radix
health

DASHself

Design Overview

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DASHself

DASHself leverages many of the rules and workflows within DASHcentral, but there are design considerations that should be reviewed to ensure your patient self-scheduling workflow meets your expectations. We will utilize a combination of the design decision grid below and the data template to configure your DASHself 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.

Client Website Specifications		
Function	Decision Options	Client Decision
Website Design	(1) Is your website already configured for your marketing team to easily add the Provider Search and/or individual Provider Scheduling links? Please consider the time needed to make any website changes as it corresponds to the go live date. Please indicate Yes/No and plans to update the website in time for go live (2) Please let us know which DASHself link options we should generate: Individual provider links, provider search link, facility links	(1) (2)

Google Tag Manager	Will your marketing team utilize Google Tag Manager? If yes, please provide the following IDs in the client decision column:
	      ○ Google tag manager tag (GTM-XXX)
	      ○ Google Analytics (UA-XXX-X)
	
	If no, please write "No" in the client decision column	

Visit Reason Search	Should the top 5 visit reasons be displayed on visit reason search? If yes, please specify which visit reasons to include and indicate the sequence	

	of the visit reasons. If no, please write "No" in the client decision column	
DASHself Banner	Please indicate the verbiage you'd like to utilize for the DASHself banner, which displays at the top of the page Examples include announcements around mask protocol, where to park, or general announcements. We recommend having the message be short, so that it's legible from smart phones Note: This is site-wide and cannot be provider specific	
Provider Sorting	Should all three sorting methods be available on the Provider Search screen? -Availability -Distance -Relevance	
Patient Status	Should patients with particular account statuses be blocked from scheduling via DASHself? Note: This does not include insurance status. This would correspond to patient account status within demographics, such as inactive or collections status	

Insurance Selection		
Function	Decision Options	Client Decision
Insurance Coverage Selection	Please fill out the grid provided. **When complete, add "Complete" in the client decision column**	
Insurance Verification Options	1) Verify & Stop 2) Verify & Warn, but do not stop 3) Do not verify	
Insurance Recency	DASH can check when an established	

Period	patient's insurance was last updated. If it was updated X days ago, we can skip insurance collection What should this value be? If you want to collect insurance every time, this value should be set to 0	
Verification Eligibility & Slot Selection	How many days into the future should patients be able to schedule if their insurance plan is not verified? This is not applicable if you are not checking verification in DASHself	

Appointment Scheduling		
Function	Decision Options	Client Decision
Appointment Selection	Should we limit appointment availability to a certain number of hours or days into the future?	
Coordinated Care	Will coordinated care be offered in DASHself?	
Telehealth	Will telehealth be offered in DASHself?	
Scheduling Phone Number	What is the scheduling phone number we should direct patients to call for assistance? Note: if you do not have 1 central call number, error messages will read "please call to schedule" without displaying the phone number	
Error Messages	What should be the default error message to be displayed in DASH if a patient is blocked from Self scheduling?	*Well, this is frustrating. We're sorry, but we can't book your appointment right now. A member of our team will contact you or you can call us at @clinic_phone_no@ so we can help you the old fashioned way.*
Error Messages	What should be the default error	*We are unable to save*

	message if there is a (rare) connectivity issue where the patient's data cannot be saved?	*your information at this time. Please call @clinic_phone_no@ between 8am to 5pm. We apologize for the inconvenience.*
Tool Tips	Please fill out the grid for tool tip selection. **When complete, add "Complete" in the client decision column**	
Alternate Provider Workflow	Should the alternate provider workflow be enabled in your environment?	

| Confirmation Screen		
Function	Decision Options	Client Decision
Confirmation Screen - Rideshare	Should ride service features be enabled on the confirmation page (Uber/Lyft)?	
Confirmation Screen - Reschedule/Cancel	Should reschedule/cancel be enabled on the confirmation page?	
Confirmation Screen - Redirect	1) What URL should we redirect patients to after they've scheduled their appointment? 2) What should be the time period between confirming their appointment and being redirected to the above site?	(1) (2)
Confirmation Screen - Waitlist	Should patients be allowed to add themselves to the waitlist in DASHself?	
Confirmation Screen - DASHin	If you are live on DASHin, should we allow a patient to check-in after booking?	

Client Website Specifications

Website Design

We know you want to make it as easy as possible for patients to move from viewing your website to booking an appointment. DASHself offers multiple options for surfacing the online booking workflow. Work with your Radix implementation team and your marketing team to determine the best fit.

Provider Link Options

- **Individual Provider Links** - Individual URLs for provider scheduling, which can be used for referring offices or through a "Book Online Now" button on your website's provider profile.
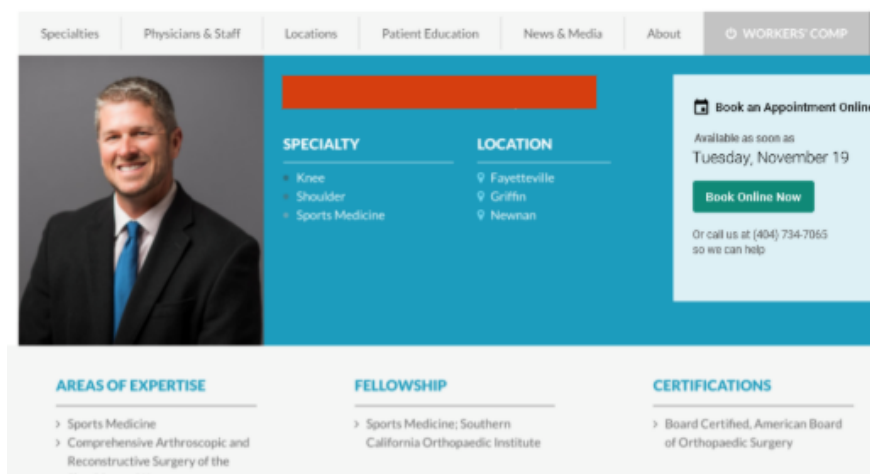

- **Provider Search Links** - This "Find-a-Doc" search link enables a list view of all providers based on Chief Complaint, Specialty, or direct provider name search. Patients can use optional filters on the left-hand side of the screen to narrow their search criteria.

- **Facility Links** - Multiple providers can be grouped by location / facility. This link enables patients to begin their search by choosing a location. When the provider list is surfaced, the location filter has been applied already according to patient selection.

Decision Needed:
(1) Is your website already configured for your marketing team to easily add the Provider Search and/or individual Provider Scheduling links? Please consider the time needed to make any website changes as it corresponds to the go live date
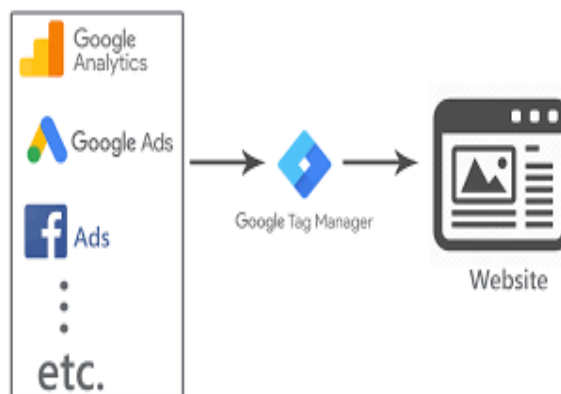
(2) Please let us know which DASHself link options we should generate

Google Tag Manager/Google Analytics

What is Google Tag Manager?

Google Tag Manager, or GTM, is an analytics tool built by Google. GTM allows users to use a User Interface to track pixels and user interactions within the DASHSelf product. For more information, please visit tagmanager.google.com.

Why should our clients use Google Tag Manager?

Individuals can visit our website from multiple sources like Google Ads, Facebook, Yelp, etc. and so usually the marketing team would want to know facts like session duration, pages per session, bounce rate etc. of individuals using the site, along with the details on the source of the traffic.

The use cases for the data collected are endless but managing the tracking code for all the sources is challenging and since the code base for DASH is the same for all the clients, it can get even more difficult to insert custom tracking code given by clients. The solution for this problem is to use GTM which allows clients to manage all their custom source code/script in one place and GTM will then embed that code in DASH

Please ask your COM to provide additional information on this if you are interested!

Decision Needed: *Will your marketing team utilize Google Tag Manager? If so, please provide the following IDs to Radix:*
- *Google tag manager tag (GTM-XXX)*
- *Google Analytics (UA-XXX-X)*

Visit Reason Search

In DASHself, we have the ability to default to five visit reasons of your choice in the search. This can be a great idea if you are a single specialty clinic and have visit reasons that are more commonly used than other visit reasons.

Below is an example of the DASHself screen with four top visit reasons configured. The top visit reasons are displayed before searching:

Below is an example of the DASHself screen without the common visit reasons configured. In this scenario, the patient will search for their visit reason and all visit reasons that have a keyword match will come back for the patient to select from:

Decision Needed: Should top 5 visit reasons be displayed on visit reason search? If yes, please indicate the sequence of the visit reasons.

DASHself Banner

A banner message can be displayed at the top of DASHself to inform the patient of important information they need to know when booking an appointment. This content can be customized with verbiage to suit the practice needs and updated as appropriate. For example, many organizations leveraged this banner message to provide important updates regarding the availability of telehealth appointments during the COVID-19 pandemic.

> **Important Notification**
> Effective immediately, patients should come alone to their appointment. Children aged 17 and under are allowed one parent/guardian. For patients who require assistance because of disabilities, one escort is permitted after a successful screening at the entrance.

Decision Needed:
(1) Please indicate if the banner will be utilized for DASHself.
(a) If so, please indicate the verbiage that should be configured

Provider Sorting

When displaying providers, DASHself allows practices to default to the sort of providers based on one of three criteria:

1. Relevance - sorts the provider list based on a combination of availability, distance from patient zip code, first slot availability, and provider type. The weight given to each of the 4 factors is configurable and the weights all together must add up to a total score of 1.

Availability	.3
Distance from patient's zip code	.4
First slot availability	.2
Provider Type (Physicians are ranked higher than non-physicians)	.1
Total Score	1.0

2. Availability - sorts the provider list based on next available appointment
3. Distance - sorts the provider list based on provider/facility zip code in relation to the patient.

To optimize appointment access, we typically recommend sorting the provider list based on availability, though we recognize different practices may have differing needs. The three options allow for flexibility here.

Decision Needed:

(1) Should all three sorting options be available?

(2) What should be the default?

(3) What should be the weight given to availability, distance from patient's zip code, provider type, and first availability in calculating the Relevance?

Patient Status

Patients with certain "status" indicated in the demographic section of the PM may be prohibited from scheduling online. For example, patients who have been discharged from the practice and/or with outstanding collections balances can be prevented from scheduling through DASHself if those statuses exist in your PM system. Statuses vary by PM. Please check with your client operations manager if you are unsure regarding capabilities.

Decision Needed: Should rules be configured to block patients of certain statuses or with outstanding balances?

Insurance

Insurance Coverage Selection

Patients can select their insurance "category" from a general list, as shown in the screenshot below, before entering their specific insurance plan. This allows us to stop scheduling for insurance categories that you do not want to have eligible within DASHself. We recommend having 5 options below, but we can configure up to 20.

Out of the above options, we can configure which insurance categories are allowed for scheduling, which categories should be blocked, and which to require an

acknowledgement from the patient. We can also allow patients to skip insurance collection (e.g. Self-pay/I don't have insurance) for certain options.

If you decide to block certain insurance options, a pop-up message will come up letting patients know of next steps or why they are not able to schedule online.

If the client wants the patients to acknowledge certain instructions before they can schedule an appointment online through a selected insurance option, we can configure a checkbox and text in red letting patients know about the protocols. The patient has to check the checkbox to acknowledge the text before proceeding.

SEARCH
INFORMATION ✓ PATIENT
INFORMATION ✓ **INSURANCE
OPTIONS** INSURANCE
INFORMATION CLINICAL
DETAILS BOOK AN
APPOINTMENT

Please select the primary method of payment for this appointment

◉ Self Pay
☑ You will be responsible for $200 for a new appointment. Please click the checkbox if you agree or contact the clinic for more information.

◯ Commercial

◯ Medicaid

◯ Medicare

◯ Worker's Comp

Previous   Next

Decision Needed: *Please fill out the grid below for your insurance configuration. Please also let us know if you would like no insurance options to be configured here, and instead, skip insurance collection in DASHself altogether.*

Radial Dial #	Category Name	Red Text Optional red text to display under the category if chosen	Allowed For Scheduling? Yes will allow the patient to proceed No will block the patient from proceeding	Proceed to individual plan collection? No will not collect any insurance details from the patient Yes will collect insurance details from the patient and update athena
1	*Self Pay*	*Our self pay policy has been updated. Self pay patients will owe $200 at check in, and are subject to further*	*Yes*	*No*

		payment as necessary		
2	Insurance	N/a	Yes	Yes
3	Medicare	N/a	Yes	Yes
4	Medicaid	N/a	No	No
5	Worker's Comp	N/a	No	No

Insurance Verification Options

DASHself has the ability to check the eligibility of the insurance the patient selects during the self scheduling process. This works in the same manner as DASHcentral i.e. for athena clients, we use Athena APIs to verify eligibility and for non-athena clients, we use third party Availity to verify the same.

The insurance eligibility check happens at the Insurance screen in the self-scheduling process. There are three configurations available for this to work as per your requirement:

1. **Block based on eligibility status -** We can configure our system to block the patients from proceeding further in the scheduling process if the insurance entered by the patient is ineligible.

2. **Show alert if Verification fails but allow scheduling -** We can configure the eligibility check to run and show an alert message if the insurance is ineligible. This error message is configurable and can be customised as per your requirement. We will not block the patient from scheduling further in this case, patients should be able to acknowledge alert and proceed with scheduling. This can allow schedulers to contact a patient prior to their appointment to obtain correct insurance information.

3. **Do not run eligibility check -** If the insurance eligibility is not required in the self scheduling process, we can configure the system to not run an eligibility check.

Decision needed: *Which insurance eligibility method should we display in DASHself?*

Insurance Recency Period

DASH can check when an established patient's insurance was last updated. If it was updated X days ago, we can skip insurance collection so that they do not have to enter it again. Alternatively, we can collect insurance every time. Note: If you want to collect insurance every time, this value should be set to 0

Decision needed: *What value (in # of days) should we configure for insurance recency?*

# Appointment Scheduling

Appointment Selection

Sometimes practices would like for Self scheduling to only offer appointments within a certain number of days in future in order to give staff time to complete in-house processes prior to the patient's appointment. For example, if I am searching for an appointment and there is availability today, you might only offer the patient an appointment that is in 48 hours.

Be sure to consider what goals you have for DASHself. If you want to fill last minute slots and boost utilization, consider limiting the number of rules that would inhibit patient access!

Decision needed: *Should we limit appointment availability to a certain number of hours or days into the future?*

Coordinated Care

DASHself also supports the Coordinated Care workflow with similar rules and protocols as DASHcentral. If the selected Visit Reason is configured for Coordinated Care, then DASHself will by default show two appointments. We can also put configurable notes to let the patient know of any information.
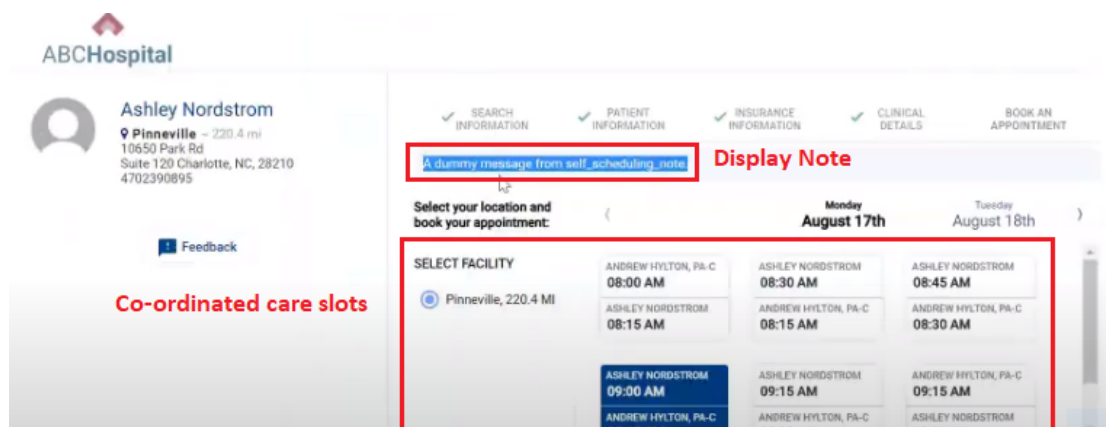
In this scenario, we would not offer the Reschedule option to patients.
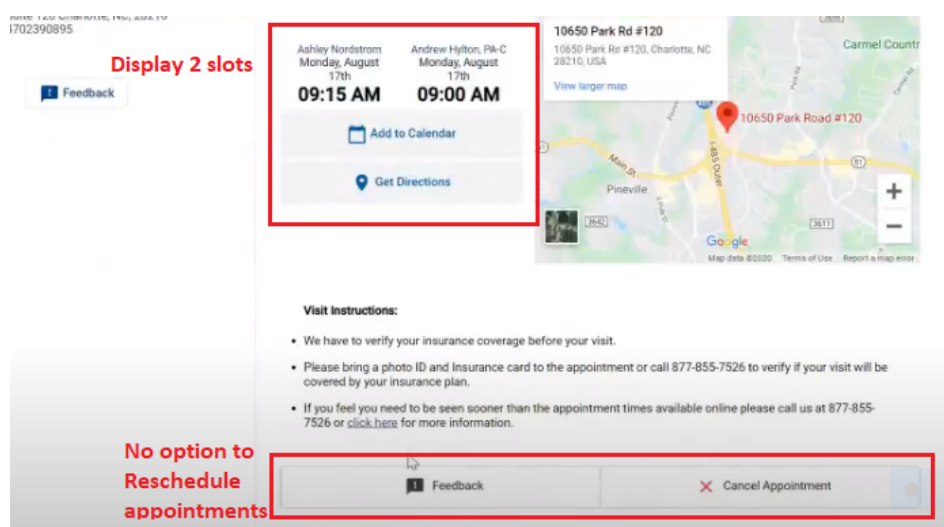
Decision Needed: *Should coordinated care workflows be enabled for DASHself?*

Error Messages

A patient going through the self scheduling process might encounter some Warnings/Info messages/Errors on various screens. These messages will be in accordance with scheduling rules and protocols of the providers or can come from system level configurations (e.g a patient whose Insurance in not verified might get below message) -
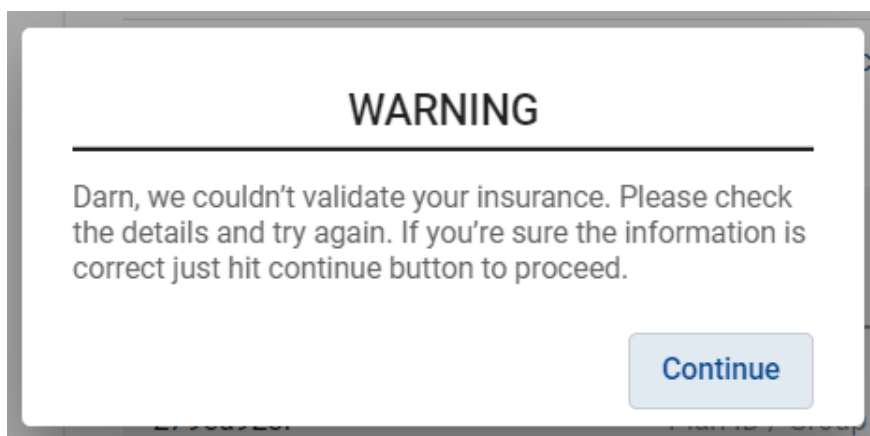
Similarly if a patient is not allowed to proceed further in scheduling process due to Provider rules or Triage output will get message like below -
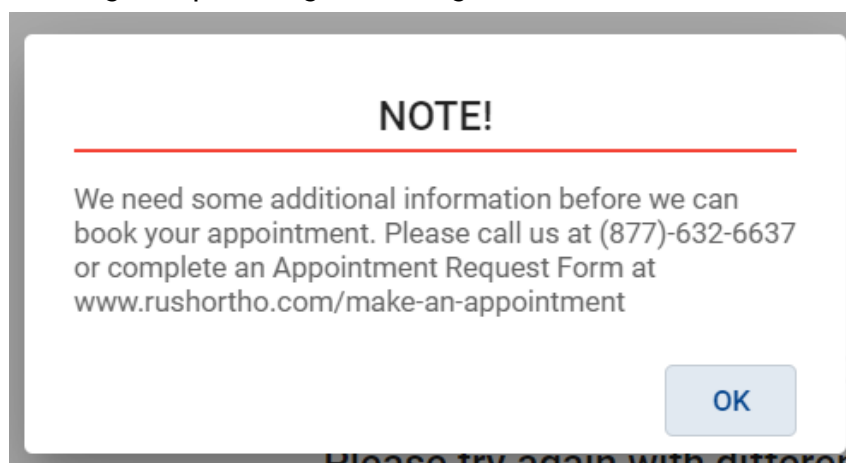
The verbiage within these messages can be configured to a certain extent to suit the appropriate situation. However we will configure standard recommended verbiage to start with and later on changes can be made as requested by the client's team.

Decision Needed: *What should the verbiage read for generic error messages? What should be the default error message if there is a rare connectivity issue?*

Tool Tips

Tooltips are small pop-up boxes that appear when a patient moves the mouse pointer over an element. DASHself can display Tooltips on various intake fields to assist patients with navigating the scheduling process.

Field	Tooltip Desired [Default is pre-populated]
Enter a Visit Reason, Specialty or Provider Name here….	Search Visit Reason
Enter Zip Code	Enter valid Zip Code
Patient's Age	Age
First Name	Patient's First Name
Last Name	Patient's Last Name
Month	Patient's Birth Month
Date	Patient's Birth Day
Year	Patient's Birth Year
Gender	Patient's Gender
Phone Number	Patient's Home Phone
Nickname / Preferred Name	preferred Name
Language	Language
Street Address	Location
Suite / Apt	Suite
City	City
State	State
Cell Phone	Mobile Phone Number
Email Address	Email

Alternate Provider Workflow

At times patients may attempt to book with a provider who is not appropriate for their care based on answers to triage questions or other factors. If DASHself determines this is the case, the application can be configured to suggest alternate providers who may be able to see that patient based on the information provided. This increases the likelihood of a patient completing the online booking process with the practice.

The alternate provider workflow can be triggered after evaluating the provider's ability to see a patient based on a provider preference. For example, if the provider does not accept second opinions or if the provider does not accept a particular visit reason at X location. The alternate providers would display (see image below) before offering slot availability.

Decision Needed: *Should we activate the alternate provider workflow in your environment?*

The following providers are better suited for your medical needs. Please select one of the following:
If you believe this message is an error or have a question please call us at 404-888-7590.

James Williams, MD
Women's Services
Available: 02/21/2019

Devon Jordan, MD
Women's Services
Available: 02/21/2019

Wing Thomas, MD
Women's Services
Available: 02/21/2019

Robert Brown, PA-C
Women's Services
Available: 02/21/2019

Michael Smith, MD
Women's Services
Available: 02/21/2019

James Cater, MD
Women's Services
Available: 02/21/2019

Ashkan Ray, MD
Women's Services
Available: 02/21/2019

Timothy Griffin, MD
Women's Services
Available: 02/21/2019

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Appointment Confirmation Screen

When patients complete the online booking process, the DASHself confirmation page can provide a patient with detailed visit instructions (to be gathered on the data template)and information regarding their newly scheduled appointment. A screenshot example is provided below.

RideShare Linking

This confirmation page also displays a map of the appointment location, as well as, optional links to book a ride via Lyft or Uber. These RideShare links can be disabled per practice preference.

Decision Needed: Should this be enabled for DASHself?

Ability to Reschedule/Cancel

When enabled, DASHself offers patients the ability to reschedule or cancel the appointment that they just scheduled.

Decision Needed: Should this be enabled for DASHself?

Redirect

Once a patient confirms their appointment in DASHself, DASH can redirect the patient to a particular URL. We recommend redirecting the patient to your website.

Decision Needed:
(1) What URL should we redirect patients to after they've confirmed their appointment?

(2) What should be the time period between confirming their appointment and being redirected to the above site?

Waitlist

When enabled, DASHself offers patients the ability to add themselves to the waitlist. Patients then will be notified via text if an appropriate appointment becomes available, offering them the option to see their provider at an earlier date and time.

Decision Needed*: Should this be enabled for DASHself?*

ABCHospital

Wing Thomas, MD
Orthopedic Surgeon
📍 **Cumming Office** ~ 999mi
, ,

💬 Feedback

✓ Your appointment has been confirmed successfully

Start CheckIn
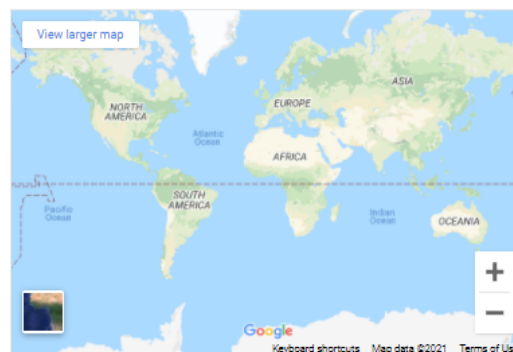Reduce wait time at clinic. CheckIn now   **START CHECKIN**

Monday, September 27th
09:30 AM

📅 Add to Calendar

📍 Get Directions

🚗 Schedule a Ride

View larger map

Keyboard shortcuts   Map data ©2021   Terms of Use

Visit Instructions:

- We have to verify your insurance coverage before your visit.

- Please bring a photo ID and Insurance card to the appointment or call 877-855-7526 to verify if your visit will be covered by your insurance plan.

- If you feel you need to be seen sooner than the appointment times available online please call us at 877-855-7526 or click here for more information.

📅 Reschedule	💬 Feedback	✕ Cancel Appointment

Radix Use Only

Function	Radix Configuration Specification
Insurance Verification Options	INSURANCE_VERIFICATION_STATUS_CHECK
Appointment Selection	MINIMUM_TIME_DIFFERENCE_IN_HOURS_FROM_NOW
Coordinated Care	enableCocareScheduling
Telehealth	telehealthApptTypeIds (if using toggle button)
Insurance Recency Window Period	IS_CAB_BOOKING_ENABLED_FROM_SELF
Verification Eligibility & Slot Selection	ALLOWED_NUM_OF_DAYS_FOR_FORWARD_SCHEDULING
Scheduling Phone Number	DEFAULT_CLINIC_PHONE_NO
Error Messages	SELF_ALERTS
Error Messages	DEFAULT_REDIRECT_URL
DASHself Banner	SELF_ALERTS
Confirmation Screen - Rideshare	isCheckInRequiredAfterAppointment
Confirmation Screen - Reschedule/Cancel	IS_RESCHEDULE_CANCEL_APPT_ENABLED_FROM_SELF
Confirmation Screen - Redirect	REDIRECTION_TIME_SEC
Confirmation Screen - Waitlist	SELF_DISPLAY_OPTIONS
Confirmation Screen - DASHin	IS_RESCHEDULE_CANCEL_APPT_ENABLED_FROM_SELF
Visit Reason Search	System code 1400 20
Alternate provider workflow	SHOW_ALTERNATE_PROVIDER_FLOW
Provider Sorting	SELF_PROVIDER_SORTING_OPTIONS, self_facility_proximity_weight, self_faciliyt_proximity_weight,self_first_slot_availa

	bility_weight, self_provider_availability_weight
Patient Status	Provider Preference Config