

## COVID-19 Related Features:

- Telehealth patients check-in and provide data before their appointment
- Onsite patients promote social distancing and spend less time at the clinic
- Allow patients to check-in and provide information electronically reducing the spread of all viruses
- No lines onsite
- No staff involvement

## Additional Benefits:

- No hardware to purchase or maintain
- Reduce workload on staff
- Eliminate rekeying of data
- Patients can check-in on any internet ready device from anywhere
- Privacy and security
- Increase revenue by prompting patients for their copay and due balance at every check-in
- Increase patient engagement

## Functionality:

- Send Appointment Reminders through Email and/or Text
- Verify and Update Crucial Patient Information
  - Address
  - Insurance Information
  - E-Mail
  - Cell Phone
  - Home Phone
  - Emergency Contact
  - Primary Care Physician
  - Preferred Pharmacy
  - And More!
- Patient Payments:
  - Co-Pay, Patient Due Balance
  - Email Receipt of Payment to Patient
  - Post Payments to a Batch
  - Payment Processing with OTech Partners
- Email Image of Insurance Card to Staff
- Arrive the Patient to their Appointment in Practice Management
- Telehealth – to Arrive Patient, the Staff will HAVE to utilize OSC Dashboard to Click/Arrive the Patient within the OTech Application

## Requirements for Expedited Implementation:

- Allow OTech to host uStart on one of our dedicated servers
- Allow OTech to host email to patients
- Customers must provide dedicated resources to assist with implementation
- Current client forms and OTech's Industry Approved & EMR Vetted forms only initially – Manual forms can be added after initial go live

## Workflow:

1. **Appointment is made in Appointment Book/Database**
2. **uStart creates a list of eligible patients every 10 minutes**
  - a. We query the PM System database, through custom programming of client's requirements to create the list
3. **Email and/or text sent to each eligible patient**
  - a. Contains a secure, unique link to uStart to use on any internet ready device
    - i. No one can use this link to get into your system. SSL and data entry are done with parameters, so SQL injection hacks are impossible. Also, URL link is a 60-character code string
  - b. You set how far in advance you want to send this email and when to send a follow up email (only sent if uStart not completed)
    - i. Customizable: logo, URL, "from" email address, wording of emails
    - ii. You can turn "off" who will receive uStart based on location, event type, provider, etc.
    - iii. It is a "no reply" email address
4. **Patient clicks the link in the email/text**
  - a. Redirects them to the uStart page
  - b. Workflow status can be set to a defined status like "Pre Check-In Started"
5. **Patient begins uStart**
  - a. Patient enters DOB as additional verification
  - b. Same functionality of uArrive: patient payments, demographics, forms, insurance
6. **Upon completion, email and/or text sent to patient containing unique code**
  - a. Workflow status changed to "Pre-Check-In Completed"
7. **One hour before the appointment, patient receives an additional reminder text with the confirmation code again**
  - a. This time window is customizable, i.c. one hour, 45 minutes, 30 minutes, etc.
8. **Patient arrives at office and can:**
  - a. Go to OTech device (existing or purchase new) and enter code and/or name and DOB
  - b. Go to staff who can use uStart Application Webpage
  - c. Use cell phone with link (uses location services) if within XX number of feet
  - d. If they forget to go to staff and/or device... they will receive a reminder email/text stating, they have not notified staff of their arrival.
9. **Patient sees custom "done" instructions**
  - a. Workflow status can be changed to "Kept" or client defined status
10. **Patient is arrived and it creates encounter (per client's request) in PM System**

## Client Directed Functionality:

- "Flag" Patients in EPM Who Should Not Check-In Based on Criteria Such As:
  - Appointment Type/ Event Type, Reason Code, Patient Status, Financial Class, Bankruptcy, Poor Credit, Mail Return, Etc.
- The Payment Option(s) Available to Patient: Credit, Debit, Cash, Check

## FAQ's:

- Is it part of the Patient Portal?
  - o No, it is a standalone web-based application
- Do I need to purchase check-in hardware?
  - o No, patients can check-in using their phone, an existing OTech kiosk/tablet, or tell staff that they are present
- What languages are available?
  - o We offer multiple languages including Spanish
- Is there a back button?
  - o No. For security purposes, patients cannot skip around the application
- What if the patient closes their browser in the middle of uStart?
  - o The patient can re-click on the link and the application will open to where they left off
- Whether a patient completes uStart or not, what happens to the data before they arrive onsite?
  - o Data completed is saved automatically and in real-time
  - o Demographics are updated right away. Insurance is emailed immediately
- How does uStart handle new patients?
  - o If the patient has an appointment and a mini registration (name/dob/email address) then yes, new patients can use uStart
- What PM systems?
  - o NextGen, Athena, Allscripts, Greenway Intergy and Primesuite
- What about reporting?
  - o We will track emails sent, emails rejected, emails viewed, patients started, and patients completed
- Can I test it before I go live?
  - o There is a "test mode" so staff can test uStart before turning live to all patients
- What if patient makes a credit card payment, but doesn't show for appointment?
  - o Due balance payments will be immediately posted. Copays attach to encounter when the encounter is created but any past due payments would be posted to the correct encounters right away
  - o Also, disclaimer text on payment screen that says "If you fail to show, any co-pays paid shall be \_\_\_\_\_"
- What will happen if staff manually changes the appointment status to Kept when not in the uStart Application Webpage?
  - o If they do that, signed documents will not be associated with that encounter and any questionnaires completed during uStart will not be viewable
- Telehealth: Can we push a check-in email to patients instead of having the application scan/send emails based on appt lookups?
  - o OTech cannot push a button to "push" a check-in email, the system will have to wait until the 5-10 min look up to push the email