



Objectives & Goals - Schedule Setup

Objective:

- To setup provider schedules and availability
- To setup room schedules and availability
- To setup and assign available procedures
- To customize the schedule parameters

HotKeys

Tab – will allow to you to toggle between entry fields

Shift + Tab – allows you to toggle backwards between entry fields

Alt + _ Underlined letter will do the same action as if you used your mouse to click on that button/menu)

Setting Up Schedules

Click on **Setup>>Scheduler** to view the various options

From the various windows you will establish

- Which Providers are to be scheduled
- Name display sequence
- Provider availability
- Rooms and schedule
- Procedure or reason for visit
- Scheduler templates
- Colors / Holidays

NOTES:



To Be Scheduled Doctors

Setup>>Scheduler>>To be Scheduled/Billed doctors

Choose the Providers **To Be Scheduled** -- Use the arrows to move each provider into the correct column.
The check box means the provider is to be billed only.

Note - to create doctors in the system see the guide to Setting up an Office.

A screenshot of a software window titled "To Be Scheduled/Billed". It contains two main columns. The left column is titled "Doctor(s)/Employee(s) not to be Scheduled/Billed:" and lists providers with their phone numbers. The right column is titled "To be Scheduled/Billed Doctor(s)/Employee(s):" and lists providers with their phone numbers and a checkbox. Between the columns are four arrow buttons: ">>", ">", "<", and "<<".

Doctor(s)/Employee(s) not to be Scheduled/Billed:		To be Scheduled/Billed Doctor(s)/Employee(s):	
Blandón, Stewart	510-632-8021-224	Alvarado, CHARLES	510-555-6141 <input type="checkbox"/>
Jacober, CHARLES	510-555-4233	Alvarado, RONALD	510-555-6141 <input type="checkbox"/>
Keeven, JESSY	510-555-2550	Carlson, JESSY	<input type="checkbox"/>
Marshi, JAY	510-555-5171	Kermit, Frog	830-555-4567 <input type="checkbox"/>
Miller, RONALD	510-555-0359	Korte, MARILYN	510-555-7857 <input checked="" type="checkbox"/>
Nurse, JAY			
Parker, MARILYN	510-555-2673		
Sutton, JESSY	510-555-3952		
Weidner, KRIS	510-555-8028		
Zindane, John			

NOTES:

To Schedule the Doctor Availability

Click Setup>>Scheduler>>Doctors Availability

For each provider, enter the day of the week, a type (T for template or M for custom time range) and an office.

The screenshot shows the 'Doctors Availability' window. It features a list of doctors on the left, a central table for scheduling, and a bottom toolbar. Callout boxes provide instructions for each part of the interface.

Callout 1: Select **Doctor** to set Availability

Callout 2: Click here to enter **Holidays**

Callout 3: Select **Start Date** and **Day** for the availability.

Callout 4: Select **M** for **Manual** and **T** for **Template**.

Callout 5: Select **Office** from the list to set availability of the doctor.

Callout 6: Click here to set **Maximum Procedure**.

Callout 7: Click here to open **To Be Scheduled** screen.

Legend: NA = Not Available M = Manual T = Template

Buttons: To be Scheduled, Max Procedure, Add, Delete, Save, Close

NOTES:



This provider has the same schedule on Monday and Thursday, so we only have to create one template for the two days. On Tuesday, this provider spends the morning in one office with 30 minute appointments and the afternoon in another office with 15 minute appointments. On Wednesday, the provider has a completely different schedule with 60 minute appointments and some time slots reserved for new patient visits and lunch blocked off.

	Start Date	Day	Type	From	To	Interval	Office	NA
1.	09/01/2007	Monday	T	Mon and Thurs			00001	<input type="checkbox"/>
2.	09/01/2007	Tuesday	M	8.00 AM	5.00 PM	30	9999	<input type="checkbox"/>
3.	09/01/2007	Tuesday	M	8.00 AM	11.30 AM	15	00001	<input type="checkbox"/>
4.	09/01/2007	Wednesday	T	Wednesday			9999	<input type="checkbox"/>
5.	09/01/2007	Thursday	T	Mon and Thurs			00001	<input type="checkbox"/>


Here is a portion of the providers schedule for the week:

12/17 (Mon)		12/18 (Tue)		12/19 (Wed)	
09:00 A - 09:15 A		08:00 A - 08:15 A		08:30 A - 09:30 A	Office 55--> New Patient
09:15 A - 09:30 A		08:15 A - 08:30 A		09:30 A - 10:30 A	Office 55--> New Patient
09:30 A - 09:45 A		08:30 A - 08:45 A		10:30 A - 11:30 A	
09:45 A - 10:00 A		08:45 A - 09:00 A		11:30 A - 12:30 P	Lunch
10:00 A - 10:15 A		09:00 A - 09:15 A		12:30 P - 01:30 P	
10:15 A - 10:30 A		09:15 A - 09:30 A		01:30 P - 02:30 P	

In the **Doctor's Availability** screen, click on the **Max Procedure** (Max Procedure) button to set the maximum number of a certain Procedure that can be scheduled for a single day. Select the procedure name from the list and then select the maximum number for the procedure.

NOTES:

To Create/Edit Schedule Templates

Click the  button to create new templates. Define time range and slot lengths (interval). For each template, define which slots are available for double booking (DB) or not available at all (N).

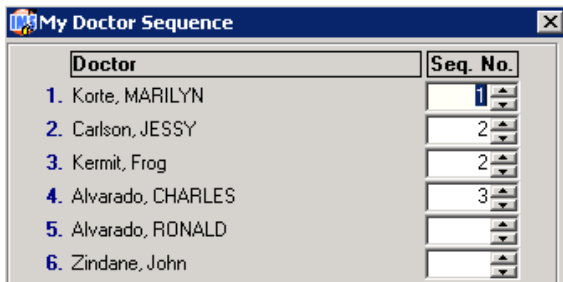
Click under the P to define which procedures are available for this time slot.

Availability for Dr Frog Template:				
	P	DB	N	Procedures
08:00 A - 08:15 A 15		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
08:15 A - 08:30 A 15		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
08:30 A - 08:45 A 15		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

You can hold down “Ctrl” or “Shift” to highlight multiple time slots. You can then change the time intervals, allow or disallow double booking, assign procedures, assign procedure groups, and make unavailable the selected time slots.

To set the sequence of the doctor list

Click Setup>>Schedule>>My Doctor Sequence.



Doctor	Seq. No.
1. Korte, MARILYN	1
2. Carlson, JESSY	2
3. Kermit, Frog	2
4. Alvarado, CHARLES	3
5. Alvarado, RONALD	
6. Zindane, John	

Enter the sequence number for the doctor to be shown (1, 2, 3, etc.) This is the order doctors will show in drop down lists. Doctors without an order or with the same order are alphabetized.

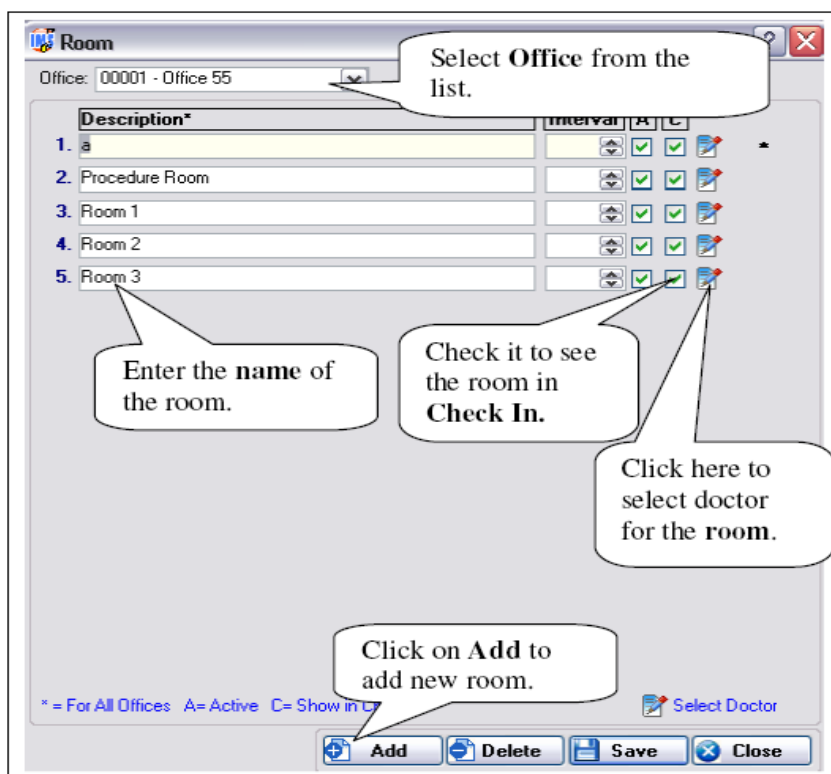
NOTES:

Room Schedule

Setup>>Schedule>>Room

Similarly, we can setup **Rooms**, by creating rooms, selecting which rooms **are to be scheduled** and defining **Room Availability** all under **Setup, Schedule**.

Some organizations create rooms to place patients in during Check In process, but do not create schedules for the rooms.



Note: if we do not define Room or Doctor Availability, by default the schedule shows them as not available, but they can still be scheduled.

NOTES:

Set the Sequence of the Rooms

You can also set the sequence of the room under **Setup>> Schedule>>My Room List**. Just enter the sequence number next to each room listed.

Schedule Room Availability

To make a room available or not for scheduling you will need to go to **Setup>>Scheduler>>Room Availability**.

The screenshot shows the 'Room's Availability' window. On the left is a list of rooms: Procedure Room, Room 1, Room 2, and Room 3, each with an 'Interval' of 0. The main area is titled '(A)availability' and contains a table with columns: Start Date, Day, Type, From, To, Interval, Office, and NA. The first row shows '04/03/2008', 'Thursday', 'M', '00:00 AM', '00:00 AM', '15', 'All', and a checked 'NA' box. Callout boxes provide instructions: 'Select room to set availability.' points to the room list; 'Select Start Date and Day for the availability.' points to the first two columns; 'Select M for Manual and T for Template.' points to the 'Type' column; 'Select office from the list to set availability of the doctor.' points to the 'Office' column; and 'Check this box to make it "Not Available" during the schedule.' points to the 'NA' checkbox. A legend at the bottom states 'NA = Not Available M = Manual T = Template'. Buttons at the bottom include 'To be Scheduled', 'Add', 'Delete', 'Save', and 'Close'.

Room	Interval
Procedure Room	0
Room 1	0
Room 2	0
Room 3	0

Start Date	Day	Type	From	To	Interval	Office	NA
04/03/2008	Thursday	M	00:00 AM	00:00 AM	15	All	<input checked="" type="checkbox"/>

NA = Not Available M = Manual T = Template

Buttons: To be Scheduled, Add, Delete, Save, Close

NOTES:

Set Procedures Available for Scheduling

Setup>>Scheduler>>Procedure

Here you will choose the schedule description, the color it will show on the schedule, the duration time of the procedure, if authorization is required for the procedure, and the visit note default for the procedure.

Procedure

Office: 00001 - Office 55

Description*	Color	Duration	A	AS
> Checkup	Yellow	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Detail Checkup	Purple	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Dgt. Physical	Orange	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. D. Physical	Green	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Echo and ECG	Blue	60	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Echocardiogram	Dark Green	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Employer Physical	Light Blue	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8. Follow-Up	Pink	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9. H. Physical	Light Green	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10. H. Physical	Orange	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11. La	Red	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12. N	Light Green	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13. Pap smear/ cervic	Red	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14. physical	Grey	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Purple		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Pink	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Cyan	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>

* = For All Offices Active
AS= Default for Allergy

Auth. Req. Sch. Columns VN Default

Add Delete Save Close

Click here to set time duration.

Click on Color to set color for the procedure.

Click here to set Authorization Requirement.

Click here to set/ schedule column for the procedure.

Click here to set Visit Note default value for the procedure.

Click here to add new procedure.

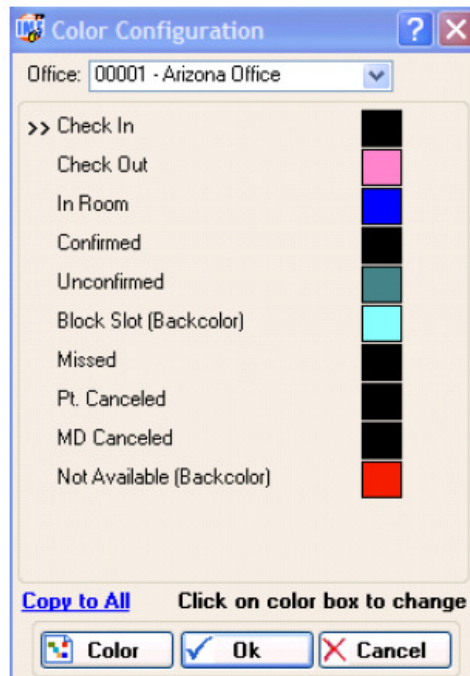
NOTES:



Customize the color of the schedule template

Setup>>Scheduler>>Color Configuration

The text in the scheduler will allow you to see what the status of the appointment is, while the background will show the Procedure the patient is coming in for.



NOTES:



Schedule Parameters

Setup>>Scheduler>>Parameters

The screenshot shows a 'Schedule Parameter' dialog box with a title bar containing a question mark and a close button. Below the title bar is a dropdown menu for 'Office' set to '00001 - Arizona Office'. The main area contains a table with two columns: 'Description' and 'Value'. The table lists various scheduling parameters and their current values. At the bottom of the table is a warning message in a box. Below the warning box are three buttons: 'Copy to All', 'Ok', and 'Cancel'.

Description	Value
Office start time	11:59 AM
Office end time	06:00 PM
Appointment Interval (Minutes)	15
Refresh Time (Minutes)	
Default View	Daily
Week view start from	Current Day
Month view start from	Current Date
Calendar View	Sun-Sat
Appointment Waiting	Yes
Set background color for	Procedure
Check room for appointment	Yes
Check maximum procedures per day and authorization	No
Default Confirm Status	Yes
Show canceled appointment	Yes
Check patient future appointment	Yes
Ask reason when move appointment	Yes

Any change to parameter will take effect, when the scheduler will open next time.

[Copy to All](#)

NOTES:



To Set User & System Parameters

Setup>>User Parameters>>Schedule>>Check In & CheckOut

Setup>>System Parameters>>Schedule>>Check In & CheckOut

The parameters give you a description at the bottom of the page as you click on each one.

System Parameters are shown below

Parameter	Value
» IVR appointment reminder	No ▾
Show doctors, who are assigned to room	Yes ▾
Show patient DOB in appointment list	Yes ▾
Show patient appointment with other detail and walkin	No ▾
Print patient balance in daily view print	No ▾
Is case required?	No ▾
Appointment Card	None
Open multiple schedule screen	Yes ▾
Show patient Zip in appointment list	No ▾
Allow to create visit note from scheduler	No ▾

NOTES:

User Parameters are shown below:

Parameter	Value
» Allow double book appointment	Yes
Allow to change visit status from check in/out	Yes
Days of appointment to synch with Outlook	1 Day
Default Status	All
Outlook reminder for appointment	Yes
Set Default Doctor in Check In/Out	All
Set Default Doctor in Scheduler	
Show appointment list	Yes
Show default doctor from User parameter	No
Show NOT checked in patient only in appointment list	No

By clicking the **Copy To User icon** when in user parameters, the parameters can also be set for other users.

Searching for a Parameter

You can search for a specific parameter by entering a word in the search box and then clicking on the filter button.

The user enters a keyword to search.

Click on the **Filter** button to search parameter on specified keyword.

Search result.

NOTES:
