PENCIL ME IN NOW

User Manual * Version 2 * Updated April 2016

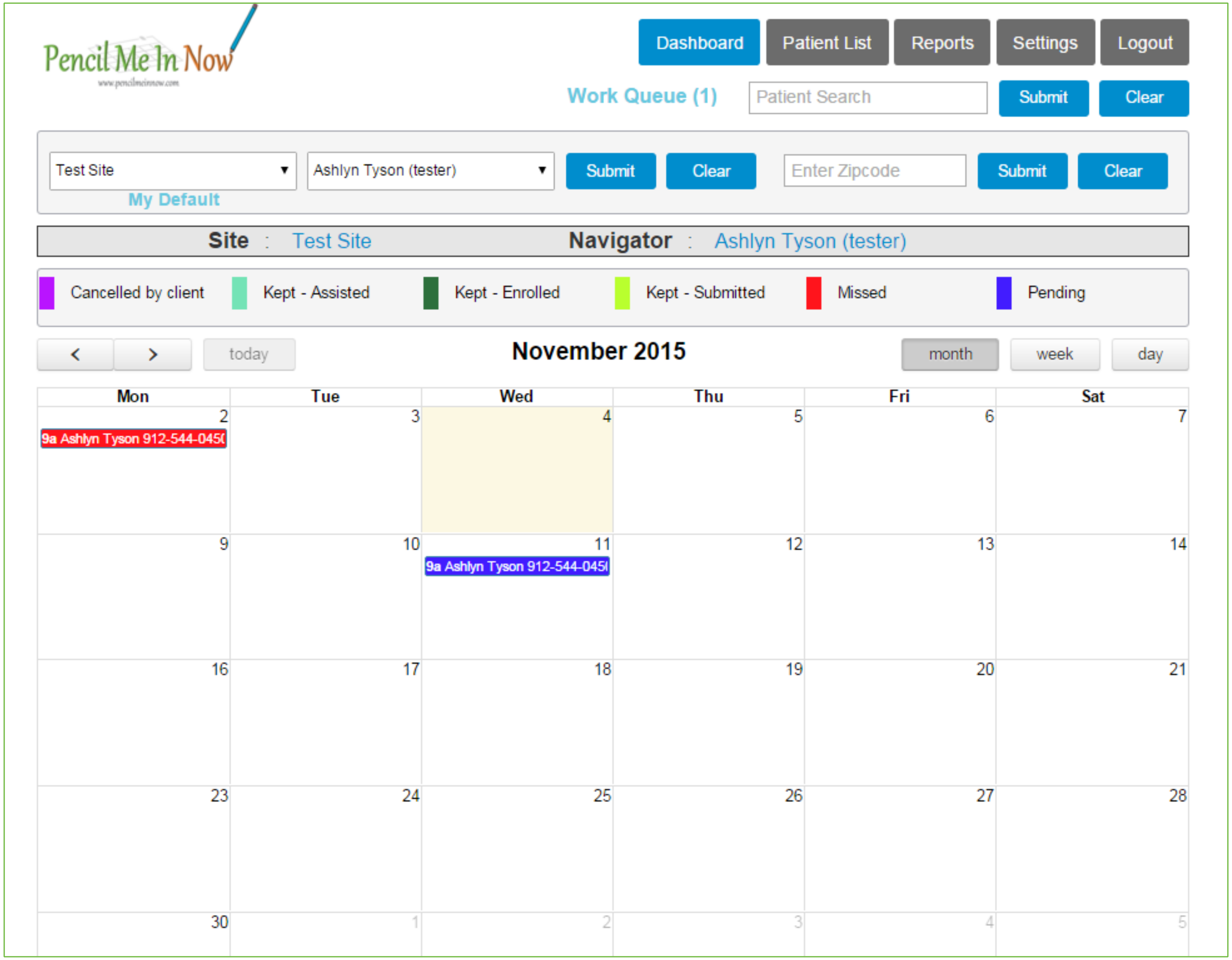
Table of Contents

DASHBOARD

Dashboard

The *Pencil Me In Now* Dashboard allows you to set appointments for patients as well as provide an overview of the schedule. On this Dashboard Screen, you will notice the options available to you.

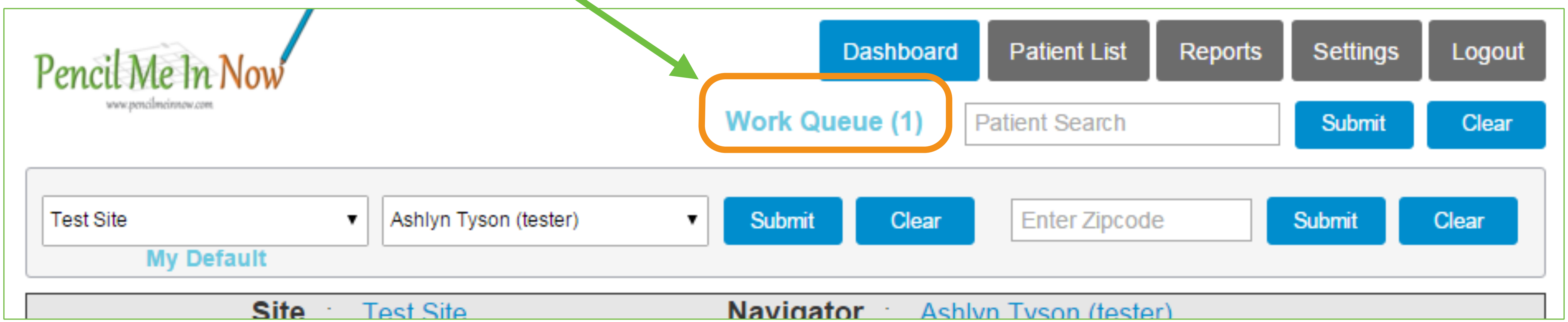
Overview of *Pencil Me In Now*:



Work Queue

If a patient sends a request via the healthcare center's website, that inquiry is sent to a ***Pencil Me In Now*** administrator who will then assign the inquiry to a navigator. That inquiry will be displayed here (in the Work Queue) with the patient contact information so you can reach out to schedule an appointment. The Work Queue may not be displayed if there are no inquiries pending for you.

Location of the Work Queue:

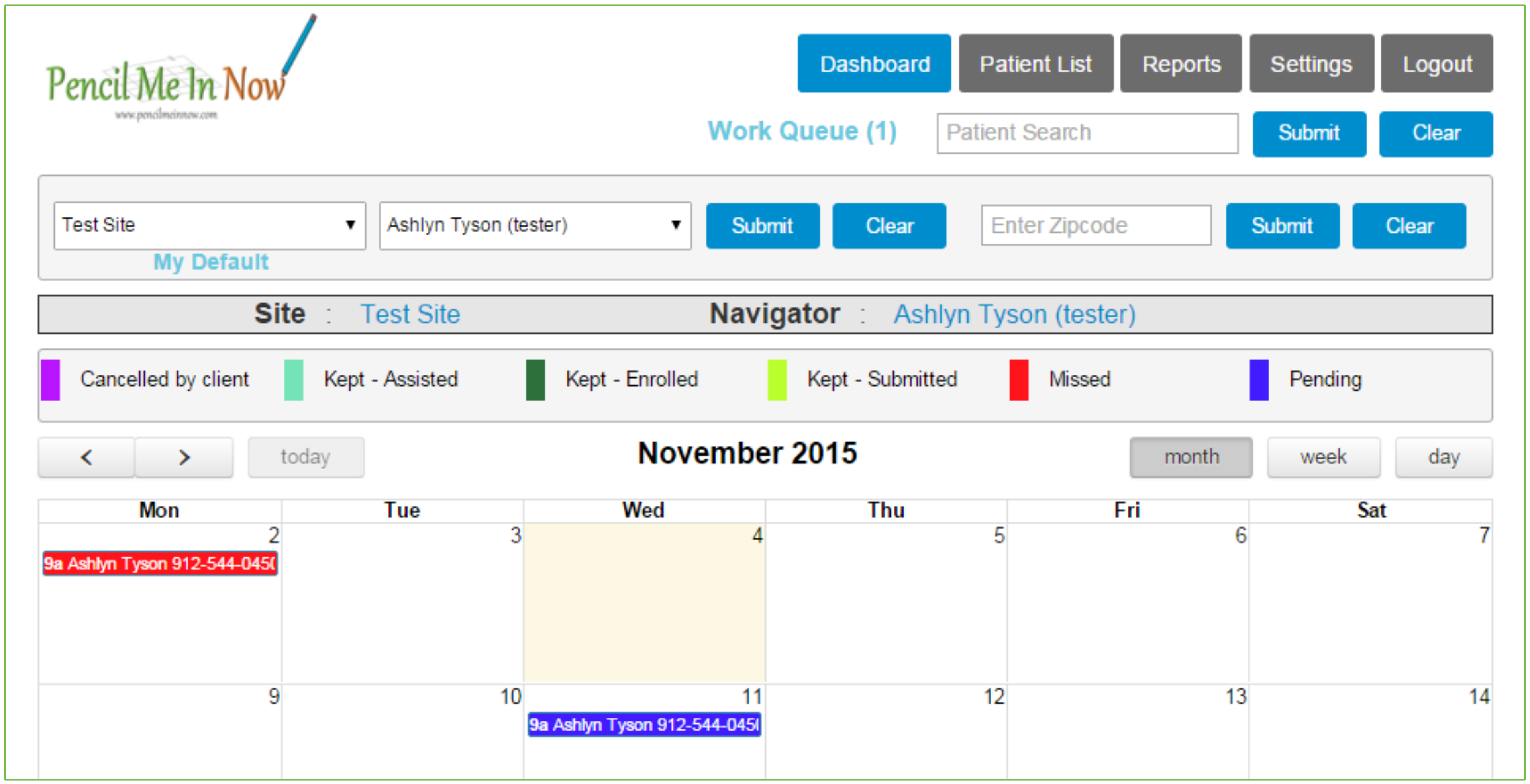


You will be able to search other sites and navigator's calendars to view availability. If you need to schedule a patient for another navigator, you can select their site to view when they have time available for an appointment.

Making Appointments

The calendar is color-coded so you will know the status of every appointment that is booked. Each color represents a different status. All appointments made in the future will be dark blue. Any missed appointments will be red. The appointments canceled by the client will be purple. Kept appointments can have three different status: Kept – Assisted, Kept – Submitted, and Kept – Enrolled. Each Kept status will be represented in a different shade of green.

Overview of the Color Code Key:



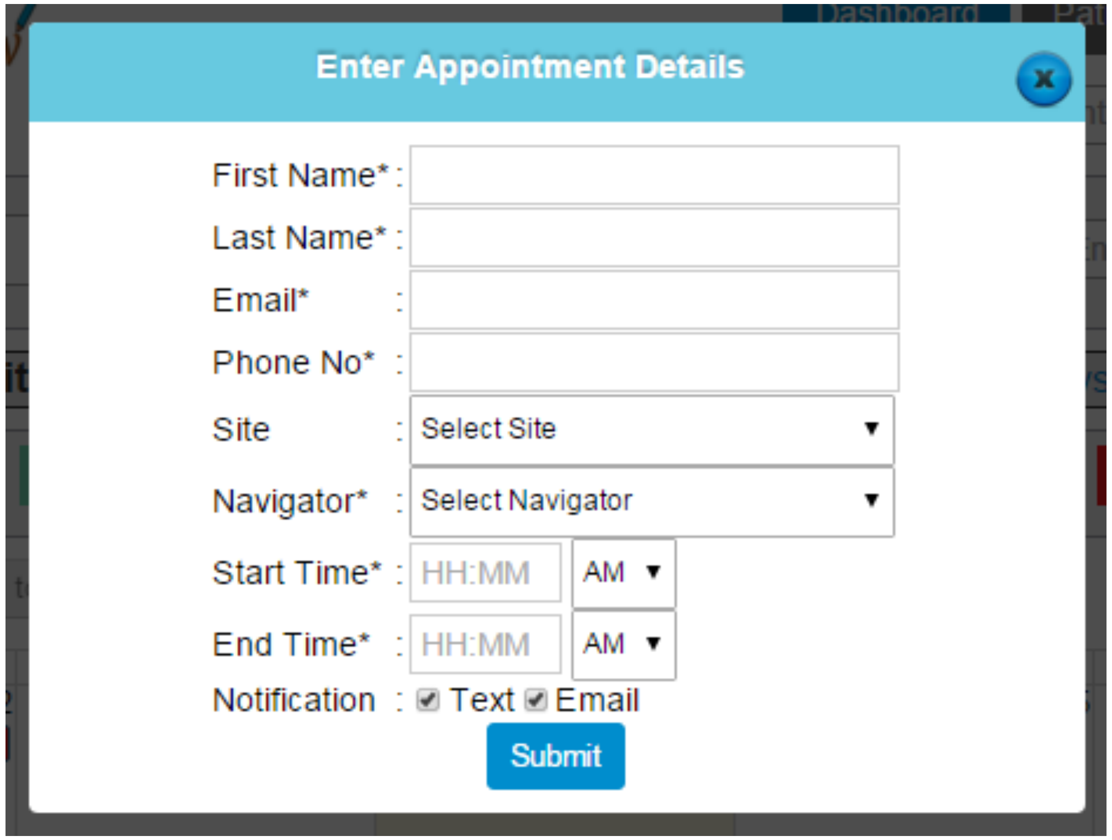
- **Dark Blue:** future appointments
- **Red:** missed appointments
- **Purple:** appointments canceled by the client
- **Greens:** kept appointments (three versions: assisted, submitted, and enrolled)

Making Appointments

- Double-click on the day you wish to make an appointment.
- **Enter Appointment Details** in the pop-up window.
- Select appointment notifications (sent via text or email).

When you are adding the appointment time, please add the Start Time in a format such as, 09:00 AM. The End Time will automatically populate to 15 minutes. You can override this populated time if extra time is needed.

Overview of the Enter Appointment Details Window:



All fields for this appointment must be completed in order to successfully submit the appointment. If you do not know the patient's phone number and email address, please enter your own to satisfy these requirements.

You can change this information later if needed.

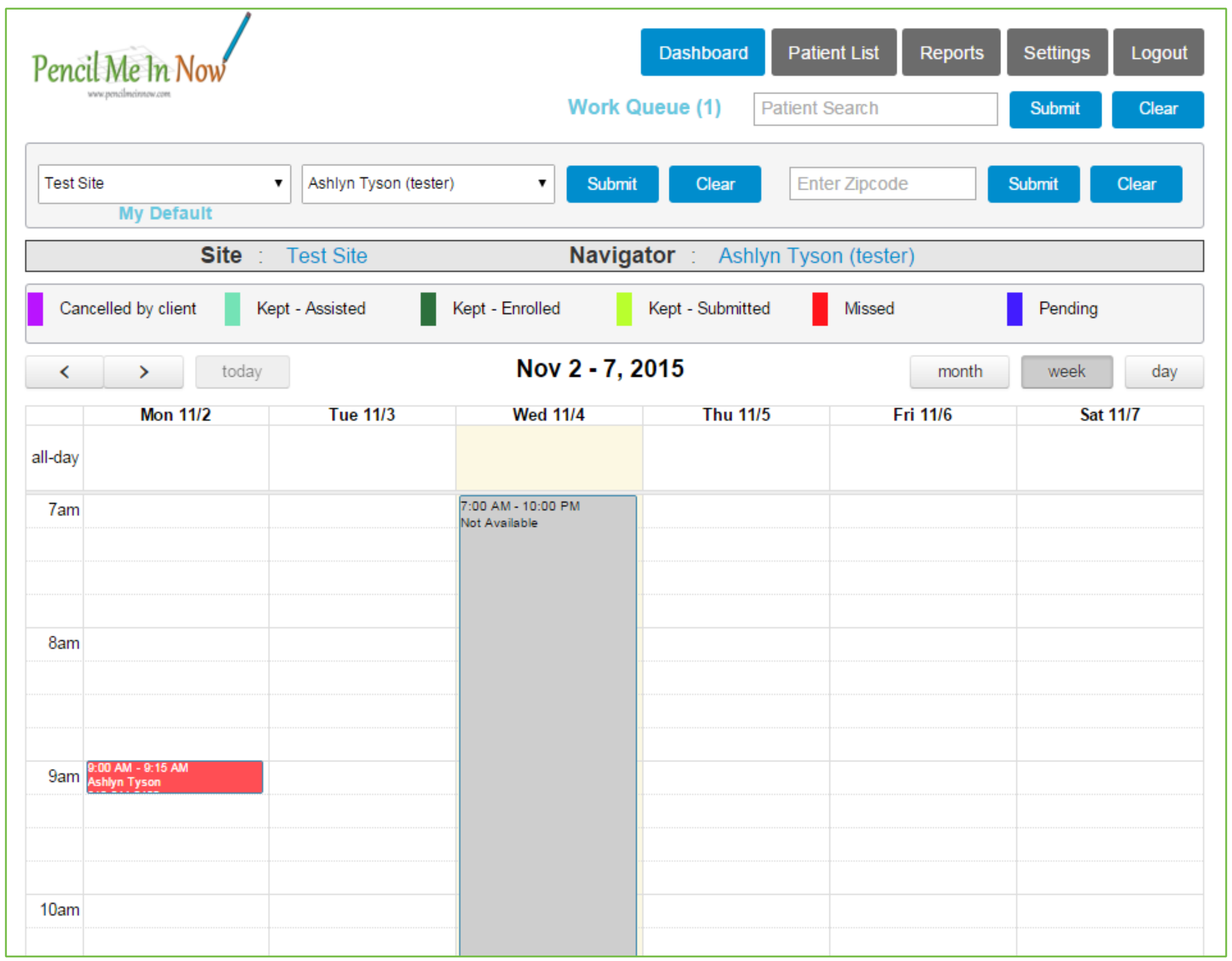
Making Appointments

After the appointment has been entered, navigate to the calendar where you will see the appointment displayed. You can enter an appointment for any time in the future, but you only will be allowed to enter an appointment up to seven days in the past.

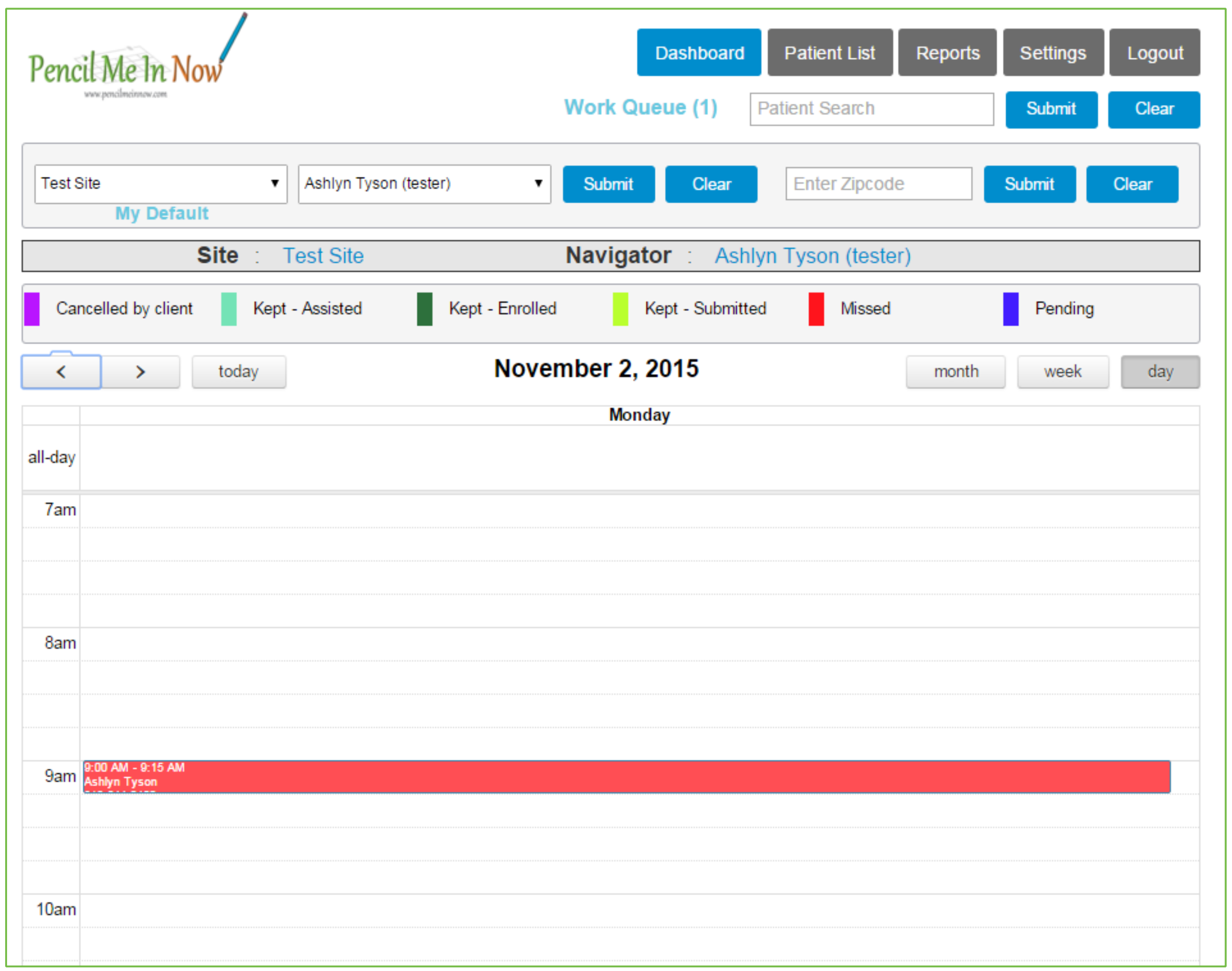
In addition to the default month view, you can view the calendar in a week or day view as well.

To view information about a currently scheduled appointment, roll the mouse over the appointment or for additional details double-click the appointment.

Overview of the Week View:



Overview of the Day View:

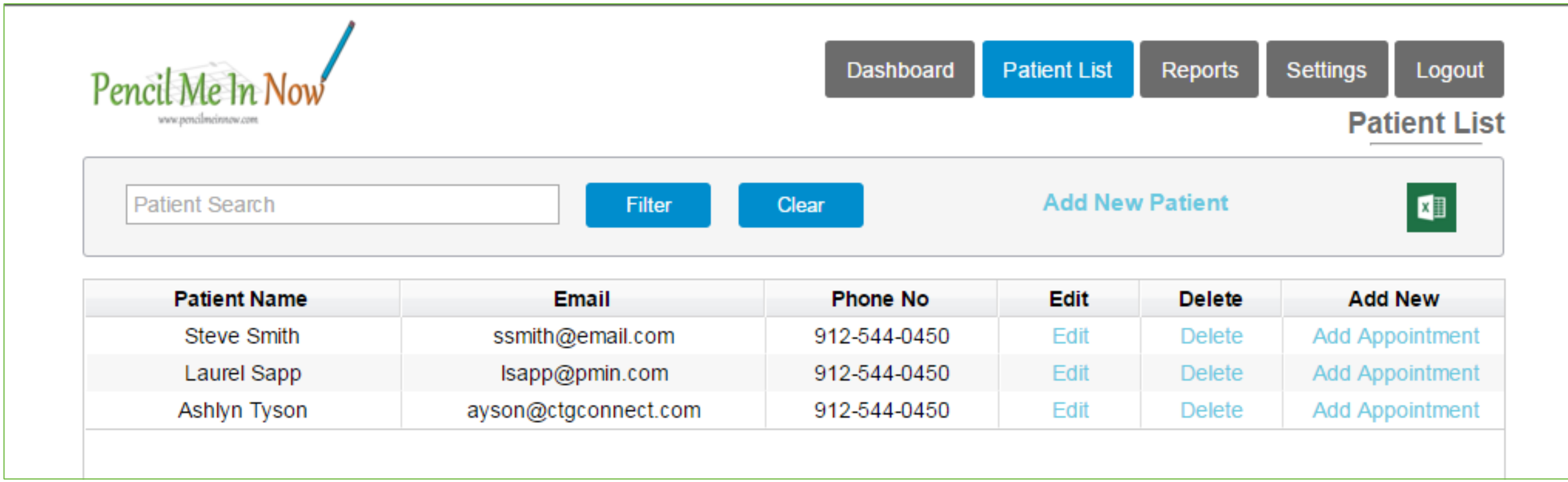


PATIENT LIST

Patient List

The Patient List shows the patients that you have entered into the system. Here you have the option to search a patient by name, add a new patient, edit patient details, delete a patient, add an appointment for an existing patient, or export the patient details to Excel if needed.

Overview of the Patient List:

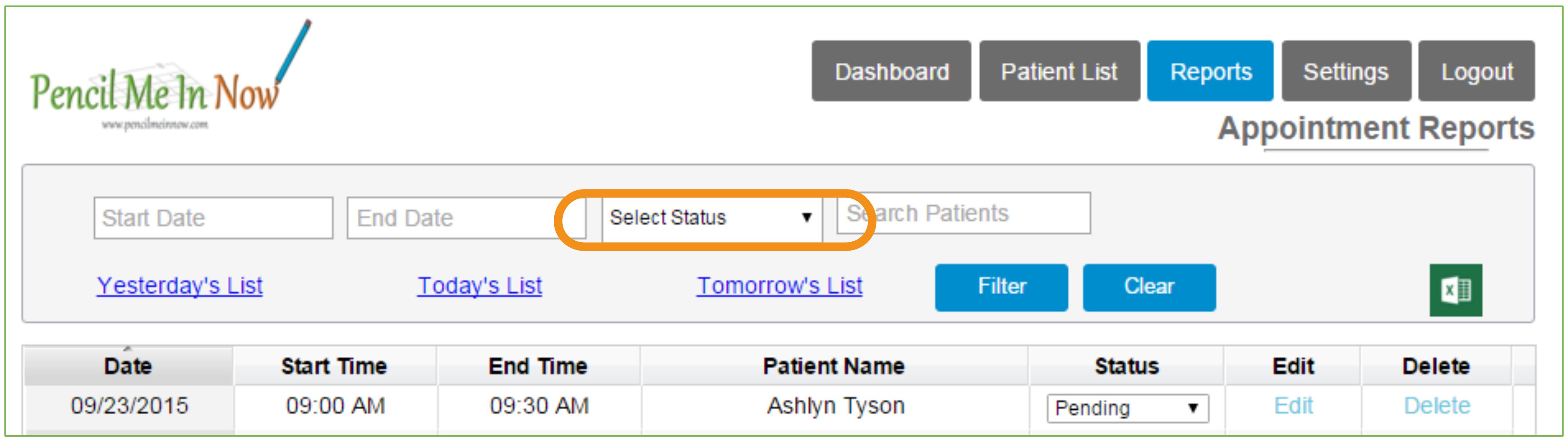


REPORTS

Appointment Reports

The Report tab is very beneficial for data review. You can set the status of the appointments for the patients as needed. Also, you can sort or view the appointments for yesterday, today, or tomorrow. An Excel export is available here as well.

Overview of the Appointment Reports:



Changing a Status

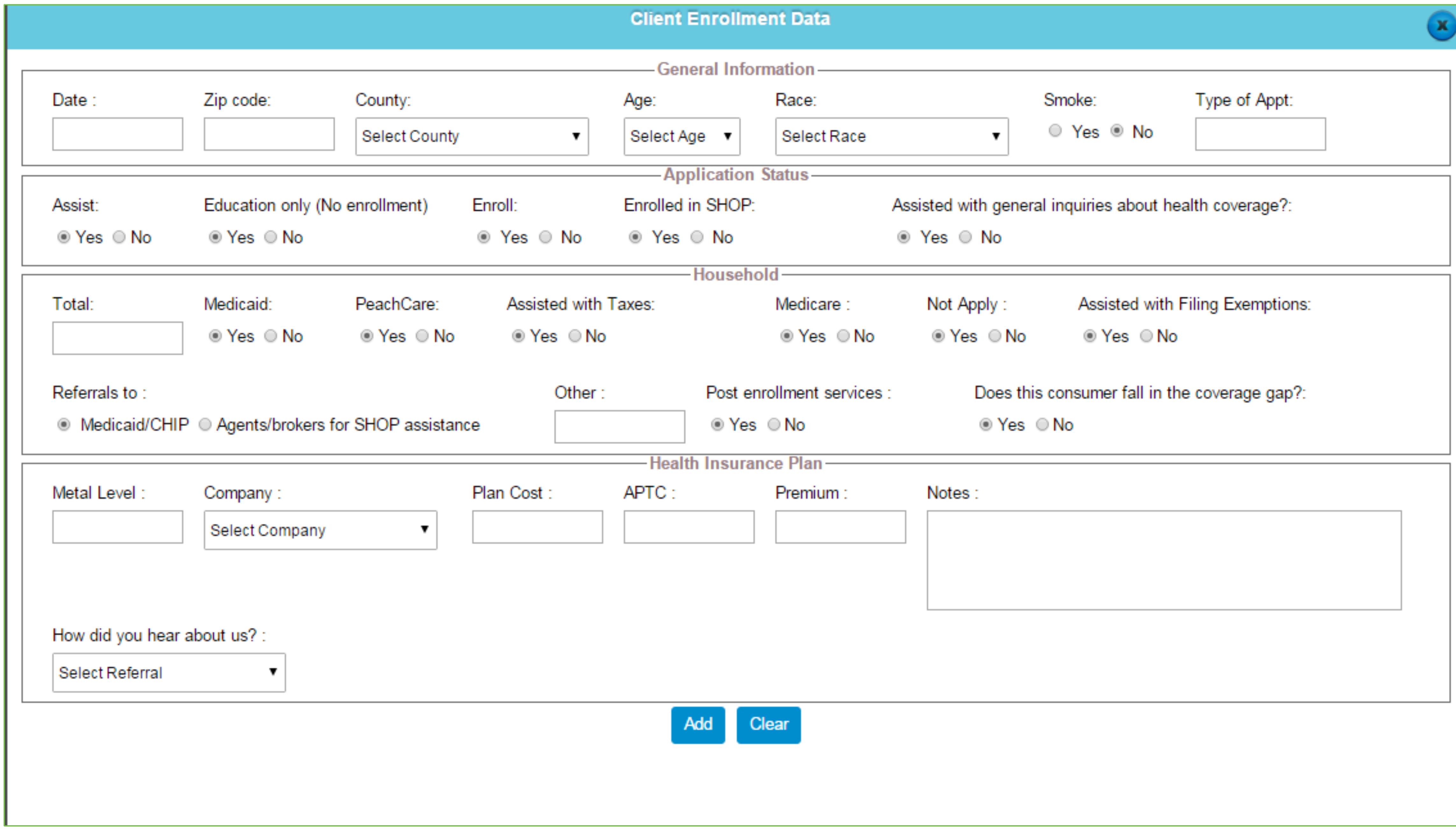
To update the status of a patient, simply select the drop-down field that is seen in the status column. Any status that is set to Kept-Assisted, Kept-Submitted, and Kept-Enrolled will prompt you to complete the Client Enrollment Data form.

(See circled above in orange)

Client Enrollment Data Form

The Client Enrollment Data form allows you to capture some demographic details about the patient’s lifestyle and insurance plan. The fields are not required but please complete as many as possible. This information will be used in future reports. To report from this data, refer to the Client Enrollment Data Report on Page 17 of this manual.

Overview of the Client Enrollment Data Form:



Client Enrollment Data

General Information

Date : | Zip code: | County: Select County | Age: Select Age | Race: Select Race | Smoke: Yes No | Type of Appt:

Application Status

Assist: Yes No | Education only (No enrollment) Yes No | Enroll: Yes No | Enrolled in SHOP: Yes No | Assisted with general inquiries about health coverage?: Yes No

Household

Total: | Medicaid: Yes No | PeachCare: Yes No | Assisted with Taxes: Yes No | Medicare : Yes No | Not Apply : Yes No | Assisted with Filing Exemptions: Yes No

Referrals to : Medicaid/CHIP Agents/brokers for SHOP assistance | Other : | Post enrollment services : Yes No | Does this consumer fall in the coverage gap?: Yes No

Health Insurance Plan

Metal Level : | Company : Select Company | Plan Cost : | APTC : | Premium : | Notes :

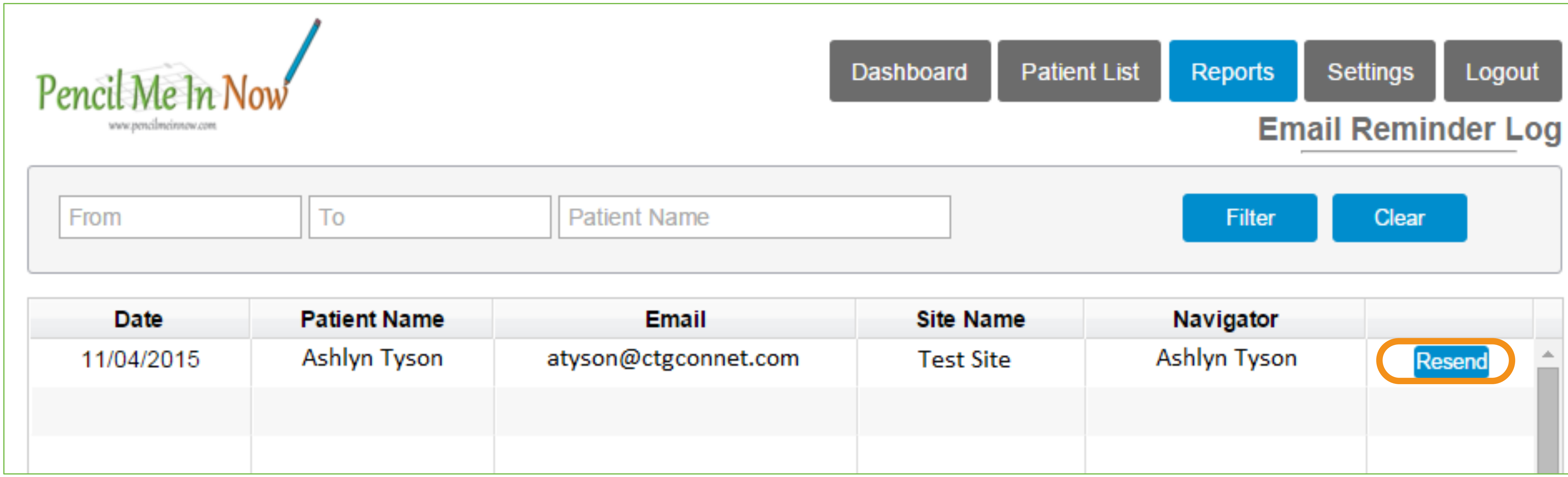
How did you hear about us? : Select Referral

Add Clear

Email Reminder Log

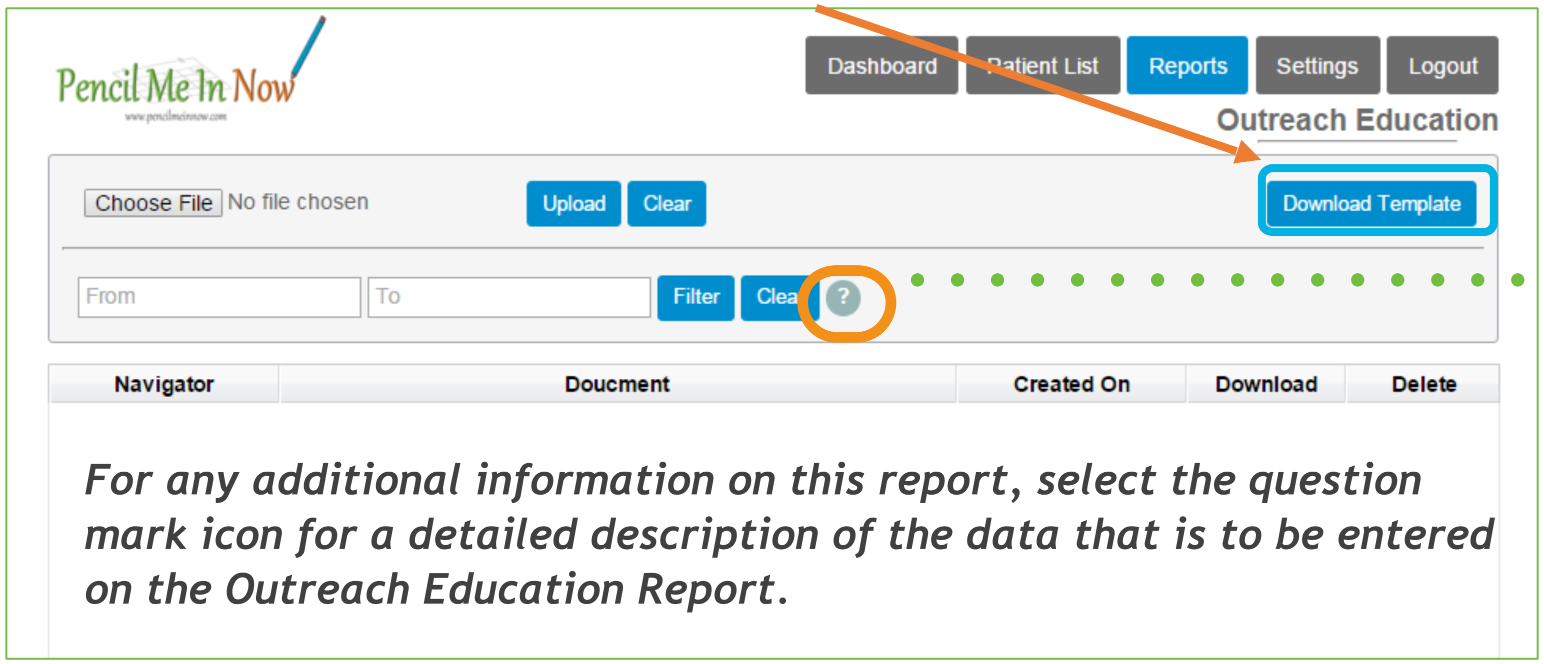
The Email Reminder Log is a history of the email notifications that were sent to the patients/navigators. If you need to resend a notification, that can be done here (see below circled in orange).

Overview of the Email Reminder Log:

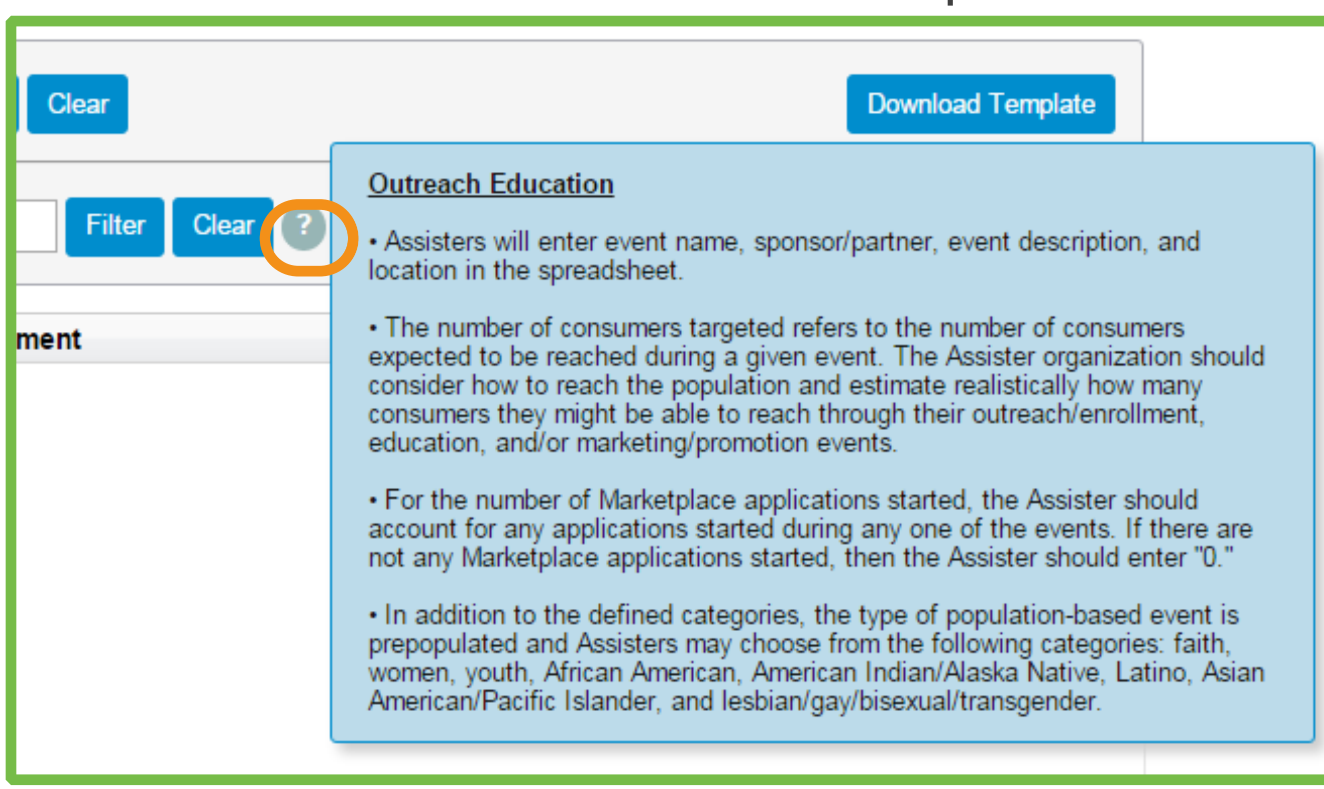


Outreach Education

This report allows you to download the template and add information about the event(s) in which you will be participating. To download the template, choose the "Download Template" button on the right of the screen.



Overview of the Outreach Education Report details:



Outreach Education

Overview of the Outreach Education Report:

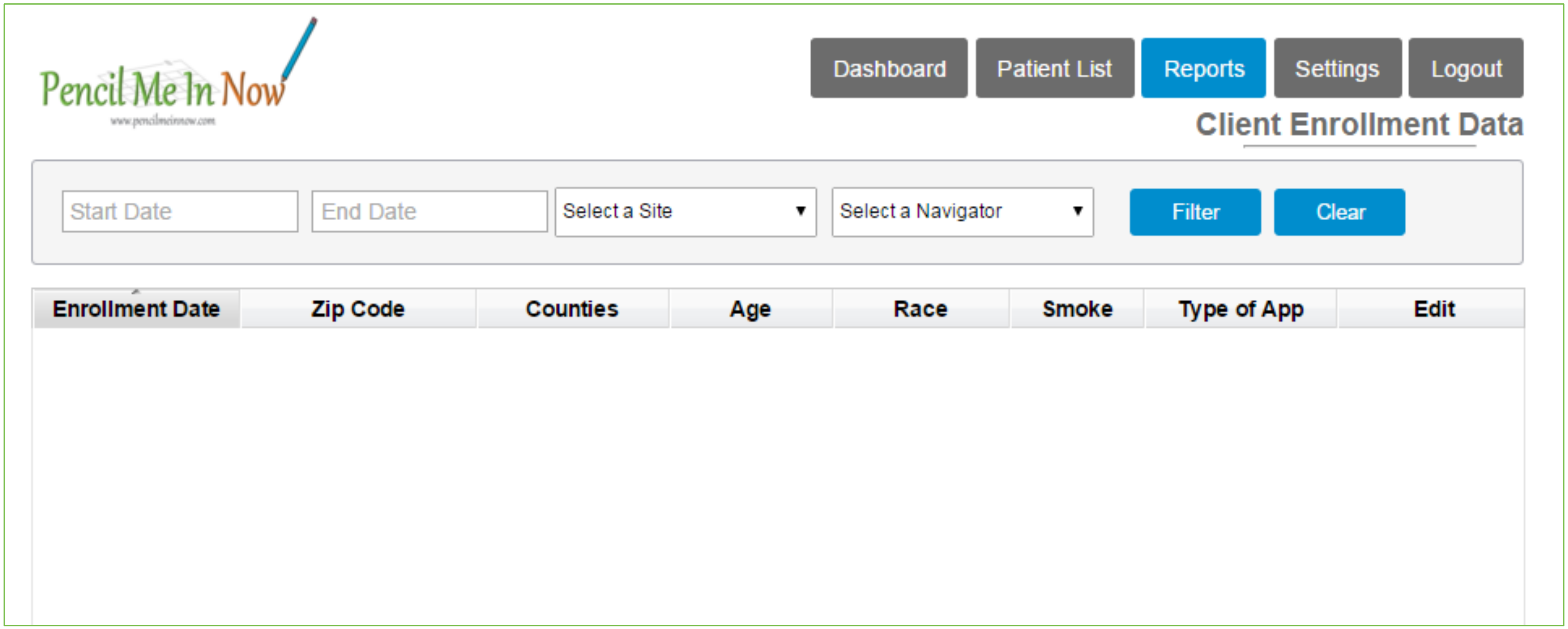
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	
1													Population-Based Activity										
2	Date	Type (Outreach, Education, or Marketing)	Event Name	Sponsor/Partner	Event Description	Location Name	Street Address	City	State	Zip Code	Number of Consumers Targeted	Number of Marketplace Applications Started	Faith based	Women	Youth	AFR AM	AI/AN	Latino/ Hispanic	AA/PI	LGBT	POC Name	POC Phone	PO
3																							
4																							
5																							
6																							
7																							

Upon completion of the report, you have the ability to securely upload a copy of the report into ***Pencil Me In Now*** *for safekeeping.*

Note: Only the author of the report has access to this information.

Client Enrollment Data

The Client Enrollment Data that was previously recorded on the Appointment Report will populate on this report without any patient specific details to include: name, phone number, and email address. Only the demographic information that was collected will display here to allow for easy reporting.

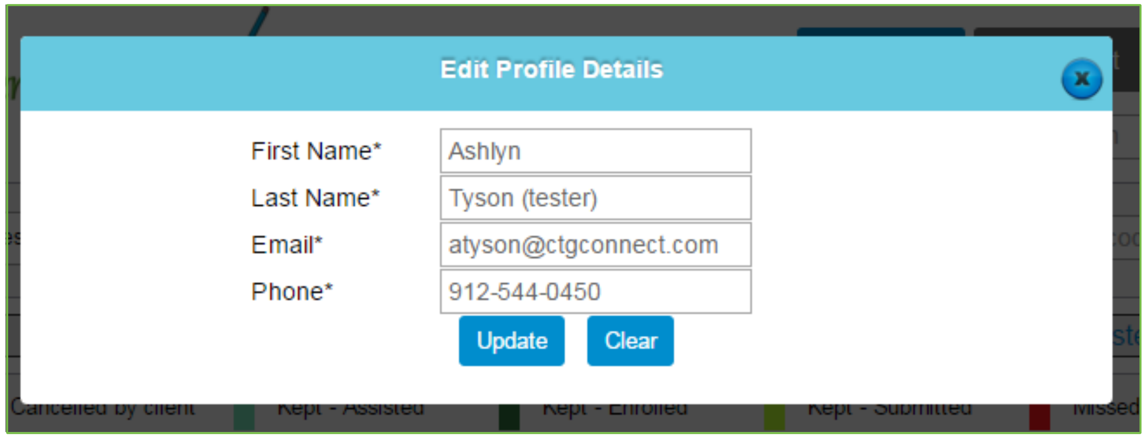


SETTINGS

Edit Profile

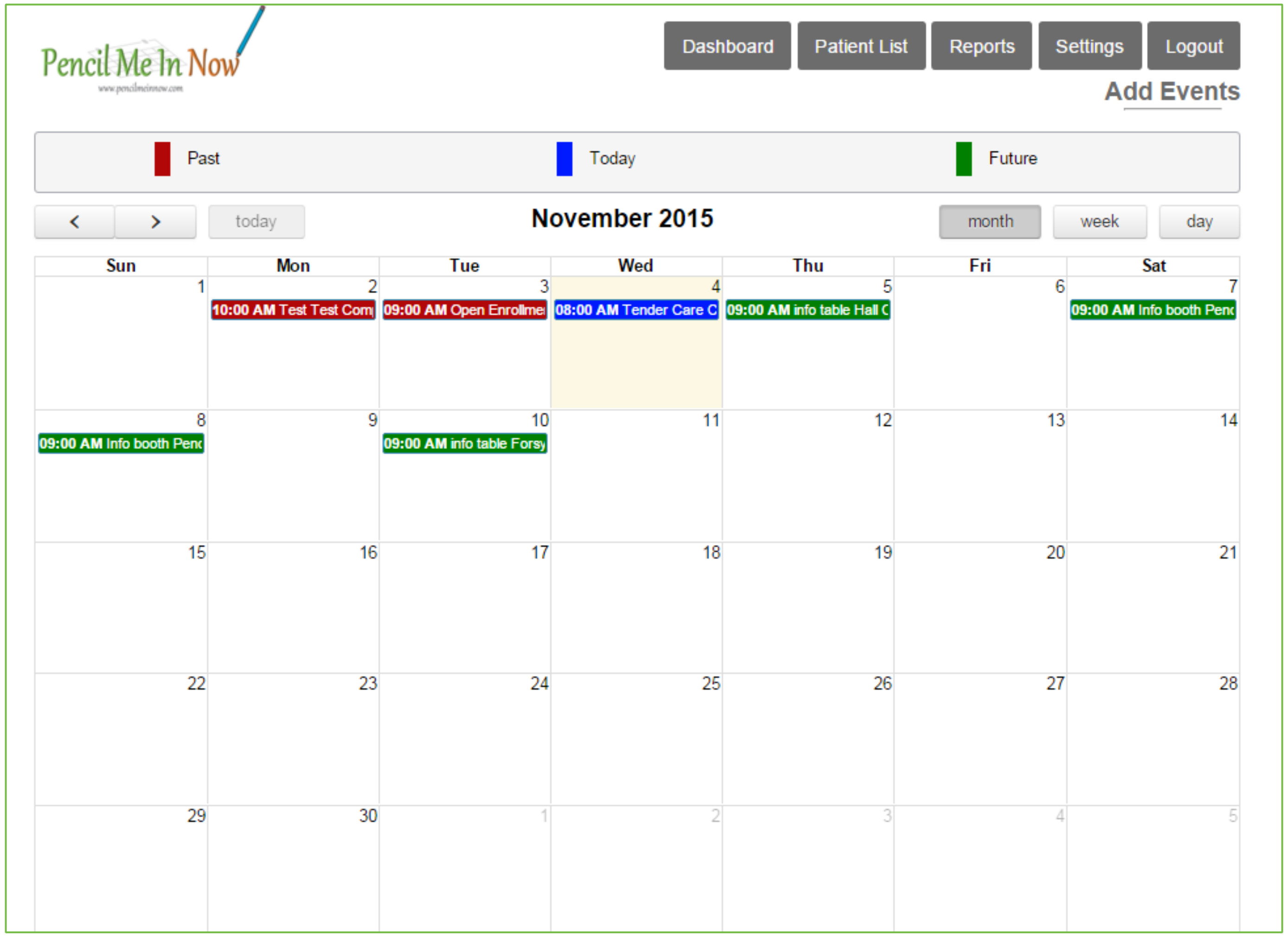
The Edit Profile option allows the contact details to be edited as needed. Fields with an asterisk are required.

Overview of the Edit Profile Details:



Adding Events

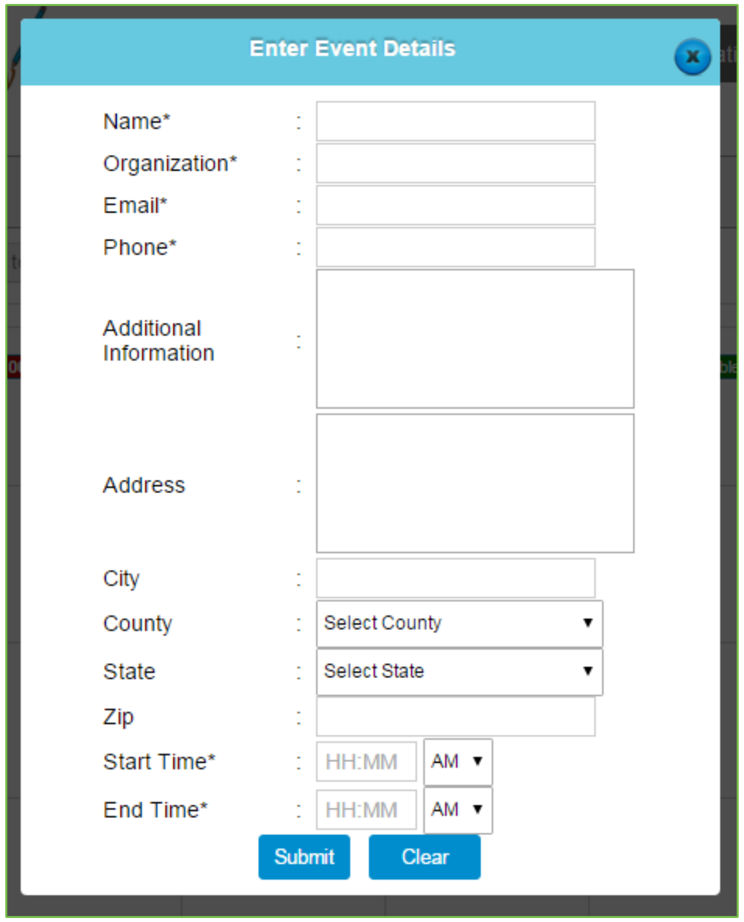
The Add Events Calendar is where all the events for all navigators can be seen. This is helpful for a patient who may like to have a face-to-face appointment with a navigator.



Adding Events

- Double-click on the day.
- Enter Event Details in the pop-up window.
- Asterisk indicates required fields.
- Note: to view information about a currently scheduled event, roll over the appointment or double-click for more details.

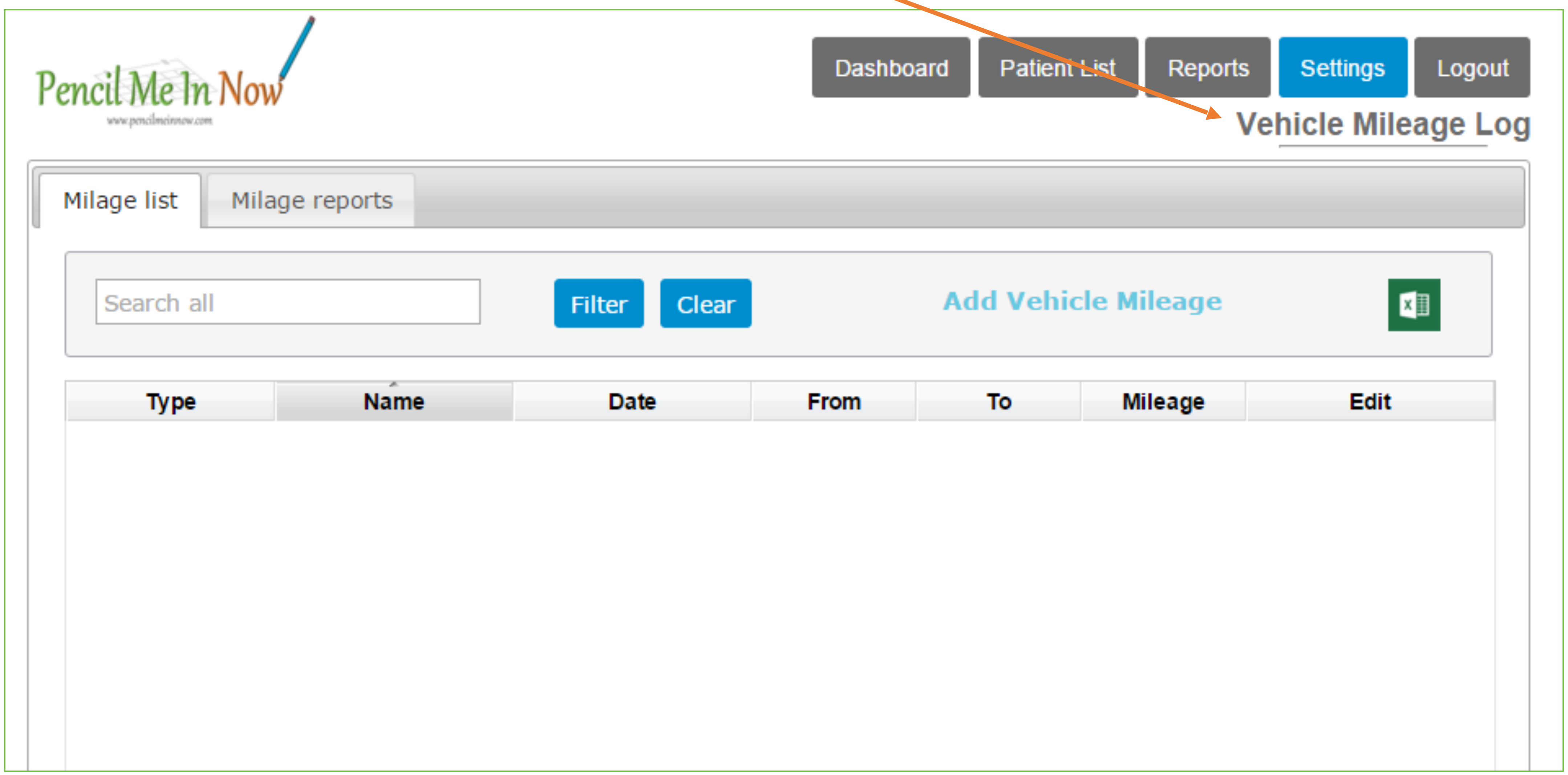
Overview of the Events Details:



Vehicle Mileage Log

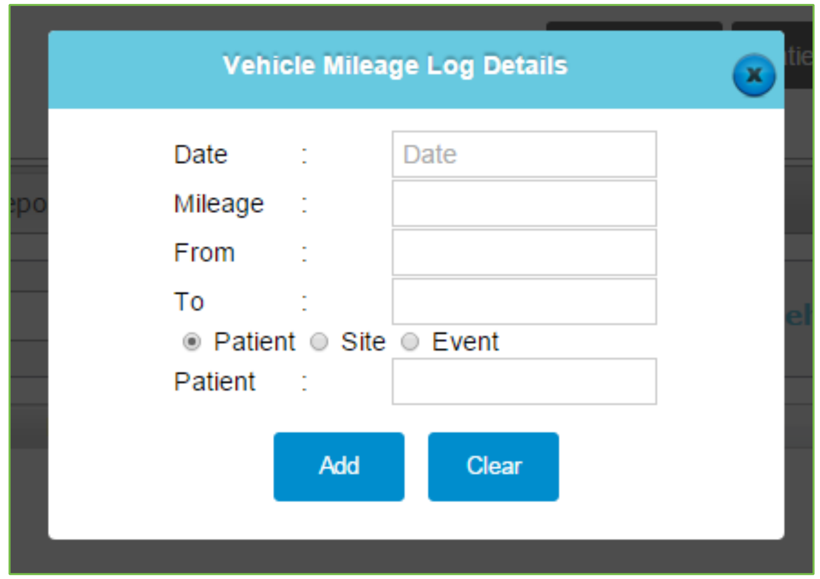
The Vehicle Mileage Log allows you to easily organize the mileage to and from any patient appointment, site visit, or event. With this Log, you can also export this information to Excel if needed.

Overview of the Vehicle Mileage Log:



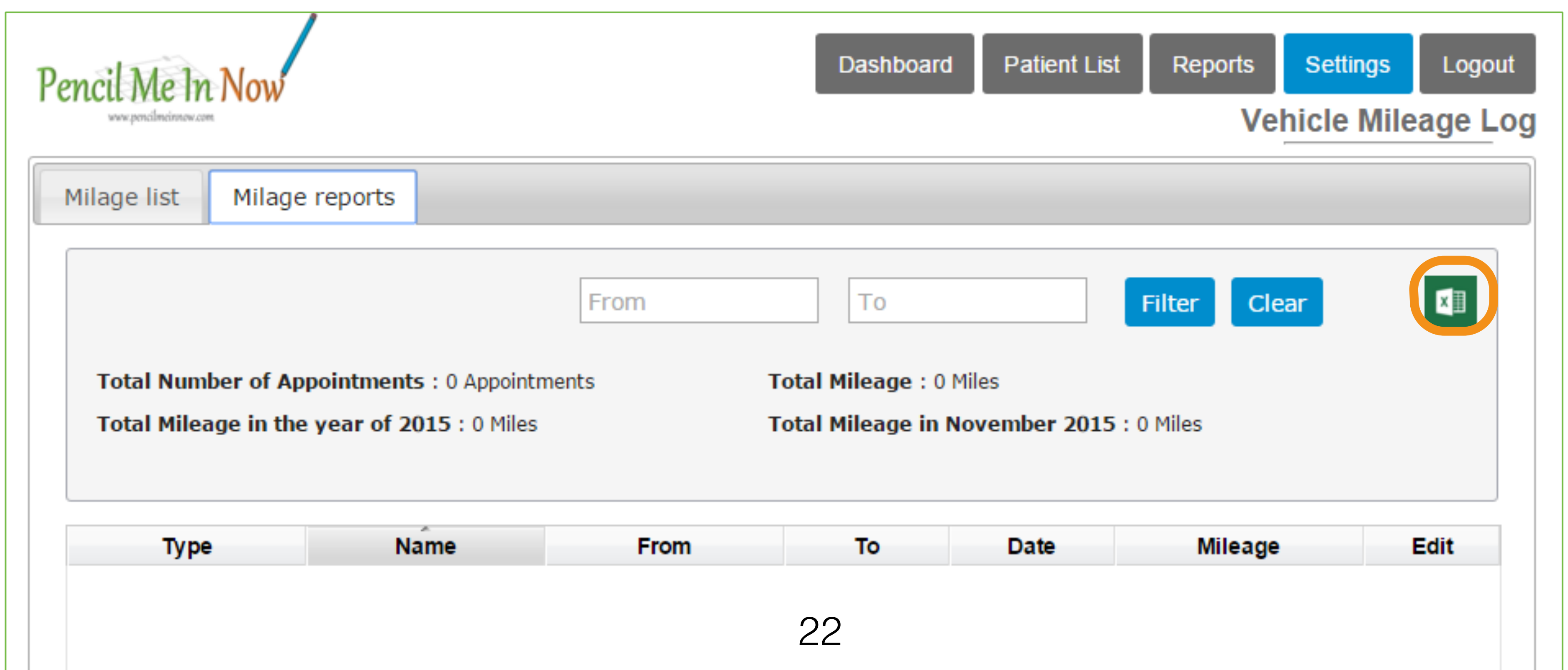
Vehicle Mileage Log

Overview of the Vehicle Mileage Log Details:



After the mileage has been entered into the system, select the Mileage Reports tab. The report can be export to Excel by date range if needed.

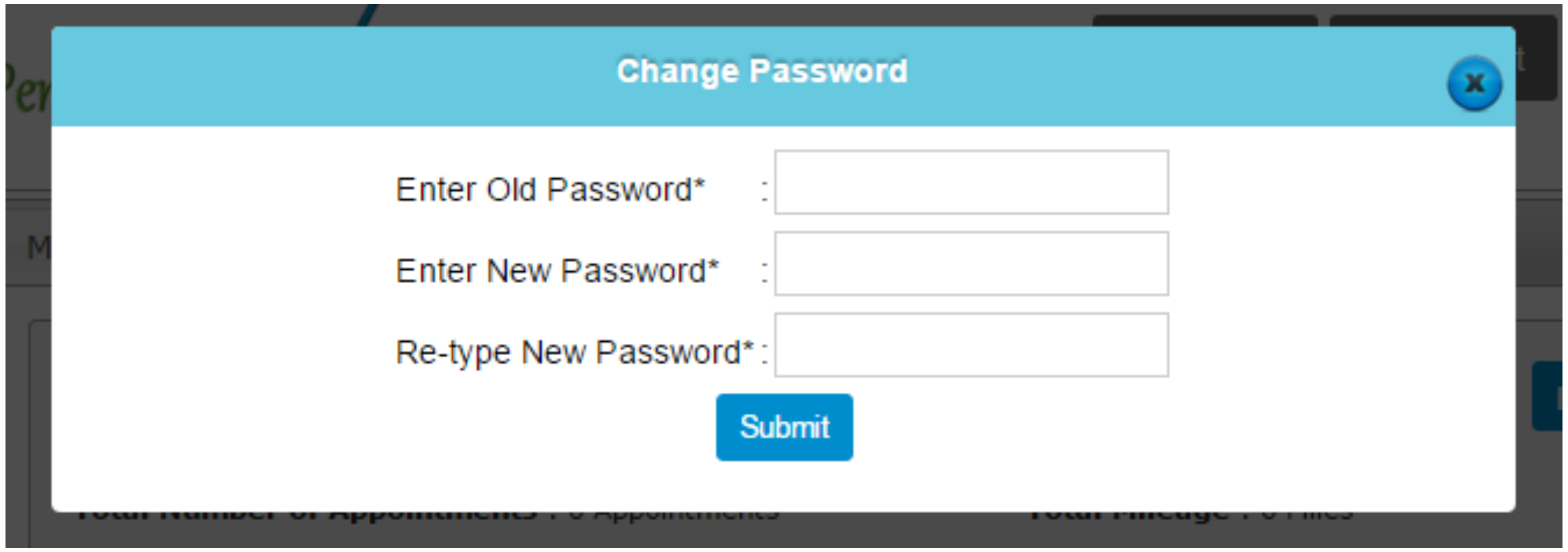
Overview of the Vehicle Mileage Log Report:



Changing Password

Under the settings option, you to change your password.

Overview of the Change Password Window:



Covenant Technology Group strongly recommends that you change your passwords regularly.

TECHNICAL SUPPORT

Database Technical Support

Covenant Technology Group
Ashlyn Tyson
Database Support Specialist
912.544.0450
support@ctgconnect.com