

June 3 - Improving the Client Booking Journey

This video outlines recent updates to the system and provides guidance on utilizing shortcuts, URLs, and QR codes to streamline client processes.

Practitioner Dashboard Widgets: New widgets have been added to help providers access information more efficiently, including quick previews of completed intake forms, document updates, appointment history, and uncharted appointments.

Feature Title: Practitioner Dashboard Widgets & Layout Preferences

- **Problem Solved:** Reduces "click fatigue" for healthcare providers by centralizing critical patient information onto a single screen and tailoring default views to individual provider preferences.
- **Core Functionality:** Adds four modular widgets to the practitioner dashboard: Intake Forms (displays forms in 'completed' or 'started' status), Patient Documents, Prescriptions, and Appointment History/Uncharted Appointments. Providers can now click straight into appointment details, forms, or document updates. Additionally, an update lets users define how chart windows open by default.
- **Technical Implementation / Config:**
 - **Dashboard Widgets:** Toggled directly on the practitioner dashboard interface.
 - **Chart View Defaults:** Configured per individual user. Navigate to the practitioner profile, click **Preferences**, and select the default layout for the chart view (e.g., bottom-right overlay, full screen, or open in a new window).

Feature Title: Letter Format Deactivation

- **Problem Solved:** Curates and reduces clutter within the practitioner/admin drop-down selection menus as organizations migrate from old letter templates to the newer PDF Form Builder.
- **Core Functionality:** Allows administrators to archive obsolete letter templates without deleting historical data. Inactive formats are hidden from the standard workflows but

remain accessible for audits and reactivation.

Missing Technical Detail

The speaker referenced deactivating letter formats from a drop-down list but did not explain specific navigation paths or button clicks in the administration menus.

Feature Title: Patient Portal Booking Shortlinks

- **Problem Solved:** Bypasses the traditional, click-heavy public booking sequence (location > service category > service > practitioner) to optimize the onboarding funnel for new or symptomatic patients.
- **Core Functionality:** Generates specific URL paths that auto-populate target parameters (such as the clinic location, a unique provider, or a precise service duration), taking the user directly to the final scheduling calendar.
- **Technical Implementation / Config:**
 - **Prerequisite:** Public booking must be explicitly enabled in system settings.
 - **Location-Specific URLs:** Retrieved via Admin account login under **Clinic Profiles**.
 - **Provider-Specific URLs:** Retrieved via individual **Practitioner Profiles** under the **QR Code** tab using the quick button. If a provider spans multiple clinics, a location prompt will generate separate unique URLs per site.
 - **Service-Specific URLs:** Must be manually grabbed from the live user-facing patient portal. The admin proceeds through the desired workflow combination (e.g., 60-minute massage), stops at the calendar screen, and extracts the full generated URL parameter string to use as a hyperlink on external clinic websites or the portal's internal text fields (**System Settings > General > Portal > Messages**).

Feature Title: QR Code Link Hubs & Contact Scrubbing

- **Problem Solved:** Facilitates low-friction offline-to-online transitions inside physical clinic spaces, allowing patients to self-triage or discover digital content via mobile devices.
- **Core Functionality:** Generates physical posters containing either a "Single Link" or a comprehensive mobile "Link Hub" page (such as a checklist for booking, arrivals, or viewing practitioner exercise libraries).
- **Technical Implementation / Config:**
 - Accessed via the **QR Code** tab present on all staff, admin, and clinic profiles.
 - Supports custom Hex/RGB brand color configuration.
 - Provides options to download the raw graphic or copy the destination link.

Best Practices

Data Privacy Check: Practitioner profiles automatically bundle phone numbers and email strings into generated QR codes to make contact-saving seamless. Administrators **must** ensure personal cell numbers or personal email addresses are removed from the practitioner profile fields and replaced with professional clinic details prior to printing out QR codes.

Feature Title: Contactless Patient Self-Check-In

- **Problem Solved:** Offloads reception workflows during peak operational hours, lunchtime gaps, or front-desk staff absences.
- **Core Functionality:** Allows patients to scan an on-site QR code, search their name against the current daily roster, and update their appointment status to "Arrived" instantly. This triggers an automatic live-refresh on the provider's schedule screen.
- **Technical Implementation / Config:**
 1. Navigate to **General System Settings > Modules > Advanced**.
 2. Toggle **Patient Arrivals** to enabled.
 3. Navigate to **Portal > Patient Arrivals** to customize messages and authentication types (e.g., "Reception Check-In" type-ahead search, resource room matching, or magnetic swipe card readers).
 4. Copy the refined arrival workflow URL and attach it to a single-link clinic QR code poster.

Caveats & Limitations

Privacy Limitations: To prevent unauthorized exposure of PHI (Protected Health Information), the text search function strictly outputs names and contains zero identifying sub-data (like phone or DOB). Consequently, this feature is highly discouraged for high-volume clinics displaying multiple duplicate names (e.g., several "John Smiths" scheduled on the same calendar day).

The type-ahead registry is hard-restricted to the current date's schedule data.

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