: test	Site:	
Started on May 21, 16:00 - 17:00	Service Unit	Created: 05/21/2024 15:43 CDT Created By: Rachel Dybvig
Status: (A) Scheduled	Provider: Collin Block, MSW Specialty: Behavioral Health	Modified Last: 05/21/2024 15:43 CDT Modified Last By: Admin
	Therapy	



#### **Home Visit**

- 1. Follow steps to schedule an appointment.
- 2. Within the "Cart" dropdown select Home Visit.
- 3. The Home Visit Section will populate below. Complete the required fields.
- 4. Finish steps to schedule appointment.
  - Able to schedule Provider for Home Visit when provider is scheduled outside of clinic hours.

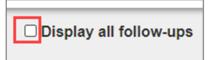
* Cart:	0	
2		~
Home Visit		
CartB-SC CartA-SC		
Schedule Note	1	
Home Visit Section		
* Type of Home Visit	•	* Cell Phone
	~	
Phone		
Video		
* Contact Email		

#### Scheduling from Queue

1. Select "Queue" from in the left-hand corner.

(ij)	Specialt v2.4						
Ŧ	Events	Calendar	Queue Shifts	Specialties	Dispositions		<
₩	>						
		<b>&lt;</b> 8:00	9:00		10:00	11:00	

2. Select the check box next to "Display all follow-ups" to launch all queued appointments regardless of location.



3. Search for a specific location within the Lookup Location field. The locations will start appearing once you begin typing. Select desired location.

L	ookup Location	
	Tes	
	Test Site	
1		



#### Scheduling from Queue

4. Right click anywhere within the black row of the patient you want to schedule and select edit.

<b>&amp;</b>	Specialty Clinic UAT	
Ŧ	Events Calendar Queue Shifts Specialties Dispositions	
<b>#</b>	Displaying all sites	
	Mouse, Mickey     Reason for visit: ns 2/21     Right click →       Target date: February 22, 2024     Image: Click →     Image: Click →	Edit Specially, Dermatology Provider: Derek Chan, MD No cart assigned
۵	Dybvig, Rachel	Site:
•	Reason for visit: TEST Target date: February 28, 2024	Sue: Specialty: <b>Neurology</b> Provider: <b>Teresa Mangin, MD</b> No cart assigned

- 5. This will launch the patient summary screen.
- 6. Verify correct site/patient/specialty/provider. Review target date and enter date in the date field under Patient Follow-up in the right-hand panel. Then Search for Schedules.

ſ	Appointment Summary		•	
	* State Test State Pestanet: Test. Patient (1/12/2023) Speciality: Behavioral Health Therapy	Appointment History Patient Summary Pat Reason for visit: adf Started on Mar 5, 14 00 - 14:30 Status: (C) Completed	ent Notes Site: Service Unit Provider: Adrience Highhouse, MSW Speciatry: Exhavioral Health Theorem	Patient Follow up Future Appointments Repeat Appointment Select date than search. After searching, click on an availability to finish scheduling Cole Frem
	*Prover	Reason for visit: FU Started on Feb on the second second (A) Scheduled	Center Provider: Shella Middagh, MSW Cart: RAPID CITY-SD-CartC-SC Specialty: Behavioral Health Therapy	
,	ATSOVA	Reason for visit follow up Started on Feb 26, 11:30 - 12:00 Status: (A) Scheduled	Site: Thompson Service Unit Provider: Ashley Jansen, DNP Cart: Fort Thompson SD-IHS-CartA-SC Specialty: Psychiatry	
		Reason for visit. Test appt creation 2/23/24 Started on Feb 23, 08:30 - 09:00 Status: (C) Completed	Site: Service Unit Provider: Colin Block, MSW Cart: BELCOURT-ND-HIS-CartB-SC Cart: BELCOURT-ND-HIS-CartB-SC Specialty: Behavioral Health Therapy	
		Reason for visit: test no show block Started on Feb 16, 11:00 - 11:30 Status: (N) No Show	Site: Service Unit Provider: Teresa Mangin, MD Cart: Browning-MT-HS-CartB-SC Specialty: Neurology	
		Reason for visit: fu Started on Feb 14, 11:00 - 11:30 Status: (C) Completed	Site: Service Unit Provider: AJ Peterson, MD Cart: CrowAgency-MT-HIS-CartA-SC Specialty: Pediatric Psychiatry	
			-	Close

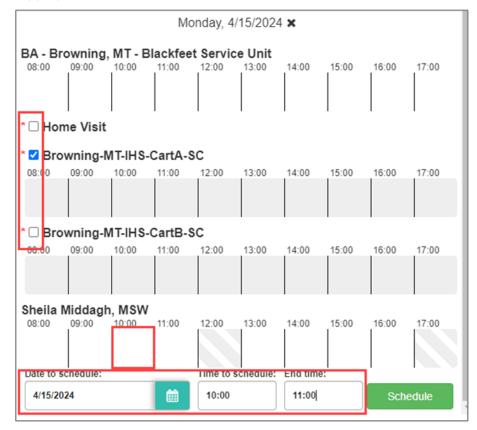
- 7. This will populate a month view based on the date you selected. Example: Date enter April 15<sup>th</sup>, the month view with provider's availability will display.
  - a. Unavailable will have the diagonal lines within the box (red box below)
  - b. Available will be white (green box below)

Mar 31	1		2		3		4		5		6
	08:00 -		08:00 -		08:00 -		08:00 -		08:00 -		
	12:00	•	12:00	Ψ.	12:00	•	12:00	•	12:00	•	
7	8	-	9	-	10	-	11	-	12		13
	08:00 -		08:00 -		08:00 -		08:00 -		08:00 -		
	12:00	Ψ.	12:00	Ψ.	12:00	Ψ.	12:00	•	12:00	•	
14	15		16	-	17		18	-	19		20
	08:00 -		08:00 -		08:00 -		08:00 -		08:00 -		
	12:00	*	12:00	•	12:00	*	12:00	-	12:00	*	
21	22	-	23		24	-	25	-	26		27
	08:00 -		08:00 -		08:00 -		08:00 -		08:00 -		
	12:00	*	12:00	•	12:00	*	12:00	•	12:00	•	
28	29	-	30		May 01	-	May 02	-	May 03		May 04
	08:00 -		08:00 -		08:00 -		08:00 -		08:00 -		
	12:00	*	12:00	•	12:00	*	12:00	-	12:00	•	
			Μ	lond	day, 4/1	5/20	24 🗙				



#### Scheduling from Queue

8. Select the available date you would like to schedule on and scroll down. Verify site, select home visit or the appropriate cart. Then click on an available spot within the provider row. Confirm date and time populated to the appropriate fields. Edit timeframe if need within the time slots, then select Schedule.



9. This will take you back to the queue and display a pop-up confirming appointment with a launch point to view appointment in the calendar. Click the green confirmation message to jump to scheduled day.

☑ Display all follow-ups	Q Fi ter patiente Follow up scheduled at Mar, 08 2024 Click to jump to day	8
nit		

\*\*Able to delete appointments from the Queue by right clicking then selecting Delete from Queue.\*\*





# **Cancelling Appointment**

- 1. Open the appointment.
- 2. Within the patient summary screen, change status and select close in the bottom right-hand corner.

Status:		Schedule Follow-Up
(11.0.1.1.1.1	<u> </u>	Queue For Scheduling
(A) Scheduled (C) Completed		
(E) Cancelled (N) No Show		

# No Show Appointment

Able to No Show appointment on the same day.

Appointment Summary	
* Site:	0
Patient:     X Shortcake, Strawberry (6/06/1954)     New Patient	
* Specialty:	
Behavioral Health Therapy	*
Appointment Time: 5/30/2024 at 14:00 until 15:00 Sile Time: 5/30/2024 at 13:00 until 14:00 MDT	
* Cart:	
* Reason for visit:	•
test	
Status:	6
(A) Scheduled	~
(A) Scheduled (N) No Show	

# Editing Appointment and Reschedule/Follow up

- Ability to update/modify scheduled appointment time by selecting the clock icon.
   The clock icon is only for updating that day.
  - Use the calendar icon for rescheduling appointment to another day.

Appointment Time 5/30/2024 at 1		ntil 14:00	3					
Start:	Start: End:							
13:00	until	14:00	Change Time					
Site Time: 5/30	0/2024	at 12:00 un	til 13:00 MDT					



2. To Reschedule to a different date: Open the appointment and select the calendar icon under Appointment Time

ate From	nish scheduling	
5/30/2024	<b></b>	Search For Schedules

- 3. In the right-hand panel under Reschedule Appointment select the Date to be rescheduled and Search For Schedules.
- 4. Review cart and provider's schedule for availability.
- 5. Select cart or home visit.
- 6. Select the time of appointment within the provider's row.
- 7. Verify date and time. \*\*Appointments will default to 30 minutes. Adjust accordingly by clicking in the time field, backspace and enter new time.\*\*
- 8. Select Schedule.

31	Apr 0 08:00	-	Apr 02 08:00 -	Apr 03		Apr 04 08:00 -	Apr 05		or 06
	12:00	Ť	12:00 F	12:00 riday, 3/0		12:00 4 🗙	* 12:00	•	
Test	Site								
08:00		10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
* 🗆 Hon	ne Visit								
* 🗆			CartA-	sc					
08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
* 🔽			CartB-	sc					
08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
Collin E	Block, N	isw							
08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
Date to se	chedule:		_	Time to s	chedule	e: End fir	ne:	-	-
3/8/202	4			10:00		11:00	•	Sci	nedule



#### Adding Patient to Queue

- 1. Open the appointment and change status from active to cancelled.
- 2. Cancelled and No-Show appointments will populate required fields. Complete requirements.
- 3. Select Queue For Scheduling.

atus:	 Schedule Follow-Up
(C) Completed	 Queue For Scheduling
Schedule Note	

4. The appointment summary overlay will appear. Enter a target date and reason for visit. Verify patient demographic and select Place in Queue in the bottom right-hand corner. You will receive a pop-up confirmation when completed.

Test Site ent: valdtest, Adam (5/31/1977) cility:	* MRNs MRN ID	MRN App	Oswaldtest, Adam Starting on Mar 21, 10:00 - 10:30	Silte: Provider: Collin Block, MSW Cart: CartA-SC Specialty: Behavioral Health Therapy
havioral Health Therapy	4365247543	HL7 V	Reason for visit: test Status: (A) Scheduled	
vider: ollin Block, MSW	* First Name	Adam	Oswaldtest, Adam	
R Date:	* Last Name	Oswaldtest	Oswaldtest, Adam Starting on Apr 24, 13:00 - 13:30 Reason for visit: test Status: (A) Scheduled	Site: BA - Browning, MT - Blackfeet Ser Unit Provider: Collin Block, MSW Cart: DartB-SC
eason for visit:	Middle Name			
eeson tor visit:	Suffix			Specialty: Behavioral Health Therapy
	* Address Line	123 S Water St		
° City		Beach	1	
	* State	so		
	* Postal Code	78658		
	* Work Phone			
	* Home Phone			
	* Cell Phone	1231231234		
Er	Email			
	* Patient DOB	5/31/1977		
				Place in Queue