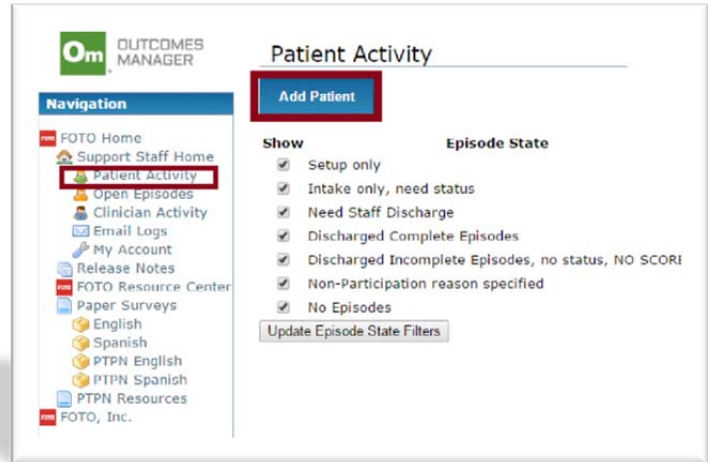


SUPPORT STAFF TRAINING GUIDE

EMAILING PATIENT INTAKE/STATUS ASSESSMENTS



- 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**

Create a New Patient

Enter the patient's email address in the sign-up new patient screen (as shown below):

Create a New 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.

Navigation: FOTO Home, Support Staff Home, Patient Activity, **Open Episodes**, Clinician Activity, Email Logs, My Account, Release Notes, FOTO Resource Center, Paper Surveys, English, Spanish, PTPN English, PTPN Spanish, PTPN Resources, FOTO, Inc.

Open Episodes

Search: email

Id	Patient	Clinician	Condition	Info	Setup	Intake	Status	Close
Email_Sample_1	Sample Email, Test	bh	Shoulder	Intake Incomplete	12/29/14			NP
Email2	Survey Sample, Email	bh	Shoulder	Intake Complete	03/07/14	03/07/14	Add Survey	Staff DC

Showing 1 to 4 of 4 entries (filtered from 153 total entries) Show 10 entries

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.

Patient Details

- Patient Details
- Episodes
- Add Episode
- Audit Report

Patient Details

First Name: Test

Last Name: Sample Email

Patient ID: Email Sample 1

Default Clinic: tpt3

Date of Birth: 08/02/1952

Gender: Male Female

Language: English

Email: thayes@fotoinc.com

Reset Update ★

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

Episodes Instruction Guide

Condition	Clinic	Clinician	Created	Intake	Status	Staff Discharge	NP
Shoulder	tpt3	bh	12/29/2014 4:19:09 PM	Pending			NP

Start a New Episode

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

Activity

Date Created	Activity	Activity Status	Date of Activity	Measure	Visit	Report	
						Open	Save
12/29/2014	Intake Survey Setup		12/29/2014		1		

Paper Entry Continue **Email Survey** Show QR Code Show Lobby Code

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.

Email sent to thayes@fotoinc.com

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.

Open Episodes

Search: email sample 1

Id	Patient	Clinician	Condition	Info	Setup
Email_Sample_1	Sample Email, Test	bh	Shoulder	Intake Email Sent	12/29/14

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.

Open Episodes								
Search: [email sample 1]	Id		Patient	Clinician	Condition	Info	Setup	Intake
[Email Sample 1]	Sample Email, Test		bh	Shoulder	Intake Complete	12/29/14	12/29/14	

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.

Open Episodes									
Search: [email sample 1]	Id		Patient	Clinician	Condition	Info	Setup	Intake	Status
[Email Sample 1]	Sample Email, Test		bh	Shoulder	Intake Complete	12/29/14	12/29/14	Add Survey	

A Create Survey window will open.

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

Create Survey

This survey associated with visit number: [8]

Choose how or whether to start the survey.

Login as 123456a now.
 Paper Survey Entry
 Email Survey

Start Method: Return to Patient Details

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.

Open Episodes									
Search: [email sample 1]	Id		Patient	Clinician	Condition	Info	Setup	Intake	Status
[Email Sample 1]	Sample Email, Test		bh	Shoulder	Status Email Sent	12/29/14	12/29/14		


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.

Open Episodes							
Search: <input type="text" value="email sample 1"/>							
<u>Id</u>	<u>Patient</u>	<u>Clinician</u>	<u>Condition</u>	<u>Info</u>	<u>Setup</u>	<u>Intake</u>	<u>Status</u>
Email_Sample_1	Sample Email, Test	bh	Shoulder	1 Status Complete	12/29/14	12/29/14	12/29/14 Add Survey

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.



Navigation

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- Clinician Activity**
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- PTPN English
- PTPN Spanish
- PTPN Resources
- FOTO, Inc.

Clinician Activity

Last 30 Days | 11/30/2014 - 12/29/2014

Search:

Select	Clinician	Count	Last Intake	Last Status	Last Discharge	Visits	Setup Only	Intake Only
<input type="button" value="Select"/>	Hoover, bubba [bh]	14	12/29/2014	12/29/2014	12/04/2014	10	2	9
<input type="button" value="Select"/>	Karp, Stephen [SK]	1					0	0
<input type="button" value="Select"/>	Stancil, Cynthia [10111]	1					1	0
<input type="button" value="Select"/>	Smith, Susie [1234]	1					1	0

Showing 1 to 4 of 4 entries | Show 10 entries | Previous Next

Hoover, bubba [bh] Statistics

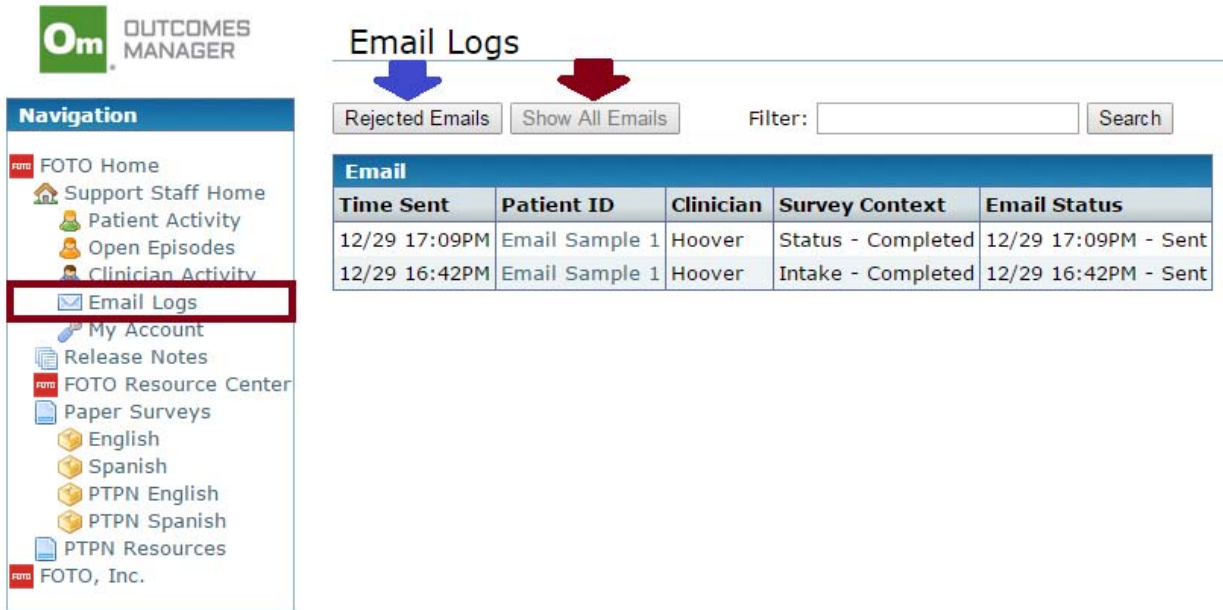
Show	Episode State	Count
<input checked="" type="checkbox"/>	Setup only	2
<input checked="" type="checkbox"/>	Intake only, need status	9
<input checked="" type="checkbox"/>	Need Staff Discharge	2
<input checked="" type="checkbox"/>	Discharged Complete Episodes	1
<input type="checkbox"/>	Discharged incomplete episodes, no status, NO SCORE	0
<input type="checkbox"/>	Non-Participation (NP) reason specified	0
	Total	14

Search:

<u>Patient ID</u>	<u>Patient</u>	<u>Body Part</u>	<u>Payer Source</u>	<u>Insurance</u>	<u>Site</u>	<u>Start</u>	<u>Intake</u>	<u>Status</u>
Email_Sample_1	Sample Email, Test	Shoulder	Government Funding		Trish's Physical Therapy 3	12/29/2014	12/29/2014	12/29/2014 Add Survey

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.



Om OUTCOMES MANAGER

Navigation

- FOTO Home
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Email Logs

Rejected Emails Show All Emails Filter: Search

Time Sent	Patient ID	Clinician	Survey Context	Email Status
12/29 17:09PM	Email Sample 1	Hoover	Status - Completed	12/29 17:09PM - Sent
12/29 16:42PM	Email Sample 1	Hoover	Intake - Completed	12/29 16:42PM - Sent