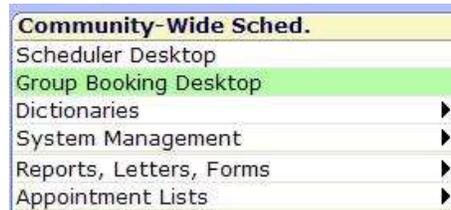


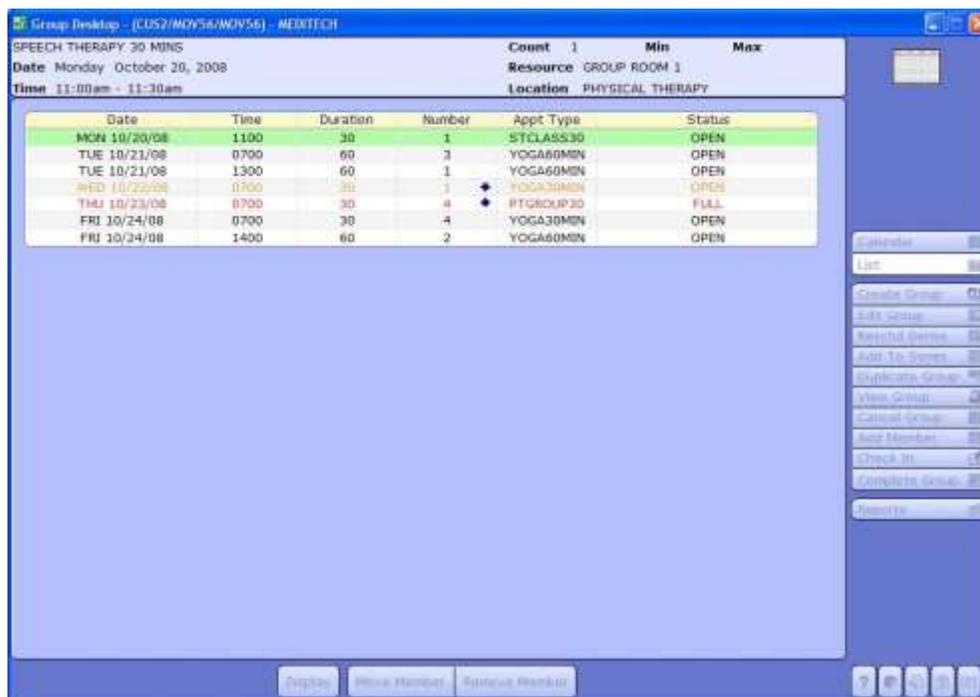
About this Manual

- This manual provides overviews and descriptions of the Group Booking routine in the Scheduling 5.6 release.
- We suggest that you use the online Help for information about responding to individual prompts, a glossary of terms, and to take advantage of the hypertext links that indicate related topics.
- This manual is current as of the date it was created. For the most up-to-date information about this application, consult the online Help.

Overview



This allows users to create Group Appointments and quickly book many patients for a single or a series of appointments.



The "List" view displays information from existing Group Appointments in a list format.

When you highlight an appointment from this list, more information is listed at the top of the routine. If a session is below the group minimum for patients, the text will be displayed in orange and a downward-pointing arrow will be displayed in the Number column. If the session has more patients than the group maximum, the text will be red and an upwards-facing arrow will be displayed in the Number column.



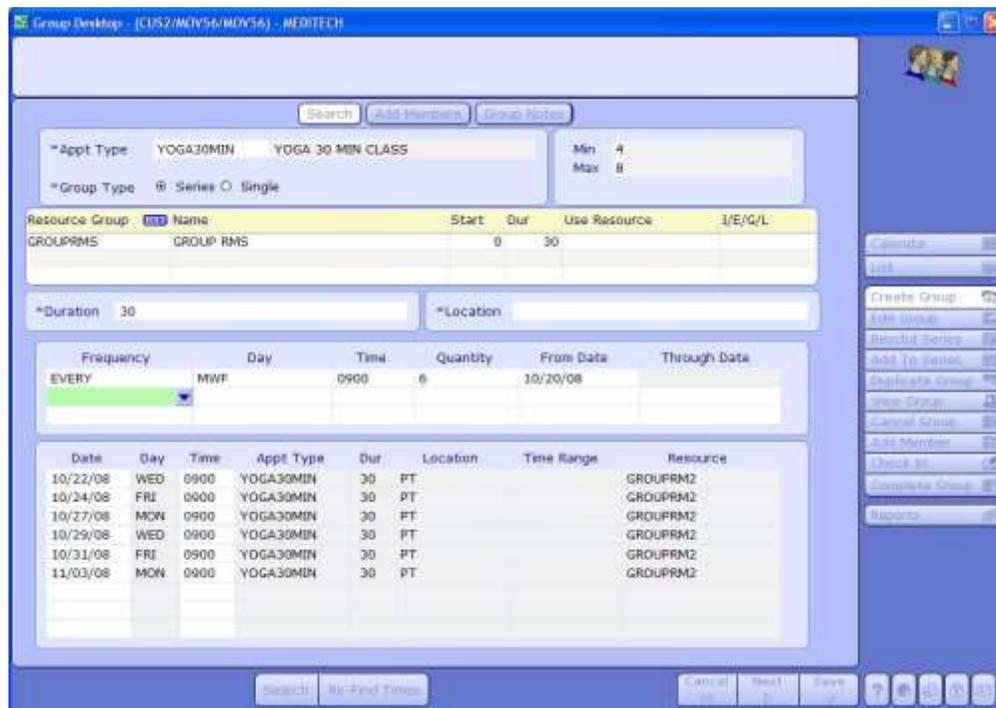
The “Calendar” button displays information from Group Appointments in a calendar view. Information from the highlighted appointment is displayed at the top of the screen.

Each cell displays information about the group appointments. The Appointment Type is the first line, followed by the appointment duration. The number on the left corresponds to the number of patients booked for this group appointment. The number on the left of the slash is the group minimum, and the number on the right is the group maximum. If there are no minimum and maximum numbers of patient defined in the Appointment Type dictionaries, only the slash will be displayed.

YOGA30MIN
30 Minutes
4 4/8

Like the list view, if a session is below the group minimum for patients, the text will be displayed in orange. If the session has more patients than the group maximum, the text will be red and an upwards-facing arrow will be displayed in the Number column.

Create Group



Group Desktop - (CPS2/WV56/MW56) - MEDITECH

Search Add Members Group Notes

*Appt Type: YOGA30MIN YOGA 30 MIN CLASS Min: 4 Max: 8

*Group Type: Series Single

Resource Group	Name	Start	Dur	Use Resource	I/E/G/L
GROUPRMS	GROUP RMS	0	30		

*Duration: 30 *Location:

Frequency	Day	Time	Quantity	From Date	Through Date
EVERY	MWF	0900	6	10/20/08	

Date	Day	Time	Appt Type	Dur	Location	Time Range	Resource
10/22/08	WED	0900	YOGA30MIN	30	PT		GROUPRM2
10/24/08	FRI	0900	YOGA30MIN	30	PT		GROUPRM2
10/27/08	MON	0900	YOGA30MIN	30	PT		GROUPRM2
10/29/08	WED	0900	YOGA30MIN	30	PT		GROUPRM2
10/31/08	FRI	0900	YOGA30MIN	30	PT		GROUPRM2
11/03/08	MON	0900	YOGA30MIN	30	PT		GROUPRM2

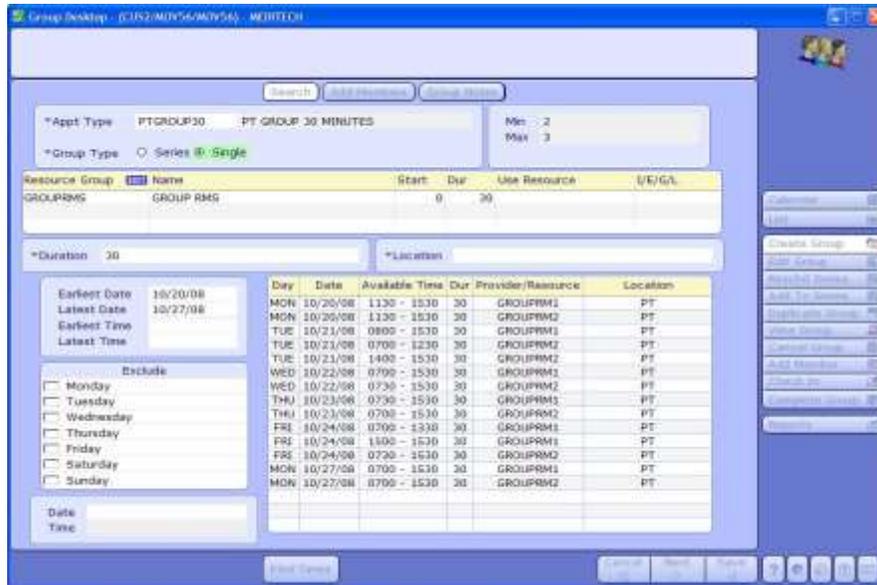
Calculate List Create Group Edit Group Rescind Series Add To Series Duplicate Group New Group Cancel Group Add Member Check In Duplicate Group Reports

Search Re-Find Times Cancel Next Save

The "Create Group" option enables a user to create a new Group Appointment. The user must select an appointment type that has the option "Available as Group Appointment?" set to Yes in the Appointment Type dictionary.

In the Search tab the user must select if the Group Appointment is part of a series of appointments, or if it is a single appointment. The values for minimum and maximum number of patients that can attend this appointment defaults from the Appointment Type Dictionary.

If the user chooses to book a series of appointments, Frequency, Day, Quantity, and From Date are required fields. The Time and Through Date fields are optional. Using these fields, the user must specify when the appointments will occur. After clicking the "Search" button, available time slots for the Group Appointments will appear, based on the specifications entered. The user may use the "Re-Find Times" button to search again for times.



Group Desktop - (052/MO/56/MO/56) - MEDTECH

Search | Add Members | Group Appointments

*Appt Type: PTCGROUP30 PT-GROUP 30 MINUTES Min: 2 Max: 3

*Group Type: Series Single

Resource Group	Name	Start	Dur	Use Resource	U/E/G/L
GROUPRMS	GROUP RMS		0	30	

*Duration: 30 *Location:

Earliest Date: 10/20/08 Latest Date: 10/27/08

Earliest Time: Latest Time:

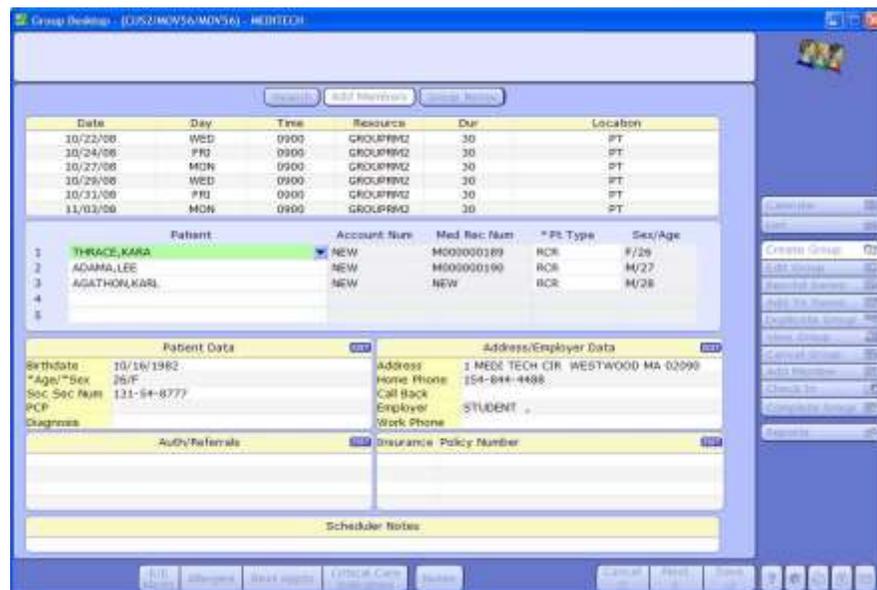
Exclude:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Day	Date	Available Time	Dur	Provider/Resource	Location
MON	10/20/08	1130 - 1530	30	GROUPRM1	PT
MON	10/20/08	1130 - 1530	30	GROUPRM2	PT
TUE	10/21/08	0800 - 1530	30	GROUPRM1	PT
TUE	10/21/08	0700 - 1230	30	GROUPRM2	PT
TUE	10/21/08	1400 - 1530	30	GROUPRM2	PT
WED	10/22/08	0700 - 1530	30	GROUPRM1	PT
WED	10/22/08	0730 - 1530	30	GROUPRM2	PT
THU	10/23/08	0730 - 1530	30	GROUPRM1	PT
THU	10/23/08	0700 - 1530	30	GROUPRM2	PT
FRI	10/24/08	0700 - 1530	30	GROUPRM1	PT
FRI	10/24/08	1500 - 1530	30	GROUPRM1	PT
FRI	10/24/08	0700 - 1530	30	GROUPRM2	PT
MON	10/27/08	0700 - 1530	30	GROUPRM1	PT
MON	10/27/08	0700 - 1530	30	GROUPRM2	PT

Find Times

If the user chooses to book a single appointment, they may enter in Earliest Date, Latest Date, and any day exclusions. After the user clicks the “Find Times” button, available times for the appointment populates the large grid on the right portion of the screen.



Group Desktop - (052/MO/56/MO/56) - MEDTECH

Search | Add Members | Group Appointments

Date	Day	Time	Resource	Dur	Location
10/22/08	WED	0900	GROUPRM2	30	PT
10/24/08	FRI	0900	GROUPRM2	30	PT
10/27/08	MON	0900	GROUPRM2	30	PT
10/29/08	WED	0900	GROUPRM2	30	PT
10/31/08	FRI	0900	GROUPRM2	30	PT
11/03/08	MON	0900	GROUPRM2	30	PT

Patient:

1	THRACE, KARA	NEW	MO00000389	BCR	F/26
2	ADAMA, LEE	NEW	MO00000190	BCR	M/27
3	AGATHON, KARI	NEW	NEW	BCR	M/28
4					
5					

Patient Data:

Birthdate:	10/16/1982	Address:	1 MED TECH CIR WESTWOOD MA 02090
Age*/Sex:	26/F	Home Phone:	504-844-4488
Soc Sec Num:	131-54-8777	Call Back:	
Diagnoses:		Employer:	STUDENT
		Work Phone:	

Auth/Referrals:

Insurance	Policy Number

Scheduler Notes:

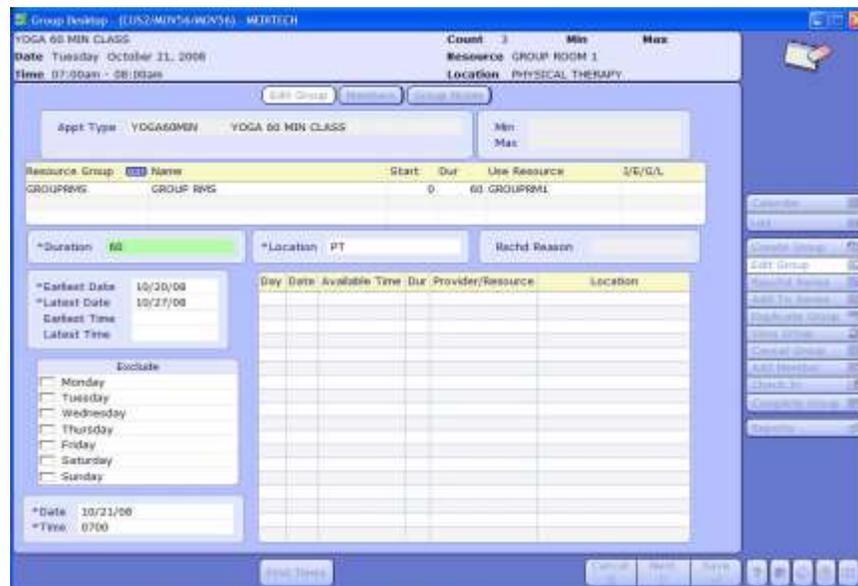
Full | Cancel | Cancel Appointment | Edit Group Appointments | Print

On the “Add Members” page, the user is able to add patients to this Group Appointment. The first box displays the dates, days of the week, times, resources used, duration, and location of the Group Appointments. In the numbered “Patient” fields, the user may pull in existing patients by searching Medical Records, or create new patients. The Group Appointment may be placed on an existing or new account number. The patient information will display on the bottom half of the page for the highlighted patient. From here users may also enter or edit alerts, allergies, view the patient’s next appointments, view any Critical Care Indicators, and notes.

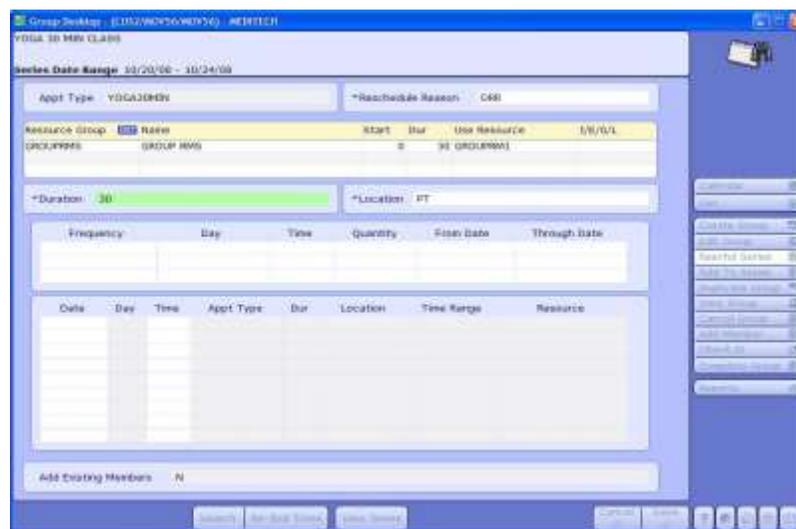


On the "Group Notes" page, a user may enter any notes for the Group Appointment.

Edit Group and Reschedule Series

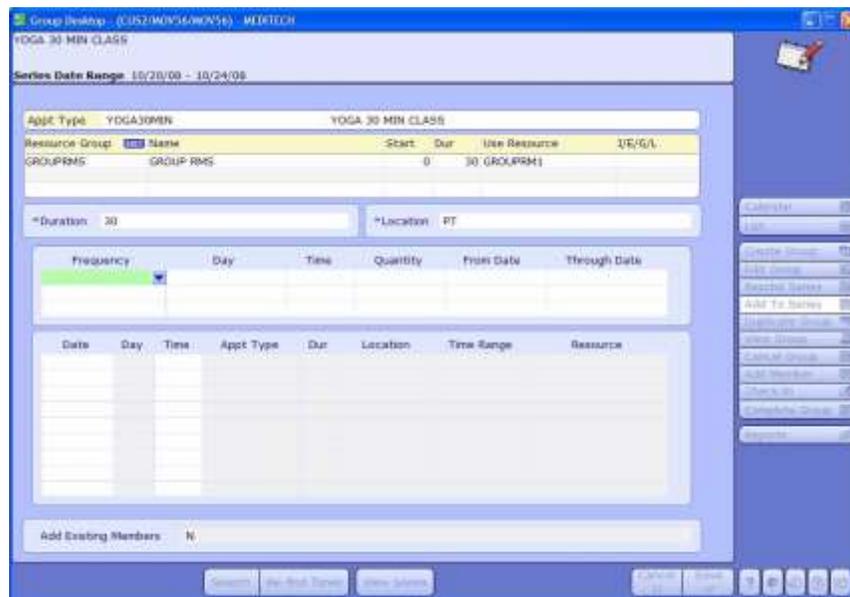


Using the "Edit Group" button, the user may decide between editing a single appointment, or if the appointment is part of a series, the user may edit the entire series. Here, the user may change appointment times, choose different resources for the appointment, or edit patient data on the Members page.



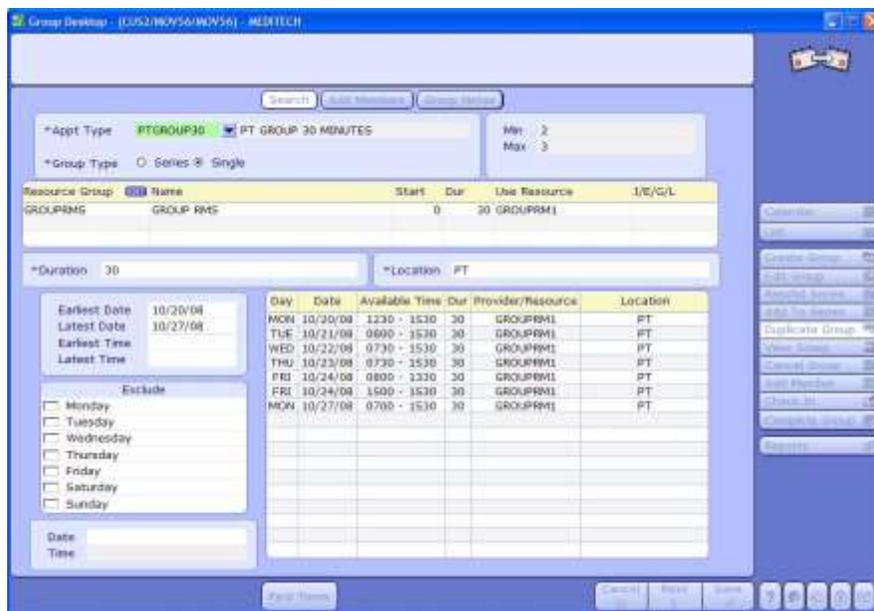
Using the "Reschd Series" button, users may choose to move a series of appointments to new dates and times. If a user answers "Y" to the Add Existing Members required field, all existing patients will be added to the new rescheduled series.

Add to Series and Duplicate Group



The screenshot shows the 'Group Booking' window for a 'YOGA 30 MIN CLASS'. The 'Series Date Range' is 10/20/08 - 10/24/08. The 'Appt Type' is 'YOGA30PMN'. The 'Resource Group' is 'GROUPRMS'. The 'Duration' is 30 and the 'Location' is 'PT'. The 'Frequency' is set to 'W'. The 'Add To Series' button is highlighted in the right-hand sidebar.

Using the "Add To Series" button, a user may choose to schedule additional appointments for an existing series.

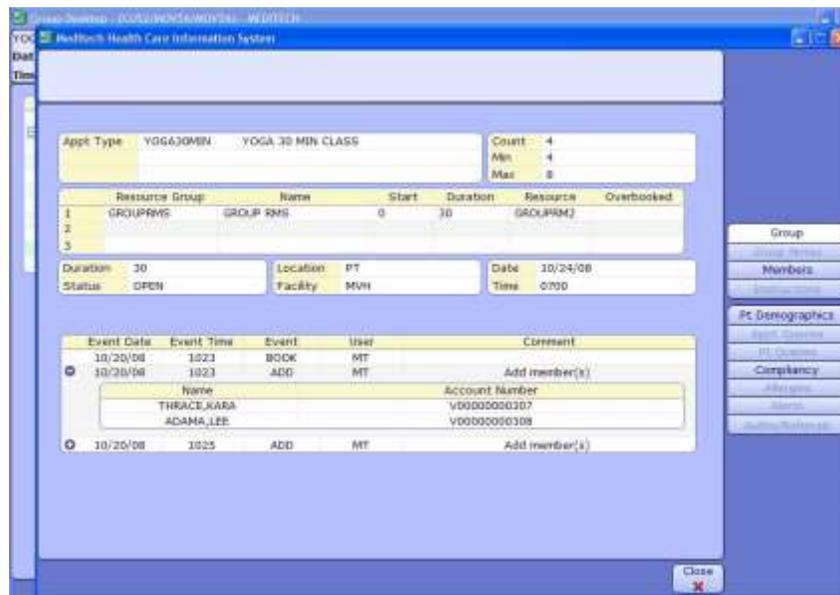


The screenshot shows the 'Group Booking' window for a 'PT GROUP 30 MINUTES'. The 'Appt Type' is 'PTGROUP30'. The 'Group Type' is 'Series'. The 'Resource Group' is 'GROUPRMS'. The 'Duration' is 30 and the 'Location' is 'PT'. The 'Earliest Date' is 10/20/08 and the 'Latest Date' is 10/27/08. The 'Duplicate Group' button is highlighted in the right-hand sidebar.

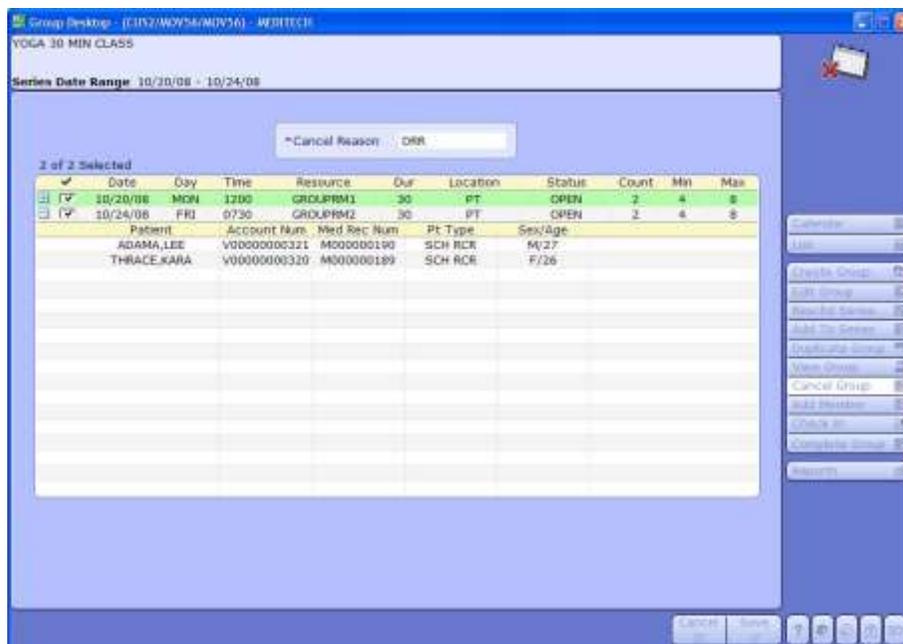
Day	Date	Available Time	Dur	Provider/Resource	Location
MON	10/20/08	1230 - 1530	30	GROUPRMS1	PT
TUE	10/21/08	0800 - 1530	30	GROUPRMS1	PT
WED	10/22/08	0730 - 1530	30	GROUPRMS1	PT
THU	10/23/08	0730 - 1530	30	GROUPRMS1	PT
FRI	10/24/08	0800 - 1530	30	GROUPRMS1	PT
MON	10/27/08	0700 - 1530	30	GROUPRMS1	PT

With the "Duplicate Group" button, users may choose to duplicate a single appointment, or duplicate a series of appointments. The duplication function will duplicate patients, and account numbers from the existing Group Appointment.

View Group and Cancel Group

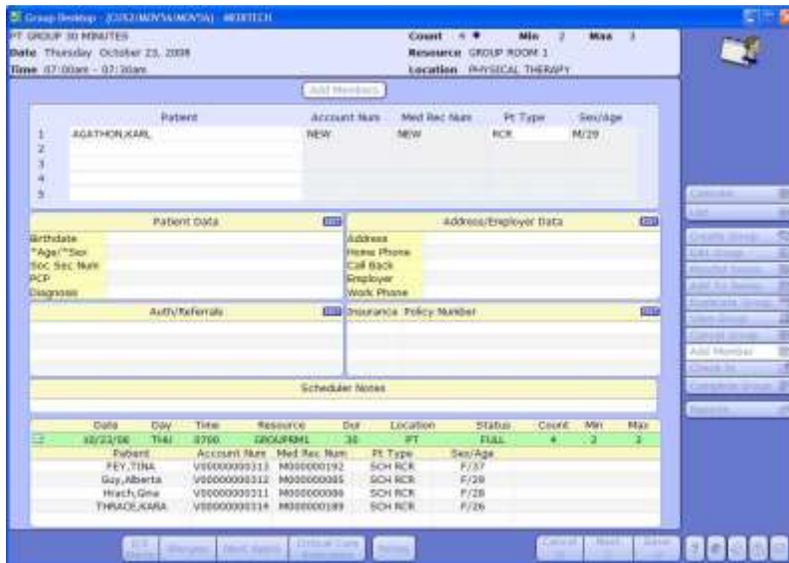


The “View Group” button allows users to view information for the Group Appointment without making any edits. This page also displays the audit trail.



Using the “Cancel Group” button, users may cancel the selected group or multiple groups. A Cancel Reason must be entered. By clicking on the plus sign in the list, a user may see the patients booked for the appointments.

Add Member



Group Booking - [C:\G\MOV\MOV14] - 4018121

Count: 4 * Min: 2 Max: 3

Date: Thursday, October 23, 2008

Time: 07:00am - 07:20am

Research: GROUP ROOM 1

Location: PHYSICAL THERAPY

Add Member

Patient	Account Num	Med Rec Num	Pt Type	Sex/Age
1: AGATHOR, KARL	NEW	NEW	RGR	M/29
2:				
3:				
4:				
5:				

Patient Data

Birthdate:
 *Age/*Sex:
 SOC Sec Num:
 ACP:
 Diagnosis:

Address/Employer Data

Address:
 Home Phone:
 Cell Bkch:
 Employer:
 Work Phone:

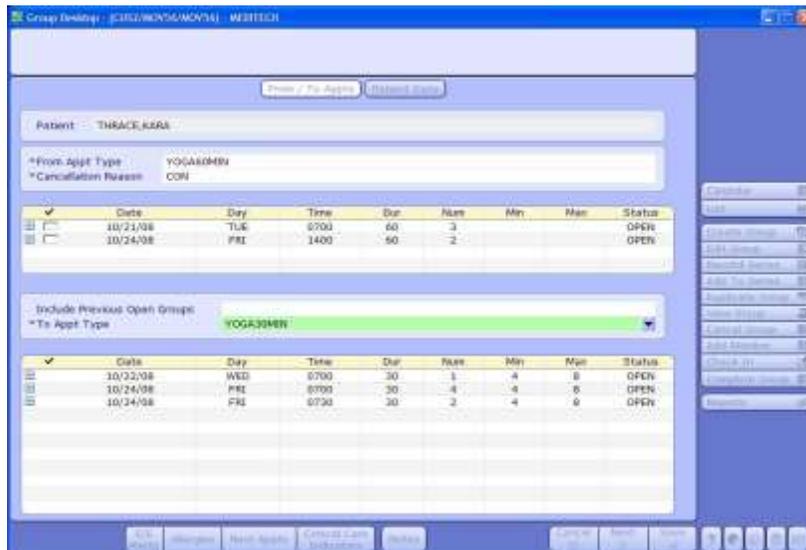
Audi/Referrals:
Insurance Policy Number:

Scheduler Notes:

Date	Day	Time	Resource	Dur	Location	Status	Count	Min	Max
10/23/08	Tue	0700	PHYSICAL	30	PT	FULL	4	2	3
			Patient						
			FEY, THIL						
			Guy, Alberta						
			Hrach, Gwa						
			THRACE, KARL						

With the "Add Member" button, users may quickly add patients to a single or multiple Group Appointments. The patients currently booked for the appointment appear by clicking the plus sign in the box in bottom of the screen.

Move Member and Remove Member



Group Booking - [C:\G\MOV\MOV14] - 4018121

From: To: Appnt: [Related Group]

Patient: THRACE, KARL

*From Appt Type: YOGA30MR
 *Cancellation Reason: CON

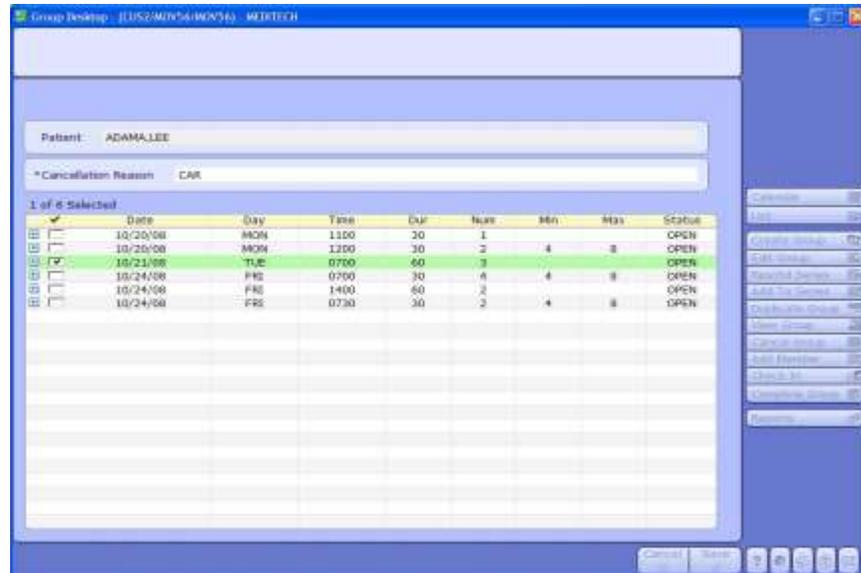
Date	Day	Time	Dur	Num	Min	Max	Status
10/21/08	TUE	0700	60	3			OPEN
10/24/08	FRI	1400	60	2			OPEN

Include Previous Open Groups:
 *To Appt Type: YOGA30MR

Date	Day	Time	Dur	Num	Min	Max	Status
10/22/08	WED	0700	30	1	4	8	OPEN
10/24/08	FRI	0700	30	4	4	8	OPEN
10/24/08	FRI	0730	30	2	4	8	OPEN

CMPH- CWS GROUP BOOKING TOOL

The "Move Member" function button allows a user to move a patient from an appointment they are scheduled for, into an existing Group Appointment. A Cancellation Reason must be entered for this edit.



The "Remove Member" button allows a user to remove a patient from an appointment without needing to edit the actual Group Appointment. When a user enters a name at the Patient field, appointments that the patient is currently scheduled for populates the lower portion of the screen. A Cancellation Reason must be entered.