AVEL eSYNC

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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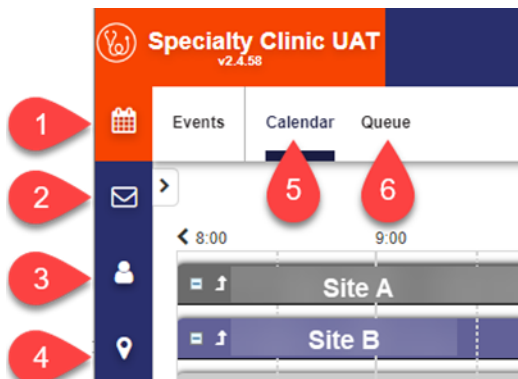# Telemedicine Scheduler User Guide | eSYNC

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
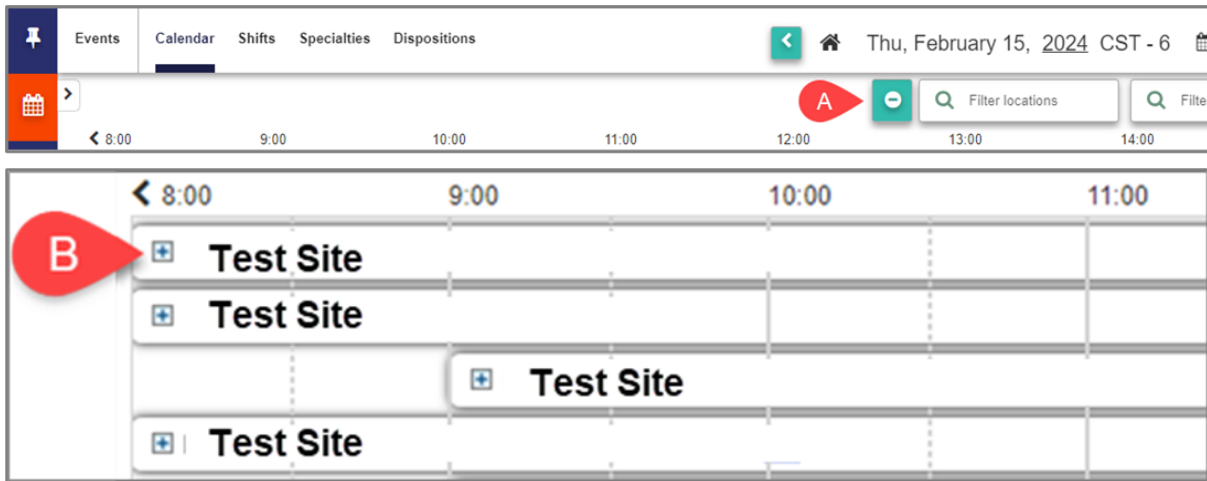

Appointment Color Code Guide

1. Black/Dark Grey – Scheduled Appointment

2. Blue - Complete

3. Fuscia – No Show

4. Green – Canceled
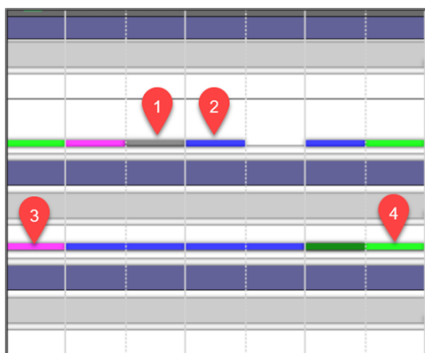
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Collapse/Expand

A. Collapse all by selecting the "-" sign

B. Expand all by selecting the "+" sign

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.

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.
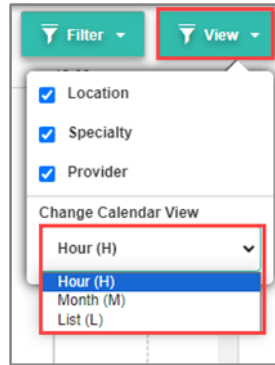
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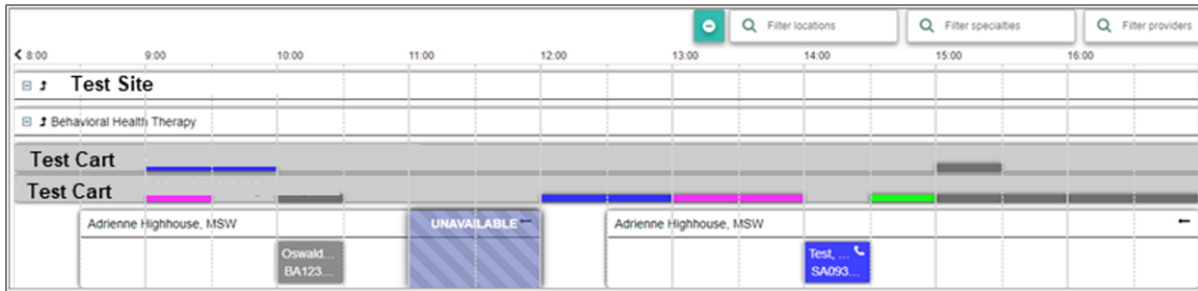
Calendar Views

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
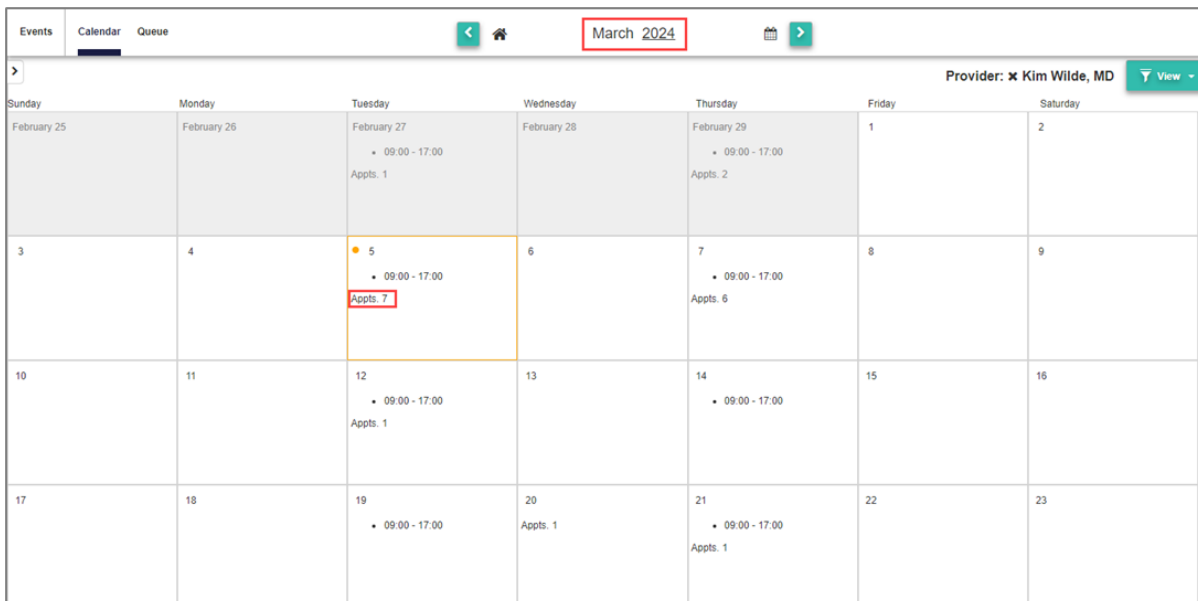- type "m" to get to the month view
- type "l" to get to the list view

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

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
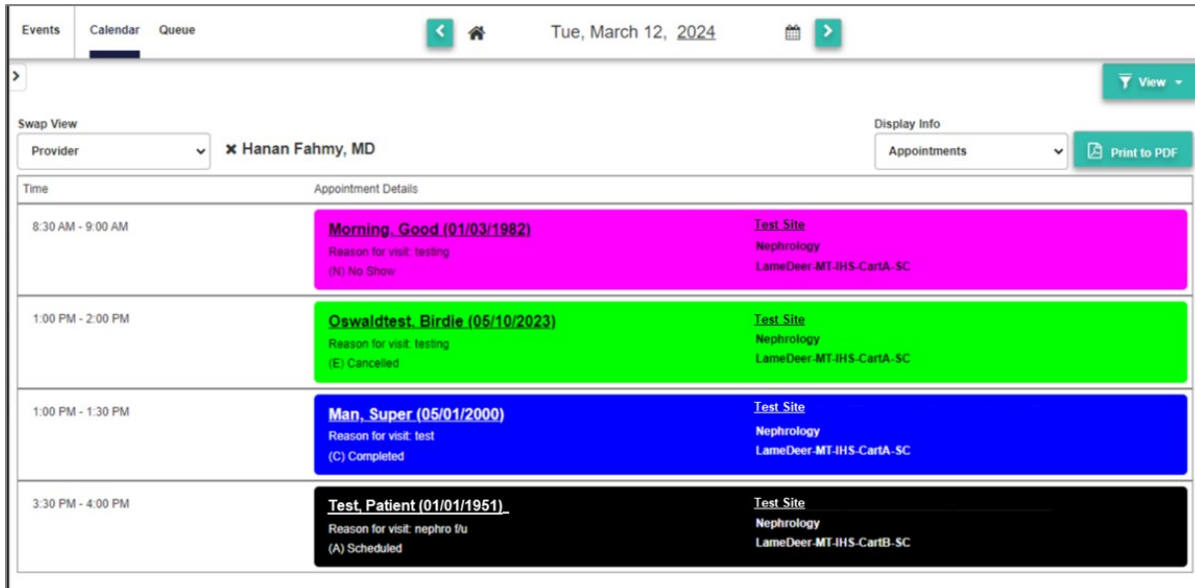
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Calendar Views

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

- In Provider field, remove auto-populated name and enter specific provider name
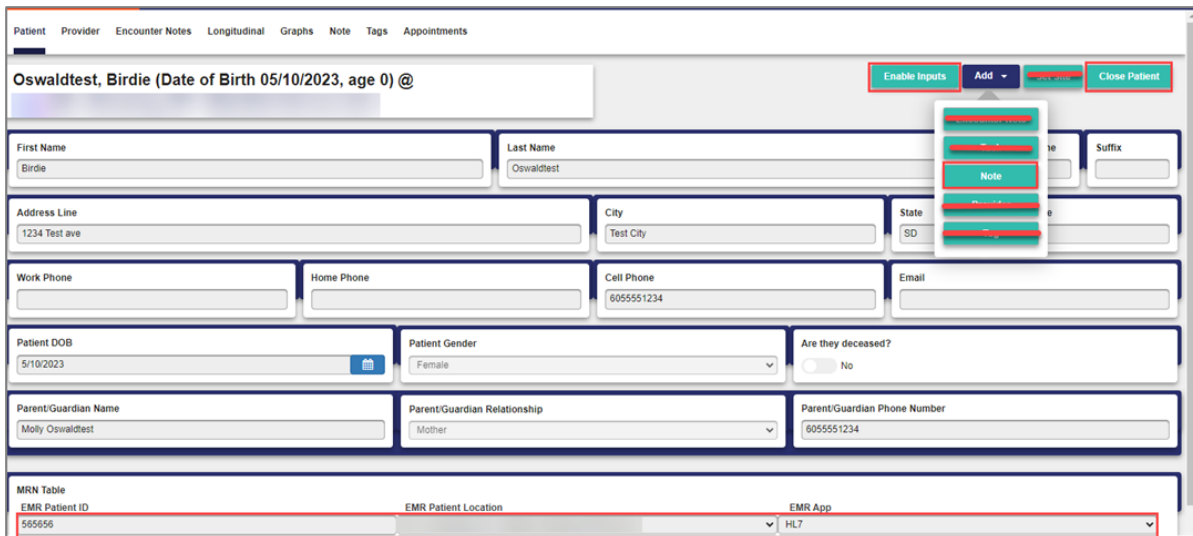
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Patient Profile General Navigation

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.

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.

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

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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.
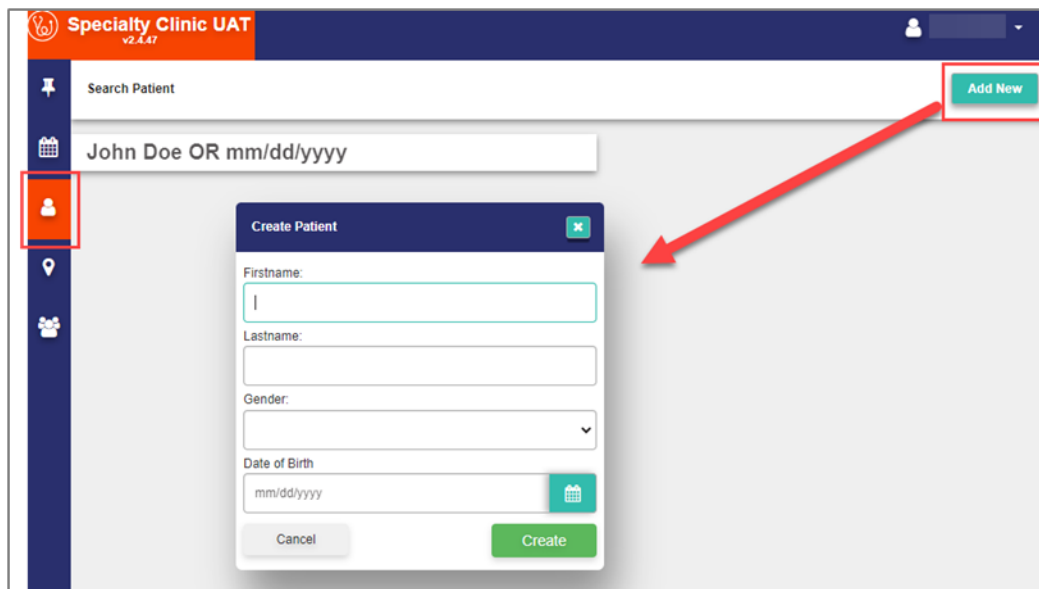

4. The Create Patient overlay will launch.

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.

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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**).
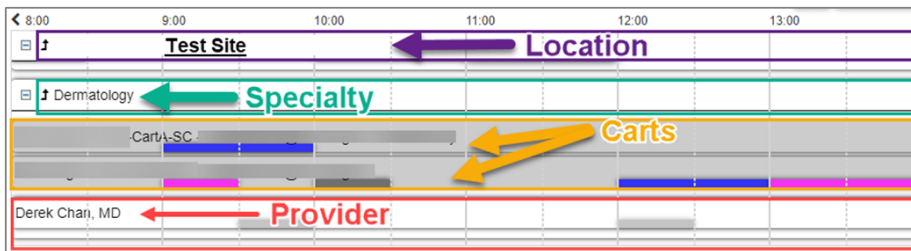
6. Double click or right click> schedule event on the desired time within the provider bar to schedule an appointment.
7. This will launch the appointment summary overlay.
8. Verify the correct site is listed.
9. Search for patient.
10. Verify the correct specialty is listed.
11. Verify the correct provider 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.

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Scheduling Appointment
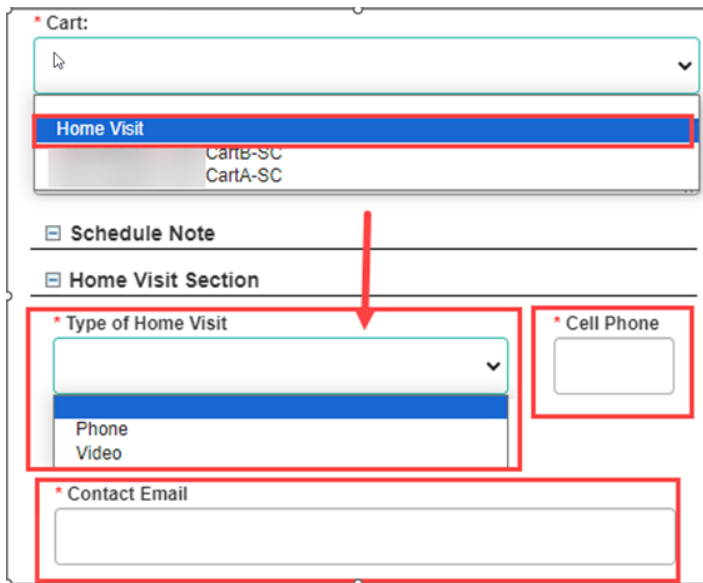
Clinic Appointment

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):

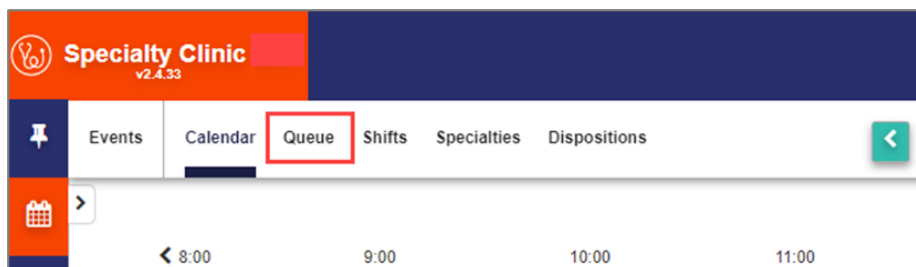# Telemedicine Scheduler User Guide | eSYNC

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.
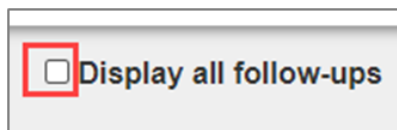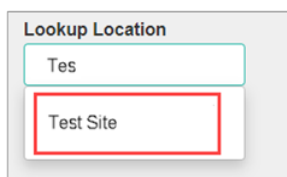

Scheduling from Queue

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

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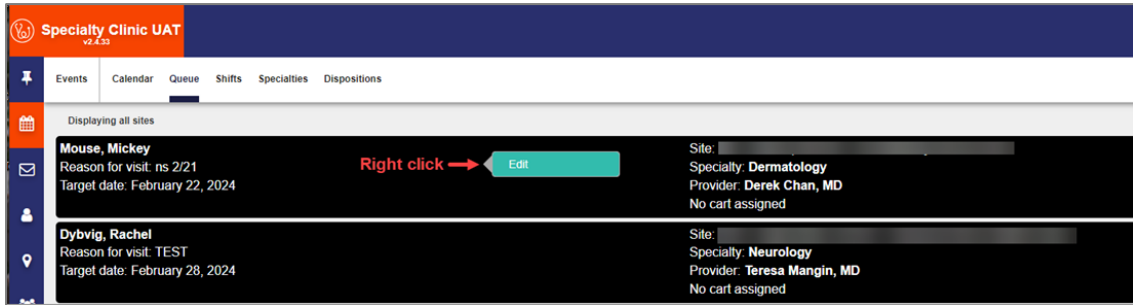

3. Search for a specific location within the Lookup Location field. The locations will start appearing once you begin typing. Select desired location.

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Scheduling from Queue

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

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.
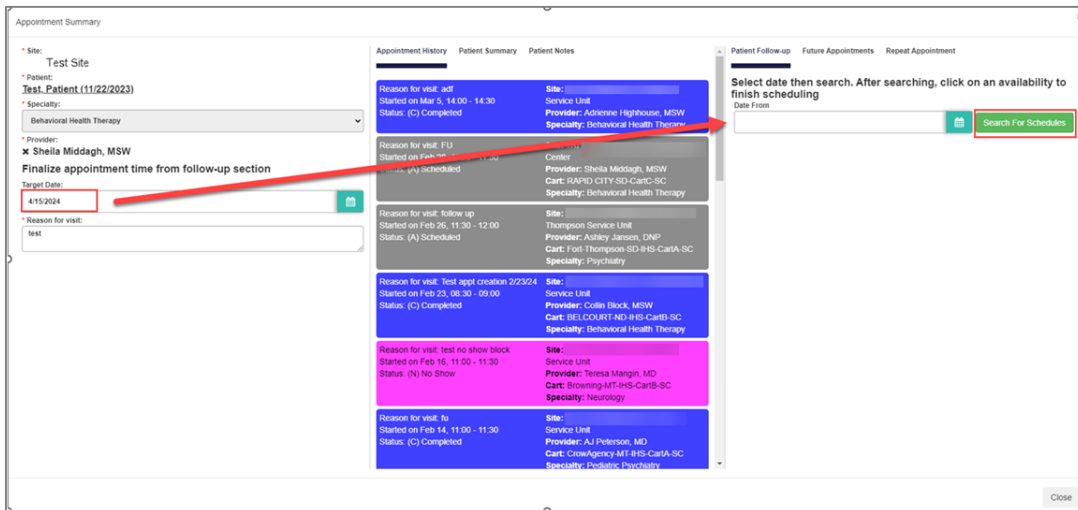
7. This will populate a month view based on the date you selected. Example: Date enter April 15th, the month view with provider's availability will display.

   a. Unavailable will have the diagonal lines within the box (red box below)
   b. Available will be white (green box below)

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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.
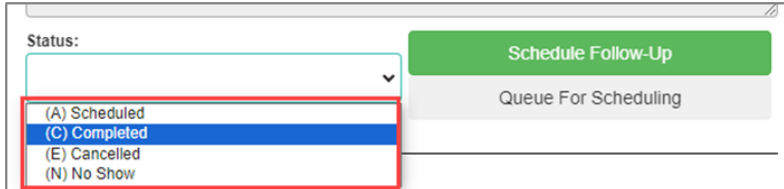
Able to delete appointments from the Queue by right clicking then selecting Delete from Queue.
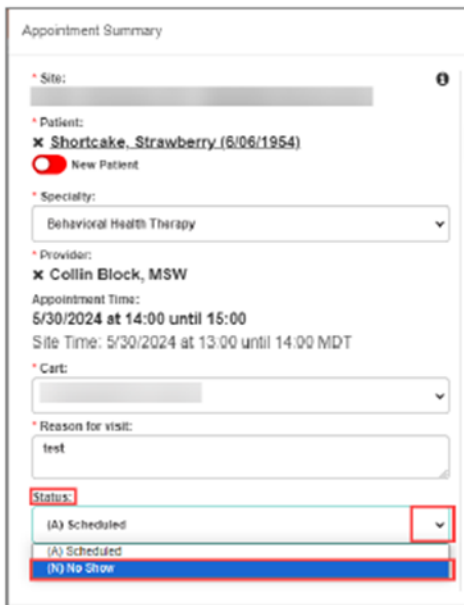
Cancelling Appointment

1. Open the appointment.

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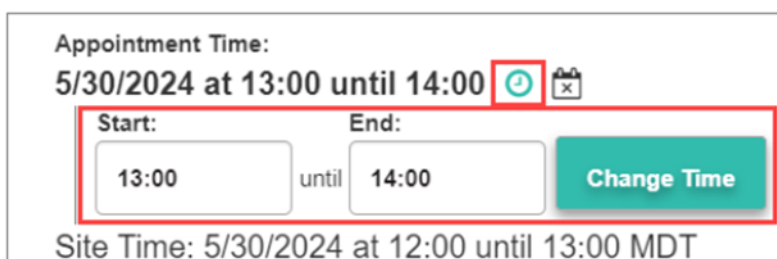

No Show Appointment

Able to No Show appointment on the same day.

Editing Appointment and Reschedule/Follow up

1. 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.

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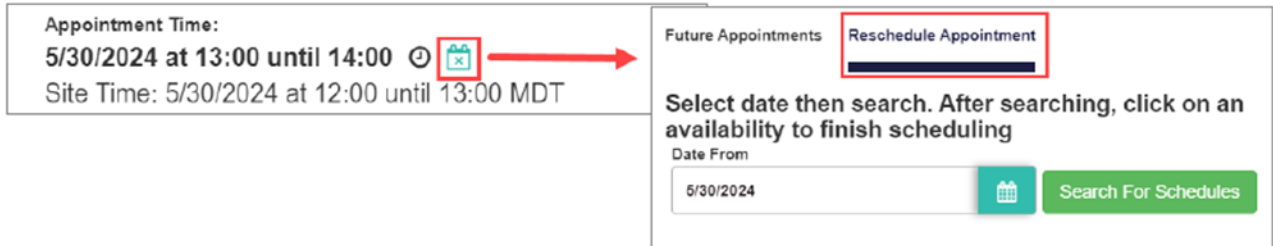

3. In the right-hand panel under Reschedule Appointment select the Date to be rescheduled and Search For Schedules.

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.

![AVEL eCare | SPECIALTY CLINIC]
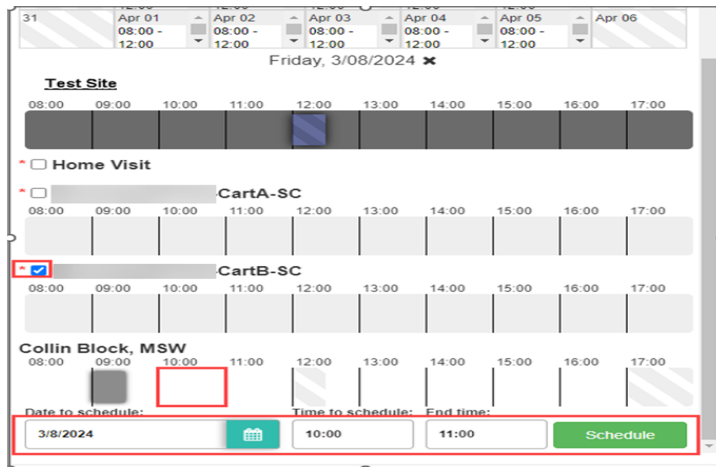
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Adding Patient to Queue

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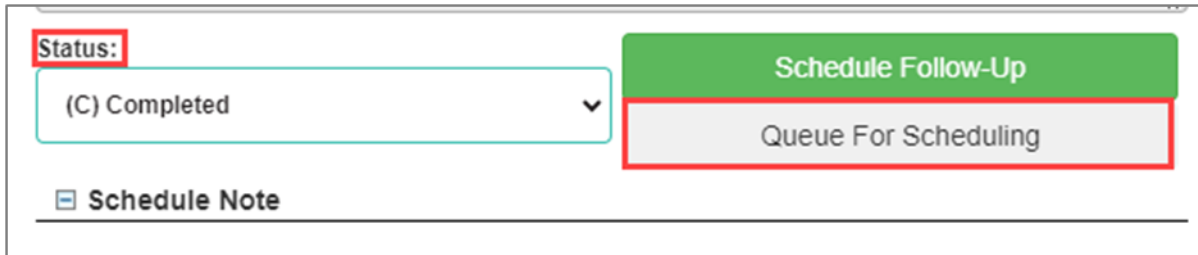
4. The appointment summary overlay will appear. Enter a target date and reason for visit. Verify patient demographic and select Place in Queue in the bottom right-hand corner. You will receive a pop-up confirmation when completed.