



DASHcentral

Design Overview

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DASHcentral

DASHcentral has a variety of customizable features within the scheduling platform that are able to be modified or updated to meet your needs. This document outlines a description of those features so you can choose the option that works best at your organization. We will utilize a combination of the design decision grid below and the data template to configure your DASHcentral environment. You will complete the grid by filling out your decisions in the third column. For any questions or clarifications, please reach out to your Client Operations Manager.

Providers		
Function	Decision Options	Client Decision
Availability	N/A	N/A
Provider Slot Ranking	See Provider Ranking Section for different options. Specify if certain providers or provider type(s) need to be ranked higher than others. If no ranking should apply, please write N/A in the client decision column	
Care Team Linking	<ul style="list-style-type: none"> (1) Auto-link provider care team as a dropdown for manual selection (2) Auto-link all associated providers (3) Do not auto-link care team 	
Auto Updating Preferred Provider/Facility	<ul style="list-style-type: none"> (1) Auto update preferred provider/facility based on the appointment selection (2) Do not auto-update 	

New Patient Flag	<ul style="list-style-type: none"> (1) Enable New Patient Flag with Equal Opportunity method (2) Enable New Patient Flag with Equal Distribution method (3) If specific providers or resources should be disabled, please list them here 	
Recommended Provider Dropdown	<ul style="list-style-type: none"> (1) Enable recommended provider dropdown and make it mandatory (2) Enable recommended provider dropdown and make it non-mandatory (3) Disable recommended provider dropdown 	
Insurance		
Function	Decision Options	Client Decision
Appointment Insurance Attachment	<ul style="list-style-type: none"> (1) Enable insurance attachment at the appointment level (only applicable for <i>athenaOne</i>) (2) Disable insurance attachment at the appointment level (only applicable for <i>athenaOne</i>) 	
Insurance Eligibility	<ul style="list-style-type: none"> (1) Will run insurance verification in DASHcentral (2) Will not run insurance verification in DASHcentral 	
Scheduling		

Function	Decision Options	Client Decision
Triage	(1) Triage as optional (2) Triage as mandatory If it varies by Visit Reason, please indicate in the data collection template	
Templates	N/A	N/A
Telehealth	(1) Configure Telehealth in DASHcentral <ul style="list-style-type: none"> (a) As a separate service with telehealth checkbox (b) As a separate service only (2) Do not configure Telehealth in DASHcentral	
Custom Fields	(1) Enable custom fields <ul style="list-style-type: none"> (a) If so, specify the custom fields (b) If so, specify which fields should be mandatory (2) <i>For NextGen only</i> , please indicate all user-defined fields that should be enabled in DASHcentral and whether or not they should be mandatory	
Appointment Notes	Appointment Notes <ul style="list-style-type: none"> (1) Auto-populate Appointment Notes with scheduler's full name, date/time 	

	<p>(2) Auto-populate Appointment Notes with scheduler's initials and date/time</p> <p>(3) Do not auto-populate any scheduler info nor date/time</p> <p>Chief Complaint Notes</p> <p>(1) Auto-populate the selected Visit Reason to the Chief Complaint Notes</p> <p>(2) Do not auto-populate the selected Visit Reason to the Chief Complaint Notes</p>	
Coordinated Care	<p>(1) Configure Coordinated Care in DASHcentral. If so, specify the details in the data collection template</p> <p>(2) Do not configure Coordinated Care in DASHcentral</p>	
Sequential Scheduling	<p>(1) Enable Sequential Scheduling feature in DASHcentral</p> <p>(2) Disable Sequential Scheduling feature in DASHcentral</p>	
Urgent Overbooking	<p>(1) Enable Urgent Booking button. If specific User Group should be restricted, please indicate in the data collection template</p> <p>(2) Disable Urgent Booking button</p>	

Misc		
Function	Decision Options	Client Decision
Waitlist	<p>(1) Please indicate if the waitlist should be enabled at go live. If so, specify the details in the data collection template</p> <p>(2) Disable Waitlist feature</p>	
Referral Tasking	<p>(1) Should referral tasking be configured in DASHcentral?</p> <p>(2) Should fax notifications be sent to inform the referring provider when an appointment has been scheduled?</p>	
Users	<p>(1) Keep the default threshold for lockout to be 15 days</p> <p>(2) Extend the threshold beyond 15 days. Specify the threshold here</p>	
Chart Search		
Function	Decision Options	Client Decision
Patient search/ID Restriction	<p>(1) <i>For athenaPractice (GE CPS) only</i>, when searching for a patient in DASHcentral, indicate which Patient ID the system should search by</p> <p>(2) <i>For athenaOne only</i>, restrict the display of appointments by provider group</p> <p>(3) <i>For athenaOne only</i>, restrict user access by provider group</p>	

Patient Chart Alerts	<ol style="list-style-type: none"> (1) Should alerts be enabled in DASHcentral (2) Specify the type of alerts that should be enabled (3) Specify any rule configuration required for the above alerts 	
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Providers

Availability

The screenshot shows the 'SELECT RESOURCE' step in the DASHcentral interface. The 'Availability' dropdown menu is highlighted with a red box, showing options: High, Medium, and Low. The interface includes search bars, filters, and a date range selector.

The Provider/Resource list in DASHcentral displays providers from High to Low based on availability. DASH calculates this value for each provider by the ratio of the number of appointments scheduled to the number of appointments available. Providers are then sorted into three buckets of High, Medium, Low availability. The top 50% of providers are classified into high availability, bottom 25% are classified into Low availability, and the rest are grouped as Medium availability.

Decision Needed: None

Provider Slot Ranking

DASHcentral can customize the slot output by assigning higher/lower weights to certain providers if desired. This takes effect when searching across multiple providers' schedules at the same time. For example, a practice may want to use this weighting if a doctor's schedule is often booked out quite far while their associated PA has significant

open availability. Weighting doctors higher than non-physician practitioners will result in promoting the doctor's slots higher up in the list of slot offerings for each search. In this example, if the doctor has a few slots open up due to cancellations, those will be more noticeably offered at the top of the list rather than among the PA's many open slots. This can also be customized on a granular level, by appointment type, Service, or Visit Reason. For example, we can apply rankings to doctors only when scheduling a New Patient.

In the below example, you can see that the provider weighting is working by moving Dr. Cherry's slots to the top of the list, even though the PA has sooner availability.

Recommended Slots				
Rank	◇	Date and Time		◇ Provider / Resource
1		Tuesday , Jun 1, 2021	10:15 AM 15 mins	Andrea Cherry, MD
2		Tuesday , Jun 1, 2021	10:45 AM 15 mins	Andrea Cherry, MD
3		Wednesday, Jun 2, 2021	10:15 AM 15 mins	Andrea Cherry, MD
4		Friday , May 28, 2021	07:00 AM 15 mins	Alicia Simpson, PA
5		Friday , May 28, 2021	07:15 AM 15 mins	Alicia Simpson, PA
6		Friday , May 28, 2021	01:45 PM 15 mins	Alicia Simpson, PA
7		Tuesday , Jun 1, 2021	07:00 AM 15 mins	Alicia Simpson, PA
8		Tuesday , Jun 1, 2021	07:15 AM 15 mins	Alicia Simpson, PA
9		Tuesday , Jun 1, 2021	07:30 AM 15 mins	Alicia Simpson, PA

By default, all the providers will have equal weight and available slots will be displayed in date-time order.

Decision Needed: Are there any rules that should be applied to weight or rank providers?

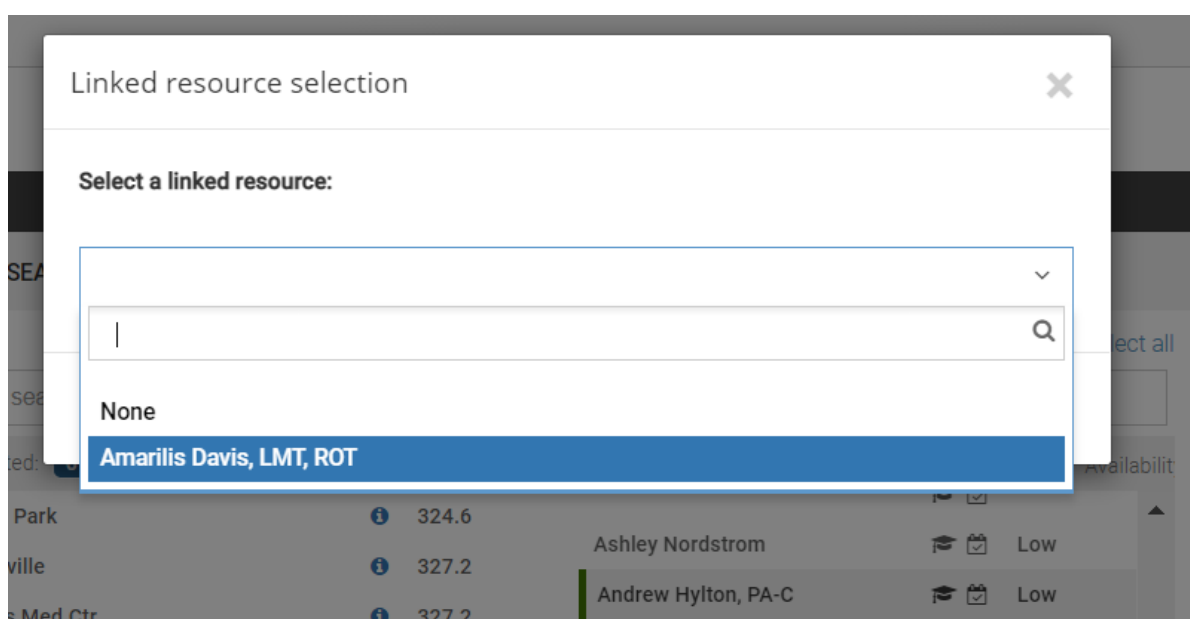
- (1) Default: providers have equal weight, and available slots are displayed in date-time order
- (2) Provider level weighting: ability to rank providers higher than other providers
 - (a) We can prioritize MDs higher than PAs
- (3) Preference level weighting: ability to rank a provider higher or lower based on an existing rule or preference

- (a) *We can prioritize certain providers based on patient establishment, or AM/PM slots.*

Care Team Linking

DASHcentral can automate the selection of associated providers, so that when one provider is selected, other linked providers will get selected automatically. For example, we can link each physician with their associated PA to facilitate searching across both schedules at the same time. Schedulers can also manually deselect a provider to isolate their search, as desired.

Alternatively, we can make this linking more manual by displaying a pop-up window reminding the user to select one other associated provider (see screenshot below). Of note, with below configuration, you will not be able to select multiple providers (e.g. NP and PA).



By default, associated providers are not automatically linked for searching.

Decision Needed: Should DASHcentral automatically link provider care teams on the scheduling screen? If so, should this be displayed as a dropdown for manual selection or should all associated providers link automatically?


Auto Updating Preferred Provider/Facility


DASHcentral has demographic fields to store a patient's Preferred Provider and Facility. When scheduling an appointment with a different provider or facility from the patient's preferred provider and facility, DASHcentral can show a prompt to choose whether the

preferences are automatically updated (screenshot below). This feature works for all PM systems with the exception of athenaDX.

PM System	Corresponding Preferred Provider Field	Corresponding Preferred Facility Field
athenaOne	Usual Provider	Usual Facility
athenaPractice	Responsible Provider	Facility
athenaDX <i>Auto updating feature is not available</i>	Primary Provider	Primary Location
NextGen	Default Rendering Provider	N/A
eCW	Rendering Provider	Default Facility
Allscripts	Usual Provider	N/A

 New Patient 30

 Wednesday, Jun 9, 2021
10:00 AM to 10:30 AM

 Cumming
1505 Northside Blvd, Suite 3100
CUMMING GA 30041

 (404) 355-0743

Patient Instructions

Please instruct patient to arrive 30 mins prior to their appointment and have their insurance card, identity, and prior medical history with them.

The selected provider/facility for this appointment is different than the patient's preferred provider/facility!

Preferred provider: Patrick Connor, MD

Preferred facility: Sports Med Ctr

☐ Update patient's preferred provider/facility

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☐ ADD TO WAITLIST

Book slot

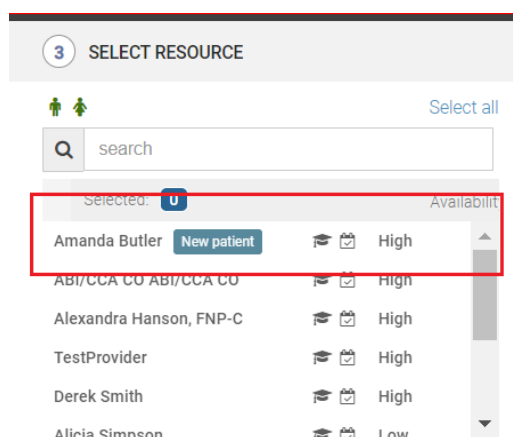
Cancel

Decision Needed: Should DASHcentral display the Preferred Provider/Facility on the appointment confirmation screen based on the appointment criteria selection?

New Patient Flag

DASHcentral can assign a New patient flag to a provider on the scheduling screen with each new search that will move them to the top of the Provider/Resource window regardless of their availability. This flag is automatically assigned to guide the scheduler to select the provider that is next in line to schedule a new patient. This flag is optional and can be deactivated from the environment or from specific providers, like non-physician providers or non-human resources. It is important to note that the new patient flag will appear in all scheduling scenarios to account for established patients coming in for new problems.

There are two methods that can be used to dynamically calculate which provider receives the New Patient Flag: Equal Opportunity or Equal Distribution. [See here for more information on which method to choose.](#)



Decisions Needed:

(1) *Should the New Patient flag be enabled?*

(a) *If this flag is active, which method of assignment should be used?*

(b) *Should all providers be eligible for the flag?*

Recommended Provider Dropdown

This feature provides the ability to track why your schedulers are not choosing the provider with the new patient flag. If the scheduler does not choose the provider with a

new patient flag for whatever reason, this field on the Confirmation screen will prompt the scheduler to identify the reason. This feature will appear for all appointment types and cannot be hidden for specific ones. The results of this question can be reported through DASHIQ for tracking purposes. The dropdown options can also be customized for your practice, and practices can decide whether to make this field mandatory before allowing them to book the appointment.

Patient Instructions

NOTICE: We have implemented a Restricted Visitor Policy at ALL locations until further notice. Exceptions to this are: Parent/guardian for patients under the age of 18, Interpreters/Translators, and 1 support person for patients who require physical/cognitive assistance. A mask is to be worn during your entire visit in the office. If you have symptoms of fever, cough, shortness of breath, sore throat, loss of smell, or body aches, we ask that you reschedule your appt for a min. of 2 weeks from now and seek care from your primary care physician. If you or someone in your immediate family are awaiting COVID-19 test results, we ask that you reschedule your appt until the result is received.

Please note that a photo ID, insurance card, and any required payments, such as copay will need to be presented at your upcoming appointment. Remember to bring in all relevant medical records such as office notes, Xray, MRI reports and images, which must be stored on a CD. Pls arrive 15 mins prior to your appt.

Select insurance

Select insurance

Please choose a reason for not selecting the recommended provider on this appointment

Patient Requested Sooner Appointment

Choose a reason

Care Continuity

Patient Requested Sooner Appointment

Patient Requested Specific Date

Patient Requested Specific Location

Provider Protocols

Referred to Specific Provider

Requested Specific Provider

Decision Needed:

(1) Should the recommended provider dropdown be enabled to track if schedulers are not scheduling with the provider who is assigned the new patient flag?

(a) If so, should this field be mandatory?

(b) What should the options in the dropdown be?

Recommended options:

Patient requested sooner appointment

Patient requested specific location

Patient requested specific provider

Patient is established to practice

Insurance

Appointment Insurance Attachment

This feature is only applicable for **athenaOne** and **athenaIDX**. DASHcentral provides the ability to attach different insurances to an appointment while booking an appointment. Schedulers can choose from the list of active insurances that the patient has on file or mark the patient as Self-pay.

If the client does not want to display this selection option, we can remove it from this screen. In that case, the Primary insurance plan will automatically get attached to the appointment.

Slot confirmation for Test, RadixDASHselfPT
ID: 12737



Andrew Hylton, PA-C



New Patient 15



Wednesday, Mar 3, 2021

03:30 PM to 03:45 PM



Pinneville

10650 Park Rd, Suite 120
Charlotte NC 28210



(404) 355-0743

Patient Instructions

Please instruct patient to arrive 30 mins prior to their appointment and have their insurance card, identity, and prior medical history with them.

Select insurance

Select insurance

Select insurance
Self Pay
Primary | Company: Medicare B-GA | Plan Name: Medicare-G... | Group ID: 18657 | Member ID: MED112 | Insurance ID: 1587

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ADD TO WAITLIST

Book slot

Cancel

For athenaIDX clients, this feature is mandatory due to athenaIDX's insurance set requirement. In that case, the field will contain the list of the patient's Insurance Sets instead of specific plans.

Select insurance*

Select insurance set

Select insurance set

1 - IL PERSONAL

2 - WC

Decision Needed: Confirm if schedulers should have the ability to select the insurance plan in the appointment confirmation screen.

Insurance Eligibility

DASHcentral has the ability to verify the eligibility of patient insurance plans. DASHcentral uses the patient's insurance data (Insurance plan name, Patient DOB, Insurance ID etc.) and validates it against the data of insurance clearinghouses.

For clients using athenaOne as their PM, we use athena APIs to check the Insurance eligibility. This is automatically enabled in DASH.

For clients on other PMs, we use the third party clearinghouse, Availity, to check Insurance eligibility. Eligibility details would remain in DASHcentral (with the exception of athenaPractice clients). If you'd like to utilize this feature, please fill out the tab on the DASHcentral data template labeled "Availity Insurance Eligibility".

WINDREY ORTHOPAEDICS at RUSH

Insurance coverage for Test, Radixmx (1660705 , MRN: 1660705) 02/10/1980

Check Eligibility Set Details Edit Back

Priority 1

Cigna CIGNA HEALTHCARE - OPEN ACCESS PLUS (POS)

ID : CH123 Group :

Subscriber : TEST, RADIXMX

Verification Status: Unverified

last checked on 2021-05-21 00:00:00

The member ID does not match the payer's file. Please confirm the member ID with the member and the payer and resubmit.

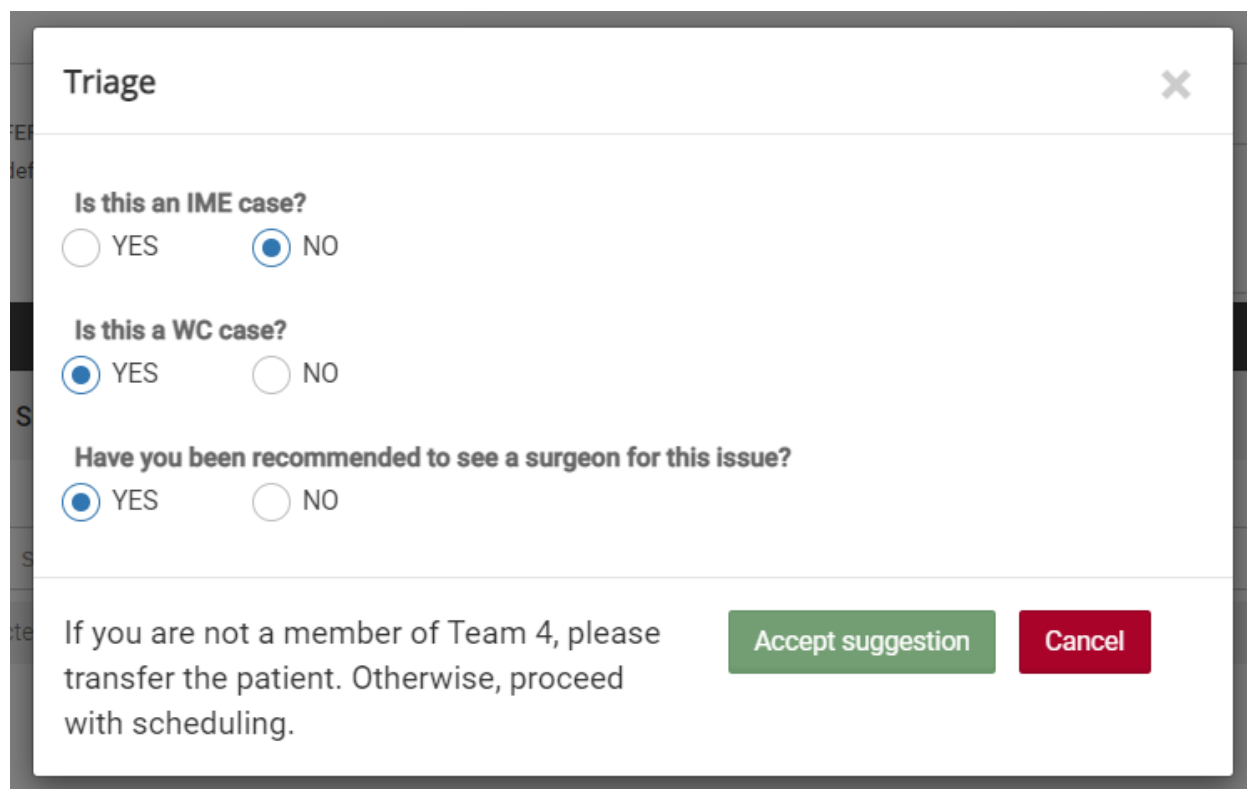
Decision Needed: Will schedulers need to perform insurance verification within DASH?

Scheduling

Triage

Triage questions help to organize the process of collecting patient information by transforming simple question-and-answer into decision trees, in some cases reducing the number of questions per call. When designing for Triage, consider where the questions fall in the patient's and scheduler's decision-making process. Triage appears immediately after Visit Reason selection, prior to selecting a Service, Specialty, facility, or provider. Because of this, Triage can be especially helpful in guiding the patient in making those decisions.

Triage decision trees are assigned at the Visit Reason level and only one tree can be assigned to each reason. If a Visit Reason does not have an assigned tree, then the Triage prompt will not appear when that reason is selected. Custom Triage trees can be created for individual Visit Reasons or groups of reasons.



The screenshot shows a 'Triage' dialog box with a close button (X) in the top right corner. It contains three questions, each with radio button options for 'YES' and 'NO':

- Is this an IME case?**
☐ YES ☒ NO
- Is this a WC case?**
☒ YES ☐ NO
- Have you been recommended to see a surgeon for this issue?**
☒ YES ☐ NO

At the bottom, there is a text instruction: 'If you are not a member of Team 4, please transfer the patient. Otherwise, proceed with scheduling.' To the right of this text are two buttons: 'Accept suggestion' (green) and 'Cancel' (red).

There are three possible options with Triage --

1. A visit reason does not have any Triage attached to it

2. A visit reason has a Triage attached to it, but it is not mandatory and can be skipped
3. A visit reason has a Triage attached to it and it is mandatory to complete the triage to proceed with scheduling

You can find a more in-depth explanation of triage in this document: [How to optimize triage](#)

Decision Needed: *Should Triage be optional, mandatory, or a combination of both? The data template will be used to make decisions by visit reason, if needed.*

Templates

While scheduling will move to DASH, your template within the PM will remain the source of truth. It's important for Radix to have a good understanding of your templates because there are different integration considerations to take into account. Providers should have the same definition for template slots as well as the same definition for appointment types.

The template slot is the templated appointment on the provider's schedule. The appointment type or event type is what the patient's appointment is scheduled as within the template slot.

- In a restrictive template set up, you may have a provider that has each appointment type templated so that certain appointments occur at certain times. This is a 1:1 relationship where the template slot only accepts that same appointment type. If provider's follow their template, template rules in DASH are not needed.
- In an open template set up, your provider may be on an open or any template where the template slot will accept any appointment type. This allows the provider to have a very flexible schedule, which leads to increased utilization. If a provider's template is open, we can manage template rules in DASH such as max count rules and back to back rules. Work with your COM and SDC if your providers are on an open template and review the considerations listed below per PM.
- Some clients have a hybrid approach where template slots can accept many appointment types, but not all of them. One example would be a

recheck template slot that accepts recheck, post op, and test results appointments. This is a many to one relationship. There could be template rules in DASH that could manage max counts and back to back rules. Work with your COM and SDC if your providers are on a hybrid template and review the considerations listed below per PM.

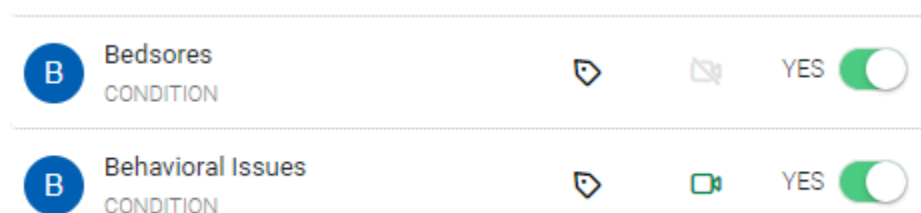
Please review the following considerations when discussing template changes and updates for your DASH implementation.

PM	Template Integration	Considerations
athenaOne	DASH will read the provider's template and configure custom appointment type mapping for templated slots. We can also configure custom rules to open up unused slots within x number of days.	Appointment slots that should accept other appointment types will need to be set to generic
NextGen	DASH will read event type to slot eligibility based on the Category Member Event mapping in NextGen.	The client will need to review their category mapping to ensure it aligns with how DASH should function.
Allscripts	DASH will read the appointment type to slot eligibility based on the Activity Type mapping in Allscripts.	The client will need to review their activity type mapping to ensure it aligns with how DASH should function.
eCW	DASH will read the templated Visit Types and configure custom appointment type mapping for templated slots. We can also configure custom rules to open up unused slots within x number of days. If provider templates are on an open template (i.e. no Visit Type rules), we can configure custom appointment type mapping to allow different appointment types to be booked into open slots.	DASH cannot support hybrid templates that have both Visit Type rules and any (open) slots. Templates will need to be either fully Visit Type rule-base or fully open.

athenaIDX (GEGM)	DASH will only read Encounter Code assignments to slots and the ALL code from GEGM. GEGM will only allow us to book an encounter code on an “ALL” slot or a slot that lists that code already; we can not override that mapping.	We can ignore the ALL code for certain providers or when the slot is more than x days away.
athenaPractice(GE CPS)	<p>DASH will read the appointment type assigned to each slot in GE CPS and configure custom appointment type mapping by provider and/or by how many days away the slot is.</p> <p>If a provider template is open template (i.e.open yellow slots), we can configure custom appointment type mapping to allow different appointment types to be booked into open slots.</p>	

Telehealth

Clients can configure which Visit Reasons should be allowed to schedule for Telehealth in DASH360 by enabling the telehealth icon.



We configure telehealth slots as a separate Service. Telehealth slots can be configured to be available with Office Visits. Schedulers just have to click on the check box as shown below and slots switch between the Office Visit and Telehealth options. If the

client has mapped telehealth slots to a specific location in the PM system, schedulers would be able to select that location and book telehealth slots.

Recommended Slots						
Rank	Date and Time	Provider / Resource	Facility	Status	Appointment type	
1	Wednesday, Jun 10, 2020 07:00 PM 15 mins	Matthew Gullickson, MD	Matthews	Available	Telehealth	
2	Wednesday, Jun 10, 2020 07:15 PM 15 mins	Matthew Gullickson, MD	Matthews	Available	Telehealth	
3	Wednesday, Jun 10, 2020 07:45 PM 15 mins	Matthew Gullickson, MD	Matthews	Available	Telehealth	
4	Thursday, Jun 11, 2020 07:00 PM 15 mins	Matthew Gullickson, MD	Matthews	Available	Telehealth	
5	Thursday, Jun 11, 2020 07:15 PM 15 mins	Matthew Gullickson, MD	Matthews	Available	Telehealth	
6	Thursday, Jun 11, 2020 07:30 PM 15 mins	Matthew Gullickson, MD	Matthews	Available	Telehealth	
7	Thursday, Jun 11, 2020 07:45 PM 15 mins	Matthew Gullickson, MD	Matthews	Available	Telehealth	

This functionality is configurable if no additional questions are needed to confirm a Telehealth appointment. If these questions are required (i.e. asking for permission prior to scheduling), then this same functionality can be achieved by selecting the Telehealth service and proceeding with scheduling.

SERVICE NEEDED

Choose...

|

Choose...

Office visit

Telehealth

telehealth test

Decision Needed:

(1) Do we need to configure Telehealth in DASH?

(a) If yes, how do we need to configure it out of the above options?

Custom Fields

There are few fields in various PM systems which are filled out at appointment level (e.g. Referring provider, Responsible provider). They can be accessed upon clicking the "Additional Details" option as below -

This field is integrated with different fields as per the PM. See below to understand which fields we are integrated with.

PM	Field
athenaPractice (GE CPS)	Responsible provider
Allscripts	Referring provider
athenaIDX (GE GM)	Referring provider
NextGen	Referring provider, cases, user defined fields, Rendering provider
athenaOne	Not applicable
eCW	Development in process

User-defined fields in Nextgen - We are integrated with all the User Defined fields from Nextgen which are attached at the appointment level. As per your environment setup, all the fields will be pulled into DASH and will be displayed under the 'Additional details' section.

Additional appointment details ×

APPT FIELD 1 <input type="text" value="Appt Field 1"/>	APPT FIELD 2 <input type="text" value="Appt Field 2"/>
WHY DID YOU SCHEDULE THE APPOINTMENT WITH THIS PROVIDER? <input type="text" value="Appt Field 3"/>	RENDERING PROVIDER <input type="text" value="None Selected"/>
	REFERRING PROVIDER <input type="text"/>

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Save changes

Decision Needed:

- 1) Do we need to enable any of the custom fields as per above?
- 2) Do we need to make any of them mandatory vs non-mandatory when booking an appointment?
- 3) For Nextgen clients - Please let us know which all user-defined fields you want to be enabled in DASH and if they should be mandatory vs non-mandatory

Appointment Notes

Appointment Notes - DASH can automatically pre-populate the scheduler name and timestamp in the below field for record of who created the appointment.

APPOINTMENT NOTES: <input type="text" value="Singh, Sudeep 6/9/2021 02:56 AM"/>	CHIEF COMPLAINT NOTES: <input type="text" value="Low back pain"/>
------------------------------------------------------------------------------------	----------------------------------------------------------------------

Additional details
Actions
Past appointments

We can also make it shortened and have only the first initial and last name of the scheduler pre-populate in this field.

APPOINTMENT NOTES: s. singh

CHIEF COMPLAINT NOTES: Threw out my back

Additional details Actions Past appointments

If desired, we can configure DASH to not auto-populate anything in this field. If nothing is auto-populated, it would be a blank free text field.

PM	Corresponding Field in the PM
athenaOne	Note
athenaIDX (GE GM)	Comments
athenaPractice (GE CPS)	Appointment Note
eCW	General Note
NextGen	Details
Allscripts	Comments

Decision Needed: Should the appointment notes field be populated with the scheduler's full name & date/time, the scheduler's initials, or nothing at all?

Chief Complaint Notes - DASH can auto-populate the Visit Reason selected during appointment scheduling in this field. Users can still edit the field if auto-populating is chosen to add additional details. Chief Complaint Note will be appended to the Appointment Notes in the PM.

Back Search patient > Schedule appointment

Test, Radixkittu
03/12/1989 | 32 years, Female
Patient ID: 13695

PREFERRED PROVIDER:
Patrick Connor, MD

APPOINTMENT NOTES:
Singh, Sudeep 6/9/2021 02:56 AM

CHIEF COMPLAINT NOTES:
Low back pain

1 SEARCH SERVICE
VISIT REASON: Low back pain
SERVICE NEEDED: Choose...
SPECIALTY: All

2 SEARCH FACILITIES
Reset Unselect all
search
Selected: 0 Distance
No data available in table

3 SELECT RESOURCE
Reset Unselect all
search
Selected: 0 Availability
No data available in table

4 SCHEDULE PREFERENCES
DATE RANGE: 06/09/2021 to 07/14/2021
PRESELECT
MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY
AM, PM
Unselect all

Decision Needed: Should the Chief Complaint Notes field auto-populate with the selected Visit Reason?

Coordinated Care

Coordinated care can be used to schedule two appointments with multiple resources in a single click. This is particularly useful when there are resource appointments required with a physician appointment (e.g. Patient needs to have an MRI before he can come visit the provider. So the clinic will schedule an MRI appointment at their MRI centre and directly after this time, the patient would be scheduled for an appointment with a physician). DASH can help to streamline the patient experience in this scenario. Through coordinated care configuration, schedulers can book two different appointment types through the same scheduling workflow. The time duration between such appointments can also be adjusted depending upon the workflow.

When the resources are eligible to schedule a coordinated care appointment, the question below will come up and the scheduler would need to click on Yes/No accordingly.

Coordinated care alert

Would you like to book a coordinated care appointment with the provider for this arthrogram contrast?

☐ YES ☐ NO

Accept

Upon clicking Yes, DASH will display all the resource slots as configured in the coordinated-care setup.

Recommended Slots						Show urgent slots	Eliminated Slots	Confirm slot
Rank	Date and Time	Provider / Resource	Facility	Status	Appointment type			
1	Tuesday, Jun 8, 2021 2:40 pm - 3:00 pm Tuesday, Jun 8, 2021 3:00 pm - 4:00 pm	Matthew Bernstein, MD Hoffman Estates MRI	Schaumburg Hand Center MRI Schaumburg	Available Available	Arthrogram 20 MRI Arthrogram Contrast			
2	Monday, Jun 14, 2021 11:40 am - 11:50 am Monday, Jun 14, 2021 12:00 pm - 1:00 pm	Mark Yaffe, MD Hoffman Estates MRI	Schaumburg Hand Center MRI Schaumburg	Available Available	Arthrogram 10 MRI Arthrogram Contrast			
3	Monday, Jun 14, 2021 1:40 pm - 1:50 pm Monday, Jun 14, 2021 2:00 pm - 3:00 pm	Mark Yaffe, MD Hoffman Estates MRI	Schaumburg Hand Center MRI Schaumburg	Available Available	Arthrogram 10 MRI Arthrogram Contrast			
4	Tuesday, Jun 15, 2021 8:40 am - 9:00 am Tuesday, Jun 15, 2021 9:00 am - 10:00 am	Matthew Bernstein, MD Hoffman Estates MRI	Schaumburg Hand Center MRI Schaumburg	Available Available	Arthrogram 20 MRI Arthrogram Contrast			
5	Tuesday, Jun 15, 2021 2:40 pm - 3:00 pm	Matthew Bernstein, MD	Schaumburg Hand Center	Available	Arthrogram 20			

The duration between the two appointments can be configured based on a desired lag time to allow appointments to be scheduled 'x' minutes/hours/days apart.

Decision Needed: Do we need to configure coordinated care in your environment?
Specific details for coordinated care will live on the data template.

Sequential Scheduling

Sequential scheduling will provide you with the ability to schedule multiple **occurrences of the same appointment** at once with one or more providers. This feature **cannot be used in conjunction with the Follow Up button**.

Decision Needed: Will sequential scheduling be utilized by schedulers? The sequential scheduling button can be hidden if it is not needed in the environment.

Actions

Past appointments

4 SCHEDULE PREFERENCES

DATE RANGE

06/09/2021

08/08/2021

PRESELECT

Unselect all

☒ MONDAY
☒ TUESDAY
☒ WEDNESDAY
☒ THURSDAY
☒ FRIDAY
☒ SATURDAY
☒ SUNDAY

☒ AM
☒ PM

Sequential Scheduling

Search slot

Urgent Overbooking

In situations where there is limited availability and the patient needs to be seen as soon as possible due to an urgent medical need, the scheduler should first try to find the earliest slot with the desired providers.

If an earlier slot is found, continue with confirming the appointment. If an earlier slot is not found, use the "Show Urgent Slots" button to display all slots for the provider, including the slots that are **already booked**.

In DASH versions of 21.1 and higher, DASH will denote a number next to the slot indicating how many patients are already scheduled into that slot. You can click on the button again to "Show regular slots", as in those that are available normally for scheduling.

- a. One important note is that booking one of these urgent appointments will create a new slot in the PM. If the patient in that slot happens to cancel, which is unlikely as these are generally last-minute add-ons, the new slot will stay on the template and could be used for another patient.

Note: when urgently overbooking, we follow template slot mapping. For example, a new patient appointment can only be urgently overbooked on the template where there is new patient appointment eligibility/ability to fit into that slot

The screenshot displays the DASH scheduling interface. At the top, there are buttons for "Show urgent slots" (highlighted with a red box), "Eliminated Slots", and "Confirm slot". Below these buttons is a table with columns: Provider / Resource, Facility, Status, and Appointment type. The table lists three available slots for Tara Anderson, PA-C and Matthew Siskosky, M.D. at Royal Oak, all with a status of "Available" and an appointment type of "New 15".

Below this table, there is a section for "Recommended Slots" with a "Show Urgent Slots" button (also highlighted with a red box). To the right of this button is a "Show regular slots" button. Below the "Show Urgent Slots" button is a table with columns: Rank, Date and Time, Status, Facility, and Appointment type. The table lists six slots for Thursday, Sep 17, 2020, all with a status of "Booked" and an appointment type of "New Patient". The slots are: 08:30 AM, 09:15 AM, 10:30 AM, 11:15 AM, 01:15 PM, and 02:30 PM. Each slot has a red circle with the number "1" next to it, indicating one patient is already scheduled. A tooltip message is displayed over the 09:15 AM slot, stating: "Appointment(s) already scheduled at 09:15 AM: 1. New Patient (10 min)".

This feature works only if the PM supports the integration. Currently those PMs are **athenaOne, Nextgen and Allscripts**.

Decision needed: *Should schedulers be able to overbook the provider's template? If this should be restricted by user group, please indicate so on the data template.*

Miscellaneous

Waitlist

DASH provides the ability to add patients who seek an earlier appointment to a waitlist. The waitlist feature of DASH has the capability to automatically inform the patient via a text message if an earlier slot becomes available and then automatically book the slot once the patient confirms.

Decision Needed: *Should we turn on the Waitlist feature in your environment? If you would like to utilize the waitlist feature, please provide us further information in the DASHcentral data template.*

Referral Tasking

Please note that both DASHcentral and DASHconnect products are required to utilize referral tasking.

Referral tasking can be used to track, schedule, and close the loop on referrals. Schedulers can initiate a Referral Task in DASHcentral, which will then automatically contact the patient to allow them to schedule or inform them to call the office to schedule. At the same time, referring providers are automatically notified that the service is completed via fax.

The patients can receive messages via Email, Text or Voice.

Decision Needed:

(1) *Should referral tasking be configured in DASH?*

(a) Should fax notifications be configured to inform referring providers when the appointment has been scheduled?

Users

By default, users who have been inactive for 15 days or more will be locked out of DASHcentral. This threshold can be extended up to 90 days as needed.

Decision Needed:

(1) Should we extend the default threshold beyond 15 days?

(a) If so, what should be the threshold?

Chart Search

Patient Search/ID Restriction

For **athenaPractice (GE CPS)**, when searching for a patient in DASHcentral, we can configure which patient ID field we search by. It can be set to either Patient Profile ID or Patient ID. We recommend setting the search to the ID that the schedulers normally use when searching in the PM system. Please note that if a patient has multiple patient IDs (a unique Patient ID and a unique Patient Profile ID), both IDs will be displayed on the patient chart regardless of the search setting.

Decision Needed: *When searching for a patient in DASHcentral, which patient ID should the system search by?*

For **athenaOne**, if the practice has multiple provider groups under their tablespace, DASHcentral will display multiple IDs of patients as below:

Patient Information | Payment History | Insurance | Demographics | Action

Test, Radix ACTIVE
 12/03/1998 | 21 yrs, Male

30020 Ipoh Perak Malaysia, Wadgaon Bk, Pune, IPOH, GA 30020 | English

(678)-884-7174
 megan.shaffer@radixhealth.com
 \$ 0.00 PAST BALANCE

Insurance carrier

Organization	Patient ID
BLACKSTONE VALLEY MEDICAL GROUP	6205
7 Hills Medical Group	6198
6 Hills Medical Associates	6105 ✓

Listing all IDs like Athena

Priority	Self-Pay (cash)	*SELF PAY*	Verification Status
Priority 0	ID : Group :	Subscriber : INSURANCE, TEST	Verification Status: Unverified Dummy verification message.
Priority 1	BCBS-AR	BCBS-AR: BCBS OF ARKANSAS	Verification Status: Unverified last checked on 2017-03-30 00:00:00

Users can click on any of the available IDs to pull patient information pertaining to that particular local patient ID. The system can be configured to restrict the display of appointments tied to the selected patient ID (i.e. selected provider group). For example, if a patient belongs to both provider group A and B and patient ID tied to group A is selected, then under the Appointments screen, DASHcentral will only display appointments that are tied to provider group A. If the patient ID tied to group B is selected, then appointments tied to provider group B will be displayed. This configuration is recommended for clients that have scheduling restrictions depending on the type of schedulers.

We can also configure the user access to allow them to see only specific provider groups as per the client setup. By default, every user will be able to see every patient ID but if there is a constraint in terms of which scheduler can see info pertaining to which provider group then we can configure the user access appropriately.

Decision Needed:

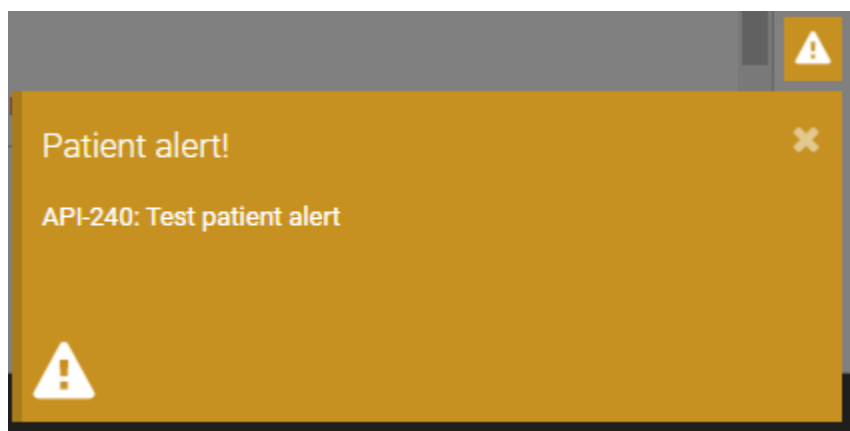
(1) Do we need to restrict the grouping/display of appointments as per the provider group?

(2) Do we need to restrict user access as per their provider groups? If so, #1 must be configured

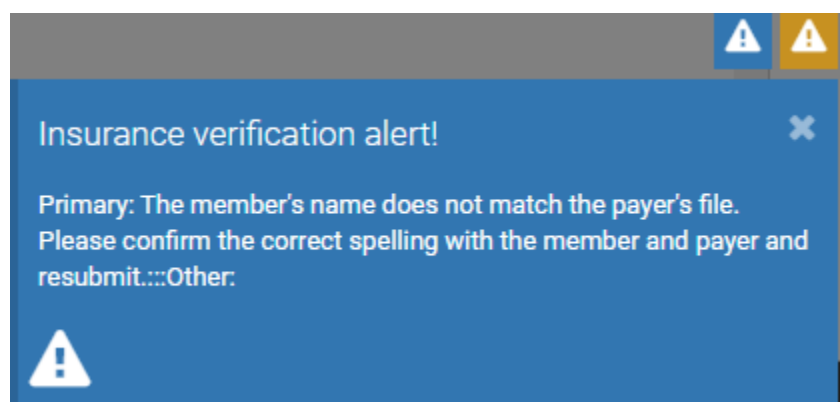
Patient Chart Alerts

There are three types of patient alerts we can configure to be displayed in DASHcentral - general chart alerts, insurance eligibility alerts, and bad debt/collections alerts. The alerts will automatically appear as a pop-up when pulling up a patient's chart.

General chart alert:

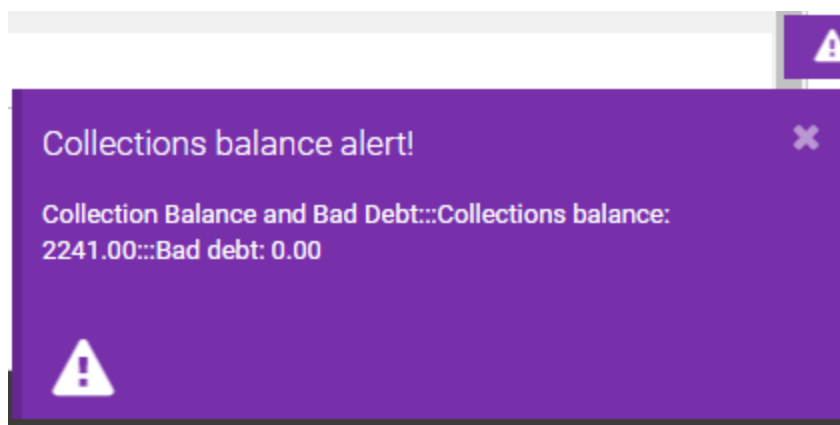


Insurance Eligibility alert:



Note: the insurance verification alerts vary by PM system and DASH will only display what is sent by the payer

Bad Debt & Collections Alert:



Depending on the PM system, integrated alert types may be limited. A summary of our integration capabilities are shown below:

	athenaOne	athenaPractice	athenaIDX	NextGen	eCW	Allscripts
General Chart Alerts	Y	Y	Y	Y	N	N
Insurance Eligibility Alert	Y	N	N	N	N	N
Bad Debt/Collections Alert	Y	Y	Y	N (We display this info on patient card)	Y	N

For PM systems that the integration does support, rules can be configured to block patients based on patient balance or Bad Debt amount. For example, DASHcentral can block scheduling if a patient has collection balance or bad debt exceeding a certain amount. This configuration is available for all PMs except Allscripts.

Decision Needed:

(1) Do we need to turn on the above alerts?

(a) If Yes, please specify which ones out of the supported ones.

(b) Please also specify if there are any Rule configurations needed depending on the alerts.