welio

better together

User guide
RECEPTION

V1.3.0 - MAY 2021

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1. Welcome to Welio

Thank you for choosing to use Welio!

Welio works using a secure web browser to allow the healthcare practitioners in your practice to easily connect with their patients by telehealth and secure messaging without worrying about chasing payment.

These instructions will teach you how to login, add appointments and cancel appointments.

Logging in

To start with, open your computer as usual and launch a Google Chrome, Safari 11 or later, or Firefox browser window. These browsers are preferred from a security and stability perspective. Next, go to www.clinic.welio.com. Enter your email address and the password you when you activated your account.

Once you have logged in you will be presented with your home dashboard. Here you will see the clinic schedule for all of the healthcare providers, arranged by the date of the next consultation first - this filter can be sorted by date by clicking on the 'date' option here. The schedule shows the date, the time, the patient's name, the status of the appointment (i.e. in progress, completed or cancelled), and the duration of the appointment.

2. Making appointments

Now you're ready to make a new appointment.

Clinics using Best Practice

For clinics using Best Practice, Welio syncs with your appointment book and will automatically create an appointment in Welio for the patient where the appointment in Best Practice has the appointment type 'Telehealth Consult is used and the patient's file in Best Practice has the requisite demographics – name, date 'of birth, mobile number, gender, and email. Any appointments cancelled or moved in Best Practice will also be cancelled or moved in Welio. Welio will notify you of any patient Telehealth consult appointments that don't sync by sending you a Sync Error email with the error details. This can act as a prompt to update the patient details in Best Practice to enable the patient to use Welio.

Clinics using other Patient Management Systems (PMS)

For clinics using another PMS type, you will need to create a duplicate appointment for them in Welio. After booking the appointment in your PMS, click on + new appointment in the Welio dashboard. Enter the patient's mobile phone and click 'add appointment'. If the patient has registered for Welio already, the next screen will display the patient's details; the first name, last name, email and phone number. For patients who have not yet downloaded Welio and registerd as a user, you will need to enter these details.

There is also an option to select that the patient is another family member where the mobile phone number owner is not the patient. For example a child or elderly parent. Simply click on 'Patient is another family member' then enter the other family members first name and family name, click on Save then OK.

You then need to click on the drop-down menu to select the specific healthcare provider who the patient will be having their consultation with. Next, select the date, the time of the appointment (this is in 24-hour time and can be set using the up & down arrows or typed in manually) and the duration of the appointment. Make sure the appointment time and duration in Welio match the time and duration in your PMS appointment book. The selected duration will indicate to the patient how much the consult is likely to cost.

Once you have finished adding these details click Save then OK to confirm the appointment has been created successfully. Welio will then send a notification by email and SMS to the patient with the details of their appointment

You're now back on the home screen of Welio and your healthcare provider can conduct the telehealth consultation!

3. Cancelling an appointment

Clinics using Best Practice

To cancel an appointment simply follow your usual process in Best Practice. Welio will sync with Best Practice and cancel the appointment in Welio.

Clinics using other Patient Management Systems (PMS)

Just like making an appointment, you will need to cancel an appointment in Welio corresponding to any cancellations in your PMS. If you need to cancel an appointment, simply click on the appointment you wish to cancel then click on the red cancel button on the panel on the right-hand side of the screen. The appointment will still be visible in the appointment schedule but will have the status Cancelled. Your patient will receive a text to advise them that the appointment has been cancelled. Don't forget to also cancel the appointment in your PMS!

4. Search for appointment

You may want to search to see what appointments you have booked or for a particular patient booking. To see all appointments booked for a certain date, click on Consult Schedule, then click on the down arrow next to select date. This search can be used to look for current, future or past appointments. Alternatively, to search for a patient, type in their first or last name into the search bar on the right-hand side of the dashboard.

5. Billing

Currently Welio is not integrated with your PMS for billing, though this is planned for future versions. For now, your healthcare provider will need to finalise their visit in your PMS and enter billing as usual. You will then finalise the billing as usual with the exception of processing private account payments through your eftpos machine as this has automatically been done by Welio. In this instance, you need to receipt the billing off manually in in your PMS (e.g. in Best Practice, untick TYRO) & send the patient's Medicare claim by electronic claimin. We recommend using the following process to ensure that payments received by Welio are distinguishable from your usual eftpos billings. *This is based on Best Practice and may differ for other PMS's.*

1. Follow usual procedure to receipt off payment, but untick Tyro (if using)
2. Click on Direct Credit – this keeps Welio payments separate to your in clinic eftpos payments
3. Click on Full payment
4. Enter payment Reference (recommended for clinics who use Surgical Partners or similar) – each one needs to be unique. We recommend using the doctor's initials, followed by date, then patient initials i.e. For Dr John Smith who consulted Jenny Brown on 3rd October 2020, the payment reference will be JS03JB
5. Click on Online Claiming
6. Click on Process

For bulk billed appointments just send the billing to Medicare via the usual process using your PMS.

6. Change clinic

You may work across multiple clinics for the one organisation. If this is the case and you need to manage appointment books across multiple sites, you can change clinics within Welio provided you are using the same login details. To change clinics, click on the picture icon on the top right-hand side of the page, then select 'change clinic'. Using the drop-down menu, select the clinic you want to go to and then click on Continue

7. My profile

Click on the picture icon next to your name on the top right-hand side of the dashboard where you will access the following:

My Profile

Click on the picture icon on the top right-hand side of the dashboard then My Profile and Edit. Update your details including your title, name, email, phone number and password. Provider number is also here but not relevant for a reception login. To add/change your photo, click on the small blue circle at the bottom of the picture icon and navigate to a location on your computer to select a photo the use the slide bar to zoom in or out as required then save. Once you've made all your changes to your profile, click on Save then OK.

Change Clinic

If you are using Welio at more than one location, you can change which dashboard you are looking at by clicking on change clinic then clicking on the drop-down menu and selecting the clinic you want to change then continue.

Sign out

When you have finished for the day, don't forget to click on sign out then OK to confirm you want to sign out.

Return to the dashboard

To go back to the main dashboard, click on the Welio logo on the top left hand-side of the page.

8. Settings

Pricing

Under 'pricing', you will be able to check the prices set by the different healthcare providers.

Invoices

This is not functional at the moment but is a feature that will be available in future versions

Connector

This is not functional at the moment but is a feature that will be available in future versions

9. Troubleshooting

For troubleshooting, please see our FAQ section on our website at https://www.welio.com/support-resources/. Need some more help, please contact us via email at support@welio.com.

10. Contact us

For more help or feedback about the app, send us an email to support@welio.com and one of our support staff will contact you as soon as possible.

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