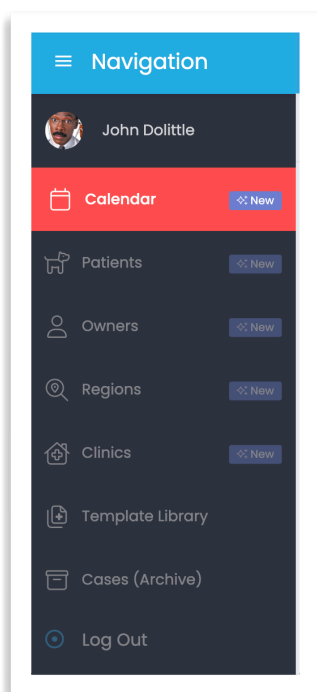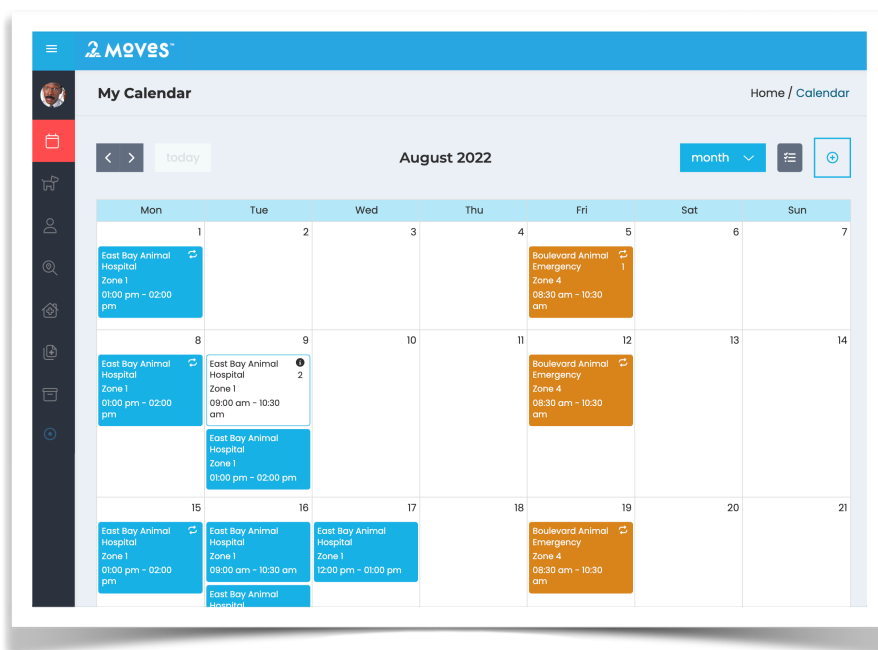# MYMOVES

MOBILE VETERINARY SPECIALISTS®

MyMOVES

*Our cloud-based case management workflow from scheduling through invoicing.*

Upon logging into the MyMOVES web app, the program displays the current-month calendar view of your appointments with many similar elements to the Clinic Portal. Tapping on the ≡ icon at top left opens up the primary navigation window:

- Calendar displays your appointments
- Patients lists your patient history
- Owners lists the owners of your patients
- Regions lists the regions of your service area
- Clinics lists the clinics in your service area
- Template Library is where you manage the default content of your medical reports
- Cases (Archive) is an archival view of appointments seen prior to the launch of version 2.0 of the MOVES app

ℹ️ Cases (Archive) is only relevant to doctors hired before August of 2022.

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Viewing Calendar Rules
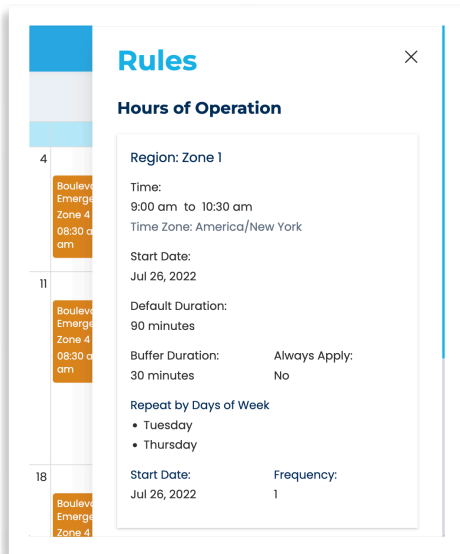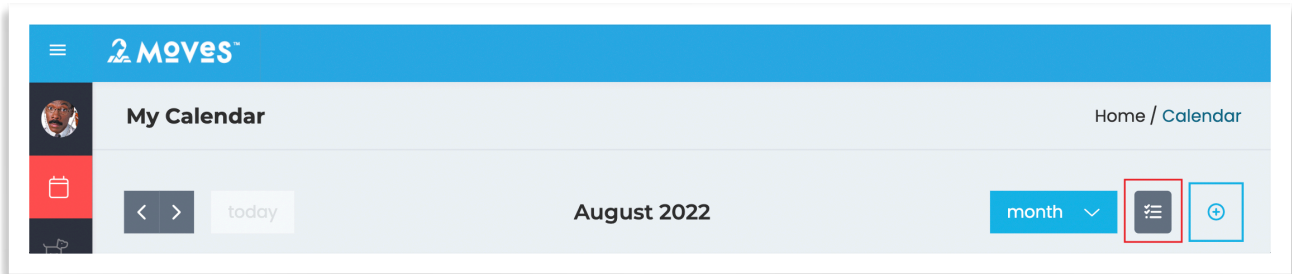
Tapping the Rules button near the top left your Calendar will open up the Rules drawer on the right-hand side of the screen.

ℹ️ Rules are only editable by HQ team members. Doctors and technicians may view but not edit Calendar Rules. If you need to add or update a Rule, reach out to your HQ support team on Slack.

There are three types of Rules:

1. **Hours of Operation**
   These rules govern the days and times you are open to see appointments. They are set on a per-region basis and may include recurrence settings.
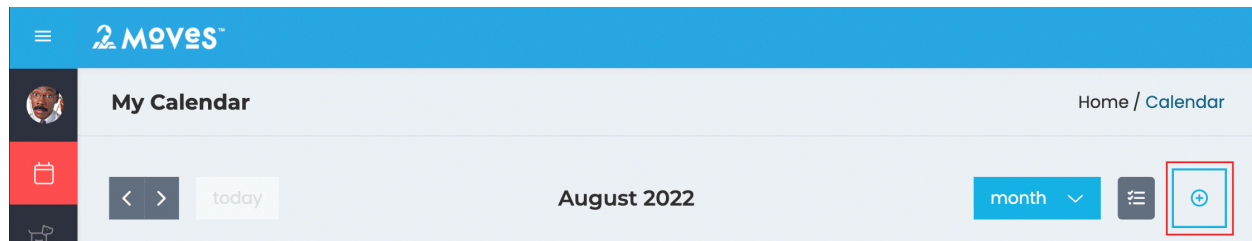
2. **Blocks**
   These rules govern any time during your normal hours of operation when you want or need to prevent clinics from being able to schedule.

3. **Advance**
   These rules how far in advance or on how short notice clinics are allowed to book appointments.
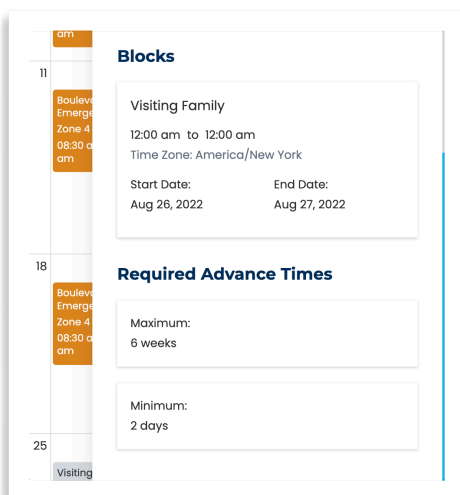
Booking an Appointment

Tapping the ⊕ icon at the top right of your calendar page will open up the New Appointment drawer on the right-hand side of the screen. In most cases, clinics will book their own appointments, but there are circumstances in which you as a doctor or technician user may need to book an appointment on behalf of a clinic, such as custom-booking a date or time which is outside of the clinic's normal Rules, or custom-booking a clinic that belongs in the Restricted region and has no ability to book appointments on their own.

As a doctor or technician user, your experience of booking an appointment is exactly the same as a clinic user's, but with two additional features:

Override

You may check the box labeled "Override My Calendar Rules" if you wish to custom-book an appointment date/time that does not conform to Rules governing the selected clinic. The system will alert you if you are breaking any calendar rules and ask you to confirm your choice.

Scheduling Notes

The scheduling notes field is visible only to MOVES users (not clinics) as a back-door communication method between you and your support team.
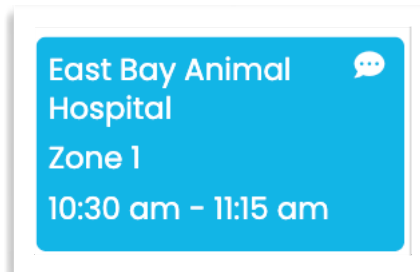
The event card for any appointment that has Scheduling Notes will display a 💬 icon. Tap on the event card to open the appointment details and read/edit the Notes.

Editing Appointments

Tap on any event card in your calendar to open the Appointments drawer and view the details of that appointment. If you need to edit the appointment date, time, or location, click the Edit button to re-open the appointment and make your changes.
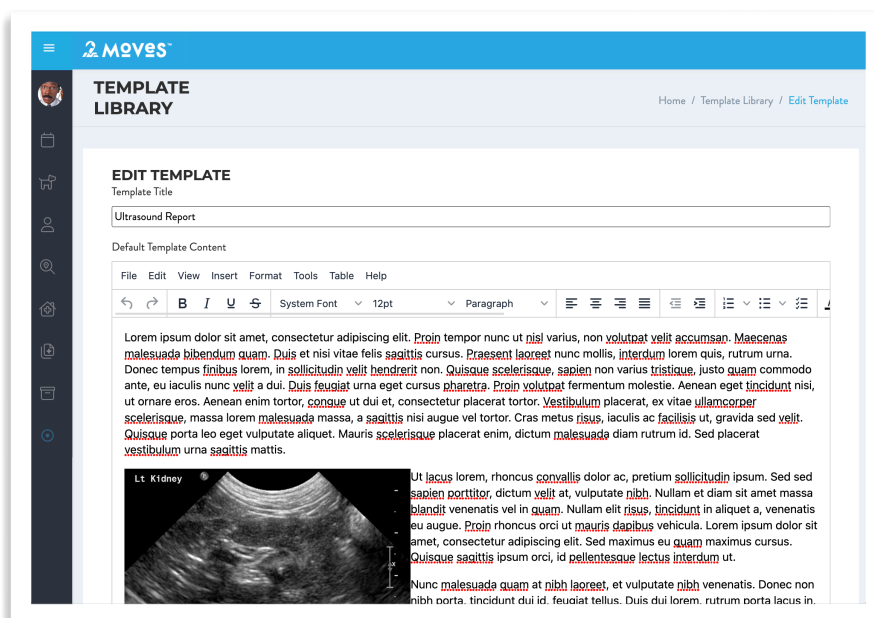
ℹ️ You do not need to edit the appointment in order to submit your reports or your invoice. You can complete these actions by opening up the details for each Patient on the appointment.

Creating and Managing Templates
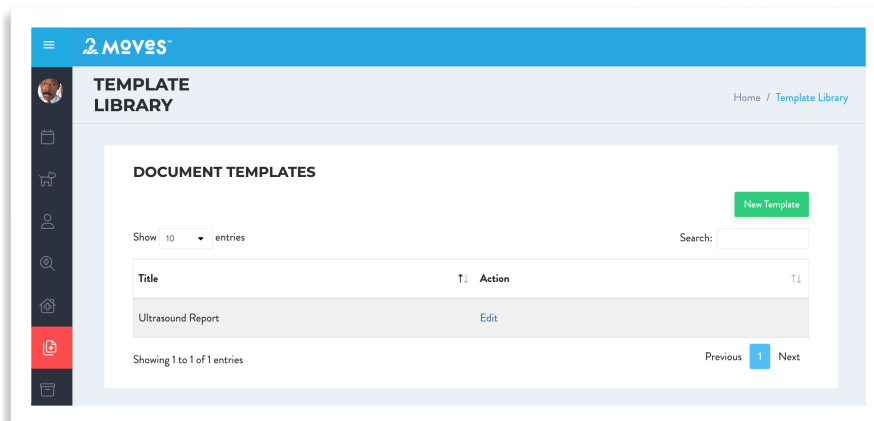
Using the primary left-hand menu, navigate to the Template Library section to view, edit, or create new templates for your medical reports.

Creating or Editing a Template will lead you to a stereotypical word-processing interface where you can compose your templates with the same type of formatting tools common to rich-text applications such as Word, Pages, or modern email clients.

You can create as many templates as you need, and all of the templates in your library will be available to you as a starting point for the Reports you write for any given patient.

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## Writing Reports for a Patient
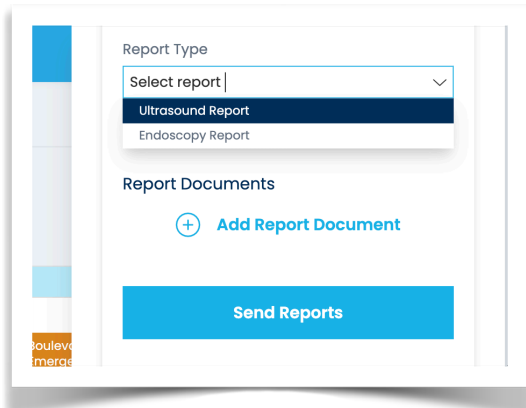
When you are ready to compose your report(s) for a patient encounter, the app gives you two options:

1. Select a template from your template library and fill it in.

2. Compose your report in a third-party application such as Word or Pages and then attach it in PDF format.

ℹ️ The advantage of using the template system is that you can come back and revise your report(s) after the fact. Documents attached from a third-party application must be deleted and re-uploaded in order to revise. Uploaded report documents are great for for including lab results and other relevant findings/documents from outside sources.

Filling In a Template Report

Once you select an available template from the drop-down menu, the "Fill In Report" link becomes active. Click that link to begin editing/completing your report.
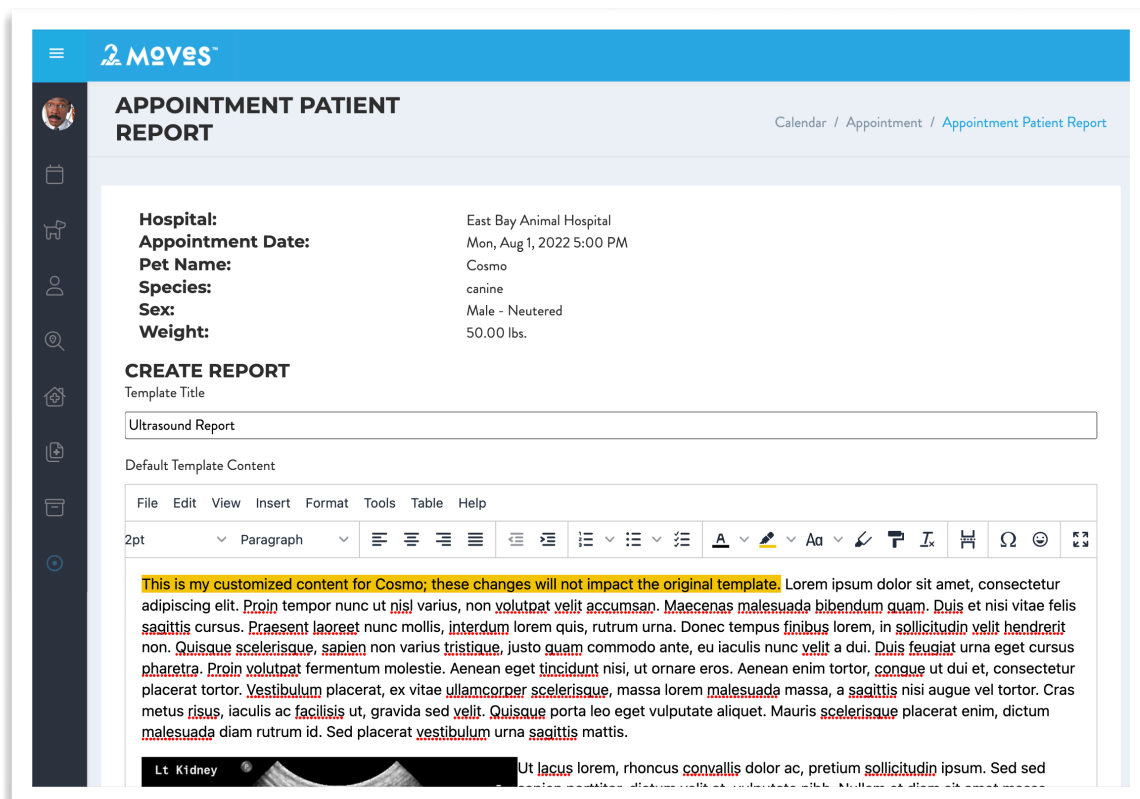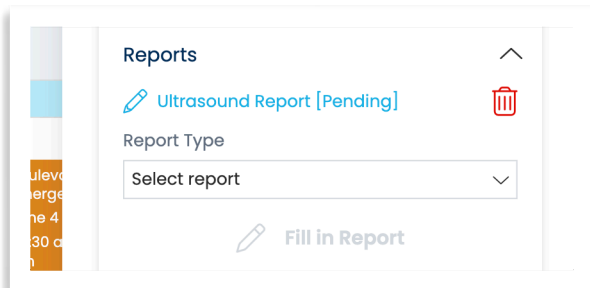
You may begin working on your report in advance of the appointment, save your work, and come back to finish it when ready. After saving your edits, a link to the report will appear on the patient record and [Pending] indicates the report has not been sent yet.
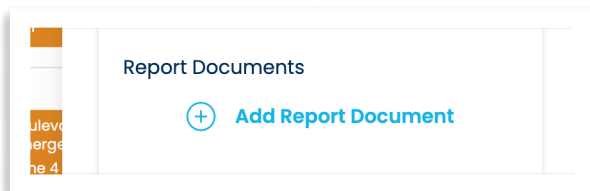
Attaching External Documents
If you need to attach a document other than a template-generated report, use the ⊕ Add Report Document link to upload a file from your iPad or other device.
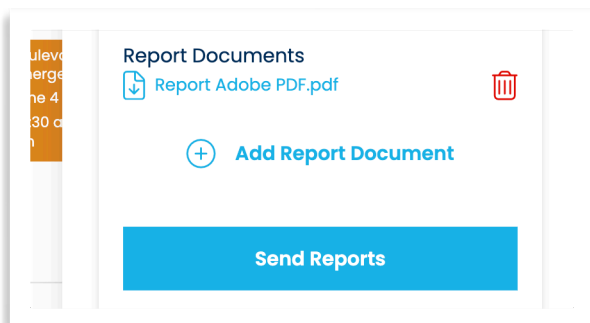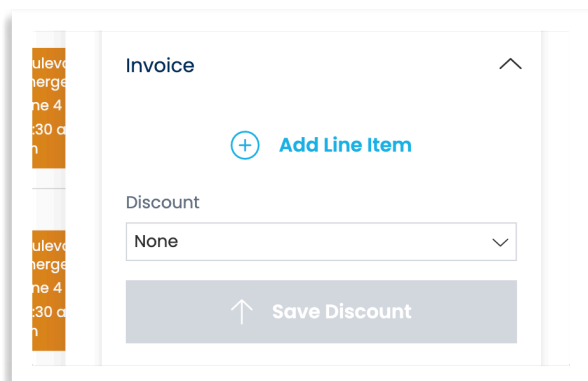
Once uploaded, the document is accessible through a link and may also be deleted from the patient record.

Submitting Reports to Clinic
Once you're ready, click the Send Reports button to submit your reports to the clinic via email. Allow the app a few moments to process and look for a success message.
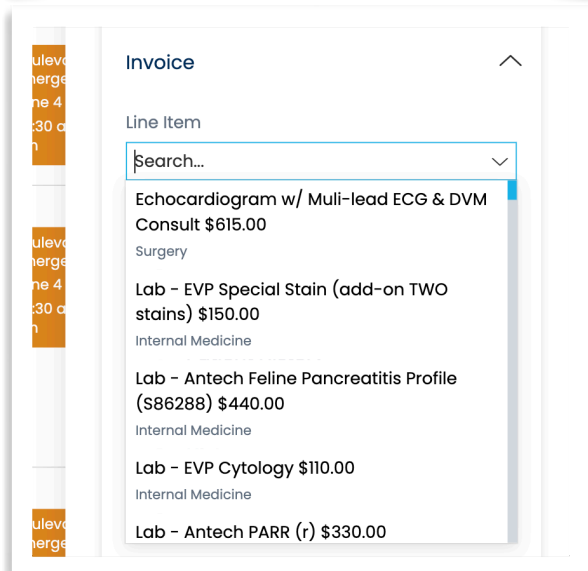
Invoicing

ℹ The invoice you prepare in the app does not go to the clinic. It is a pro-forma invoice that goes to the MOVES billing department at HQ. The information is reviewed for accuracy before entry into our bookkeeping system and delivery to the clinic.

Invoices are composed of Line Items and Discounts. You can add as many line items as needed but you may only select one type of Discount.

Tap the ⊕ Add Line Item link to open up the line item search and choose the service(s) you are billing for, adding them to your invoice one at a time.
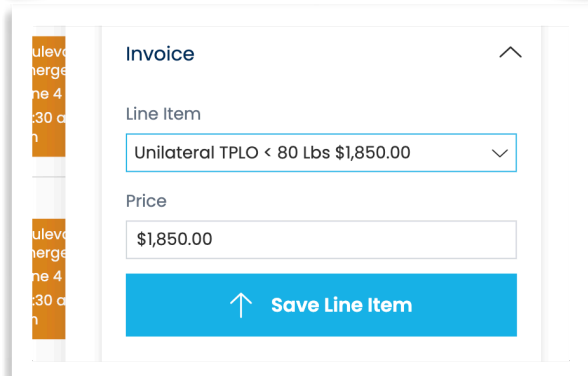
ℹ Type to search; don't scroll.

⚠ Roadmap: the app currently displays line items assigned to you plus "global" items available to all doctors. We are going to further limit this by department so you only see global items relevant to your department.

Once you've selected a line item from the drop-down menu, the application will display your default price for this service. If you are going to apply any discounts, do not manually change the price here - this should be the price *before* discounting. If you need to change the price for any other reason, you may edit the price here.

ℹ Changing the price for an individual patient will not change the default price for this line item.

Confirm the Line Item and Price look good, and click Save Line Item to add it to the invoice for this patient.

MOVES supports three standard discounts:
- 10% for Rescue Organizations
- 20% for Staff Pets
- 30% for DVM Pets

ℹ️ Restricted Class production line items are ineligible for discount and will always be billed at full price.

Select "Other" if you need to enter a custom discount amount, and the app will prompt you to enter a reason for the custom discount, the value of the discount, and whether to apply the discount as a percentage or dollar amount.

Once your discount information looks correct, click Save Discount to add it to the invoice for this patient.

Once all of your line items and discounts are saved, click Generate and Send Invoice. Confirm your choice when prompted, allow the system a moment to process, and look for a new link to a PDF copy of the invoice once finished.

That invoice document is visible to MOVES users only; the clinic cannot see it.

Clinic Portal Overview

The **Login Screen** is where clinics will land after clicking the link for their hospital from the referral page. There is no username required because each clinic portal has a unique URL. They can sign in using their clinic code.

🛣 Roadmap: to improve security, we plan to transition clinics to a more traditional user name + password system.

Cases Tab
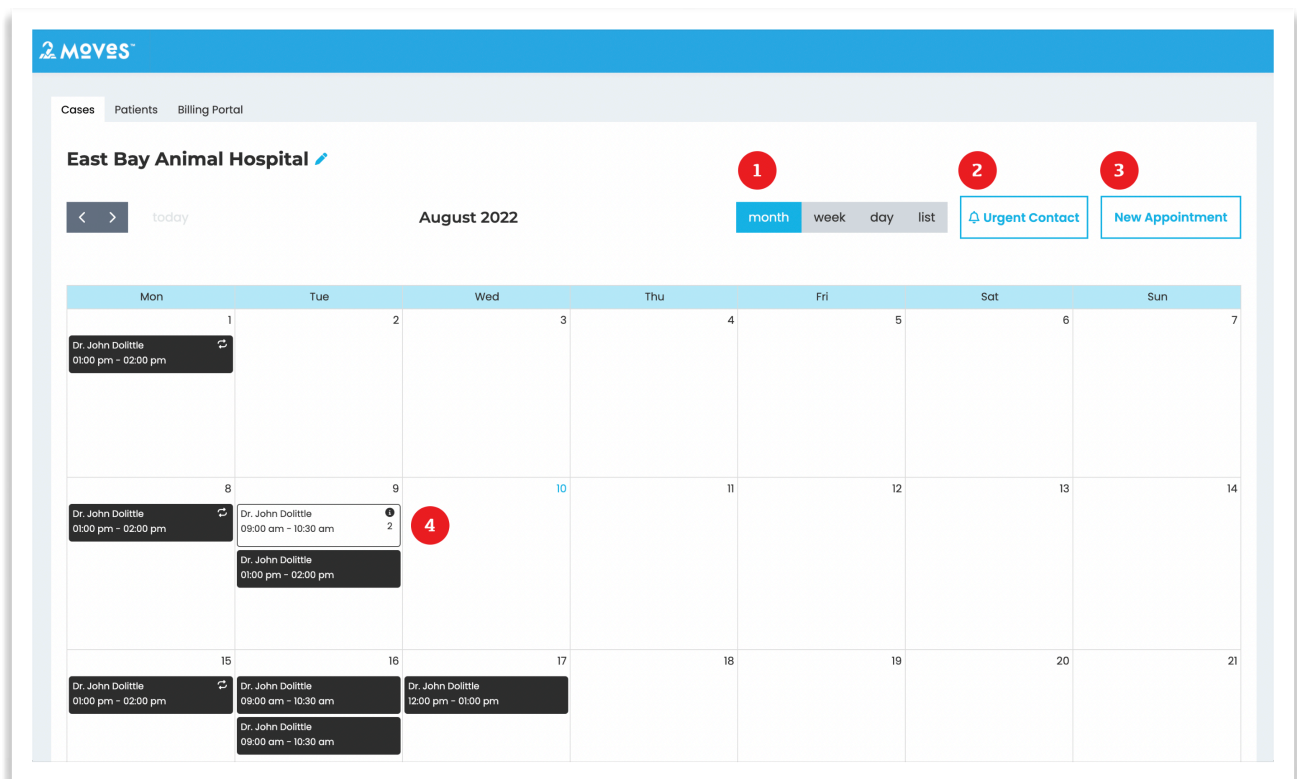
1. Upon logging in, clinics will see a calendar view of their upcoming/past appointments; they can view the calendar in month, week, day, or list format.

2. If clinics wish to book a same- or next-day appointment with you but don't have an available appointment spot, they can use the Urgent Contact button to submit a

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request via text message.

🛣 Roadmap: we plan to add time/day configurations around the Urgent Contact feature to better manage when clinics may reach out to you.

3. Clinic users can click the New Appointment button to begin scheduling a new appointment with you.

4. Upcoming and past appointments display as event cards on the calendar interface. All event cards will display the name of the MOVES doctor scheduled to appear and the start/stop time of the appointment. Some event cards may display additional iconography:

    🔁 indicates a Recurring Appointment
    ⓘ indicates one or more patients needs records.
    2 indicates the number of patients attached to the appointment.

Booking a New Appointment

When a clinic user clicks the New Appointment button, the appointment drawer opens on the right side of the screen.
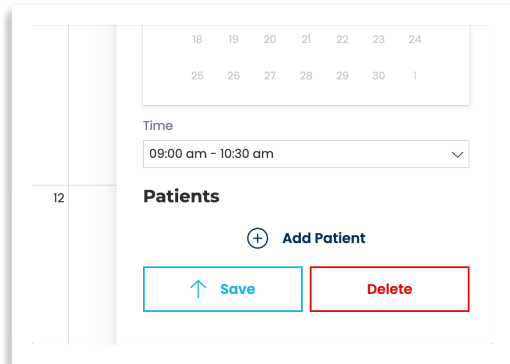
First, the clinic user will choose which MOVES doctor they are booking.

Once this selection is made, the system loads the date picker with available appointment days based on this combination of doctor and clinics.

Once a date is chosen, the system loads available appointment times for that day.

After selecting the doctor, day, and time, the clinic user will click the Create button to book their appointment and they can begin adding patients.

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Adding Patients

After saving the appointment, the page reloads to the Edit view of the appointment drawer, and the clinic user has the ability to click the Add Patient link.
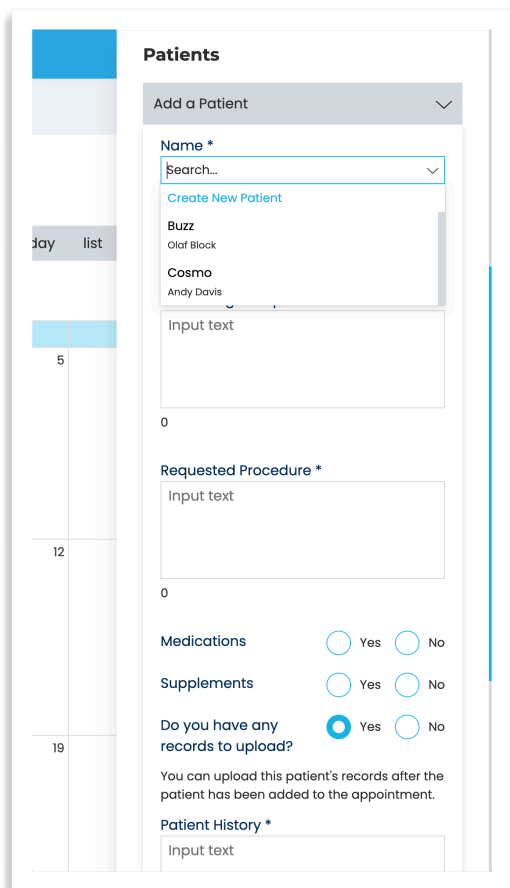
Clinics may elect to create a new patient, or add an existing patient to the appointment.

ℹ Clinics only have visibility to patients who have been treated at their hospital before.

To finish adding the patient to the appointment, the clinic user must complete the following fields:
- Appointment type (e.g. consultation or procedure)
- Presenting Complaint
- Requested Procedure
- Medications (if any)
- Supplements (if any)
- Records/Attachments (if any)
- Patient History

ℹ Because records/attachments must be stored in relationship to a combination of Patient and Appointment, we have to complete the process of adding the patient to the appointment before the clinic can attach records.

Patients Tab

In the Patients tab, clinic users can view or edit basic information about the patients they have referred to a MOVES specialist. Within an individual patient records, they can also expand the Appointments section to view a complete history of appointments for that patient and jump to the records associated with that particular encounter.
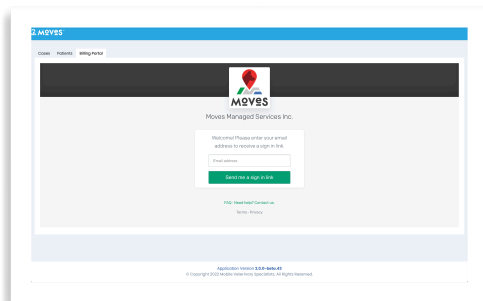
Billing Portal Tab

In the Billing Portal tab, clinic users can enter the email address associated with their accounts payable department, and that will trigger a message sent to that address with a unique sign-in link to view and manage their invoices, payment methods, and other preferences.