

EPES -
MyScheduler Portal/Scheduler User Guide



02/01/2012

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WELCOME

We are excited to announce the availability of our new Online Scheduler – Portal, which you may begin using on **February 1st, 2012**. This is a great compliment to our charting application used within your worksite clinic. It is very easy to learn and simple to use. It is a separate, password protected and fully secure website that you can access to schedule appointments, pre-register for appointments and view your secure medical data, which is linked to our charting application system.

Below are some of the great benefits that *MyScheduler* can provide:

- You can interact remotely with your clinic.
- Positively influences your experience by providing self-service capabilities such as scheduling, pre-registration, and a limited viewing of your medical profile.
- Saves time by allowing you to pre-register online instead of filling out paperwork while waiting in the clinic.
- After scheduling an appointment, an automated email is sent to you and can easily be added to many of the popular calendar applications.
- Ensures clinic staff can focus on valuable treatment time instead of administrative tasks such as answering telephone calls and scheduling appointments.
- The provided scheduler URL can be accessed 24/7 from any computer with internet connection.

MYSCHEDULER USER GUIDE

1 Logging In

Click the below link to enter *MyScheduler*:

https://mywebchart.com/concentra/webchart.cgi?svar_cobrand_patid=719868

FIRST TIME USERS MUST CREATE AN ACCOUNT:

Step	Action
1	Click on Create Account
2	Create a Username – Pick something easy to remember.
3	Create a Password – Pick something easy to remember, but unique and secure.
4	Retype Password
5	Enter Email address
6	Read the Terms of Use
7	Click the Check Box stating you understand and agree to the Terms of Use
8	Click on Create Account



Welcome to the EPES Online Employee Portal

Concentra

Log On

Username:

Password:

[Forgot Username / Reset Password](#)

Already have an account? Enter your Username (login name) and then your password. Click the Log On button to connect to the Web Portal

Problems logging in? Click on the Forgot Username link below the Login button or click the Reset Password link to request a password change.

Don't have an account? Click on the Create Account button to create an account that will grant you access to the Employee Web Portal

FIRST time users must create an account.

If you would like to create a new portal account, please fill out the simple form below.

*Username:

*Password:

* Retype Password:

* Email address:

TERMS OF USE

By registering or using the Service, you agree to be bound by these Terms of Use without modification. Please make sure you read these Terms of Use thoroughly before registering.

Definition of Terms.

I agree to the Above Terms and Conditions

If you already have an employee portal account, sign in below.

Username:

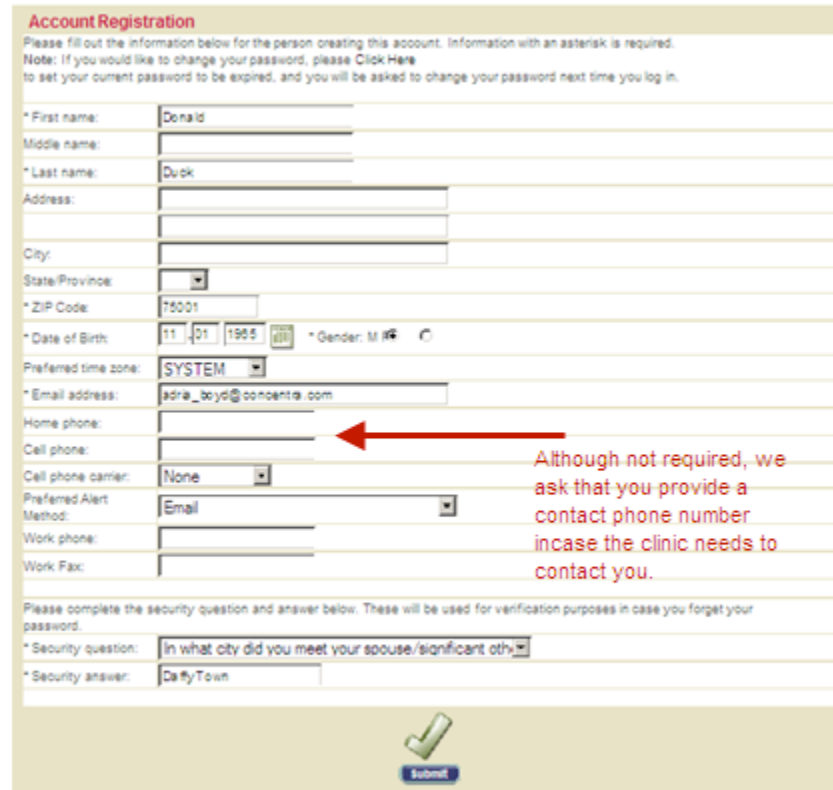
Password:

[Forgot Username / Reset Password](#)



The Account Registration page will display. Fill in, at a minimum, the mandatory fields, marked with an *. Although not required, we ask that you provide a contact phone number.

Once the form is completed, click Submit.




Click Submit.

You will receive a welcome confirmation via email:

Welcome to your Personal Wellness Portal!!!

Thank you for creating your Personal Wellness Portal account. Your Personal Wellness Portal registration is confirmed and your user name is:
alytest

Your Personal Wellness Portal account can help you get a better handle on your health. Your new account will allow you to:

- Add and update health records for you and your family members at any time
- Check your Personal Clinic Profile
- Schedule, reschedule, and cancel an appointment at a clinic
- Share your personal information with your PCP through NoMoreClipboard
- Fill out forms prior to a pending appointment

Registration forms can be found on your Personal Wellness Portal, making it easier for you to fill out necessary forms or send in health records in advance of your scheduled appointment. This feature eliminates the need to fill out endless medical forms upon arrival at the clinic.

If you have any questions or comments, please contact your local clinic.

ALREADY CREATED AN ACCOUNT? YOU MAY LOG ON USING YOUR USERNAME AND PASSWORD:

Step	Action
1	Type in User Name
2	Type in Password
3	Click on Log On



Welcome to the EPES Online Employee Portal

Concentra

Log On

Username:

Password:

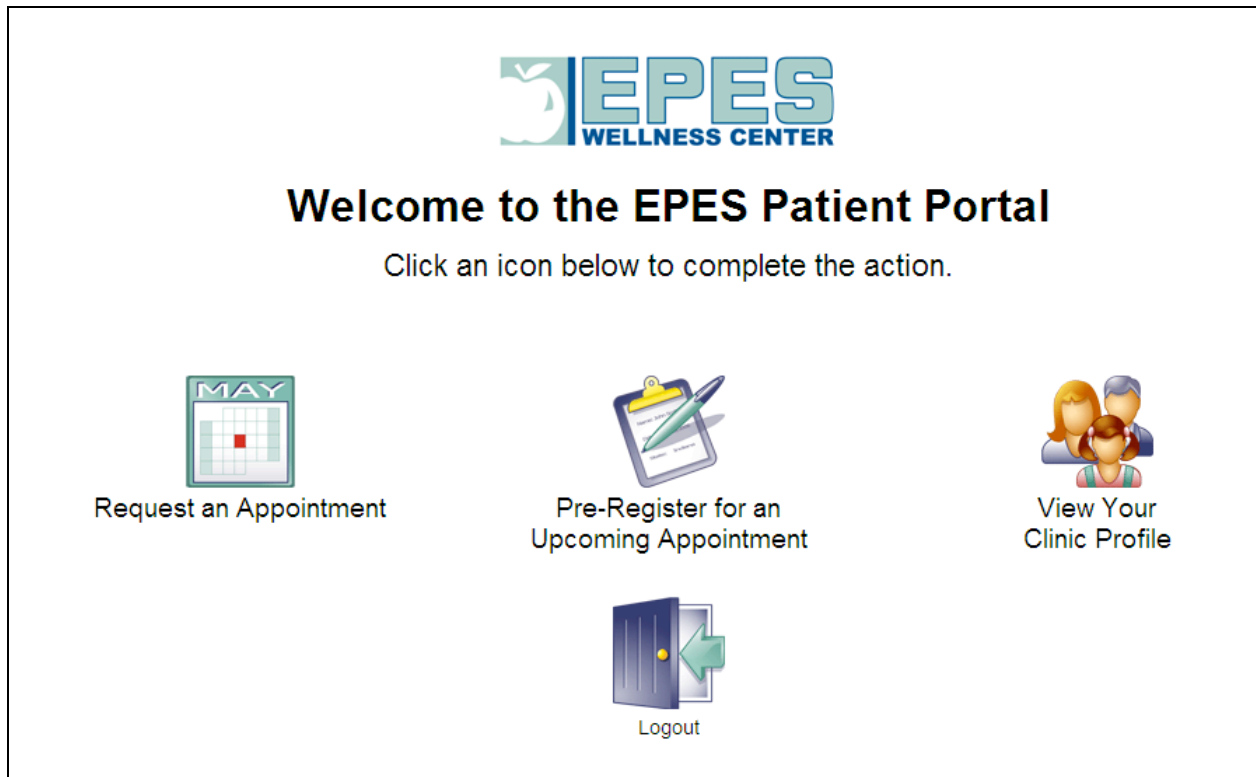
[Forgot Username / Reset Password](#)

Already have an account? Enter your Username (login name) and then your password. Click the Log On button to connect to the Web Portal

Problems logging in? Click on the Forgot Username link below the Login button or click the Reset Password link to request a password change.

Don't have an account? Click on the Create Account button to create an account that will grant you access to the Employee Web Portal

MyScheduler Welcome Screen:



The Welcome Screen offers several different functions that allow you to either:

- Request an Appointment – Allows you to create an appointment.
- Pre-Register for an Upcoming Appointment – Allows you to add your information to a profile that is stored in the system for all future appointments.
- View Your Clinic Profile – Allows a one screen quick view of your clinic profile.
- Logout – Scheduler log out.

2 Request an Appointment

Click on Request an Appointment



Request an Appointment


Complete the form:

Location: Clinic location will default. Clinic Hours of Operation will display.

Reason: Use the drop down box to select the reason for your visit. *This is a required field.

Comments: Add any comments you would like the clinic staff to know. Please keep it brief. This is a free text area and is not required.

Appt Date/Time: FIRST available time will default. You may use the drop down arrow OR the calendar to choose a different day/time.



Schedule New Appointment

Clinic location will default. If there are two or more clinics to choose from, a drop down box will display.

Choose your reason from the drop down below

Location	EPES Transport Systems 3308 Edgefield Rd Greensboro, NC 27409 (336) 865-5985		
Day	Hours of Operation	Staff/Notes*	
Monday	8 a.m. - 5 p.m.		
Tuesday	8 a.m. - 5 p.m.		
Friday	8 a.m. - 5 p.m.		
Sunday	12 p.m. - 5 p.m.		

Reason New Patient Visit *Required

Comments

Choose your date/time from the drop down below. (?)


Appt Date/Time < Feb 2012 >


S	M	T	W	T	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29			


Fri 02-03-2012 08:00a


FIRST available appointment time will automatically display. You can change the time by using the drop down arrow. Or, you may click on the calendar to change the day/time.

If you are experiencing an emergency, please dial 911 for assistance.
 Please try to arrive at the clinic about 15 minutes before appointment.
 If you need to speak with anyone at the clinic, please contact your local clinic at (336) 865-5985.


Save


Save And Add Another


Cancel


Logout

Click Save  Save

Please NOTE:

If you receive the message “No free times 12-27-2011-12-28-2011. Use calendar to find an open date/time” as shown below in the Appt/Date box, check to see if Reason is missing. If so, please select a Reason and try again. If not, select a different date/time for your appointment.



Choose your reason from the drop down below

EPES Transport Systems
 3308 Edgefield Rd
 Greensboro, NC 27409
 (336) 665-5985

Location	Day	Hours of Operation	Staff/Notes*
	Monday	8 a.m. - 5 p.m.	
	Tuesday	8 a.m. - 5 p.m.	
	Friday	8 a.m. - 5 p.m.	
	Sunday	12 p.m. - 5 p.m.	

Reason: Select Reason *Required

Comments:

Choose your date/time from the drop down below. ?

Appt Date/Time: < Jan 2012 >

S	M	T	W	T	F	S
	1	2	3	4	5	6
	7	8	9	10	11	12
	13	14	15	16	17	18
	19	20	21	22	23	24
	25	26	27	28	29	30
	31					

No free times 01-24-2012-01-25-2012
Use calendar to find an open date/time.

If you are experiencing an emergency, please dial 911 for assistance.
Please try to arrive at the clinic about 15 minutes before appointment.
If you need to speak with anyone at the clinic, please contact your local clinic at (336) 665-5985.



You will receive an appointment confirmation immediately after clicking “Save”. This will display on your screen. Click “Return to homepage”.

EPES WELLNESS CENTER

You have successfully created a new appointment.
Please review your pending appointments below.
An email confirmation will be sent to you.
Please be sure to Pre-Register.

MAY 24 Review Pending Appointments

- **Mon Feb 6 8:00AM** [Reschedule](#) [Cancel](#) ←

Location: EPES Transport Systems
Visit Reason: New Patient Visit

Click "Return to homepage" → [Return to homepage](#) ↑

You will also receive an appointment confirmation via email in the format of a calendar meeting request that can be added to your calendar.

Add to Calendar Request Information... Check Calendar Chat

Calendar Entry
Meeting Invitation noreplywebchart has invited you to a meeting

Confirmation email: You should receive it as a calendar meeting request.

Subject	Concentra Apt - New Patient Visit		Chair	noreplywebchart@med-web.com
When	Date	Friday 02/03/2012	Sent by	<noreplywebchart@me
	Time	07:00 AM - 07:30 AM (0 hours 30 minutes)	Invitees	
Where	Location	EPES Transport Systems	Required (to)	Adria Boyd/Dallas/HS/Concentra
			Optional (cc)	

Date/Time: 02-03-12 08:00am
Location: EPES Transport Systems

Thank you for scheduling your appointment.

You are scheduled to complete the following:
[New Patient Visit]

Please be sure to Pre-register!

3 Pre-Registration for an Upcoming Appointment

Click on Pre-Register for an Upcoming Appointment



Pre-Register for an
Upcoming Appointment

The screen will default to the Demographic Registration Information page, which auto populates the First name, Last name, Address, City, State, Zip, Country, Date of Birth and Email Address.

Please take a moment to fill out each section (see highlights below). The more information you can provide, the quicker your office visit will go.

To move to any of the other sections within the Pre-Registration section, you may either click on the appropriate icon at the top of the page OR click “Save and Proceed” at the bottom right of the page.

Member Review Progress

Demographic Registration Info

Click here to autofill the main fields below with your default account data* - Data with asterisks is required.

* First name: Spouse Name:

Middle name or initial:

* Last name: Spouse Birthdate:

Address:

City, State/Province, ZIP Code: Guarantor/Responsible Party:

Country: Home phone:

* Gender: Male Female Cell Phone:

SSN: Email Address: Race: White African American Asian American Indian / Alaskan Hawaiian / Pacific Islander Other

* Date of birth: Ethnicity: Hispanic or Latino Not Hispanic or Latino

Marital status: Married Single Widowed Divorced Legally Separated Common Law

Height: in

Weight: lbs (*only update if known within last week)

Blood type:

←

Please NOTE:

Make sure to complete the “Insurance” section. Providing this information is very important to us as this enables the clinic to verify your insurance coverage.

Hint: You may <tab> to each field

Please complete the following fields:

- Insurance Company Name
- Policyholder Info
- Group #
- Policy #
- Holder’s Relationship to Member
- Policy Priority
- Policy Start Date
- Policy End Date

Member Review Progress

Demographics **Insurance** Medications Allergies Illnesses Procedures Pregnancies Immunizations Family History Social History Finish

Insurance Plans

Insurance Company Policyholder Info

Group #	Policy #	Holder's Relationship to Member	Policy Priority	Policy Start Date	Policy End Date	Add
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

****Click Add**



Should now look like:

Member Review Progress

Demographics **Insurance** Medications Allergies Illnesses Procedures Pregnancies Immunizations Family History Social History Finish

Insurance Plans

Insurance Company	Policyholder Info	Group #	Policy #	Holder's Relationship to Member	Policy Priority	Policy Start Date	Policy End Date	Edit/Delete
Humana	pork chop	12345	123456	Self	Primary	11/01/2010	11/30/2011	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Insurance Company Policyholder Info

Group #	Policy #	Holder's Relationship to Member	Policy Priority	Policy Start Date	Policy End Date	Add
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Once all the information is filled out within the Pre-Registration sections, you may click the "Finish" icon.



Once the Finish Icon is clicked, you will be presented with your snap shot of your profile that you just completed.

4 View Your Clinic Profile

Click on View Your Clinic Profile



The screen that will be presented will be a snap shot of what is loaded in your profile and accessed by the Clinic.

Health Services Employee Portal

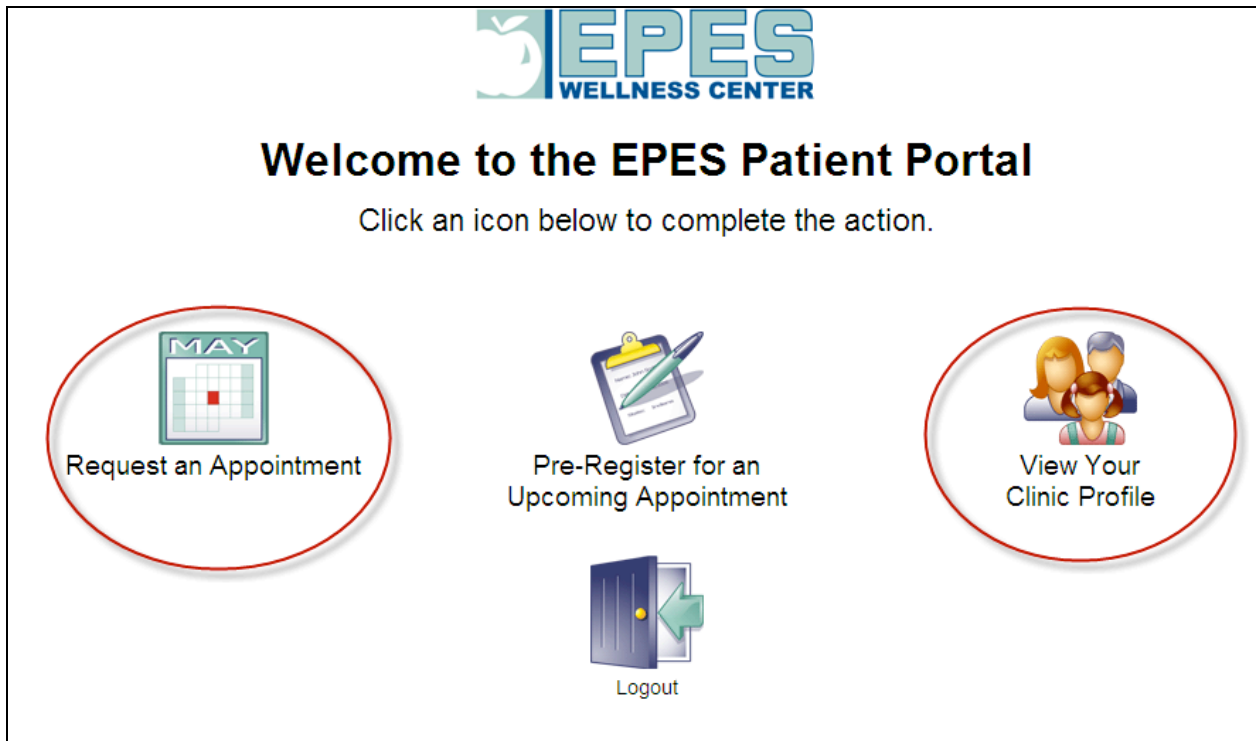
<p>Demographics</p> <p>chop_pork Email: adria_boyd@concentra.com Age: 28, Birthdate: 11-01-1982</p>	<p>Appointments</p> <p>Review Appointments</p>
<p>Physicians/Pharmacies</p> <p>No Physicians or Pharmacies on file. Add/Edit Physicians/Pharmacies</p>	<p>Medications</p> <ul style="list-style-type: none"> • None Entered Add/Edit Medications
<p>Immunizations</p> <p>None. Add/Edit Immunizations</p>	<p>Allergies</p> <ul style="list-style-type: none"> • No allergies entered Add/Edit Allergies
<p>Vitals</p> <p>Most Recent: Blood Pressure: No Data / No Data Pulse: No Data Temperature: No Data Respiration Rate: No Data</p>	<p>Lab Results</p> <p>View Results</p>
<p>NoMoreClipboard.com Personal Health Record</p> <p>You are not linked to a NoMoreClipboard.com profile. Post my data to NoMoreClipboard.com</p>	

At any time you may change what is in your profile by clicking on the ADD/EDIT links under each section.

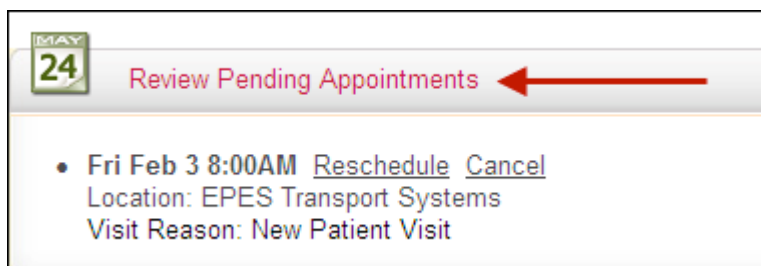
There are **TWO** ways to Re-schedule or Cancel an appointment:
From the homepage:

5 Rescheduling/Cancelling an appointment

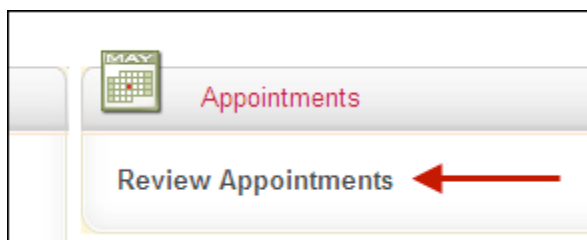
1. Request an Appointment icon
2. View Your Clinic Profile icon



1. Request an Appointment icon –



2. View Your Clinic Profile icon – Click on “Review Appointments”




Click on Reschedule –

MAY 24 Review Pending Appointments

- Fri Feb 3 8:00AM Reschedule Cancel

Location: EPES Transport Systems
Visit Reason: New Patient Visit

The FIRST available time will default. You may use the drop down arrow OR the calendar to choose a different day/time.



Reschedule Appointment

Pending Appointments

- Fri, 02/03/2012 8:00am (EPES Transport Systems) for [New Patient Visit]

Visit Reason [New Patient Visit]

Location [EPES Transport Systems]

Choose your date/time from the drop down below

Appt Date/Time


Estimated duration: 30 minutes.

Tue 01-24-2012 01:00pm


< Jan 2012 >

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				


Comments



Submit




Cancel

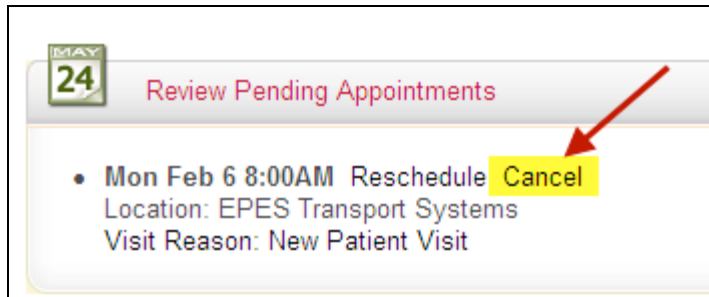


Logout

You will also receive an appointment Reschedule confirmation via email in the format of a calendar meeting request that can be used to update your previous appointment.

Add to Calendar Request Information... Check Calendar Open Meeting Chat ▾	
Calendar Entry Meeting Change noreplywebchart has rescheduled this meeting	
Subject	Concentra Apt - New Patient Visit
When	Date: Monday 02/06/2012 Time: 07:00 AM - 07:30 AM (0 hours 30 minutes)
Where	Location: EPES Transport Systems
Chair	noreplywebchart@med-web.com Sent by: <noreplywebchart@me
Invitees	Required (to):  Adria Boyd/Dallas/HS/Concentra Optional (cc):
<hr/> <p>Date/Time: 02-06-12 08:00am Location: EPES Transport Systems</p> <p>Thank you for scheduling your appointment.</p> <p>You are scheduled to complete the following: [New Patient Visit]</p> <p>Please be sure to Pre-register!</p>	

Click on Cancel –



You MUST enter a Comment in order to cancel appointment.



You will also receive an appointment cancellation confirmation via email in the format of a calendar meeting request that will automatically remove the appointment from your calendar.

Calendar Entry	
Meeting Cancelled noreplywebchart has cancelled this meeting. Your calendar will be updated to reflect this change.	
Subject	Concentra Apt - New Patient Visit
When	Date: Monday 02/06/2012
	Time: 07:00 AM - 07:30 AM (0 hours 30 minutes)
Where	Location: EPES Transport Systems
Chair	noreplywebchart@med-web.com
Sent by	<noreplywebchart@me
Invitees	
Required (to)	Adria Boyd/Dallas/HS/Concentra
Optional (cc)	
<p>When: Monday, February 06, 2012 08:00 AM-08:30 AM (US/Eastern). Where: EPES Transport Systems Provider: Dipert-Scott, Susan, NP ~~~~~</p> <p>This is a REQUIRED field. Please indicate why you are cancelling your appointment.</p>	

6 Logout

😊 😊 Congratulations!

You have successfully scheduled an appointment via your Employee portal! Be sure to click the Logout Icon before exiting! 😊 😊



Logout

7 Questions and Answers

Q – Can I schedule an appointment without registering?

A – No, you will not be able to schedule an appointment without registering.

Q – Can I use the “EPES” website if I do not have an account?

A – Yes, if you do not have an account, the first time you go to the website go to the “Don’t Have an Account?” section and click on Create Account.

Q – What is the No More Clipboard Icon at the bottom of each page?

A - NoMoreClipboard is recognized as one of the top personal health records on the market, based largely on our ability to help consumers compile, manage and share personal health information with physicians and other care providers.

Q – I do not have time to fill the entire Pre-Registration Form out, it is mandatory?

A – Although Concentra prefers the Registration to be filled out as much as possible; we recognize that some people will not have the time when making their first appointment. The only mandatory fields are in the Demographics section of the Pre Registration area. You must fill out the following:

- First Name
- Last Name
- Gender
- Date of Birth

Q – Does Concentra share my information that I place on the “EPES” website?

A – It is Concentra’s policy to never share or sell our participants information. In addition, the HIPAA law of 1996 protects information that covered entities use and disclose. This information is protected health information (PHI), which is generally individually identifiable health information that is transmitted in an electronic format.

Q – Is the Clinic Profile that I see on the “EPES” website the same information that the clinic views?

A – Yes, the information that is put into the “EPES” website is immediately shared with the clinic in real time.

Q – I made an appointment on the “EPES” website and now I need to cancel it. Do I have to call the clinic?

A – No, you do not have to call. You may cancel your appointment within the website. Click on the Request an Appointment OR View Your Clinic Profile icon from the homepage, any current appointments will be listed at the top of the page. Click Cancel on that Appointment. A new screen will display to add in why the appointment is being cancelled. Once the cancel reason is added, click Cancel Appointment.

Q – I made an appointment on the “EPES” website and now I need to reschedule it. Do I have to call the clinic?

A – No, you do not have to call. You may reschedule your appointment within the website. Click on the Request an Appointment OR View Your Clinic Profile icon from the homepage, any current appointments will be listed at the top of the page. Click Reschedule on that Appointment. The scheduler screen will display to reschedule. Choose a new date/time and click Submit.

Q – I need to add information to my profile, how do I do that?

A – You may add information at any time to your profile by clicking on the View Your Clinic Profile from the main screen. All areas that are editable, have an Edit link at the bottom of each section. Once clicked add the information that is required and click Submit.

Q – Can I email the clinic from the “EPES” website?

A – No, we currently do not have email functionality.

Q – Once I register on the website, am I limited to only making appointments on the site?

A – No, you may call or visit the clinic as well for making appointments.

Q - Do I have to be onsite at “EPES” to use the website?

A – No, the website can be accessed from any computer that has internet access.

Q – I am trying to make an appointment for a certain day and time and the option is not visible to me, do I have to do anything different?

A – No, the website will only show you available appointments. If the day and time is not visible then the appointment time has been booked and is not available.

Q – I am receiving the following message when trying to schedule an appointment: “No free times 09/26/2011-09/27/2011. Use calendar to find an open date/time”. I changed the date/time and still got the message.

A – This is usually because the Reason is not selected. Check to see if Reason is missing, if so, please select a Reason and try again. If Reason has been selected, appointments for the specified date/time are not available.

Q – After logging into the “EPES” website, my screen seems to be too large. I am not able to see the entire screen. Is it my monitor?

A – You may want to change your monitor zoom setting to 75%.

Q – I am having issues with the website, is there a help desk I may call?

A – If you have any questions or comments, please contact your local clinic at (336) 665-5985.