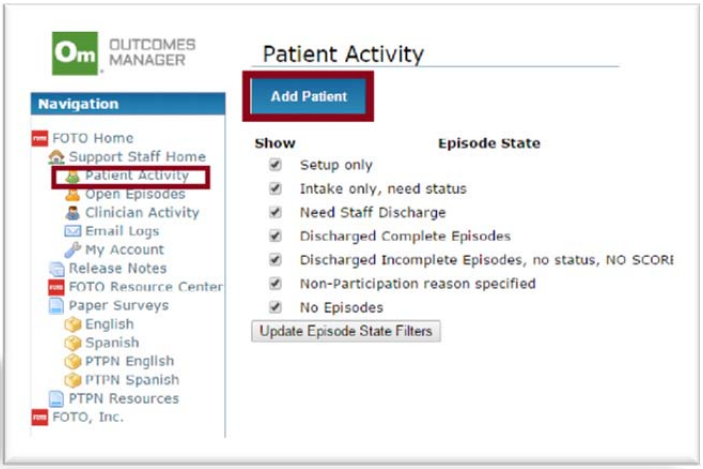
SUPPORT STAFF TRAINING GUIDE

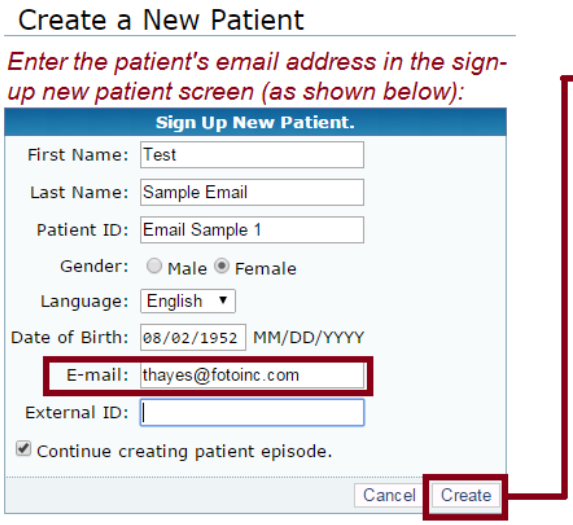
EMAILING PATIENT INTAKE/STATUS ASSESSMENTS

FOCUS ON® THERAPEUTIC OUTCOMES INC

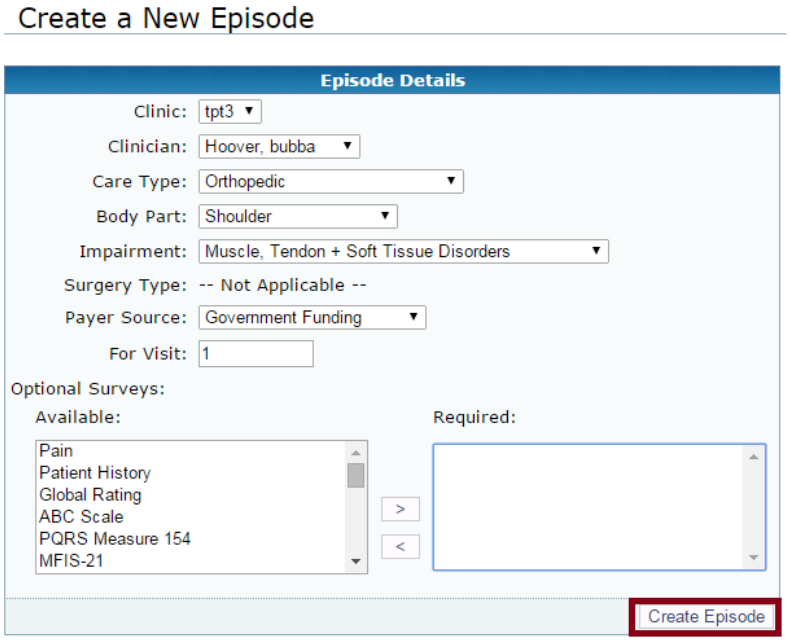
- Set up your New Patient by clicking on the Add Patient button in Patient Activity



- Complete the Sign-Up New Patient Screen
- Enter the patient's email in the Email field on this screen.
- Click **Create**



- The Create New Episode Screen opens.
- Complete the Episode Detail Screen with the clinician, Care Type, Body Part, and Payer Source.
- Click **Create Episode**

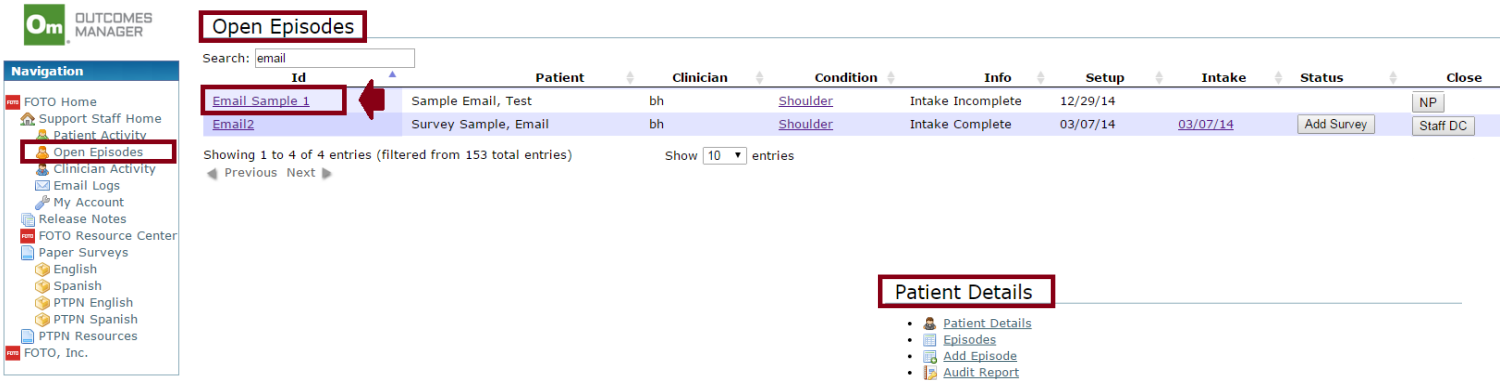


You now have an episode of care established for your new patient prepared to email the Intake or Status Assessments.

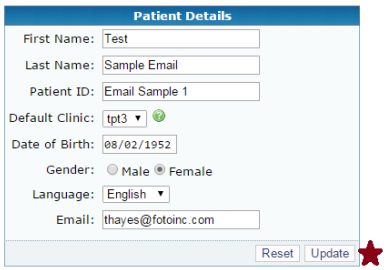
Emailing the Intake

From the Open Episodes link in the Navigation Bar, locate your patient by entering the ID number or name in the search field /or/ by sorting your Open Episode list by the ID or Patient Name column headers.

Click on the ID of the patient.

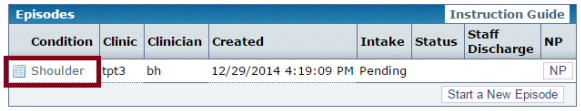


This opens the Patient Detail screen.



Note: If you did not have the patient's email address when you first set up the episode, you can enter the email address in the Patient Detail screen at any time and select UPDATE ★ to save.

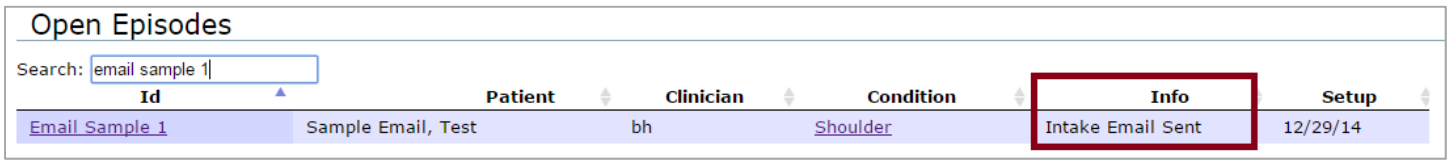
Click on the condition or body part impairment established for the Episode



In the next Episode Detail page, click on the **Email Survey** button in the Activity Window to email the **Intake Assessment**

An information bar will surface at the top of your Episode Detail Screen, verifying that you sent the Intake Survey to the patient's email address.

Return Open Episodes and you will see in the Open Episode table includes a notation in the Info column that the Intake has been emailed to the patient.



Note: When the patient opens the email, clicks on the secure link and finishes the electronic Intake assessment, you will immediately have access to the Intake Report. The Open Episode table will automatically update to reflect "Intake Completed" in the Info Column and the date the patient completed the survey will surface in the Intake Column.

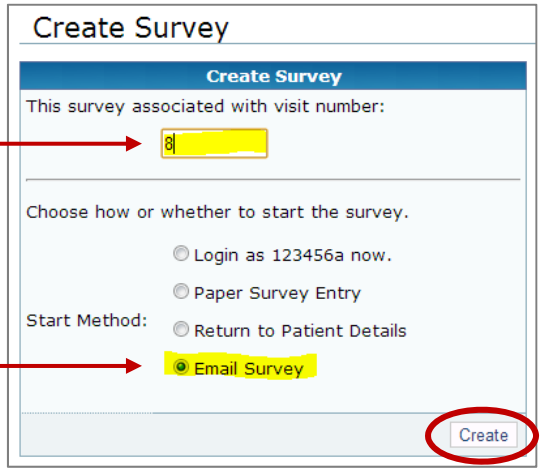
You can open the Patient Specific Intake Report by clicking on the Intake Date in the Intake Column from the Open Episode screen.

Emailing the Status Assessment

Find your patient in Open Episodes (just as you did to find the patient above) and click on the Add Survey button in the Status Column of the table.

A Create Survey window will open.

- Enter the visit # associated with the Status Assessment
- Click on the radial button for Email Survey
- Click CREATE

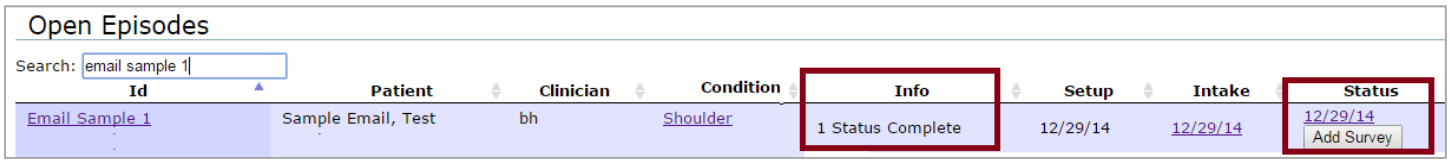


Once you select "Create", you will see a verification notice at the top of the screen that you have successfully email the Status Assessment to the patient.

Email sent to thayes@fotoinc.com

"Status Email Sent" message will appear in the Open Episode table as well to note the Status has been emailed to the patient.

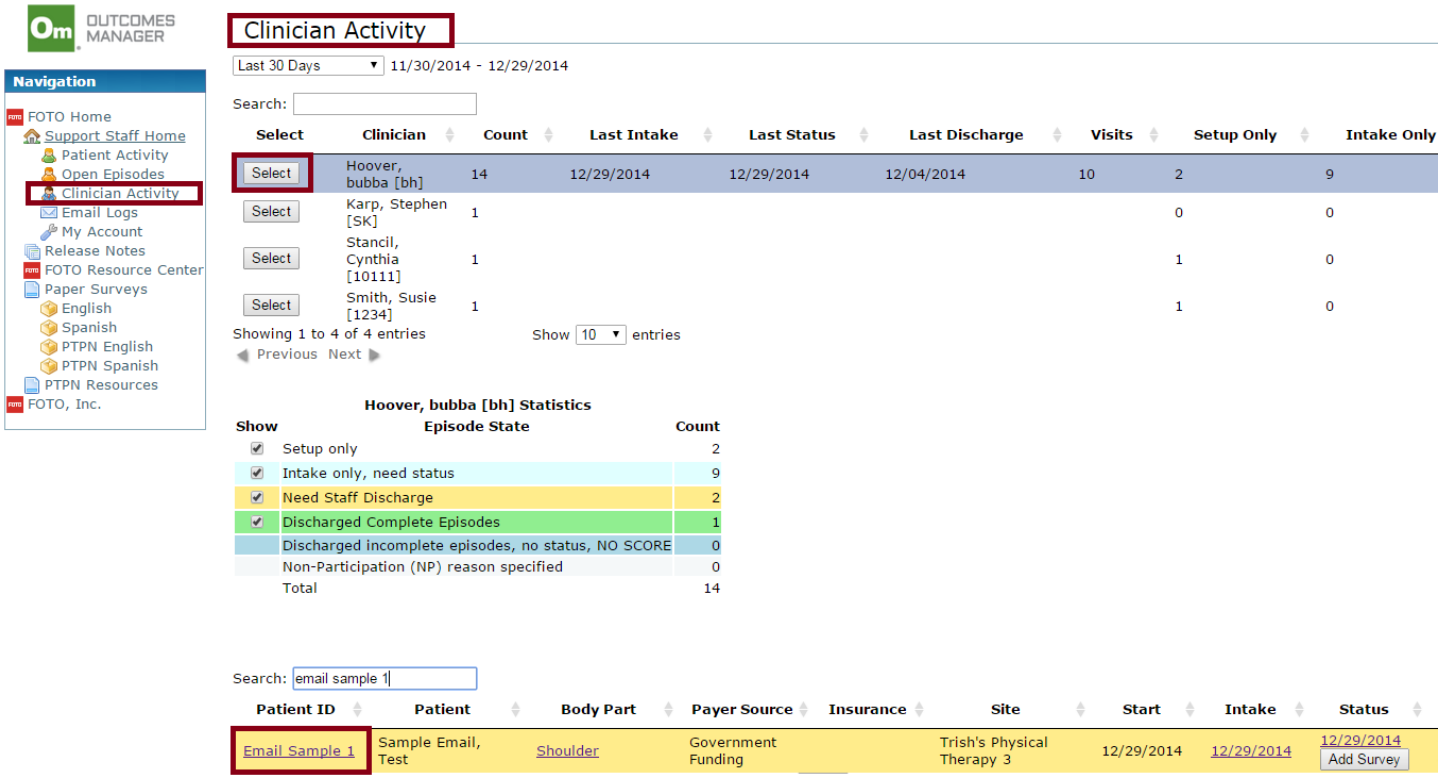
Note: Just as with the Intake Assessment, once the patient accesses the email and completes the Status assessment, you will have immediate access to the Status Assessment Report and the message in the Open Episode Table will change to Status Complete and the Status Date will populate in the Status column.

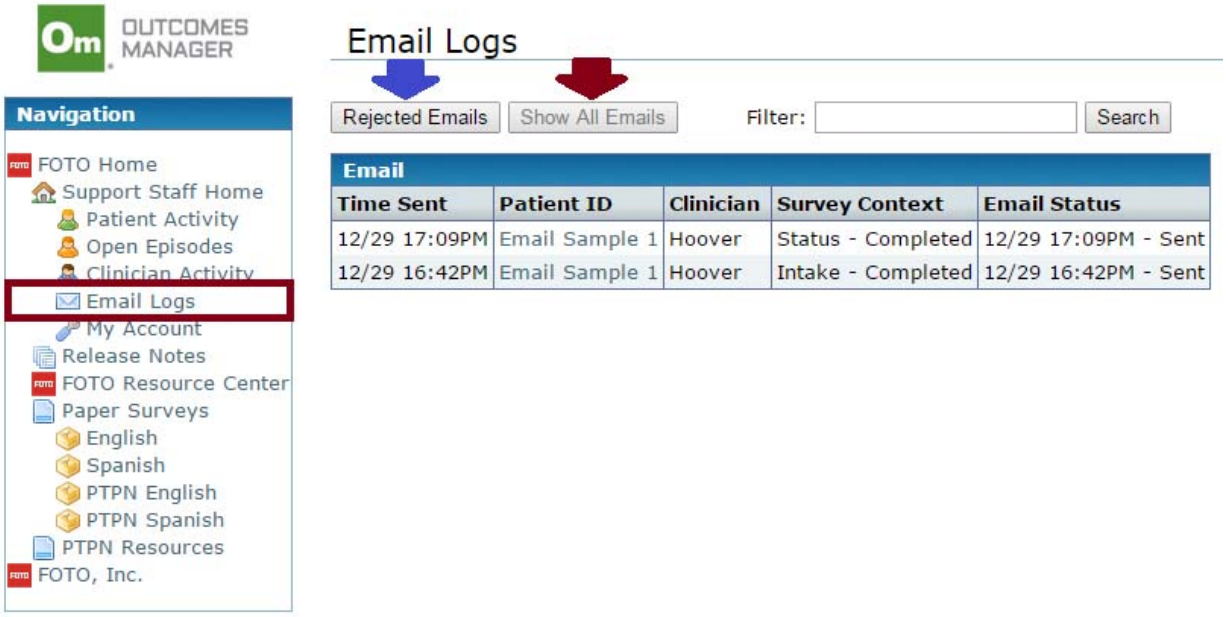


To capture another Status Assessment, simply follow the same Status Instructions as before by clicking on the Add Survey button.

The Info column will always reflect the # of Status Assessments you have captured to-date in the episode and the Status Column will always reflect the date of the most recent Status Assessment completed. Again, you can access the Patient Specific Status Assessment Report by clicking on the date of the Status in the Status Column.

You can also email Intakes and Status Assessments to your patient using the same process as outlined above through the Clinician Activity in the Navigation Bar, filtering by clinician.



Monitoring Emailed Assessments

You can monitor Email Logs from the Navigation bar. You can then select to view All Emails or Rejected Emails. This will help you identify if a patient survey email is rejected/bounced back to you, etc.