



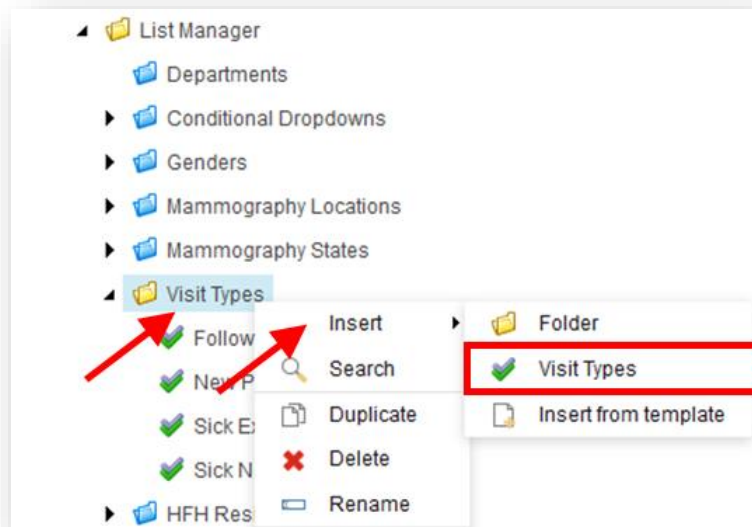
**HENRY FORD HEALTH SYSTEM
OPEN SCHEDULING**

Open Scheduling Setup

Setup Global Visit Types

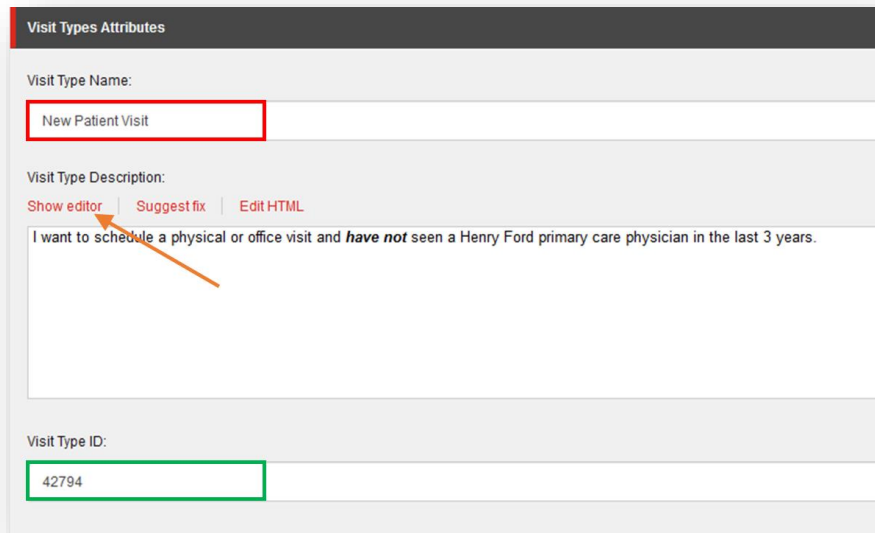
The Visit Types are created as global items which can then be added to multiple physician profiles.

1. Navigate to /sitecore/content/Global/List Manager/Visit Types
2. In the open scheduling modal the visit types will display as ordered here. Left to right.
3. To add a new visit type, right-click the **Visit Types** folder, select **Insert**, and then **Visit Types**



4. Enter a name for the visit type and click **OK**.

5. The Visit Types will display in the modal during the open scheduling process. The fields for the Visit Type include:

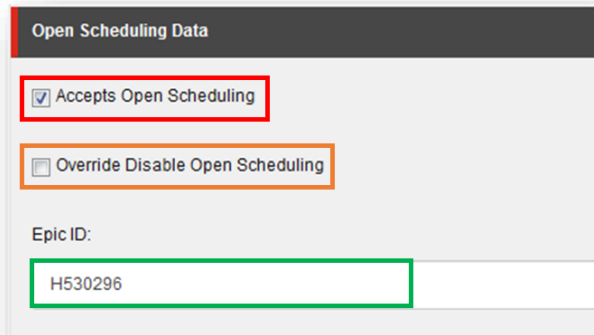


- **Visit Type Name:** Text entered here will display as visit type name on the button in the open scheduling modal.
- **Visit Type Description:** Click **Show editor** to open the RTE window. Content will display as the description for each visit type in the open scheduling modal. Includes italics, bold, and hyperlinks.
- **Visit Type ID:** Must match visit type ID in Epic. Providers will only be populated with visit types which exist in Sitecore and visit types they have open appointment slots for using the nightly Epic API call. Only one ID can be added per visit type.

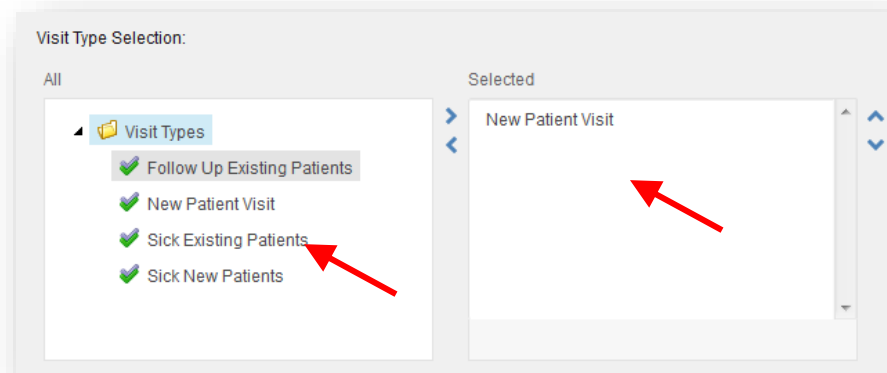
Physician Profile

1. Navigate to /sitecore/content/Shared Pages/Henry Ford/Physician Directory and select the provider that will be edited. All Open Scheduling fields are in the Open Scheduling Data section.
2. The Schedule Appointment Online and Request Appointment buttons can be displayed for providers who have the Appointments checkbox marked. The button that displays is determined

by marking the appropriate checkboxes on the provider profile:



- **Accepts Open Scheduling:** If checked and Epic ID exist and at least one visit type is selected for the provider, the Schedule Appointment Online button will display on the Find a Doctor search result and profile pages. This will also allow the physician to be returned in search results when the user applies the search filter for accepts online scheduling from the Find a Doctor search landing and search results. Request Appointment, if applicable, will display if this checkbox is marked but no Epic ID exists and/or no visit types are selected or if the checkbox is not marked. This field is set by the import.
 - **Override Disable Open Scheduling:** If checked, the Schedule Appointment Online button will not display. This checkbox is manually set and will override Accepts Open Scheduling. If this checkbox is marked, the Request an Appointment button will display, if applicable.
 - The **Epic ID** field should be populated with the Epic Provider ID and must match the ID in Epic to display the Accepts Open Scheduling button. The provider can have an Epic Provider ID without open scheduling activated.
3. The visit types are automatically populated by the Epic API.



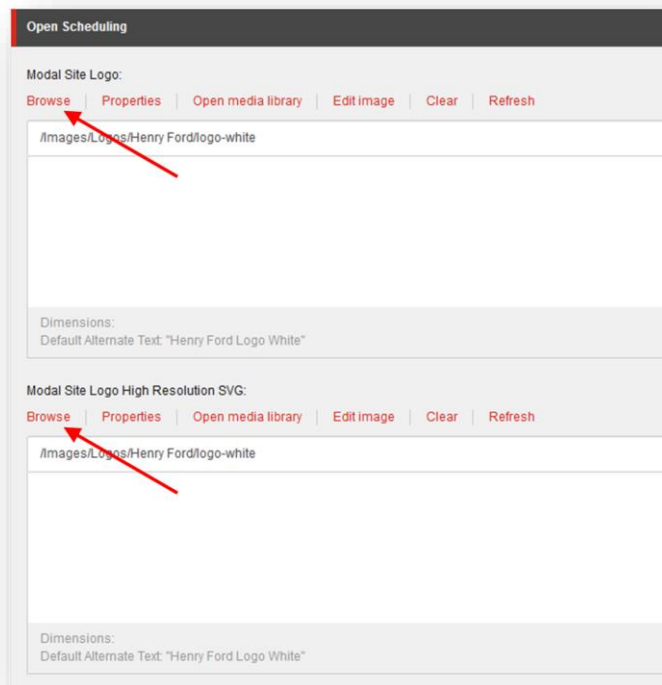
Global Settings

To edit the setting, navigate to /sitecore/content/Global/Settings/Henry Ford/Provider Directory Module Settings

Applies to HFHS Find a Doctor, Our Team, Our Faculty and See Providers at This Location (View All)

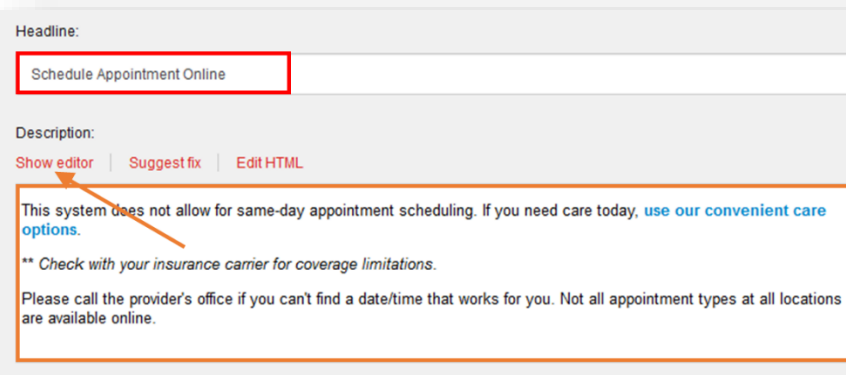
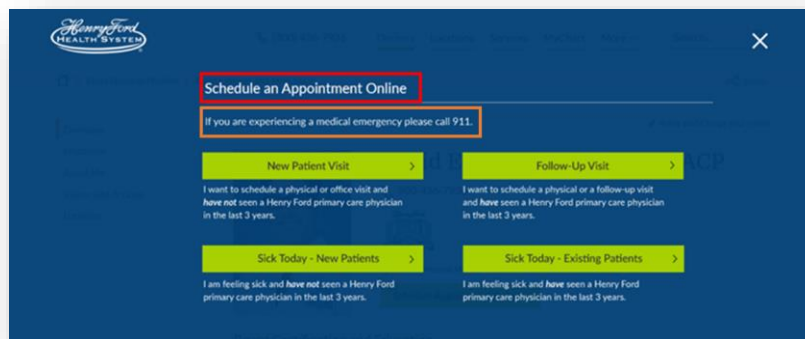
Note: Notify MedTouch if any changes are made to settings or labels to prevent a deploy overriding this information.

1. There are two logo fields are used to control the logo that displays in the open scheduling modal. To select the logo image, click Browse and use the Media Browser to select the image from the Media Library.



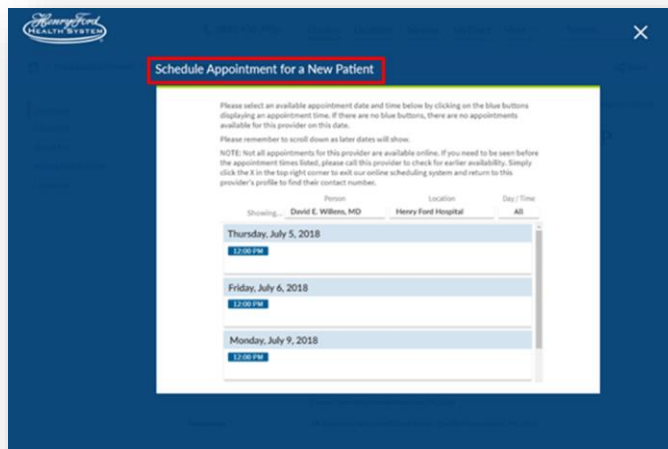
- **Modal Site Logo:** A default low resolution logo.
- **Modal Site Logo High Resolutions SVG:** A high resolution logo that should be uploaded as an SVG.

- There are two fields that are used to populate the text on the first page of the Open Scheduling modal.



- **Headline:** Contains the text that displays on the first page of the modal above selecting visit types and description.
 - **Description:** Click **Show Editor** to open the RTE window. Can contain italics, bold, and hyperlinks. This text will display below the headline on the first page of the modal.
- Fields that populate the second page of the open scheduling modal:
 - **IFrame Headline:** Contains the text that displays above the Epic Open Scheduling iFrame (Desktop and Tablet only). The visit type is automatically populated based on the

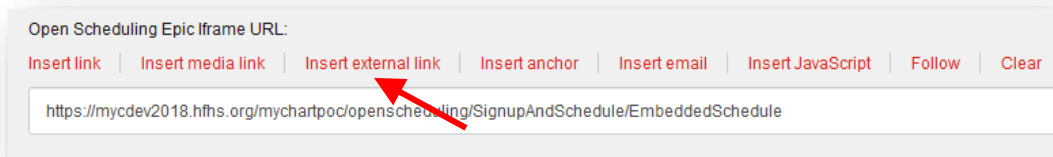
patient's selection.



IFrame Headline:

Schedule Appointment for

- **Open Scheduling Epic Iframe URL:** Click **Insert external link** to update. The base URL to use when launching the Epic Iframe within the open scheduling modal.



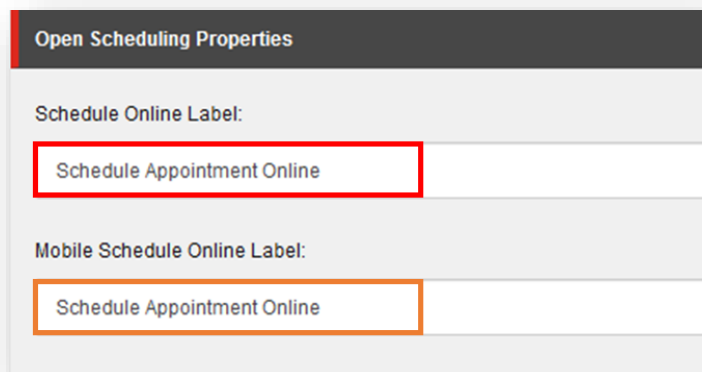
4. The **Include Open Scheduling** checkbox is used to override the Open Scheduling options set on the provider profiles.
 - If unchecked: defaults to Request an Appointment button when provider has Appointments checkbox checked.
 - If checked: Provider is marked Accepts Online Scheduling and Epic ID exist and has Visit Types selected.
5. HFPN and Medical Education Find a Doctor have separate settings and are controlled independently of each other.
 - /sitecore/content/Global/Settings/Henry Ford/HFPN Provider Directory Module Settings
 - /sitecore/content/Global/Settings/Henry Ford/Med Ed Provider Directory Module Settings

Physician Labels

The button labels that display on the physician detail pages are set at a global level and will be consistent across all profiles.

Applies to: HFHS, HFPN and Medical Education Find a Doctor profile pages.

1. To edit the button text, navigate to /sitecore/content/Global/Labels/Henry Ford/Modules/Physician Directory/Controls/Physician Detail/Physician Detail Labels
2. Within the Open Scheduling Properties section, there are two fields that control the button text in either desktop or mobile:



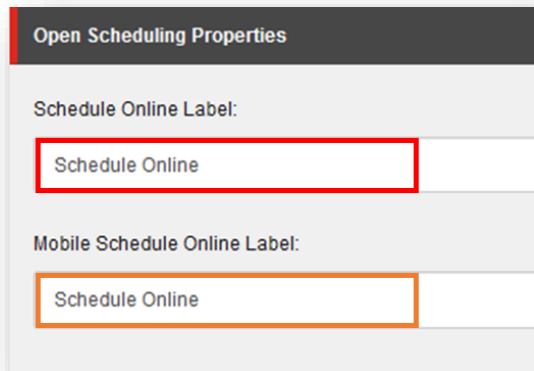
The screenshot shows a form titled "Open Scheduling Properties". It contains two sections. The first section is labeled "Schedule Online Label:" and has a text input field containing "Schedule Appointment Online", which is highlighted with a red border. The second section is labeled "Mobile Schedule Online Label:" and has a text input field containing "Schedule Appointment Online", which is highlighted with an orange border.

- **Schedule Online Label:** Contains the text that displays on the Open Scheduling button in desktop view.
- **Mobile Schedule Online Label:** Contains that text that displays on the Open Scheduling button in mobile view.

The button labels that display with the provider preview info on the search results listing page are edited at a global level.

1. To edit the button text, navigate to /sitecore/content/Global/Labels/Henry Ford/Modules/Physician Directory/Controls/Search Results/Physician Listing

2. Within the Open Scheduling Properties section, there are two fields that control the button text in either desktop or mobile:



- **Schedule Online Label:** Contains the text that displays on the Open Scheduling button in desktop view.
- **Mobile Schedule Online Label:** Contains that text that displays on the Open Scheduling button in mobile view.

Separate labels exist for:

Our Team listing (Dynamic Doctors) navigate to /sitecore/content/Global/Labels/Henry Ford/Modules/Physician Directory/Controls/Physician Detail/Dynamic Doctors Labels

Our Faculty listing (Faculty Dynamic Doctors) navigate to /sitecore/content/Global/Labels/Henry Ford/Modules/Physician Directory/Controls/Physician Detail/Faculty Dynamic Doctors Labels

HFHS, HFPN, Medical Education Find a Doctor and See Providers at This Location (View All) listings navigate to /sitecore/content/Global/Labels/Henry Ford/Modules/Physician Directory/Controls/Search Results/Physician Listing

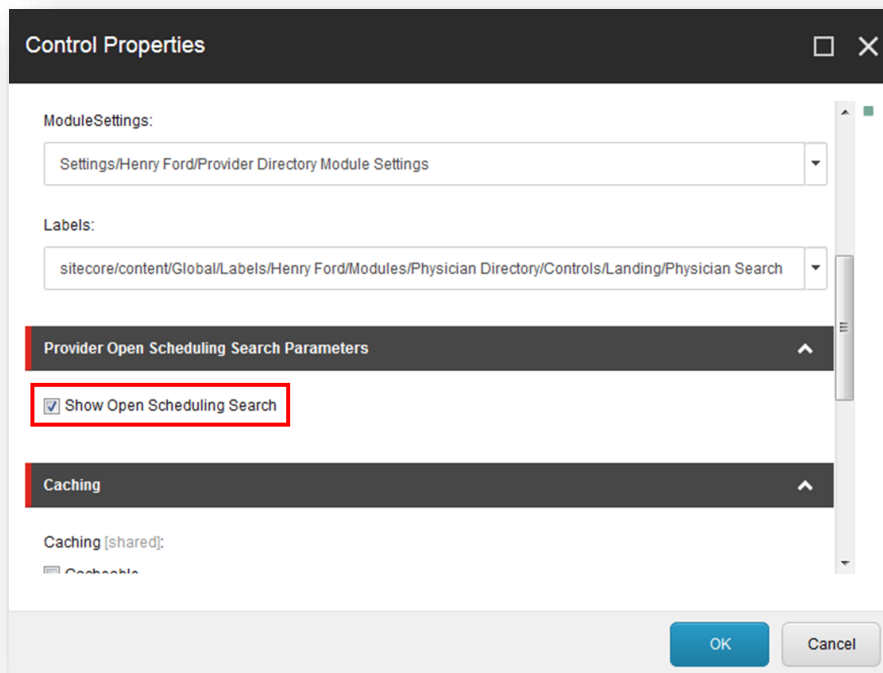
Search Options

The Provider with Online Scheduling search option can be enabled or disabled as necessary for either the Find a Doctor search landing page or the search results page.

Note: To maintain these independently of each other for each Find a Doctor the pages are protected from cloning.

After selecting the page, in the Configure menu select Unprotect Item to modify the Presentation Details. After updating in the Configure menu select Protect Item.

1. To edit the search option, select the applicable Find a Doctor page
 - HFHS Find a Doctor landing /sitecore/content/Home/Physician Directory
 - HFHS Find a Doctor search result /sitecore/content/Home/Physician Directory/Search Results
 - HFPN Find a Doctor landing /sitecore/content/Home/HCP/HFPN/Physician Directory
 - HFPN Find a Doctor search result /sitecore/content/Home/HCP/HFPN/Physician Directory/Search Results
 - Med Ed Find a Doctor landing /sitecore/content/Home/HCP/Med Ed/Physician Directory
 - Med Ed Find a Doctor search result /sitecore/content/Home/HCP/Med Ed/Physician Directory/Search Results
2. Open the **Presentation** menu and select the **Details** layout option.
3. In the Layout Details window, click **Edit** below the Controls list. Open the **Controls** tab and **Edit** the Physician Search control for landing or Physician Search Again for search result.
4. In the Provider Open Scheduling Search Parameters section, use the checkbox **Show Open Scheduling Search** to enable or disable the search option.



All changes require a publish for them to appear on the website.