

CareLink   
Mobile Practice Manager

# CareLink Mobile Practice Manager

PATIENT SCHEDULING

[www.MyMobilePracticeManager.com](http://www.MyMobilePracticeManager.com)

# CareLink Patient Scheduling Training For Administrators and Practitioners

- What is CareLink
- CareLink Scheduling Features
- Getting Started
- Patient Management
- Patient Scheduling
- Mobile Log On
- Using Workbooks

# What is CareLink?

- CareLink is a powerful practice management tool which provides a direct link between patient's care givers, assisted living homes, group homes, doctors' offices, and others who are managing the care of a large group of patients within your practice.
- CareLink has powerful patient scheduling features to help streamline patient scheduling and minimize provider travel

# CareLink Patient Scheduling Features

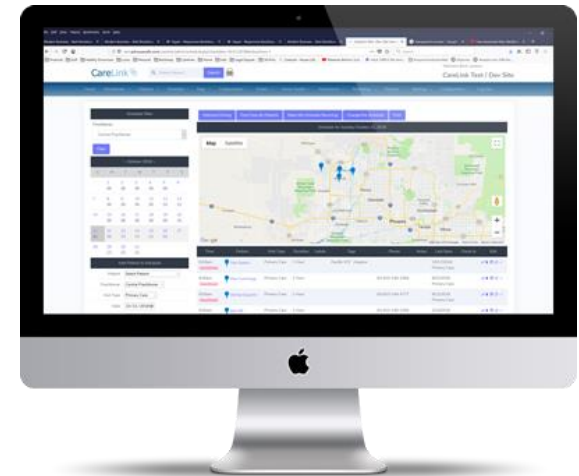
- One click bulk patient scheduling
- Find shortest travel route for the day's schedule with driving optimizer tool
- Find Close by Patients with schedule optimizer tool
- Set patient visit frequency see overdue patients
- Set up to 5 appointment types with unique visit frequencies
- Set Recurring Scheduling
- Move your entire schedule from 1 day to another or 1 provider to another with 1 mouse click
- Confirm scheduled visits and notify facility or patients electronically about an upcoming visit
- Integration with Remindercall.com for automated patient reminders (requires separate account)
- Provider "check-in" when arriving at appointment

# Getting Started with CareLink

## PORTAL AREAS AND FUNCTIONS

### Administrator Portal Log On

- Designed to be used in office
- Manage and import patients
- Patient Scheduling
- Reporting



### Mobile Practitioner Site Log On

- Designed to be used on the road via mobile or tablet
- Mobile Phone Version of CareLink optimized for Practitioners on the Go
- View Provider's schedule, turn by turn directions, and check into appointments

# Getting Started with CareLink

## LOG ON

The system administrator will create your account and send the Log On information to you with your specific domain name links.

Administrator Log On

[mydomain.MyMobilePracticeManager.com/CareLink/admin/](http://mydomain.MyMobilePracticeManager.com/CareLink/admin/)

Practitioner Mobile Site Log On

[mydomain.MyMobilePracticeManager.com/CareLink/mobile/](http://mydomain.MyMobilePracticeManager.com/CareLink/mobile/)

# Getting Started with CareLink

## MENU BAR AND USER ROLES

The menu bar contains links to all pages within CareLink  
Click on Heading to View Page Details



Different Roles have different access rights  
Currently there are 4 Roles for Patient Scheduling:

1. **Sysadmin:** Access to all system level configuration and reports
2. **Office User:** Access to all patient functions and scheduling
3. **Practitioner:** Allowed to be scheduled in system, access to all patient functions and mobile site
4. **MA:** Access to all patient functions, scheduling and mobile site

# Patient Scheduling

SCHEDULE -> TODAY'S SCHEDULE

The screenshot displays a patient scheduling interface. On the left is a 'Schedule Filter' panel with a 'Practitioner' dropdown set to 'All Practitioners', a 'Filter' button, and a calendar for October 2018. The calendar shows the 23rd as the selected date. Below the calendar are fields for 'Add Patient to Schedule', 'Patient' (set to 'Select Patient'), 'Practitioner' (set to 'Central Practitioner'), 'Visit Type' (set to 'Primary Care'), and 'Date' (set to '10/23/2018').

At the top right of the main interface are buttons: 'Optimize Driving', 'Find Close By Patients', 'Make this Schedule Recurring', 'Change this Schedule', and 'Print'. Below these is a header 'Schedule for Tuesday October 23, 2018' and a map of the Phoenix area with several location pins labeled L, B, F, I, J, H, and O.

Below the map is a table of appointments for the selected date:

Time	Patient	Visit Type	Duration	Labels	Tags	Phone	Notes	Last Seen	Check In	Edit
6:00am	Lady Baines	Primary Care	1 Hour			(H) 623-461-7203		9/12/2018	Primary Care	<a href="#">Edit</a> <a href="#">Print</a> <a href="#">Check In</a>
6:00am	Jane Bretall	Primary Care	1 Hour			(H) 480-217-0174		10/20/2018	Primary Care	<a href="#">Edit</a> <a href="#">Print</a> <a href="#">Check In</a>
6:00am	Bill Burk	Primary Care	1 Hour			(H) 602-872-2641		9/11/2018	Primary Care	<a href="#">Edit</a> <a href="#">Print</a> <a href="#">Check In</a>
8:00am	Patient 20	Primary Care	1 Hour			(H) 555-555-1212		10/22/2018	Primary Care	<a href="#">Edit</a> <a href="#">Print</a> <a href="#">Check In</a>

- Add new patients to schedule
- View different day's schedule
- View today's schedule map
- Confirm, edit, and delete appointments



# Patient Scheduling

## SCHEDULE -> TODAY'S SCHEDULE

- Navigate to Schedule -> Today's schedule
- Schedule includes patient, practitioner, patient, date, time, appointment type, schedule notes
- You can also choose to send notifications to practitioner and patient

**Add Patient to Schedule**

Patient

Practitioner

Visit Type

Date

Time

Duration

Note

Visit Confirmed

Notify Facility

Notify Practitioner

Notify Patient

# Patient Bulk Scheduling

## SCHEDULE -> BULK SCHEDULE

Select	Patient	City	Zip	Primary Care Frequency	Last Primary Care	Next Primary Care	Time	Duration	Conf	Notes
<input type="checkbox"/>	📍 Tyler Adams	Chandler	85225	As Needed	10/20/2018		6:00 am	1 Hours	<input type="checkbox"/>	
<input type="checkbox"/>	📍 Tyler Adams (Not Really)	Chandler	85225	Monthly	10/22/2018	10/23/2018	6:00 am	1 Hours	<input type="checkbox"/>	
<input type="checkbox"/>	📍 Denise Armagost	Phoenix	85015	Quarterly	9/12/2018		6:00 am	1 Hours	<input type="checkbox"/>	
<input type="checkbox"/>	📍 Lady Aros	Mesa	85209	Every 6 Months	10/20/2018		6:00 am	1 Hours	<input type="checkbox"/>	
<input type="checkbox"/>	📍 Bob Arrington	Gilbert	85234	Monthly	9/29/2018		6:00 am	1 Hours	<input type="checkbox"/>	

- Can use filters to select patients by practitioner, city, zip code
- Select Patients you wish to schedule
- Select provider and schedule multiple patients at once

# Recurring Scheduling

## SCHEDULE → RECURRING SCHEDULE

- You can set patients up for recurring scheduling if you wish and schedule them up to 52 weeks out
- Go to schedule → recurring schedule
- Fill in details of recurring scheduling event

Facility

Patient(s)

Practitioner

Visit Type

Visit Start Time

Visit Duration

Start Date

Recur Frequency

Recur Number of Weeks

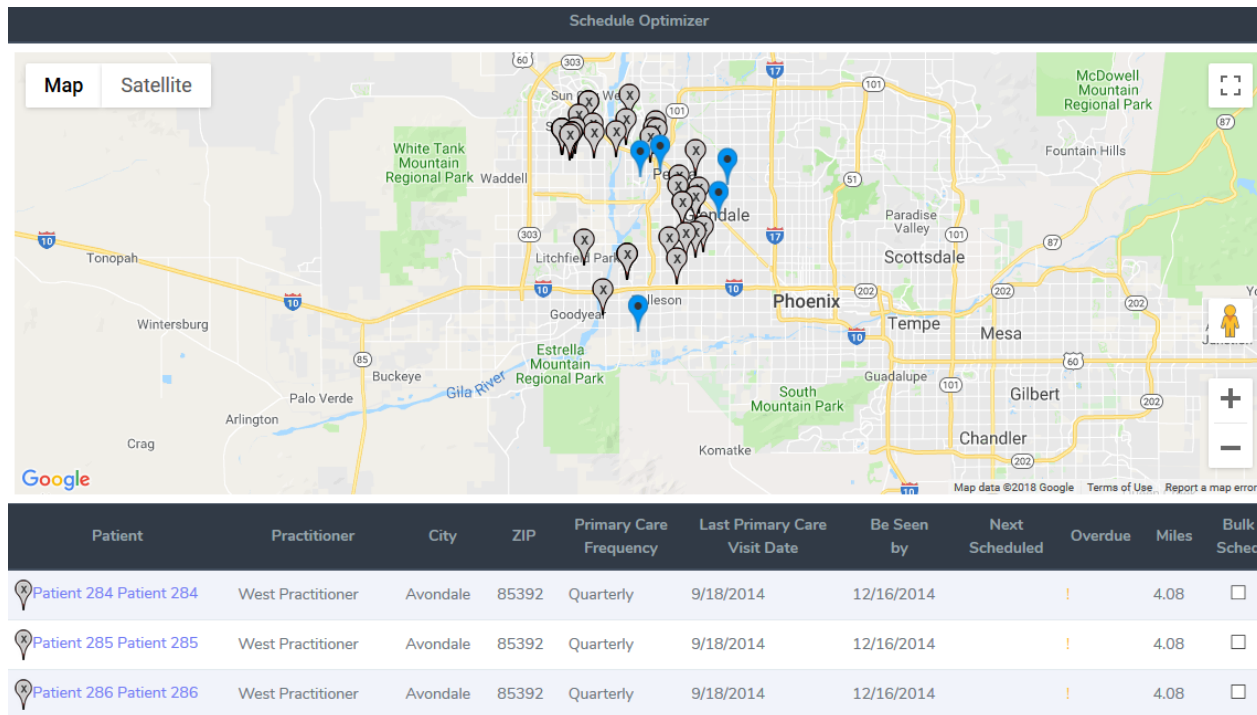
Recurring Day of Week  Sunday  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday

Schedule Note




Visit Confirmed

# Using the Schedule Optimizer

## MINIMIZE DRIVING DISTANCE WITH SCHEDULE OPTIMIZER



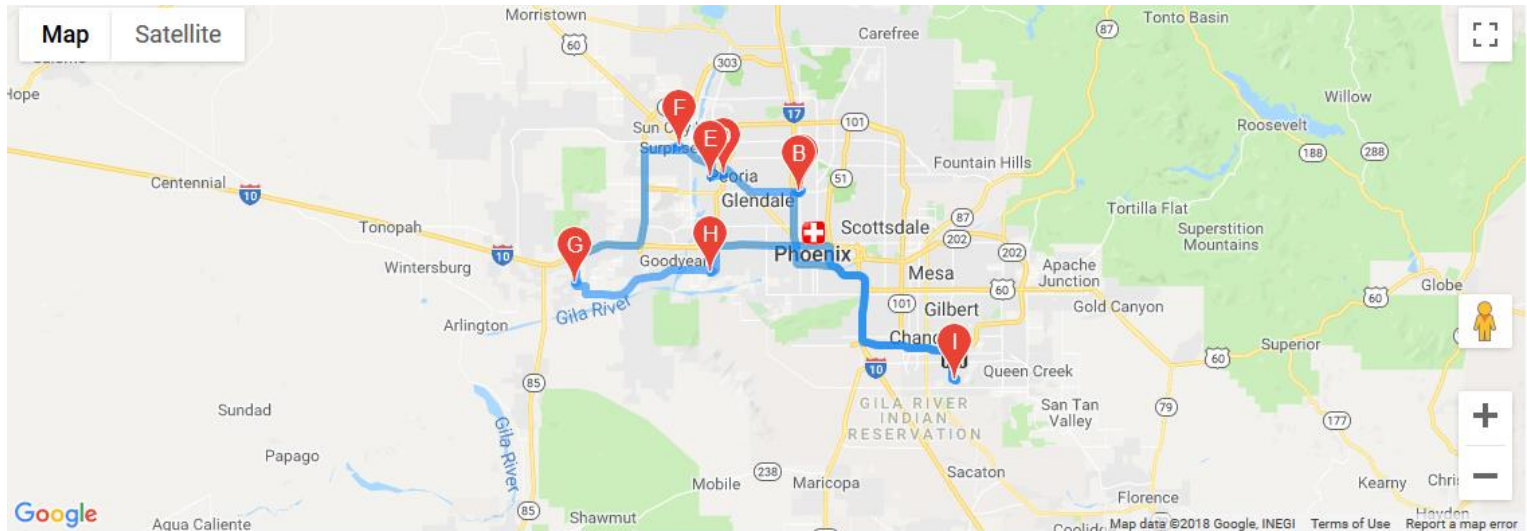
The screenshot displays the 'Schedule Optimizer' interface. At the top, there are 'Map' and 'Satellite' tabs. The map shows the Phoenix area with several patient locations marked by pins. Below the map is a table with the following columns: Patient, Practitioner, City, ZIP, Primary Care Frequency, Last Primary Care Visit Date, Be Seen by, Next Scheduled, Overdue, Miles, and Bulk Sched. The table contains three rows of patient data.

Patient	Practitioner	City	ZIP	Primary Care Frequency	Last Primary Care Visit Date	Be Seen by	Next Scheduled	Overdue	Miles	Bulk Sched
 Patient 284 Patient 284	West Practitioner	Avondale	85392	Quarterly	9/18/2014	12/16/2014		!	4.08	<input type="checkbox"/>
 Patient 285 Patient 285	West Practitioner	Avondale	85392	Quarterly	9/18/2014	12/16/2014		!	4.08	<input type="checkbox"/>
 Patient 286 Patient 286	West Practitioner	Avondale	85392	Quarterly	9/18/2014	12/16/2014		!	4.08	<input type="checkbox"/>

- From schedule page select a practitioner
- Click on 'Find Close By Patients'
- Click patients you wish to schedule and send them to bulk scheduler to complete the scheduling process

# Using the Driving Optimizer

## MINIMIZE DRIVING DISTANCE WITH DRIVING OPTIMIZER

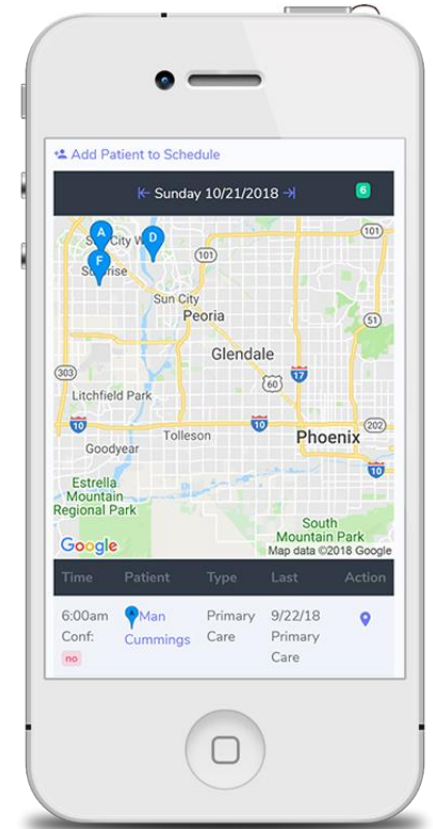


- From scheduling page click on 'Optimize Driving'
- Change Start and End Locations, CareLink will compute total driving mileage
- Calculate the optimal patient sequence to minimize driving mileage
- Click on 'Change all to Recommended Time' to update patient's appointment times

# Practitioner Mobile Site

## MOBILE OPTIMIZED SITE FOR PROVIDERS ON THE ROAD

- Log On to View Provider's daily schedule
- Get turn by turn driving directions
- Add new patients to your schedule
- 'Check in' to appointments
- Add a patient's photo



# CareLink Scheduling Reports

## REPORTS

- **New Patient Reports** – show all new patients added to CareLink in the month selected
- **Inactive Patients** – show all patients that have been set to inactive and reason code
- **Practitioner Visits** – shows all patient visits by provider for selected date
- **Practitioner Mileage** – shows the mileage driven by a provider

# Questions?

