



# AVEL

eSYNC

## User Guide

### Avel eCare Specialty Clinic Contact Information



**Phone Number**

1-833-351-4482



**Fax Number**

605-606-0611



**To Learn More:**

<https://www.avelecare.com/services/specialty-clinic/>

## Telemedicine Scheduler User Guide | eSYNC

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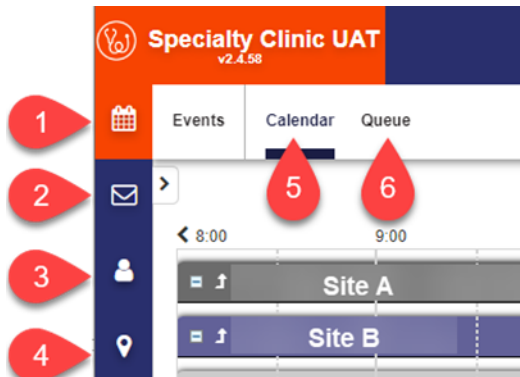
### Initial Login

For initial login, user will receive an email from 'no-reply@avel-erx.com' with subject 'Avel Specialty Clinic eSync Application Invitation.' User will click on the link in the email, follow prompts and create a password. Username for future log-ins will be the user's email address.

### eSYNC Navigation

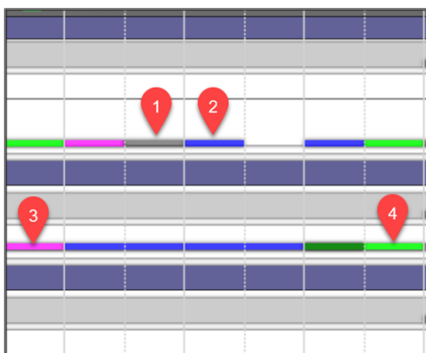
#### Home Screen

1. Event Calendar – Main calendar view
2. Dashboard
3. Patient Profile – patient demographics, past appointments etc.
4. Site – Site list
5. Calendar – calendar with provider schedules and appointments
6. Queue – launch point for the list of queued appointments



### Appointment Color Code Guide

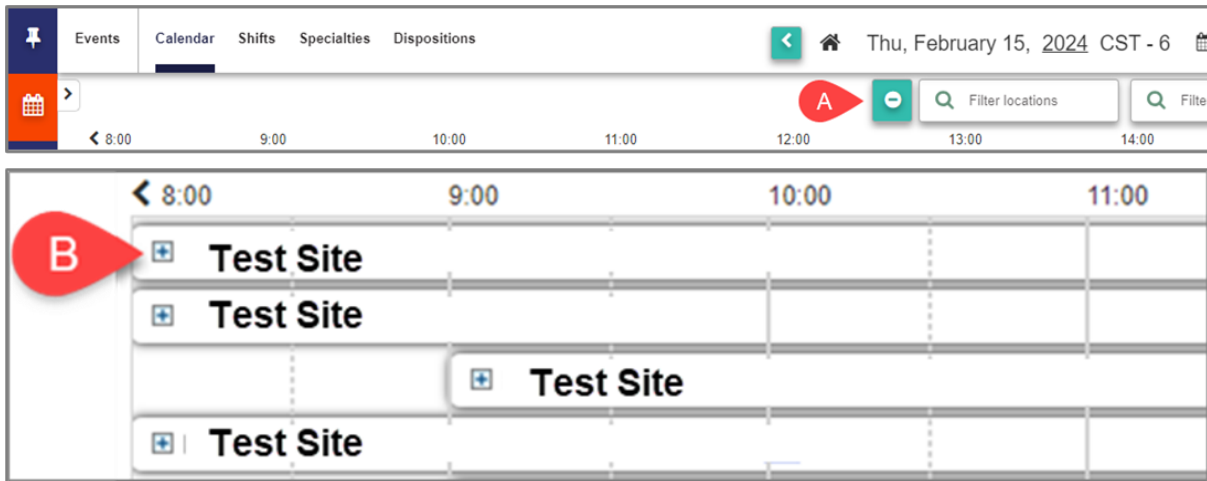
1. Black/Dark Grey – Scheduled Appointment
2. Blue – Complete
3. Fuchsia – No Show
4. Green – Canceled



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### Collapse/Expand

- A. Collapse all by selecting the “-” sign
- B. Expand all by selecting the “+” sign



### Calendar Filters

#### Search filter:

Search for the desired location, specialty, provider, or patient by typing in the free text field. This is a type ahead search meaning once you start typing the system will start filtering.



#### Filter dropdown:

Select Filter, the default is to show all locations, specialties, and providers. If you would like to filter down uncheck the box next to the applicable field. This will pull up the filter overlay with all sites selected. Within this overlay there are options to deselect all locations/select all locations.

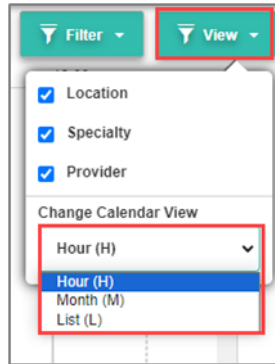
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## Calendar Views

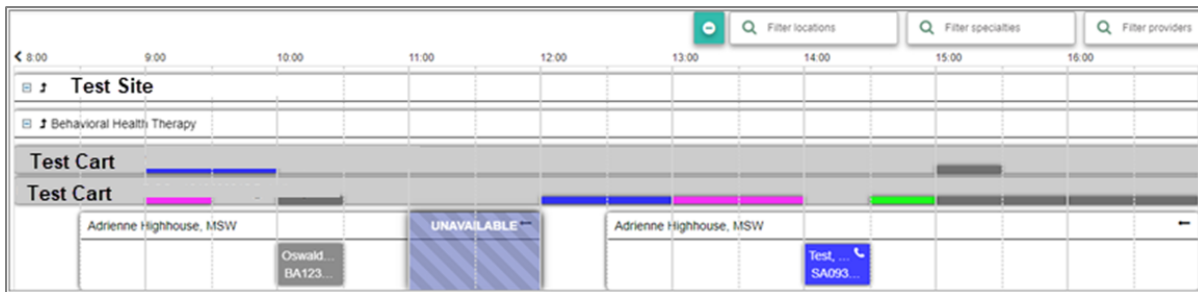
To change your calendar view, select the view filter, go to the dropdown on the bottom and select from the following options.

Or use the hot keys:

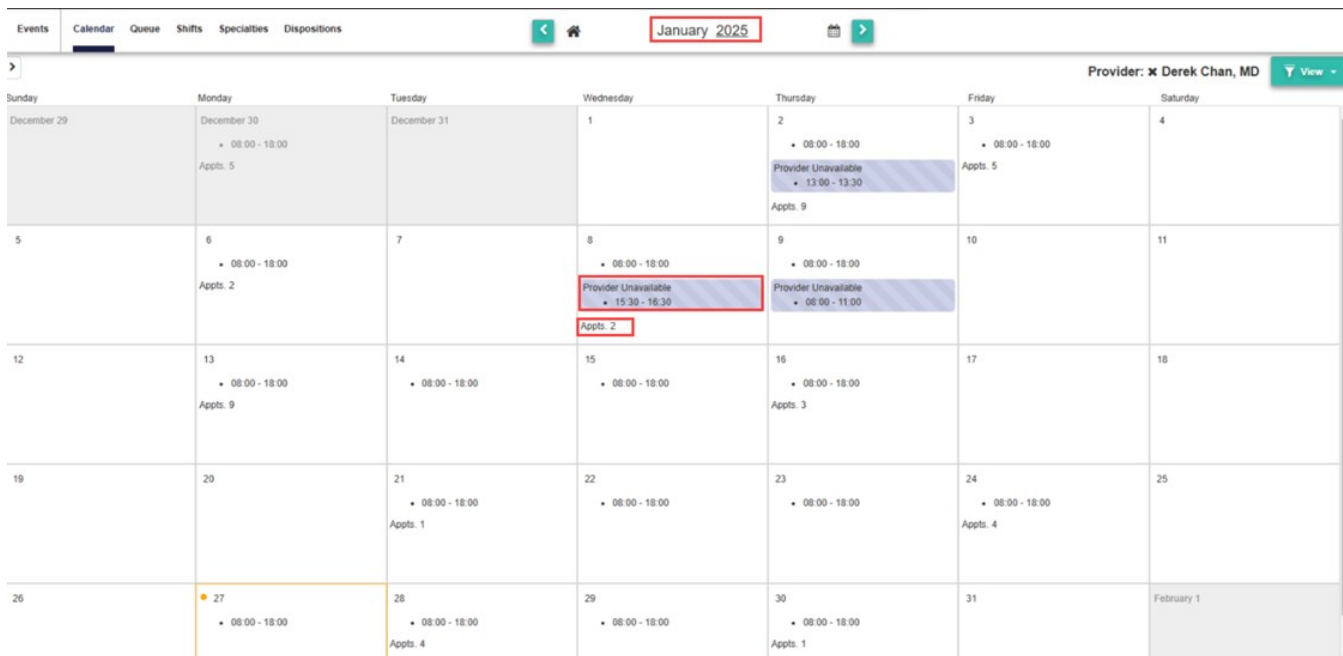
- type "h" to get to the hour view
- type "m" to get to the month view
- type "l" to get to the list view



**Hour** – default view showing provider’s schedule and appointments by date and hour.



**Month** – shows Provider’s schedule for the month listing the number of appointments for the day and any time that the provider is not available.,

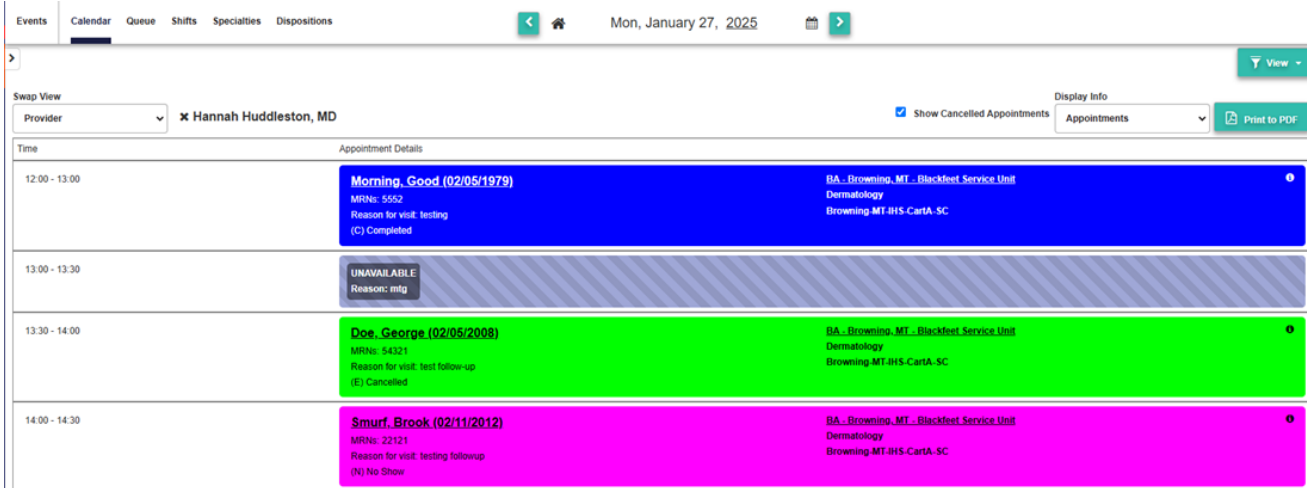


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## Calendar Views

**List** – shows Provider’s list of patients and unavailable time for the selected day.

- In Provider field, remove auto-populated name and enter specific provider name
- Can select the ‘Show Cancelled Appointments’ to view any that were cancelled.



The screenshot displays the telemedicine scheduler interface for Monday, January 27, 2025, for provider Hannah Huddleston, MD. The interface includes navigation tabs (Events, Calendar, Queue, Shifts, Specialties, Dispositions), a date selector, and a list of appointments. The appointments are color-coded: blue for completed, grey for unavailable, green for cancelled, and pink for no show.

Time	Appointment Details
12:00 - 13:00	<p><b>Morning, Good (02/05/1979)</b>            MRN: 5552            Reason for visit: testing            (C) Completed</p> <p>BA - Browning, MT - Blackfeet Service Unit            Dermatology            Browning MT, IHS-Carta, SC</p>
13:00 - 13:30	<p><b>UNAVAILABLE</b>            Reason: mtg</p>
13:30 - 14:00	<p><b>Doe, George (02/05/2008)</b>            MRN: 54321            Reason for visit: test follow-up            (E) Cancelled</p> <p>BA - Browning, MT - Blackfeet Service Unit            Dermatology            Browning MT, IHS-Carta, SC</p>
14:00 - 14:30	<p><b>Smurf, Brook (02/11/2012)</b>            MRN: 22121            Reason for visit: testing followup            (N) No Show</p> <p>BA - Browning, MT - Blackfeet Service Unit            Dermatology            Browning MT, IHS-Carta, SC</p>

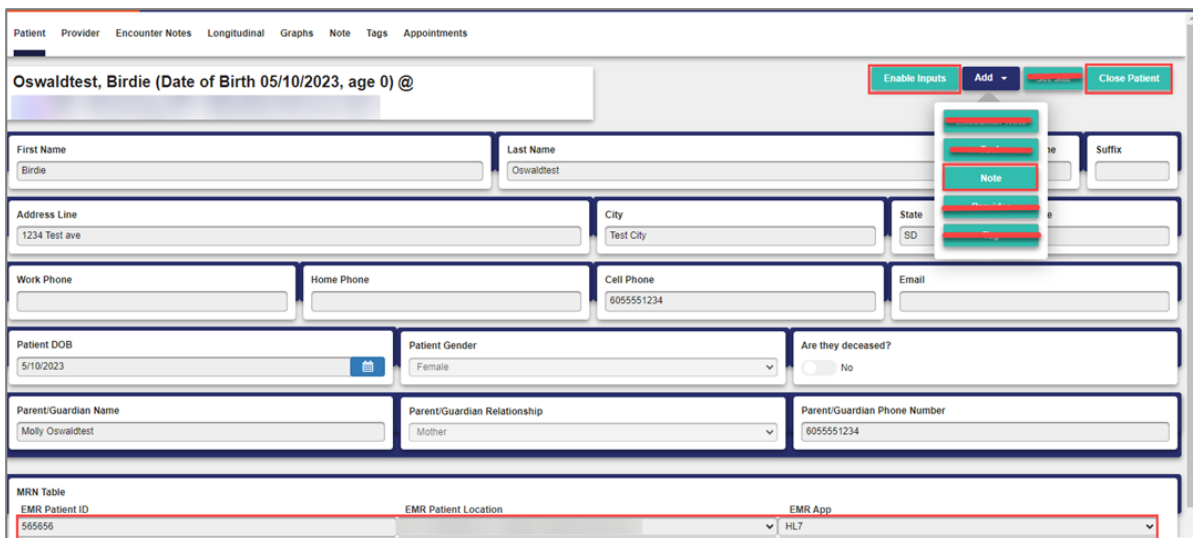
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## Patient Profile General Navigation

1. Select the patient silhouette on the blue navigation bar.
2. Search for existing patients by name and/or date of birth. Need at least the first three letters of either the first or last name.
3. Existing patients that match the search will start populating in a dropdown. Select the correct patient.

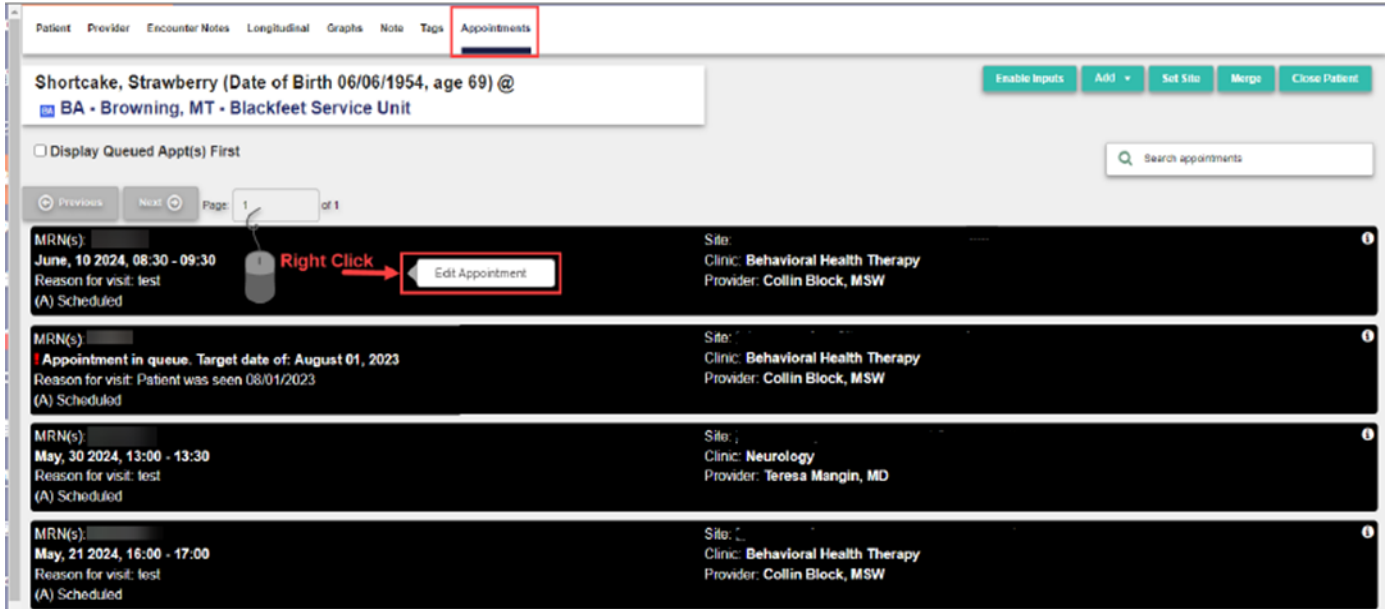


4. Upon selecting the patient, you will default to the patient demographics screen.
5. To edit demographics select Enable Inputs and update fields accordingly.
  - Able to add a new MRN number and site in the MRN Table
6. Select Add to add a note to the patient profile.
7. When finished select Close Patient.
8. To see a full list of appointments select "Appointments". This will pull in the patient's appointments.



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9. Able to edit scheduled and queued appointments from the patient profile Appointments view. Once the appointment is scheduled, it will automatically be removed from the queue.



Patient Provider Encounter Notes Longitudinal Graphs Note Tags **Appointments**

Shortcake, Strawberry (Date of Birth 06/06/1954, age 69) @  
 BA - Browning, MT - Blackfeet Service Unit

Display Queued Appt(s) First

Enable Inputs Add Set Site Merge Close Patient

Previous Next Page 1 of 1

MRN(s) <b>June, 10 2024, 08:30 - 09:30</b> Reason for visit: test (A) Scheduled	Site: Clinic: Behavioral Health Therapy Provider: Collin Block, MSW	<input type="button" value="Edit Appointment"/>
MRN(s) <b>Appointment in queue. Target date of: August 01, 2023</b> Reason for visit: Patient was seen 08/01/2023 (A) Scheduled	Site: Clinic: Behavioral Health Therapy Provider: Collin Block, MSW	
MRN(s) <b>May, 30 2024, 13:00 - 13:30</b> Reason for visit: test (A) Scheduled	Site: Clinic: Neurology Provider: Teresa Mangin, MD	
MRN(s) <b>May, 21 2024, 16:00 - 17:00</b> Reason for visit: test (A) Scheduled	Site: Clinic: Behavioral Health Therapy Provider: Collin Block, MSW	

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### 10. Schedule Appointment from the Patient Profile

- Select the 'Schedule Appointment', that will take you to the main calendar view and displays a notification on which patient you are scheduling

The screenshot shows the 'Appointments' tab for a patient named 'Smurf, Happy (Date of Birth 05/02/2001, age 23)'. The 'Appointments' tab is highlighted in the top navigation bar. Below the patient name, there are buttons for 'Enable Inputs', 'Add', 'Set Site', 'Merge', and 'Close Patient'. A 'Schedule Appointment' button is highlighted with a red box. Below this, there are checkboxes for 'Display Queued Appt(s) First' and 'Show Cancelled Appt(s)'. The main area shows a calendar for 'Wed, January 15, 2025 CST - 6'. A notification box is visible on the left side of the calendar, stating 'Looking to schedule patient Smurf, Happy DOB: 05/02/2001'.

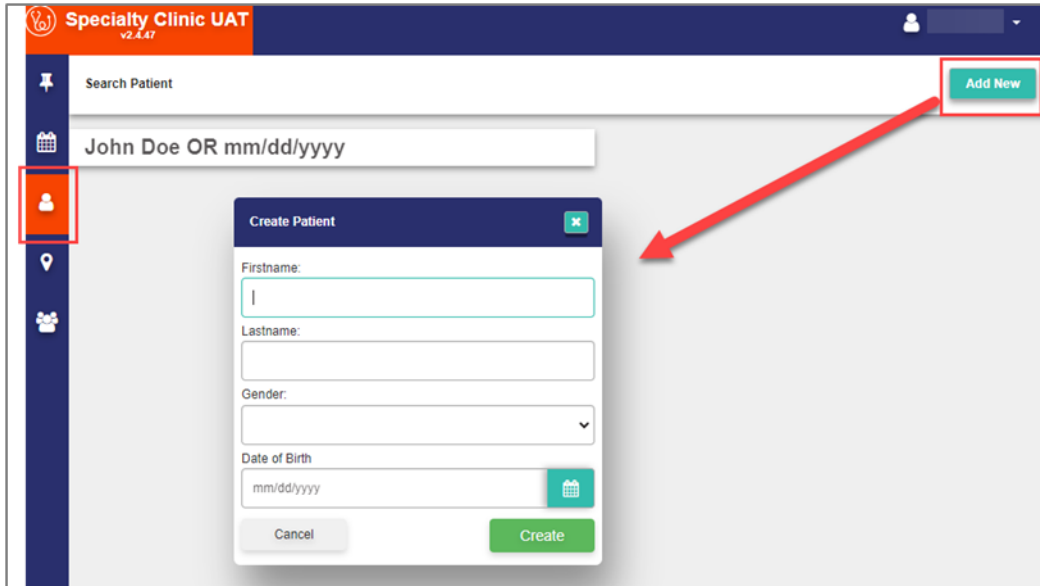
- Cancelled appointment toggle
- Can toggle to show or hide cancelled appointments
- Will only see cancelled appointments that were cancelled the day of

The screenshot shows the 'Appointments' tab for a patient. The 'Show Cancelled Appt(s)' checkbox is highlighted with a red box. Below this, there are tabs for 'Appointment History', 'Patient Summary', and 'Patient Notes'. The 'Appointment History' tab is selected. Below the tabs, there are buttons for 'Previous' and 'Next', a 'Page: 1 of 1' indicator, and a 'Show Cancelled Appts' checkbox, which is also highlighted with a red box.

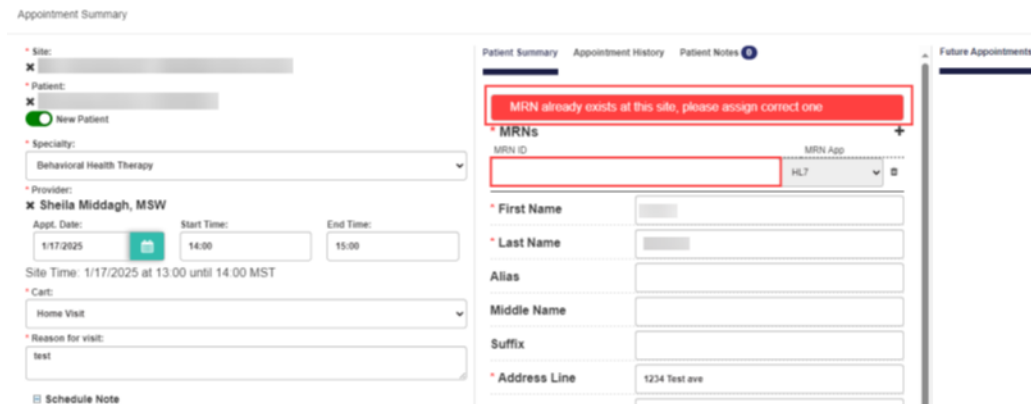
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## Create New Patient

1. Navigate to the patient profile in the blue navigation bar.
2. Search for the patient .
3. If patient is not populating in search, select new in the right-hand corner.



4. The Create Patient overlay will launch.
5. Enter First and last name, gender, and date of birth.
6. Select Create.
7. Enter patient demographics, MRN (EMR Patient ID field) and Site (EMR Patient Location dropdown) then close patient.
  - The system will recognize if there is an existing MRN within that location. An error will display and the number will be removed.

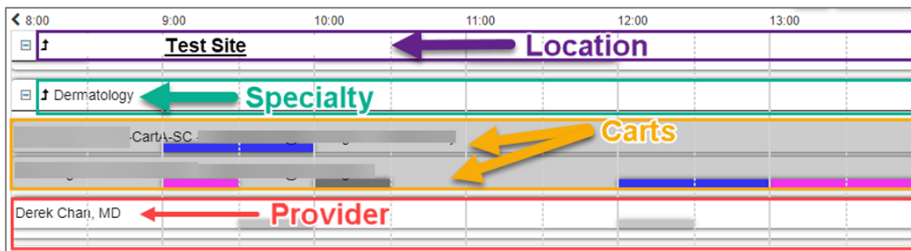


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### Scheduling Appointment

#### Clinic Appointment

1. Select event calendar and navigate to the desired location.
2. Verify you are within the correct location (**Purple**).
3. Verify you are within the correct specialty (**Green**).
4. Review cart(s) for openings (**Orange**).
5. Compare to providers schedule (**Red**).



6. Double click or right click> schedule event on the desired time within the provider bar to schedule an appointment.
7. This will launch the appointment summary overlay.
8. Verify the correct site is listed.
9. Search for patient.
10. Verify the correct specialty is listed.
11. Verify the correct provider is listed.
12. Verify/change appointment date/time.

\*\* Software recognizes new and existing patient and will apply the below timeframes. \*\*

- Initial/New Patient appointments:
  - Peds Psych – 90 min
  - All other Specialties – 60 min
- Existing/Follow-up appointments:
  - BH Therapy – 60 min
  - All other Specialties – 30 min

\*\* Site Time Zone is listed under Appointment time.

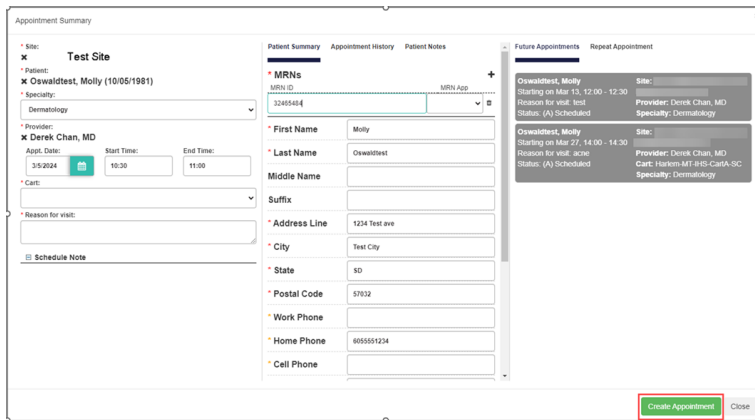
**Appointment Time:**  
 5/30/2024 at 13:00 until 14:00 🕒 📅  
Site Time: 5/30/2024 at 12:00 until 13:00 MDT

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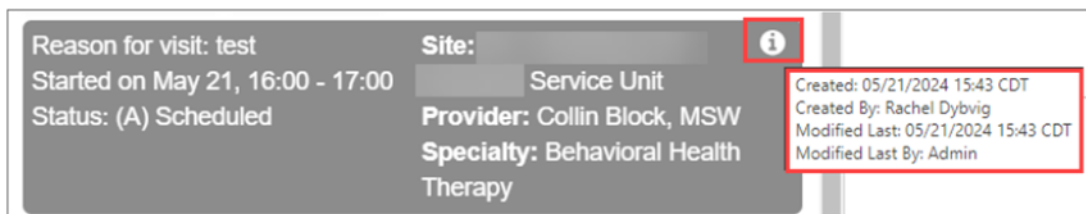
## Scheduling Appointment

### Clinic Appointment

13. Select cart from the dropdown menu.
14. Enter Reason for Visit.
15. Under patient summary, verify or enter the patient’s MRN number and demographics.
  - For Pediatric patients, enter Parent/Guardian information.
  - Can enter a patient alias. Also able to search by this alias.
16. Select appointment history to view past appointments.
17. Select patient notes to view any notes unique to this patient.
18. Future appointments will be displayed on the right-hand panel to review.
19. Select Create Appointment when finished.



Info icons (Audit info):



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### Scheduling Appointment

### Clinic Appointment

#### Patient Provider Relationship

The system will recognize if a patient is established with a provider.

A patient provider relationship is established per specialty and location once a patient has completed an appointment with a provider

If users try to schedule an appointment with a different provider with the same specialty and location, the system will automatically connect the correct provider.

If the provider relationship needs to be changed, please call the Specialty Clinic Hub at:

**(605) 606-0610 or (833) 351-4482**

Appointment Summary

\* Site:  
✘ [Redacted]

\* Patient:  
✘ [Redacted]

New Patient

\* Specialty:  
Psychiatry

\* Provider:  
✘ Ashley Jansen, DNP

Provider updated from patient/provider relationship

Appt. Date: 12/20/2024 Start Time: 14:00 End Time: 14:30

Site Time: 12/20/2024 at 14:00 until 14:30 CST

\* Cart:

\* Reason for visit:

Schedule Note

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### Scheduling Appointment

#### Clinic Appointment

#### Dual Patient Appointments

A Dual appointment is an appointment where a patient is seen by two providers during a visit.

A site cart will need to be selected, as well as a 'Dummy Cart'.

The Dummy Cart will be named, 'For Dual Appts Only-DUAL APPTS PLACEHOLDER'.

When scheduling a patient for a Dual Appointment, schedule with the initial provider within the site and the cart that will be utilized for the visit.

< 8:00	9:00	10:00	11:00
<div style="background-color: #333; color: white; padding: 2px;"> <span style="font-size: 1.2em;">↑</span> GPA - Eagle Butte, SD - Cheyenne River Health Center <span style="color: green; font-weight: bold;">GPA</span> </div>			
<div style="background-color: #4a5568; color: white; padding: 2px;"> <span style="font-size: 1.2em;">↑</span> Endocrinology                 </div>			
EAGLE-BUTTE-SD-IHS-CartA-SC* - 1560596413@vtc.ihs.gov			
EAGLE-BUTTE-SD-IHS-CartB-SC - 1560596414@vtc.ihs.gov			
For Dual Appts Only - DUAL APPTS PLACEHOLDER - Use only when patient			
	Lynn Baru, MD		
		Demo, Patient 123456	

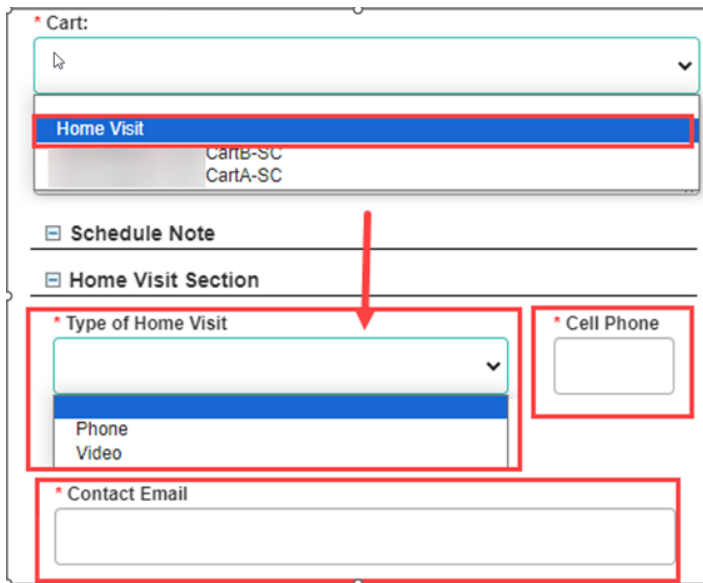
Find the second provider and schedule the same patient in that site with this provider and the 'Dummy Cart'.

< 8:00	9:00	10:00	11:00
<div style="background-color: #333; color: white; padding: 2px;"> <span style="font-size: 1.2em;">↑</span> GPA - Eagle Butte, SD - Cheyenne River Health Center <span style="color: green; font-weight: bold;">GPA</span> </div>			
<div style="background-color: #4a5568; color: white; padding: 2px;"> <span style="font-size: 1.2em;">↑</span> Rheumatology                 </div>			
EAGLE-BUTTE-SD-IHS-CartA-SC* - 1560596413@vtc.ihs.gov			
EAGLE-BUTTE-SD-IHS-CartB-SC - 1560596414@vtc.ihs.gov			
For Dual Appts Only - DUAL APPTS PLACEHOLDER - Use only when patient			
	Nisha Marek, MD		
		Demo, Patient 123456	

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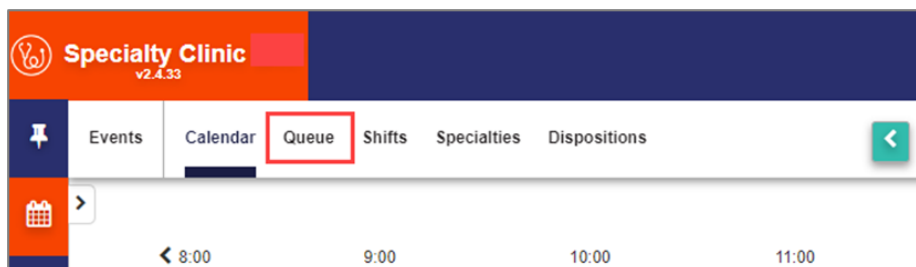
### Home Visit

1. Follow steps to schedule an appointment.
2. Within the "Cart" dropdown select Home Visit.
3. The Home Visit Section will populate below. Complete the required fields.
4. Finish steps to schedule appointment.
  - Able to schedule Provider for Home Visit when provider is scheduled outside of clinic hours.

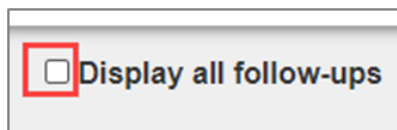


### Scheduling from Queue

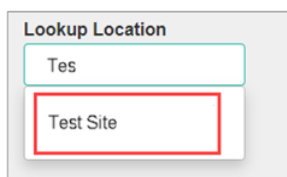
1. Select "Queue" from in the left-hand corner.



2. Select the check box next to "Display all follow-ups" to launch all queued appointments regardless of location.



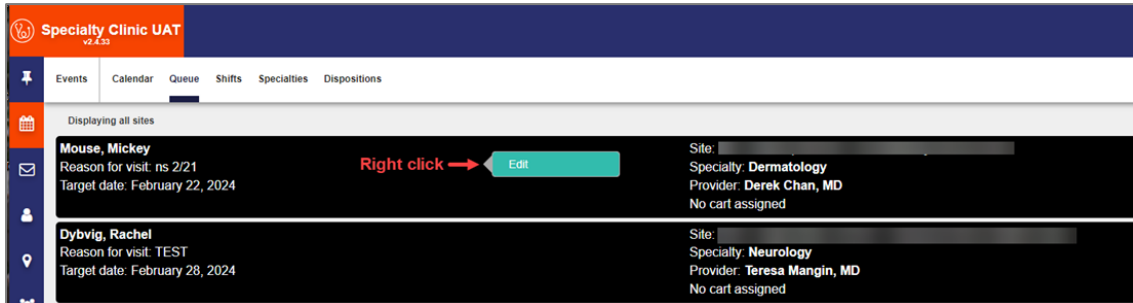
3. Search for a specific location within the Lookup Location field. The locations will start appearing once you begin typing. Select desired location.



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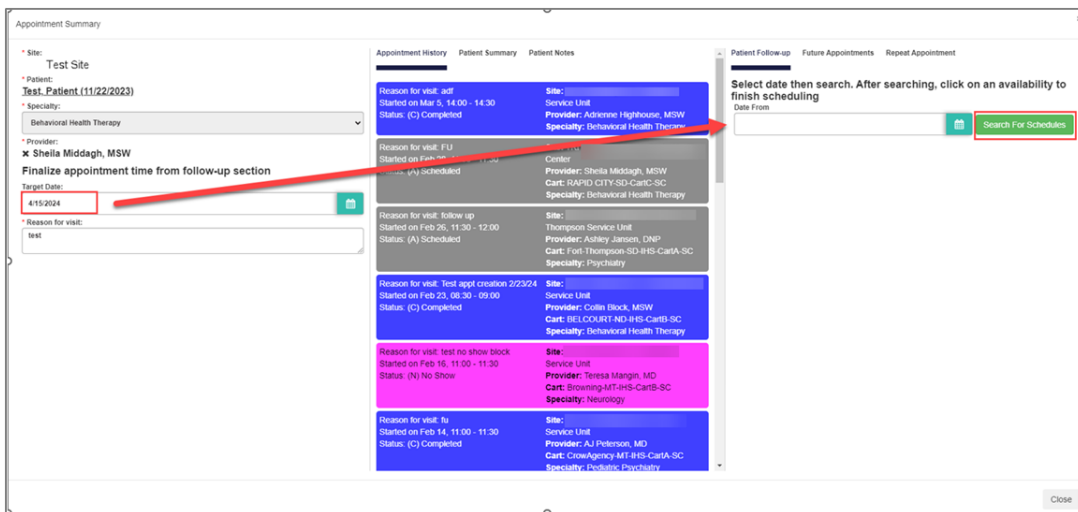
## Scheduling from Queue

4. Right click anywhere within the black row of the patient you want to schedule and select edit.



5. This will launch the patient summary screen.

6. Verify correct site/patient/specialty/provider. Review target date and enter date in the date field under Patient Follow-up in the right-hand panel. Then Search for Schedules.



7. This will populate a month view based on the date you selected. Example: Date enter April 15<sup>th</sup>, the month view with provider’s availability will display.

- a. Unavailable will have the diagonal lines within the box (red box below)
- b. Available will be white (green box below)

Mar 31	1 08:00 - 12:00	2 08:00 - 12:00	3 08:00 - 12:00	4 08:00 - 12:00	5 08:00 - 12:00	6 08:00 - 12:00
7 <span style="border: 2px solid red; padding: 2px;">Unavailable</span>	8 08:00 - 12:00	9 <span style="border: 2px solid green; padding: 2px;">Available</span>	10 08:00 - 12:00	11 08:00 - 12:00	12 08:00 - 12:00	13 08:00 - 12:00
14 08:00 - 12:00	15 08:00 - 12:00	16 08:00 - 12:00	17 08:00 - 12:00	18 08:00 - 12:00	19 08:00 - 12:00	20 08:00 - 12:00
21 08:00 - 12:00	22 08:00 - 12:00	23 08:00 - 12:00	24 08:00 - 12:00	25 08:00 - 12:00	26 08:00 - 12:00	27 08:00 - 12:00
28 08:00 - 12:00	29 08:00 - 12:00	30 08:00 - 12:00	May 01 08:00 - 12:00	May 02 08:00 - 12:00	May 03 08:00 - 12:00	May 04 08:00 - 12:00

Monday, 4/15/2024 ✕

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### Scheduling from Queue

- Select the available date you would like to schedule on and scroll down. Verify site, select home visit or the appropriate cart. Then click on an available spot within the provider row. Confirm date and time populated to the appropriate fields. Edit timeframe if need within the time slots, then select Schedule.

Monday, 4/15/2024 ✕

**BA - Browning, MT - Blackfeet Service Unit**

08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00

Home Visit

Browning-MT-IHS-CartA-SC

08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00

Browning-MT-IHS-CartB-SC

08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00

**Sheila Middagh, MSW**

08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00

Date to schedule: 4/15/2024

Time to schedule: 10:00

End time: 11:00

Schedule

- This will take you back to the queue and display a pop-up confirming appointment with a launch point to view appointment in the calendar. Click the green confirmation message to jump to scheduled day.

Display all follow-ups

Filter patients

Follow up scheduled at Mar, 08 2024

Click to jump to day

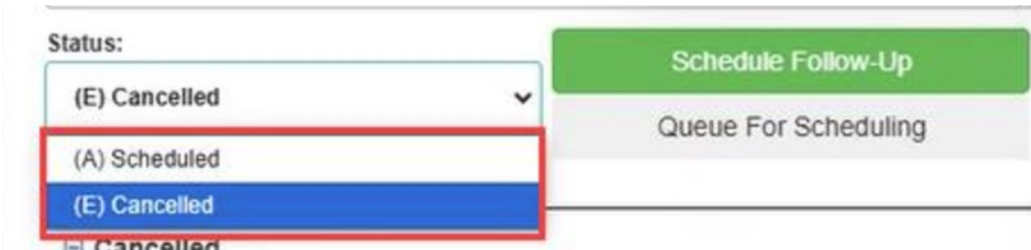
\*\*Able to delete appointments from the Queue by right clicking then selecting Delete from Queue.\*\*

<p><b>Test, Patient1</b></p> <p>Reason for visit: f/u</p> <p>Target date: May 21, 2024</p>	<p>Edit</p> <p>Delete From Queue</p>	<p>Site: . . .</p> <p>Specialty: <b>Pediatric Psychiatry</b></p> <p>Provider: <b>Kenna Kennedy, CNP</b></p> <p>No cart assigned</p>
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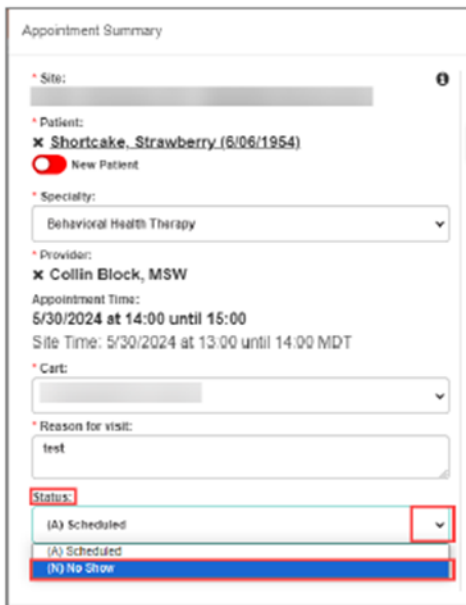
### Cancelling Appointment

1. Open the appointment.
2. Within the patient summary screen, change status and select close in the bottom right-hand corner.



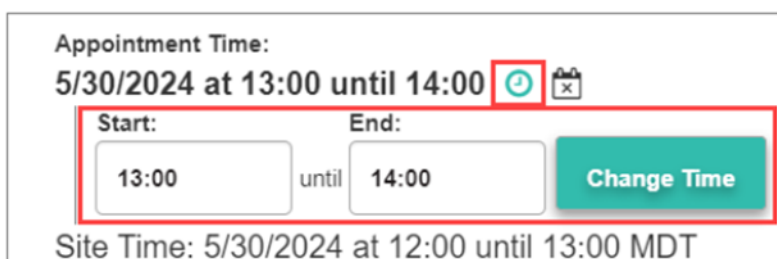
### No Show Appointment

Able to No Show appointment on the same day.



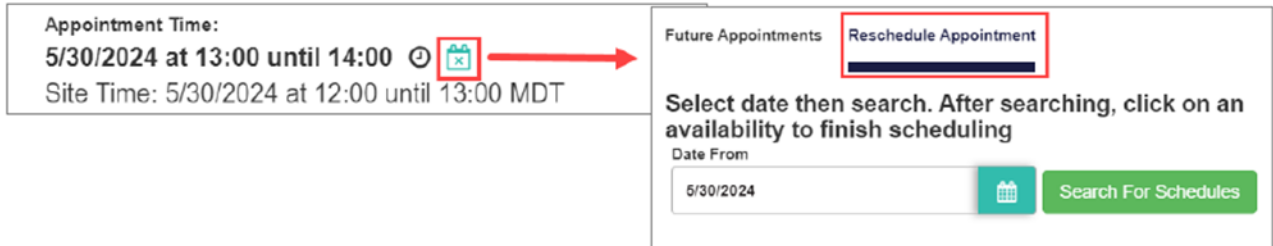
### Editing Appointment and Reschedule/Follow up

1. Ability to update/modify scheduled appointment time by selecting the clock icon.
  - The clock icon is only for updating that day.
  - Use the calendar icon for rescheduling appointment to another day.

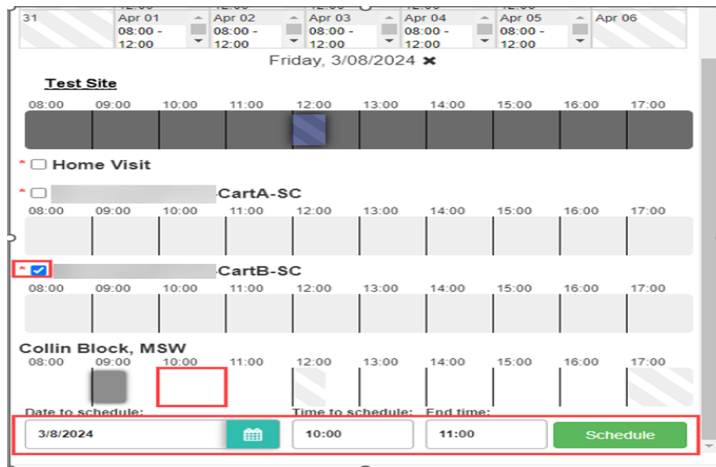


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2. To Reschedule to a different date: Open the appointment and select the calendar icon under Appointment Time



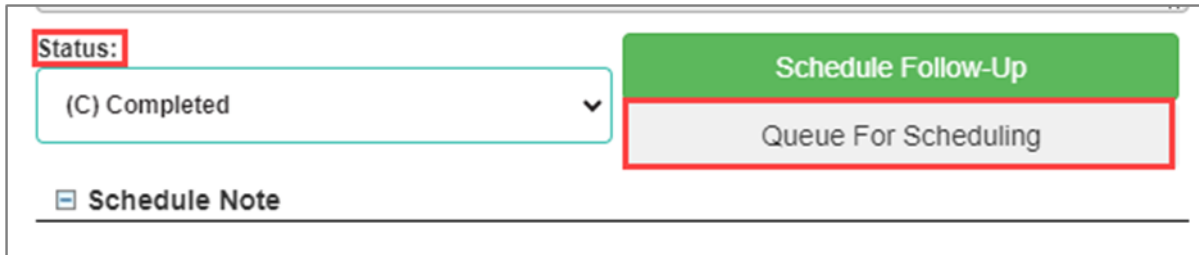
3. In the right-hand panel under Reschedule Appointment select the Date to be rescheduled and Search For Schedules.
4. Review cart and provider's schedule for availability.
5. Select cart or home visit.
6. Select the time of appointment within the provider's row.
7. Verify date and time. \*\*Appointments will default to 30 minutes. Adjust accordingly by clicking in the time field, backspace and enter new time.\*\*
8. Select Schedule.



## Telemedicine Scheduler User Guide | eSYNC

### Adding Patient to Queue

1. Open the appointment and change status from active to cancelled.
2. Cancelled and No-Show appointments will populate required fields. Complete requirements.
3. Select Queue For Scheduling.



4. The appointment summary overlay will appear. Enter a target date and reason for visit. Verify patient demographic and select Place in Queue in the bottom right-hand corner. You will receive a pop-up confirmation when completed.

