

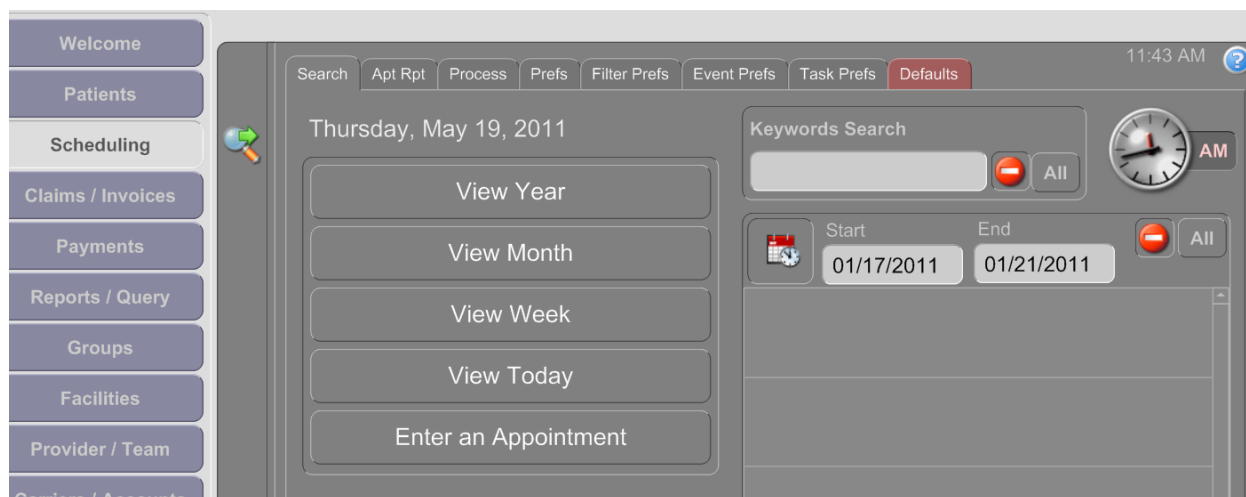
Scheduler – Adding an Appointment



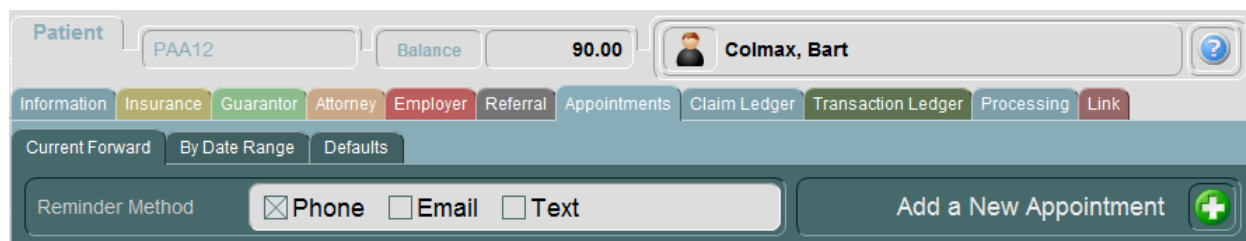
Adding an Appointment

Go to the **Scheduling** menu to view, or enter appointments.

- Click on the button labeled **“Enter an Appointment”**.

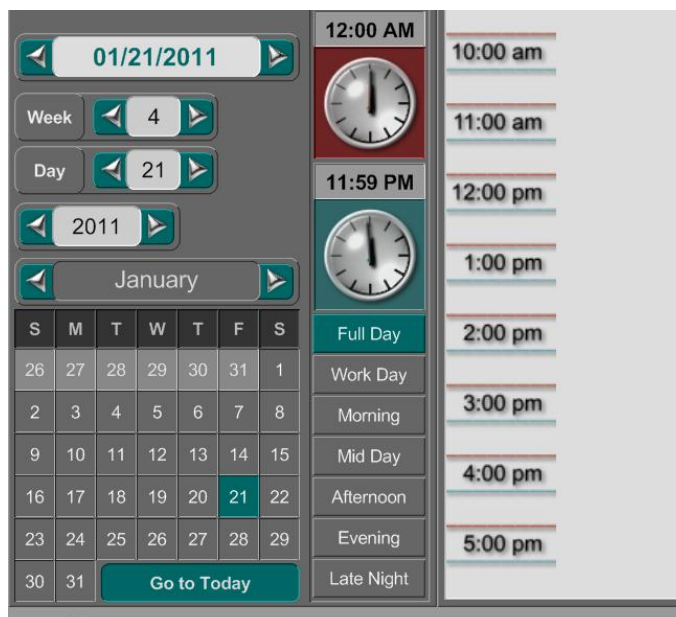


You can also create appointments from the Patient menu, Appointments tab, by clicking the green plus icon labeled **“Add a New Appointment”**.



- By clicking on the **“Go to Today”** button, the date selector is set to the current day.

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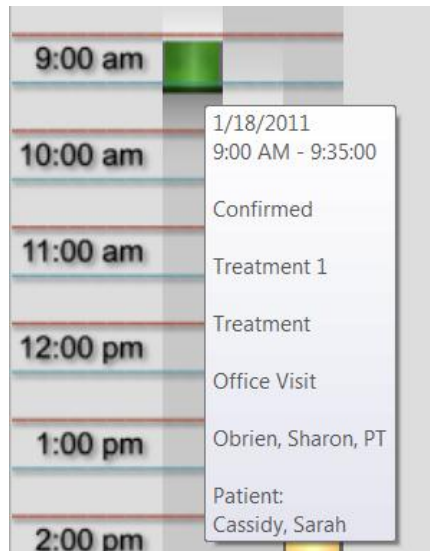


- By clicking the “All” button in the under “Set Filter to” on the left, you will see all events for all provider/team members and all criteria for that specific day. You can select different days using these options to see what is booked within those date ranges.

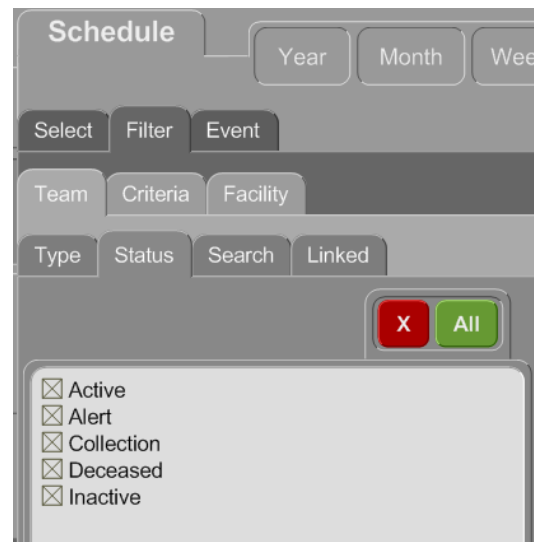
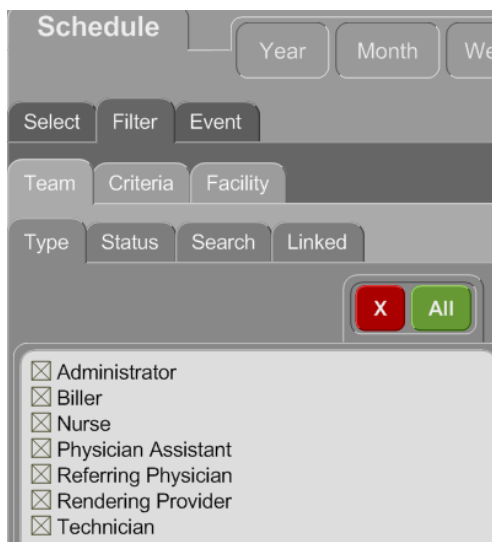


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- Holding the mouse over the individual item will bring up a tool tip to give you some quick information about the appointment.

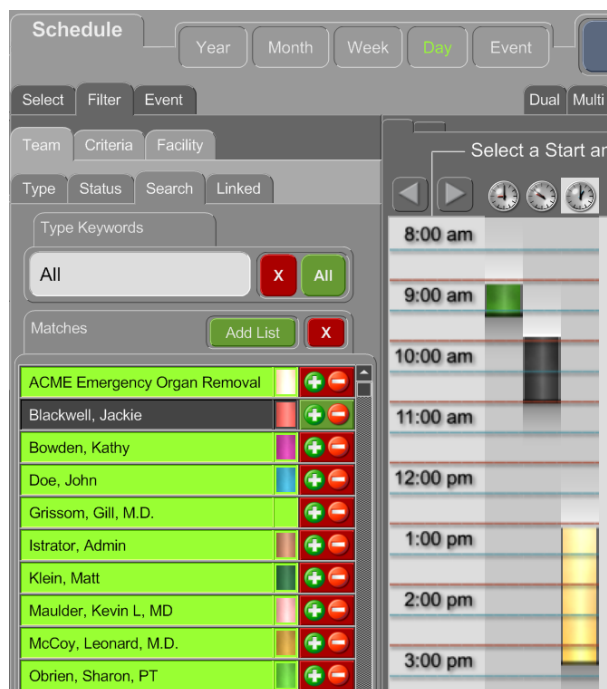


- From the **Filter** tab, you can filter appointments by Provider/Team member, by Type and Status and by Facility.
- On the **Team** tab you can filter Provider/Team members by Type and Status.

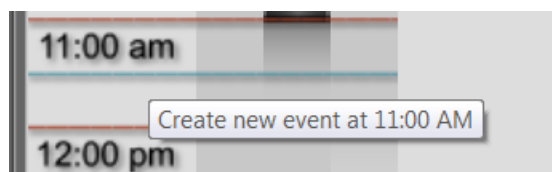


- On the **Search** tab, you can select a Provider/Team member to add or remove from the search list by clicking on the names individually. Name highlighted in green are included. You will see the events displayed on the right.

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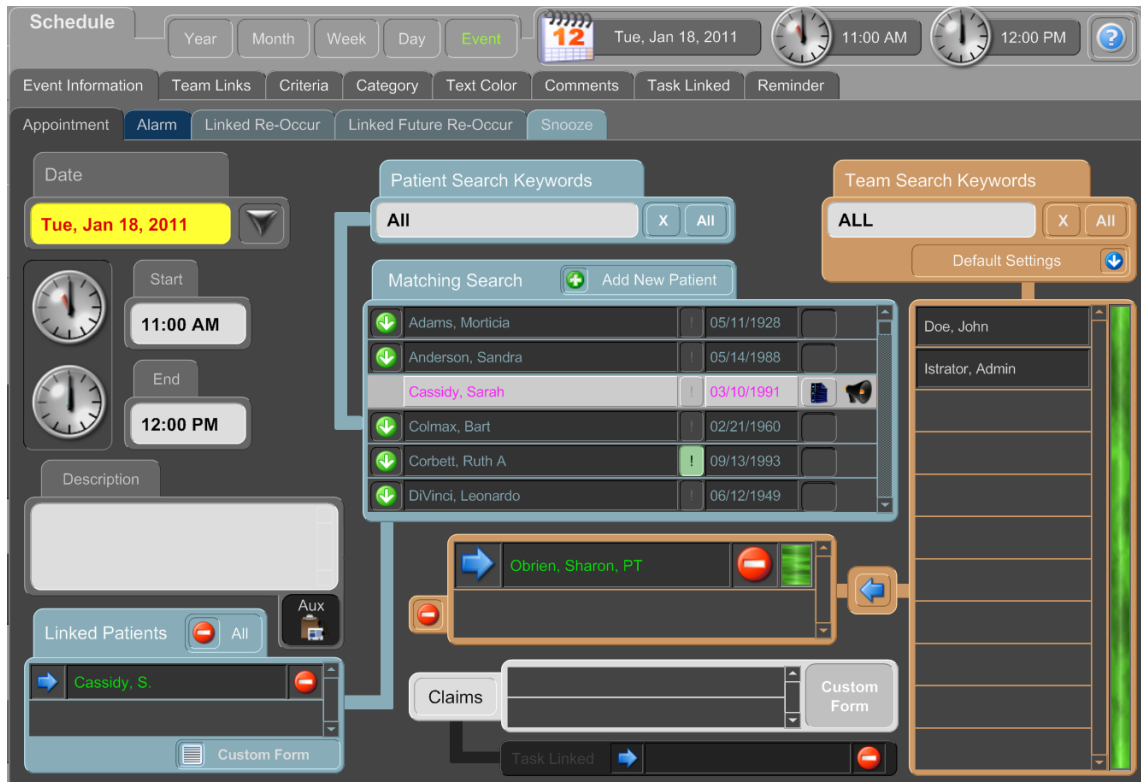
- To create a schedule event on a specific date, move the cursor over to the time ruler and select a Start time. Click again to select an End time. The **Appointment** tab for the Event will appear.



- On the **Appointment** tab:
 - You can change the times by clicking on the clock next to the Start and End time. Note that the hour hand is **red** for AM and **blue** for PM times.
 - You can enter an optional “Description” for this event.
 - You will also see a list of patients from your patient demographics. You can run a keyword search to search for a specific patient. It is always a good idea to search and make sure that you do not already have an existing patient record before you add a new one.

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- When a patient is selected, the default rendering provider is also attached to this event. You can detach the rendering provider. You can also attach additional provider/team members to this event.



- On the **Alarm** tab, you can set the time at which the alarm will be triggered for this event. It is basically an alert system for the attached provider/team members. The alarm will only be displayed to the provider team member at log in, or when returning to the main menu, or exiting the main menu. You can set the alarm, for example, to 30 minutes before the event.

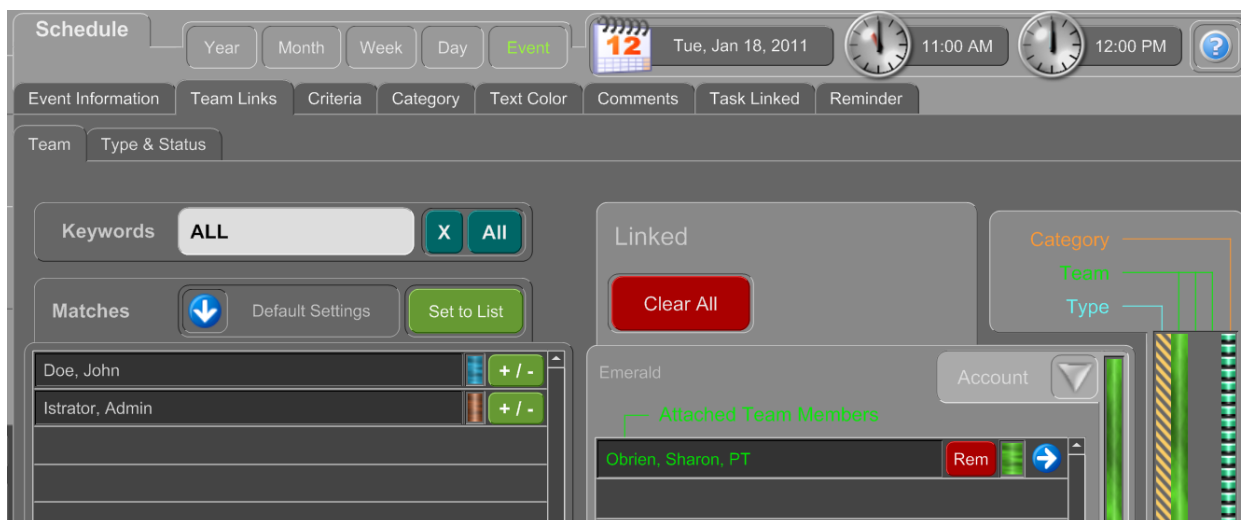
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- On the **Linked Re-Occur** tab, recurring events are events which you can create from the currently selected event, allowing you to create matching events that would span out over a period of time. For example, if you wanted a weekly appointment every Tuesday for the next 3 months, you can set the desired time range to span and it will create events for those days automatically for you.

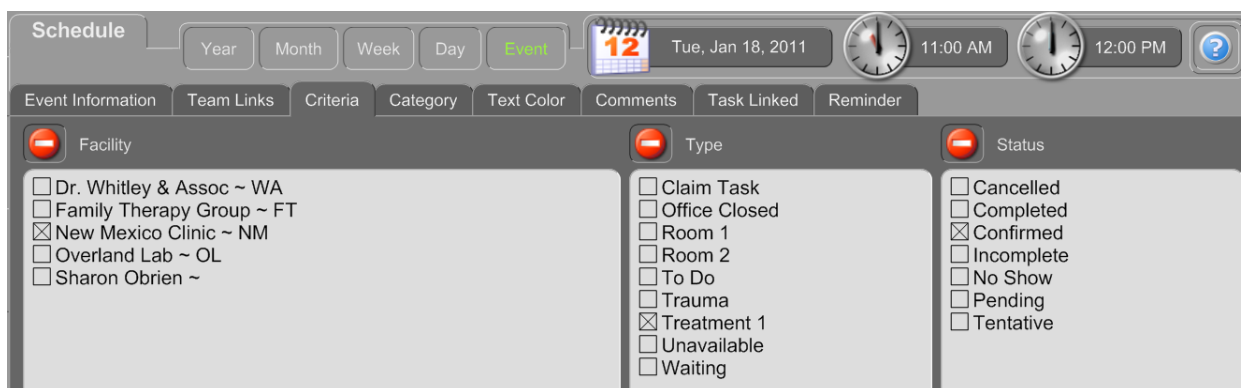
Date	Start Time	End Time	Status	Actions
Tue, Jan 18, 2011	11:00a	12:00 PM	Confirmed	[Icon] [X]
Tue, Jan 25, 2011	11:00a	12:00 PM	Confirmed	[Icon] [X]

- The **Team Links** tab is another, more advanced way of viewing and attaching different provider team members to a given event.

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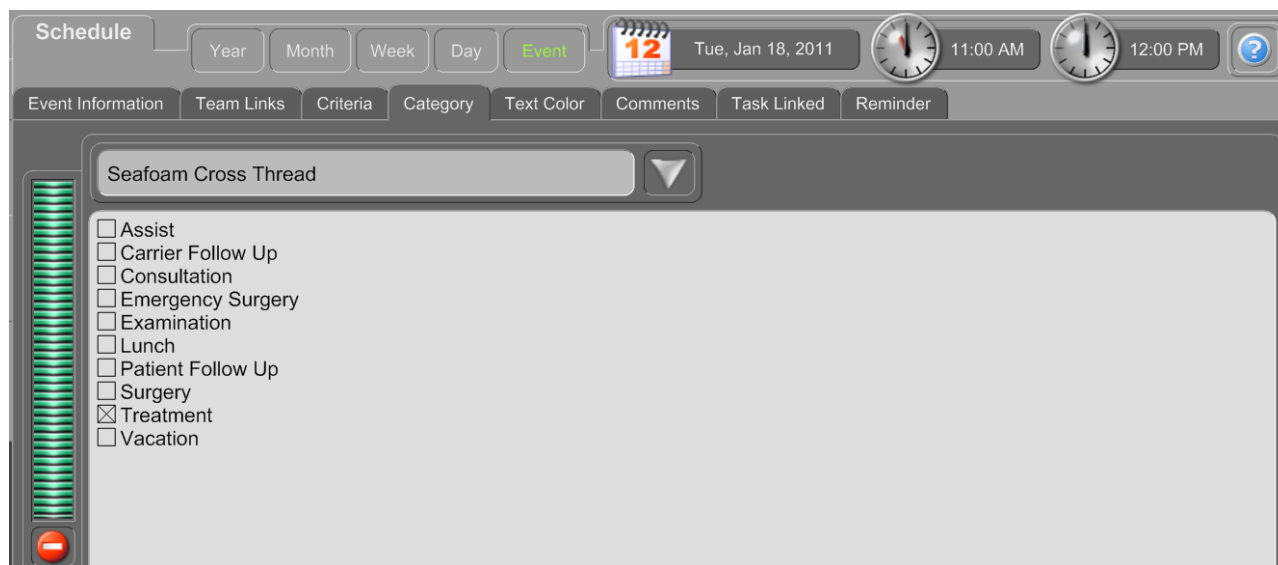


- The **Criteria** tab allows you to filter events by “Facility”, “Type” and “Status”. It is a very important area to make sure these options are set correctly. You can select more than option. More “Type” and “Status” options can be added in the Scheduler preferences.



- On the **Category** tab you can set a category. The category will not be filtered, but it is an additional way of categorizing your event. You can attach a color pattern to this event by selecting it from this list.

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- The **Text Color** tab allows you to set the text color. Text color is only visible on certain screens, but it is another way of categorizing an event by how it displays.



- The **Comments** tab allows you to input information that is to be delivered to the team member, or to the patient.

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- “Comments for Team” might be things that the provider or the technician needs to know prior to the event.
- “Comments for the Patient” might be things that need to be explained to the patient at the event.
- The “Instructions for the Patient” are use externally and will be in appointment cards and phone call reminders to the patient. Thus, it’s best to keep this area HIPPA compliant.

The screenshot shows a software interface for scheduling appointments. At the top, there's a 'Schedule' tab and navigation buttons for 'Year', 'Month', 'Week', 'Day', and 'Event'. A calendar icon shows the date '12' and 'Tue, Jan 18, 2011'. Two clock icons show the time '11:00 AM' and '12:00 PM'. Below this is a row of tabs: 'Event Information', 'Team Links', 'Criteria', 'Category', 'Text Color', 'Comments', 'Task Linked', and 'Reminder'. The main content area is divided into three vertical panels:

- Comments for Team:** A large yellow notepad area with horizontal lines for text entry.
- Comments for Patient:** A large yellow notepad area with horizontal lines for text entry.
- Instructions for Patient:** A yellow notepad area with horizontal lines. Above the lines, there is a warning: "This field should contain data that will be displayed or spoken in Reminders. We advise that you do NOT include any information that would violate HIPPA guidelines."