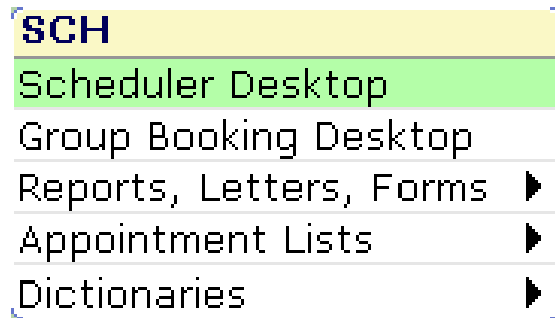# About this Manual

- This manual provides overviews and descriptions of the routines of Community-Wide Scheduling.

- 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.
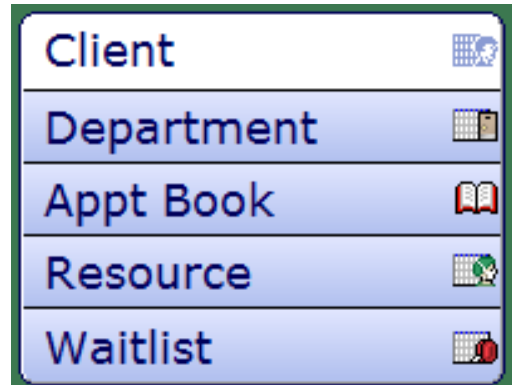
Main Desktop

Scheduler Desktop - Process routines which allow you to book appointments and meetings, manage the waitlist and control resources' schedules. This will be the main focus of this guide.

Group Booking – Routine that allows users to book Group Appointments.

Scheduler Desktop

Client	
Department	
Appt Book	
Resource	
Waitlist	

Client   Process Patient Appointments

Department   Process Department Appointments

Appt. Book   Process Appointment Book

Resource   Process Resource Schedules

Waitlist   Process Waitlist Appointments

Client Desktop

This routine is ideal for centralized schedulers which allow users to process appointments for a client. From this routine users are able to book, cancel, reschedule or edit, register or waitlist, while seeing the client's appointment history.

Function Buttons
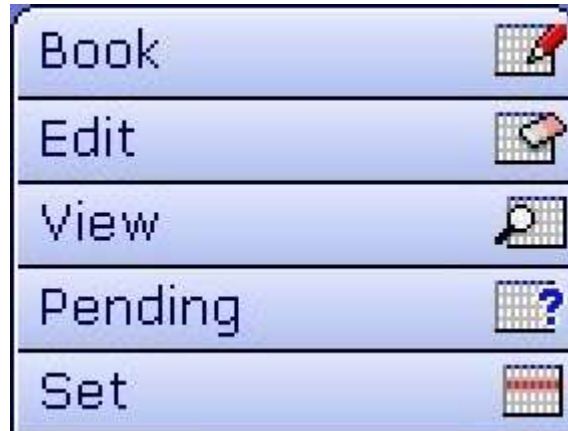
Book   Book a client appointment.

Edit   <u>Appointment</u> – Make changes to the 'checked-off' appointment

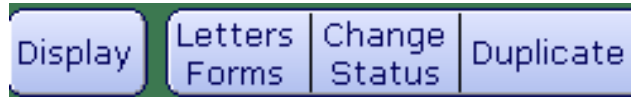   <u>Appointment Type</u> – Change the type of appointment scheduled.

        Client demographics can also be edited in either edit screen.

View   Views appointment detail for the currently selected appointment

Pending   Book a pending client appointment

Set   Book a New or Pending Appointment Set

Footer Buttons

Display   Temporarily change your display settings to show or not show appointments of different types, through different dates, or of different statuses.

Letters/Forms Print a Letter or Form for the highlighted appointment(s).

Change Status Changes appointment status.

Duplicate   Creates a duplicate appointment (on the same account).

Entering a Client

- Enter client ULI number. Ex: #XXXXXXXXX

<u>Alternate Ways of Finding a Client</u>

Account Number: Enter capital 'A', the # key, followed by the
client's account number.

> Ex: A#EH0010031/14

Medical Record Number: Enter capital 'U', the # key, followed by the prefix
letter and the client's medical record number.

> Ex: U#EH00058398

Telephone Number: Enter capital 'T', the # key, followed by the
client's telephone number.

> Ex: T#4033098166 (may omit dashes)

Date of Birth: Enter capital 'B', the # key, followed by the
client's date of birth.

> Ex: B#130613 (may omit slashes)

Booking an Appointment

- ➢ Click on the **Book** button to book a new appointment for the client.
- ➢ From the Appointment Screen you can view the client's upcoming appointments, demographics and insurance information. You can also view **their compliancy stats by clicking on the blue "i" button in the top left hand** corner.

Methods of Searching for an Appointment Date and Time

- ➢ **First Available:** The absolute earliest time an appointment can be done.
- ➢ **Search:** A list of available times from which a user can choose.
- ➢ **Manual Search**: Takes you to the appt book where if you double click on a time slot, an appointment can be booked.

Booking a Set

Set

> ➢ Press the **Set (S)** button to get to the Schedule Appointment Set routine, where you can schedule a new appointment set (or a Pending Set).

On this screen you are able to enter/edit your appointment set.

When you click on the EDIT button to change the appointment type details for the appointments in your set, you are brought to the Enter/Edit Appt Information screen.
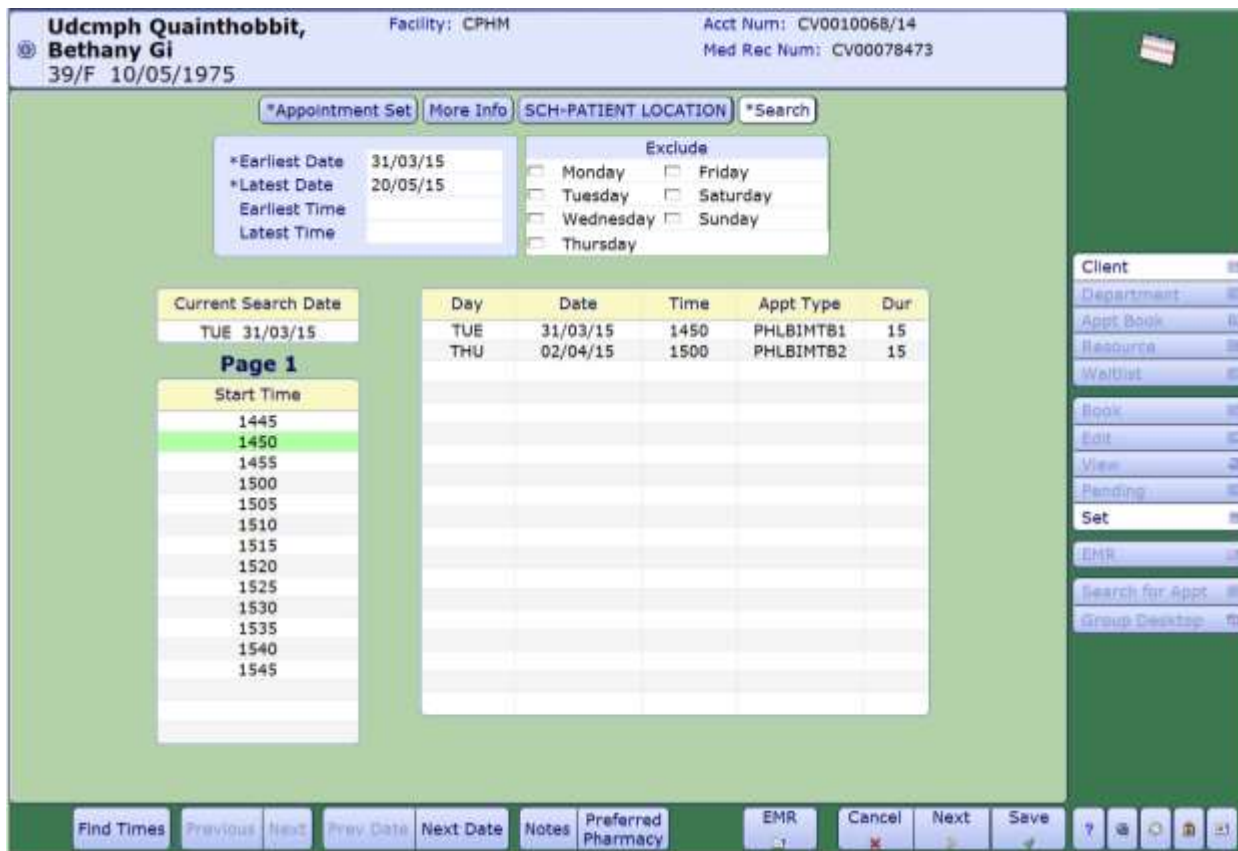
This screen allows you to change:

> ➢ Appointment Types and Durations
> ➢ Appointment Early and Late Start Times
> ➢ Resources for each Appointment in the Set

When booking appointment sets – always keep in mind what your individual appointment types have their 'book minutes' set to. As well as any start time restrictions for the appointments, or the resources associated to them (especially if the associated resources have Appointment Profiles attached to them). Set Availability will greatly depend on these factors.

After choosing the details about your appointment set, **you'll click on the SEARCH** button at the top of your screen:

➢ Enter your search criteria and click **FIND TIMES** to get a list of available times to choose for your set. Notice on the bottom right hand side of the screen is where the details about the timeslot you selected will be displayed.

➢ Use the **Prev Day**, **Next Day**, **Go To Day** buttons to navigate the DAY in which you want to search for available times for your set.

Editing/Rescheduling an Appointment

➢ From Scheduler Desktop, select the appointment to edit or reschedule, then hit the **Edit** button to access the Edit Appointment routine.

➢ This screen will allow you to edit any of the existing information about the scheduled appointment, resources, or queries **–** as well as an added section at the bottom to place a NEW date and time to the appointment (which will reschedule it) and to capture a Reschedule Reason.

➢ From Scheduler Desktop, select the appointment that needs the appointment type changed, then hit the **Edit** button to access the Edit Appointment Type routine

➢ This screen will allow you to edit the appointment type or any of the existing information about the scheduled appointment, resources, or queries and will capture the Edit Reason.

Search for Appointment

Use this routine to search for an appointment time without entering client info.

Enter the appointment type in the 'Type' field, or do an **F9** lookup to find it. Enter any day or time restrictions and click on **FIND TIMES**.

The list will display with available appointment times. To book one, click on the slot you want and then either on NEXT on the bottom, or APPOINTMENT on the top of the screen to be brought into the Appointment Booking Screen.

Department Desktop

Use this routine to see appointments in a particular department. You can change the display to include only certain appointments or appointment statuses.

This routine is ideal for departmental staff to use as a work list or for a department head to keep track of what is going on in the department.

The footer buttons on this screen are the same as the Client Booking screen, with one addition:

Transfer: Enables you to transfer an appointment from one resource to another.

Resource Desktop

Use this **routine to view or edit an individual resource's schedule. You can also** book appointments from this routine.

This routine is ideal for staff who wish to view their own schedule or book for themselves, as well as for schedulers who wish to process the appointments of a single resource.

In the calendar portion of this routine, a gauge tracks how much time the resource is booked for per day.

If this gauge is **blue**, it indicates that there are appointments booked into the day's schedule

A **white** line indicates that the time slot is available.

A **blue** line indicates that the resource is booked for an appointment at that time. The Appointment Type and client name displays in the line. A **red** line indicates

overbooked time. Each client that is booked in this time slot will have an individual line. When a user clicks on a line, additional client and appointment information is displayed on the bottom of the screen. A **green** line is the appointment that you have clicked on.

Editing a Resource's Schedule

Edit

➢ With the desired day selected, hit the **Edit (E)** button. You will be brought to the Edit Resource Schedule screen.

➢ To make a resource unavailable for all or part of the day, change the capacity in the available timeslots to 0 – or simply delete the timeslots from the day.

➢ The bottom portion of the screen can also be used to place temporary Appointment Profiles on selected time slots for a Resource.

Appointment Book Desktop

Use this routine to view the schedules for an entire resource group at once. You **can also view one resource's schedule for the week.**

Appointments can be booked from this screen, as well as easily transferred between times and/or resources via a cut and paste function.

A **peach** block indicates that the time slot is available. A **blue** block indicates that the resource is booked for an appointment at that time. The Appointment Type and patient name displays in the block. A **red** block indicates overbooked time or an appointment booked at an unavailable time. ***<Multiple>*** indicates that there are two or more patients booked at the same time. Additional patient information is displayed in the top bar when a user clicks on a time block. A **grey** block indicates that there is no schedule defined for the resource at that time. Finally, a **green** block of time indicates no schedule for that time.

By clicking on the clock in the left corner of the Appointment Book, you may change the time display. For example, you may choose to view thirty minute time increments instead of sixty.

Views can be changed from **Daily** to **Weekly** views. **Daily** shows you all the resources in the group for the day you've selected. **Weekly** will show you the weekly schedule for whatever resource you've highlighted.
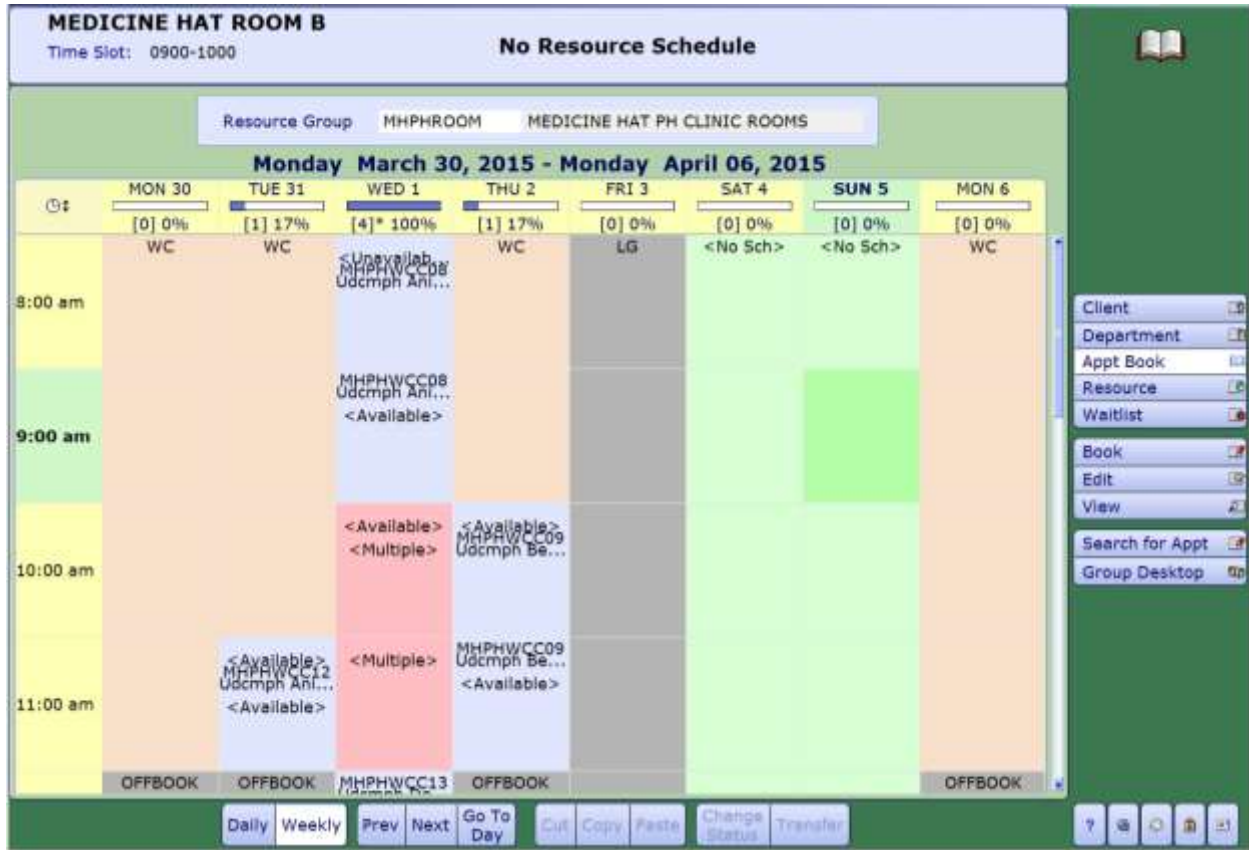
This routine is ideal for centralized schedulers who need to view the schedules of all resources in a group simultaneously.

Waitlist Desktop

This is used for clients that need an appointment, but one is not available, or for clients that have an appointment booked, but are hoping to come in sooner than the booked appointment. When there are cancellations, the staff would check the Waitlist to see if there are clients to fill the open appointment.

To put a client on your waitlist, you have to book a pending appointment. This can be done by choosing Pending from your function buttons or it can also be done in the booking screen by changing Pending?No to Pending? Yes.