

# BASIC OPERATOR CLASS FOR

## PRACTICE MANAGEMENT - Aprima PRM 2011

**SAMPLE**  
Scheduling  
Module

Produced By:



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Introduction to Practice Management v1 Instructor Edition  
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Physician Technology Group  
Telephone: 423.521.5656  
[www.PhysicianTechGroup.com](http://www.PhysicianTechGroup.com)  
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## Overview

This documentation is being provided as a sample of the educational material provided by Physician Technology Group. The documentation includes the Scheduling section from the Practice Management System Basic Operator Class.

The Review Exercises and Instructor's Notes are a part of our Introduction to Practice Management Instructor Edition which is designed specifically for educational institutions.

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## **Section Three Overview**

In this section, you will schedule appointments for individual providers, for providers and resources, double book appointment slots, reschedule appointments and use the waiting list to access and add patients. Appointments can be scheduled from the waiting lists and new patients can be added during the scheduling process. You will block appointment times when they are not available for scheduling, do a mass appointment move, and search for individual appointments already on the schedule. You will also update appointment status codes for existing appointments which is common at the time of check in.


## **Section Three Learning Objectives**

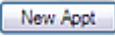
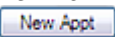
1. You will schedule at least two appointments for existing patients.
2. You will change the appointment status for a patient.
3. You will schedule an appointment and a resource at the same time.
4. You will schedule two appointments from a wait list.
5. You will double book two appointments.
6. You will add to the waiting list a patient not yet registered in the system.
7. You will move a group of appointments to another calendar.

## **Scheduling Overview**

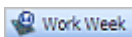
The responsibility of scheduling appointments can vary from facility to facility, so the system provides flexibility in this area. Usually there is a template or schedule that is followed and it might include specific times for specific types of visits such as new patient visits and follow ups. Templating is an administrative function and is not covered in this class, however daily appointment schedules can be edited from the Scheduler. Calendars are used for scheduling. Calendars can be created for a specific

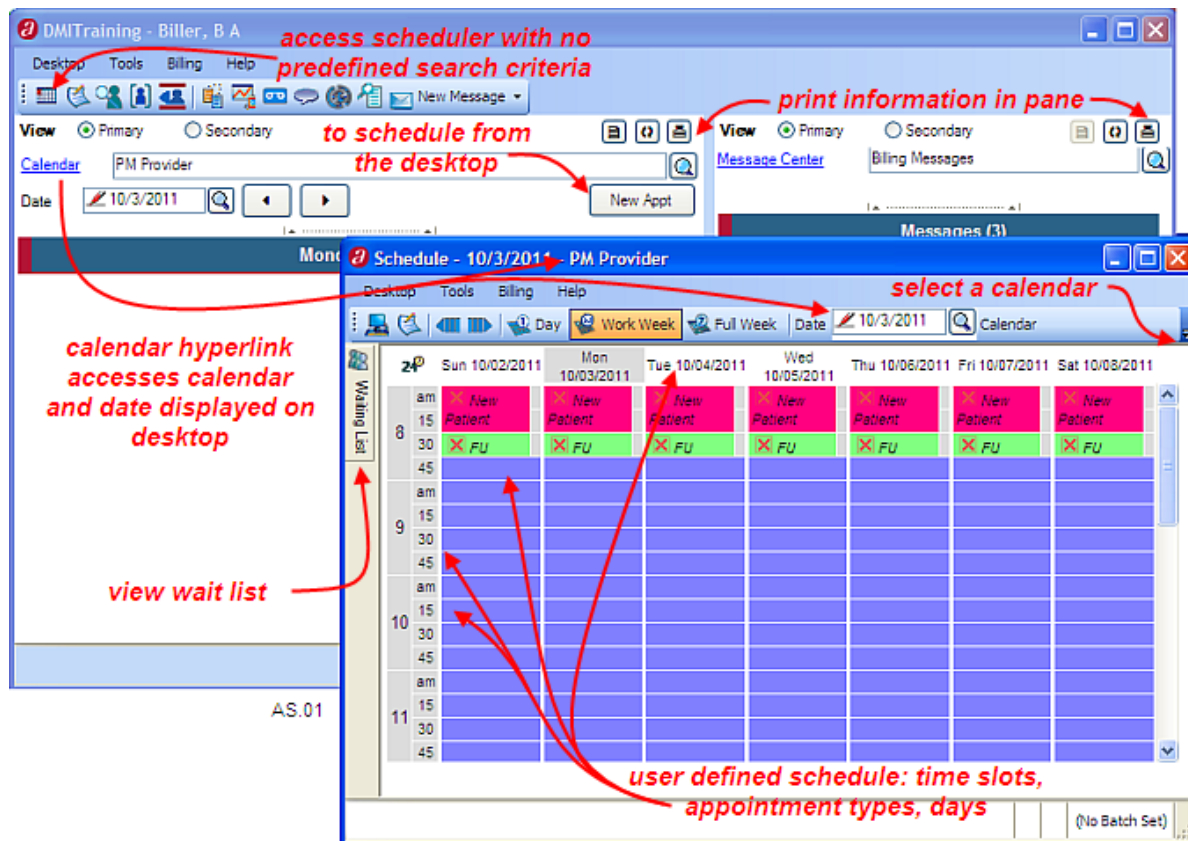
provider or resource (X-ray, procedure room, etc.) or a general calendar can be created.

There are multiple ways to schedule an appointment. The Go to Scheduler icon () on the Desktop accesses the scheduler window. No calendar is assumed, but a calendar can be selected from the Scheduler window. The Calendar hyperlink (underlined) on the Desktop accesses the Scheduler window and assumes the calendar(s) and date displayed in the associated pane of the Desktop. The Scheduler window can display one day and or multiple days and can also display multiple calendars.

The  button on the Desktop allows you to schedule an appointment without accessing a calendar. However, if you attempt to schedule an appointment in a blocked, reserved or unavailable time, a warning message displays. The  button is a great tool to get a walk in patient on the schedule very quickly.

The  button prints the information in the associated pane.

- From the **Desktop** click on the **Calendar** hyperlink (underlined) to access the scheduler for the date and provider displayed. The **Schedule** window displays (AS.01).
- Click on  to display an entire work week for the calendar identified on the Desktop. Today's date is highlighted in gray.



The screenshot displays the DMITraining - Biller, B A software interface. The main window is titled "Schedule - 10/3/2011 - PM Provider". The interface includes a menu bar (Desktop, Tools, Billing, Help) and a toolbar with icons for scheduling and viewing. The main area shows a calendar grid for the week of October 2nd to 8th, 2011. The grid is divided into time slots (8:00 am to 11:45 am) and days. The "New Patient" and "FU" (Follow Up) appointment types are visible in the grid. The "Waiting List" is shown on the left side of the grid. The "Calendar" pane on the right shows the selected calendar. The "Date" field is set to 10/3/2011. The "View" dropdown is set to "Primary". The "New Appt" button is visible in the top right corner. The "Print" button is visible in the top right corner. The "Calendar" hyperlink is underlined in the Desktop pane. The "Work Week" button is visible in the top left corner. The "AS.01" label is visible in the bottom left corner. Red arrows and text annotations highlight key features: "access scheduler with no predefined search criteria" points to the "Go to Scheduler" icon; "print information in pane" points to the "Print" button; "to schedule from the desktop" points to the "New Appt" button; "calendar hyperlink accesses calendar and date displayed on desktop" points to the "Calendar" hyperlink; "view wait list" points to the "Waiting List" pane; "select a calendar" points to the "Calendar" pane; and "user defined schedule: time slots, appointment types, days" points to the calendar grid.

The calendar for this provider is user defined. It displays 15 minute appointment slots seven days a week. The 8:00 – 8:30 slot is reserved for new patient visits every day. Pink is the user-defined color associated with the New Patient appointment type. The 8:30 – 8:45 slot is reserved for follow up appointments every day and green is the user-defined color associated with the Follow Up appointment type.

Blue identifies open slots for this provider. A color for open slots is not required but is helpful when scheduling for multiple providers on one screen. Additional calendars can be displayed when scheduling for multiple providers or resources, but only one day can display with multiple calendars.

The quick link icons available from the Schedule screen are:



return to the Desktop.



go to the Message Center.



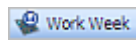
go to previous; this assumes previous day if the schedule is in Day view and previous week if the schedule is in Week view.



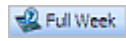
go to next; this assumes next day if the schedule is in Day view and next week if the schedule is in Week view.



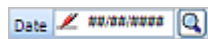
display one day of the calendar



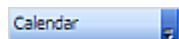
display work week for this calendar. If there are days that are unavailable for appointments those days would be suppressed.



displays seven days. If there are days that are unavailable for appointments they display as well.



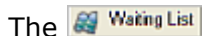
to specify a day to display for the calendar.



to select a calendar(s) to display.


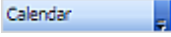


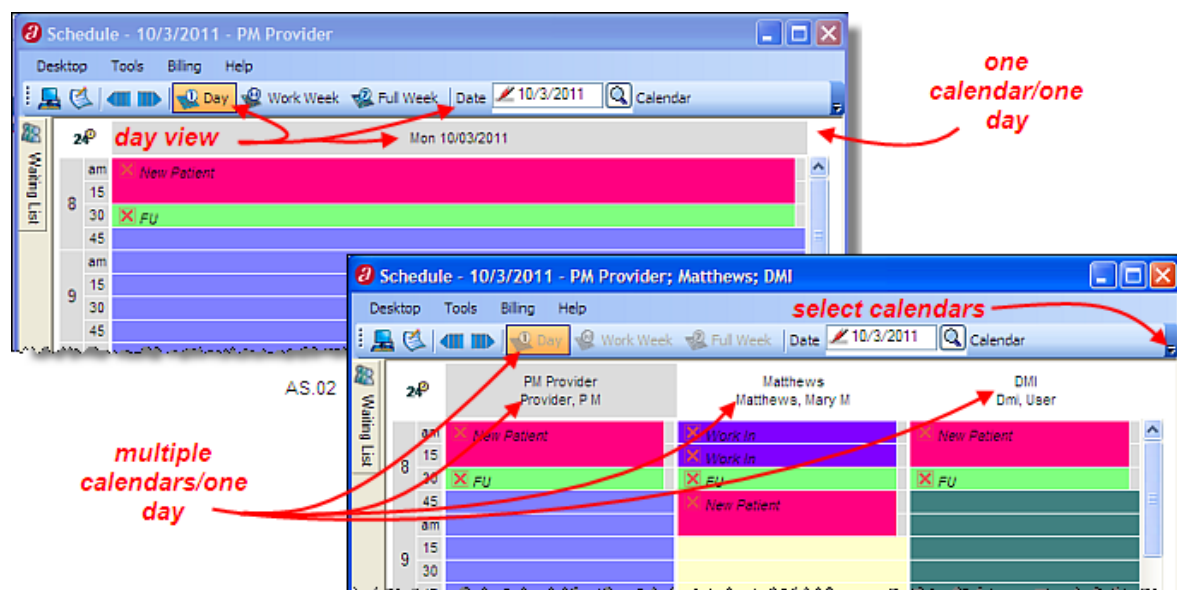
to display 24 hours for the day.



The slider is used to view patients waiting for available appointment times.

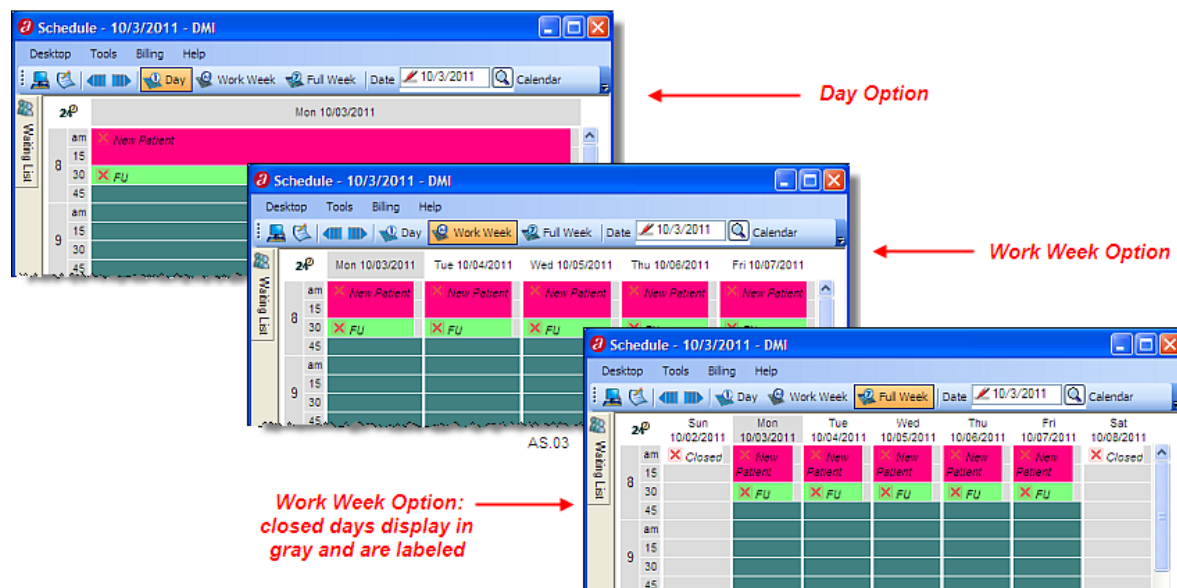
## Calendar Display Options

A single day can display for a provider or multiple providers. The calendars display from left to right based on the order in which they are selected. Use the  icon to display one day and the  icon to select the different calendars (AS.02).



When multiple calendars are displayed, each calendar name and associated provider displays at the top of the calendar. Background colors are not required but assist in scheduling accuracy when multiple calendars are used by the scheduler.


When displaying multiple calendars, only the **Day** option is available. When working with one calendar, it can be viewed using the **Day** option, **Work Week** option or **Full Week** option. The **Work Week** option displays only the days available for scheduling appointments. The **Full Week** option includes days the provider is out or the office is closed. Those days appear in gray and are marked as *Closed* (AS.03).

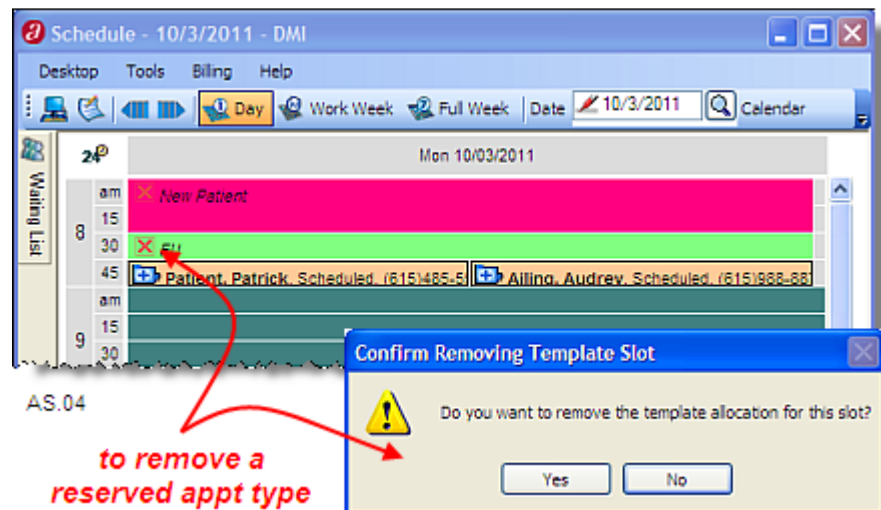




## Schedule an Appointment

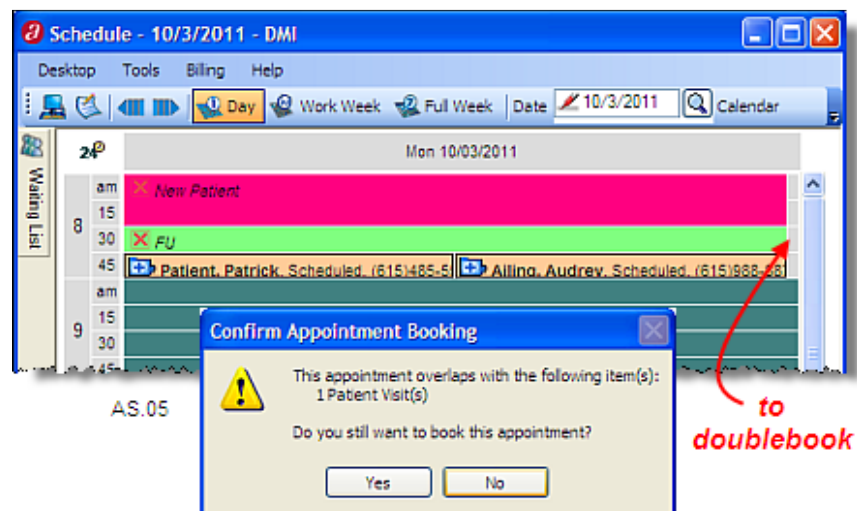
Flexibility is the key to any successful scheduling system. The templates are a guide to how a provider wants appointments scheduled; however, changes can be made at the time of scheduling. Assigned time slots can be removed and overbooking is allowed if required or needed by the practice.



Although specific appointment types can be assigned to time slots, those can be deleted from the schedule for the day. To do this, click on the associated . A warning message displays asking you to confirm the time slot deletion (AS.04).





Permanent changes must be made to the template through the List Editor. Creating and editing templates is an administrative function and is not covered in this class.

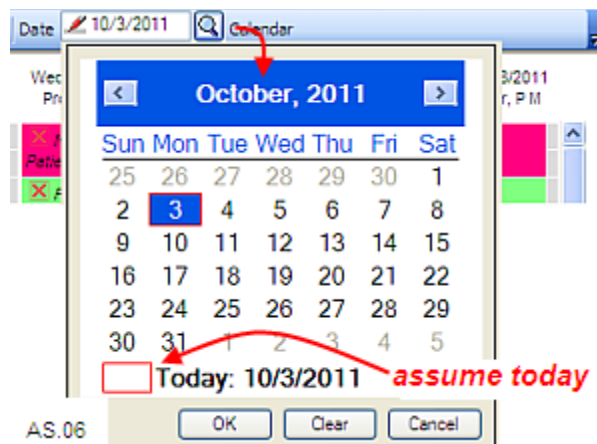
Any calendar can be set up for overbooking. To overbook a time slot, click on the gray space to the far left of the appointment slot. Appointments are listed horizontally from left to right in the order they are scheduled. A warning message displays prior to booking the appointment (AS.05).



- Click on  to display a single day schedule. Verify that today's date displays. If not, click on the  associated with the date field and select today's date (AS.06).

*Note: Use the  button whenever it is necessary to change the date of the schedule.*

- Verify that the window name says **Provider, P M**. If not, click on  to select this calendar.



- To schedule an appointment on **PM Provider's** calendar for **today** at 10:00 am, click on the blue area associated with the **10:00 am** slot. The **Appointment Patient** window displays (AS.07).

The **Schedule Type** section is used to indicate the type of appointment or event being scheduled. Options are:

**Patient Visit:** to schedule a patient appointment and record all pertinent related information including calendar, resource, appointment type, appointment date, time span and appointment length, provider, service site, financial center, patient name, phone number and type, reason, patient case (when applicable), referring provider, authorization code notes, and access to the waiting list.

**Event:** to block out time for a special event. The only fields available are calendar, resource, appointment date and time span, appointment length, phone and phone type, reason and notes.

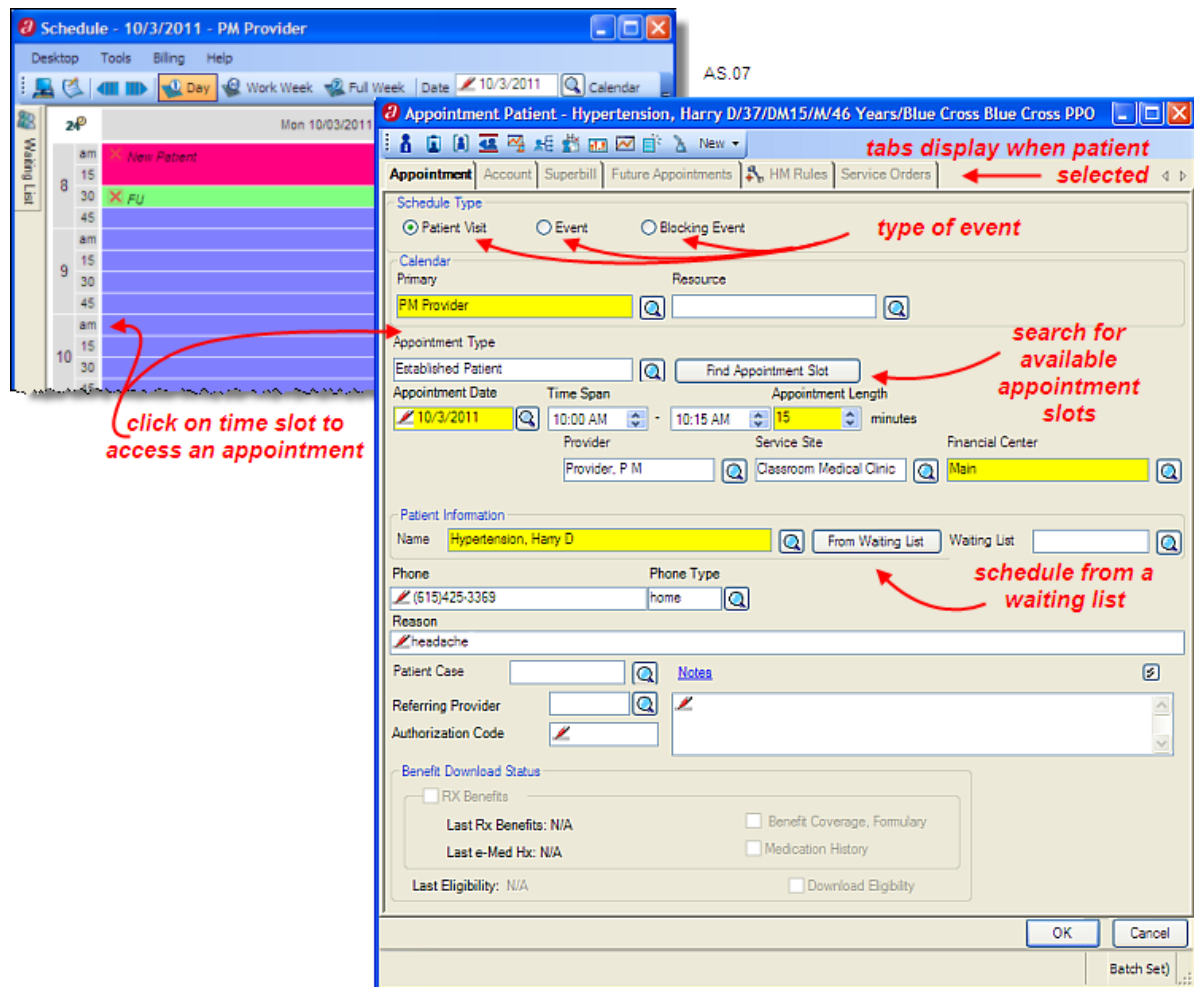
**Blocking Event:** to block out time for an event associated with an appointment type. The only fields available are calendar, resource, appointment type, appointment date and time span, appointment length, phone and phone type, reason and notes.

The only difference between an event and a blocking event is access to the appointment type, so a blocking event might be used to indicate a lunch hour or to close the office early. An event might be used to indicate an unavailable time period for some unexpected reason and for which you do not have an appointment type.

The **Calendar** section is used to identify the calendar or calendars being used for this visit. Options are:

**Calendar:** to assign this appointment to a calendar.

**Resource:** to assign this appointment to a resource (X-ray, procedure room, etc.)



The **Appointment Type** field is used to assign an appointment type to this appointment. If the appointment type entered here is different than the predetermined appointment type for this time slot, a warning displays. Appointment types can be color coded. The color assigned to the appointment type also displays on the Desktop.

The **Find Appointment Slot** button is used to search for available appointments. Search options include calendars and appointment types. You can search for the earliest available appointments within a certain timeframe (days, weeks, months, years) or for appointments available for an approximate timeframe. This search can be done for all active calendars and/or all free times which would ignore assigned appointment types.

The **Appointment Date** field assumes the date displayed on the calendar. This date can be changed if needed.

The **Time Span** fields assume the time span of the time slot selected on the scheduler but this information can be changed if needed. If using the **New Appt** button from the Desktop no time span would be assumed.

The **Appointment Length** is assumed from the appointment slot selected on the scheduler. The appointment length can be assumed from appointment type as well, so



if you schedule an appointment type that needs 30 minutes the time span adjusts accordingly.

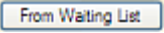
The **Provider** field is used to assign a provider to this appointment. The system assumes the provider associated with the calendar if one has been assigned. The provider can be changed if needed. Whichever provider is assigned to the appointment at this point is the provider assumed when the visit note is created. If necessary, the provider can be changed at that point that the visit note is created.

The **Service Site** field is used to assign a service site to this appointment. The system assumes the service site associated with the calendar if one has been assigned. The service site can be changed if needed. Whichever service site is assigned to the appointment at this point is the service site assumed when the visit note is created. If necessary, the service site can be changed at that point that the visit note is created.

The **Financial Center** field is used to associate a Financial Center with this appointment. The system assumes the financial center associated with the service site. The financial center can be changed if needed. Whichever financial center is assigned to the appointment at this point is the financial center assumed when the visit note is created.

The **Patient Information** section allows you to identify the patient for the appointment and to access the waiting list.

The **Name** field is used to identify the patient for this appointment. Click on  to search for the patient or enter a partial last name and . If multiple names fit the criteria provided, a find window displays.

The  button is used to access patients assigned to a waiting list. A waiting list must be identified to use this option. The search can be refined by ID, patient, provider, service site, appointment time and length, appointment type, waiting list priority and expiration date.

The **Phone** and **Phone Type** fields are populated when a patient name is selected. The number assumed is the Phone 1 from the patient's Demographics window. This information can be changed.

*Note: When a patient phone number is changed in Demographics, the system checks the phone number on appointments for the current or any future date. If the two phone numbers are the same, the phone number in the appointment is updated. If the two numbers are different, the appointment phone number remains unchanged.*

The **Reason** field is used to enter a reason for the appointment. Reasons display on the Schedule and Desktop.

The **Patient Case** field is available when a patient has an existing case. Appointments can be associated with cases. A common case type is pregnancy, but other case types can be created. If a referring provider and authorization number are associated with a case, the fields are to be populated when the case is selected.

The **Referring Provider** field is available to associate a referring provider with this appointment. If a referring provider is associated with this patient, this field will be

completed automatically. If a referring provider is associated with the patient case, this field is to be completed with that referring provider.

The **Authorization Code** field is available to associate an authorization code with this appointment. This is assumed from the patient case when available.

*Note: If a patient case is associated with the appointment at a later time, any referring provider or authorization information will overwrite entries in the referring provider and authorization code fields.*

The **Benefits Download Status** section displays the last successful downloads for this patient.


The **Last Rx Benefits** field displays the date the Rx benefits were last downloaded for this patient if applicable.

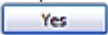
The **Last e-Med Hx** field displays the date electronic medication history was last downloaded for this patient if applicable.

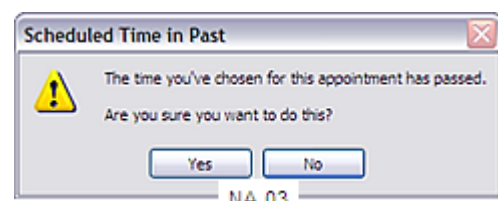
The **Last Eligibility** field displays the date eligibility was last checked for this patient if applicable. The checkbox is checked by default. This can be changed.

- Use the following information to schedule an appointment:

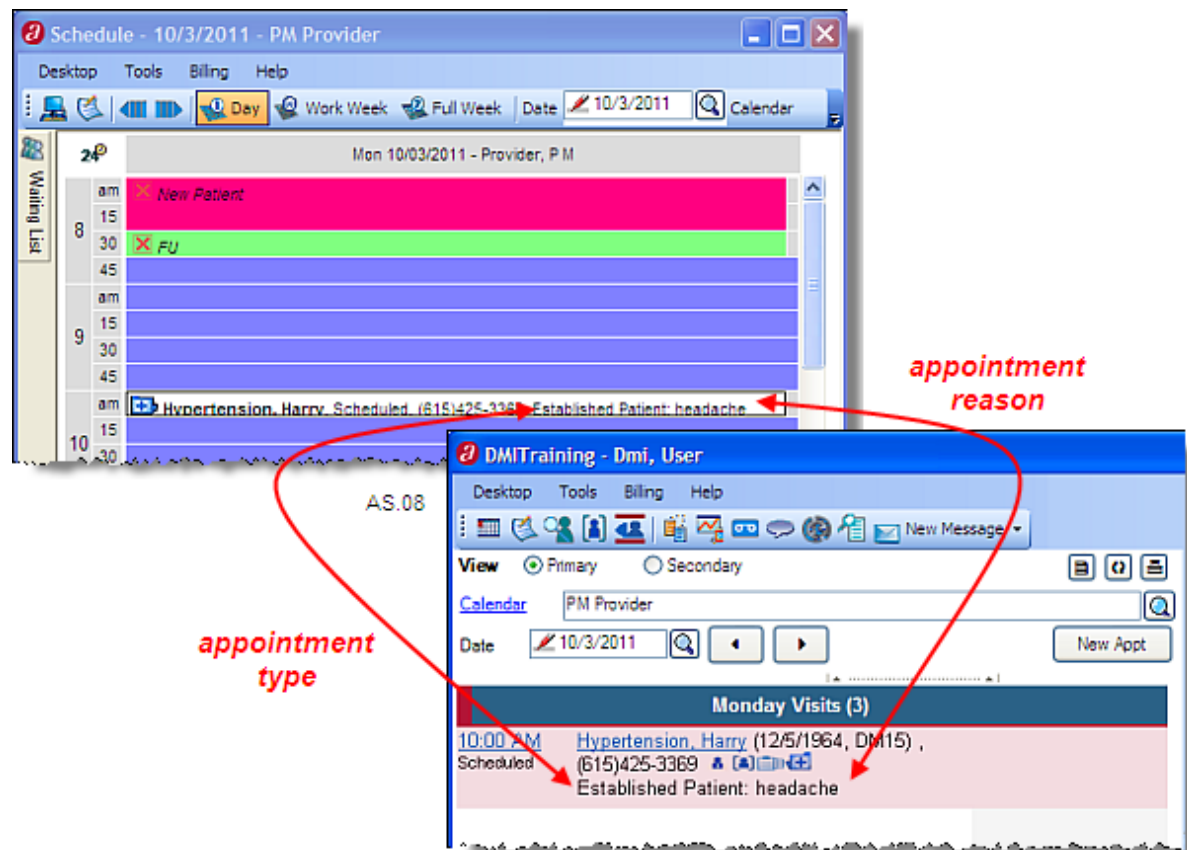
Schedule Type:	<b>Patient Visit</b> (assumed)
Calendar:	
Primary:	<b>PM Provider</b> (assumed on Schedule window)
Resource:	(blank)
Appointment Type:	<b>Established Patient</b> (optional)
Appointment Date:	(current date)
Time Span:	<b>10:00 – 10:15 am</b> (assumed)
Appointment Length:	<b>15 minutes</b> (assumed)
Provider:	<b>Provider, P M</b> (assumed from Calendar)
Service Site:	<b>Classroom Medical Clinic</b> (assumed)
Financial Center:	<b>Main</b> (assumed)
Name:	<b>Hypertension, Harry D</b>
Phone:	<b>615.425.3369, home</b> (assumed)
Reason:	<b>headache</b>
Referring Provider:	(blank)
Authorization Code:	(blank)
Notes:	(blank)

- Click on  to save the appointment.

*Note: Depending on the time of day you are doing this exercise, a warning may appear indicating the appointment time has passed. If this message appears, click on  (NA.03).*






The appointment now displays in the Schedule window for PM Provider and on the Desktop when the PM Provider calendar is selected (AS.08).

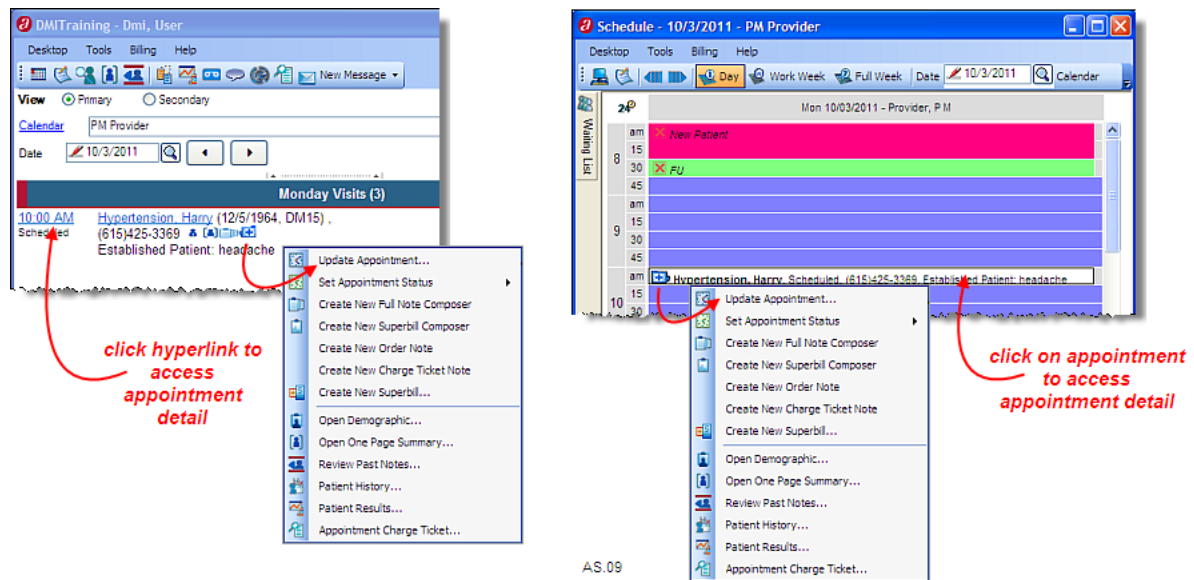




*Note: When the appointment type, Established Patient, is selected, the appointment slot has a white background because no color is associated with that appointment slot. When a color is associated with an appointment type, the appointment displays in that color. If no appointment type is associated with the appointment, the appointment displays in a tan color.*

## Access Existing Appointments

A scheduled appointment can be accessed a number of ways. From the Schedule window, you can click on the appointment information itself or click on the associated  icon and select  Update Appointment... From the Desktop, click on the appointment hyperlink (underlined) or the associated  icon (AS.09).







- From the **Schedule** window, click on the  associated with **Harry Hypertension's** appointment and click on  to view the appointment details (AS.10).

At the top of the window, quick link icons are available to access information about this patient. In addition, tabs are available to provide a quick look at information that could be pertinent to this appointment. Both the quick link icons and the tabs are helpful during the check in process on the day of the patient's visit.


## Quick Link Icons

Quick Link icons are available to access additional information for this patient. They include:

 indicator associated with the patient condition field in demographics; the indicator appears in the patient toolbar and can be color coded. The Find Patient window will display the patient's ID in the color assigned to a patient's condition.


 provides a quick view of patient demographics (DOB, address, phone, responsible party, employer, primary insurance, pharmacy, future appointments, last appointment)

 accesses Patient Demographics for this patient.





 accesses the One Page Summary for this patient.

 accesses Review Past Notes for this patient.

 accesses results for this patient.

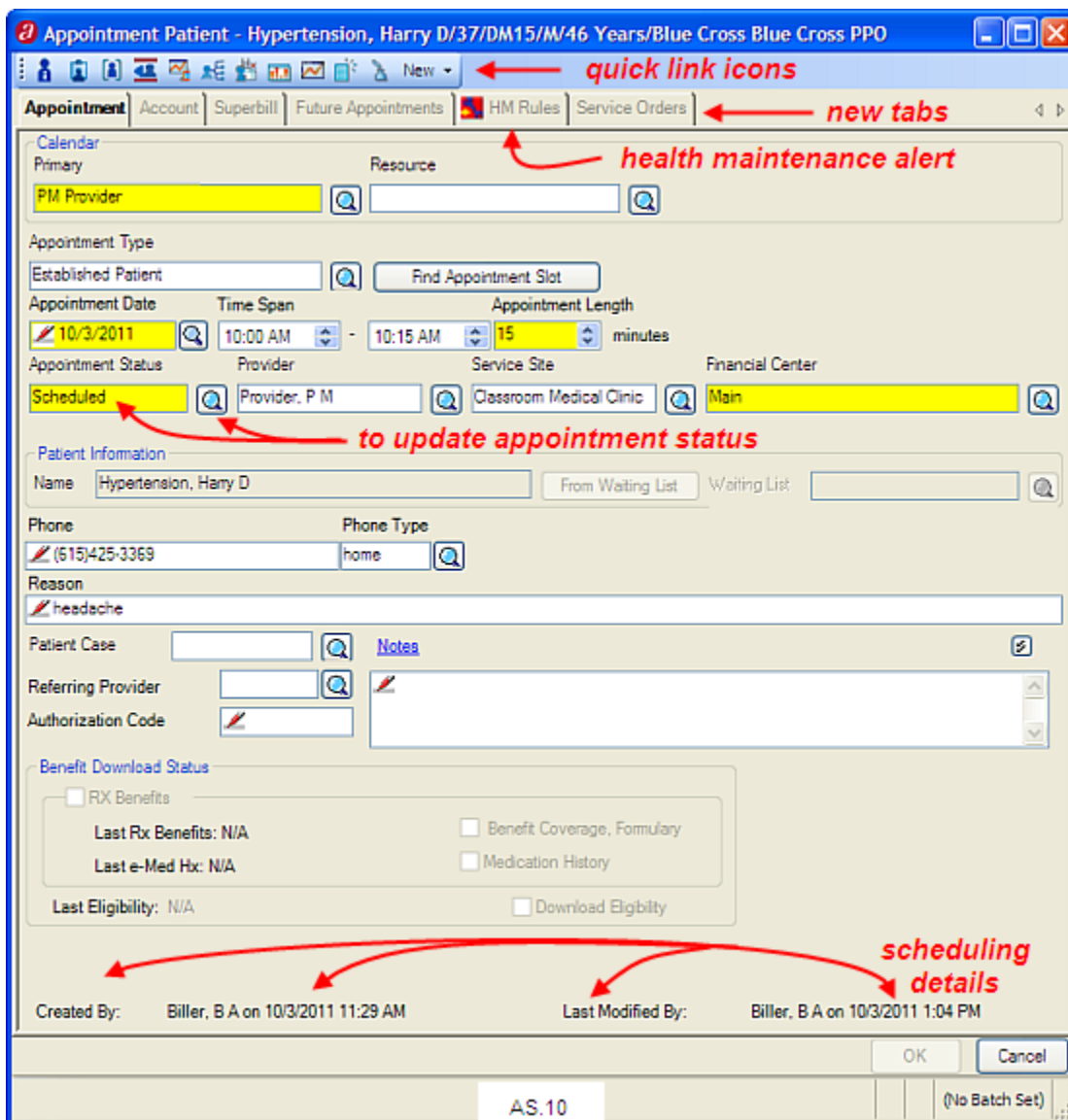
 accesses information about other providers involved in the patient's care

 accesses the patient's history information and allows for additions and updates.

-  accesses growth charts for this patient.
-  accesses chart observations (graphing vitals, labs) for this patient.
-  used to generate a document for this patient.
-  used to import advanced directives.
- New** allows you to create a new appointment, note, superbill, message, tracking event, case, remark or referral for this patient.

## Appointment Tabs

The **Appointment** tab accesses the detail about this appointment including who created the appointment, when it was last modified and by whom.



**Appointment Patient - Hypertension, Harry D/37/DM15/M/46 Years/Blue Cross Blue Cross PPO**

**quick link icons** (pointing to the top toolbar)

**new tabs** (pointing to the Appointment, Account, Superbill, Future Appointments, HM Rules, Service Orders tabs)

**health maintenance alert** (pointing to the Appointment tab)

**to update appointment status** (pointing to the Appointment Status dropdown)

**scheduling details** (pointing to the Created By and Last Modified By fields)

**Appointment Details:**

- Calendar:** Primary (PM Provider), Resource (empty)
- Appointment Type:** Established Patient
- Appointment Date:** 10/3/2011
- Time Span:** 10:00 AM - 10:15 AM
- Appointment Length:** 15 minutes
- Appointment Status:** Scheduled
- Provider:** Provider, P M
- Service Site:** Classroom Medical Clinic
- Financial Center:** Main

**Patient Information:**

- Name:** Hypertension, Harry D
- Phone:** (615)425-3369
- Phone Type:** home
- Reason:** headache
- Patient Case:** (empty)
- Referring Provider:** (empty)
- Authorization Code:** (empty)

**Benefit Download Status:**

- ☐ RX Benefits
  - Last Rx Benefits: N/A
  - Last e-Med Hx: N/A
- ☐ Benefit Coverage, Formulary
- ☐ Medication History
- ☐ Download Eligibility
- Last Eligibility: N/A

**Created By:** Biller, B A on 10/3/2011 11:29 AM

**Last Modified By:** Biller, B A on 10/3/2011 1:04 PM

**Buttons:** OK, Cancel

**Footer:** AS.10 (No Batch Set)

- Click on **Account**. This tab accesses account details for this patient including copay amounts, balances for account, patient, and responsible party. The **Account** field is used to identify which account (personal insurance or Work Comp for example) is associated with this appointment. A payment for this patient can be recorded from this window (AS.11).

Appointment Patient - Hypertension, Harry D/37/DM15/M/46 Years/Blue Cross Blue Cross PPO

Appointment | **Account** | Superbill | Future Appointments | HM Rules | Service Orders

Account: **Main** *identify which account is associated with appointment*

Copay Amount: Primary: N/A Specialist: N/A Other: N/A

Visit Payment

Amount: 0.00 Method: Reference:   
 Date: Batch:   
 Billing Note:   
 Delete Payment

Account Balance: \$0.00 Patient Balance: \$0.00   
 Responsible Party: Harry Hypertension   
 Responsible Party Balance: \$0.00

Account Payment

Amount: 0.00 Method: Reference:   
 Date: Batch:   
 Billing Note:   
 Delete Payment

Print Payment Receipt

OK Cancel

AS.11 (No Batch Set)

- Click on **Superbill**. This tab is used to create a superbill for this appointment or start a note for this appointment. Both superbills and creating notes will be discussed later in this class (AS.12).

Appointment Patient - Hypertension, Harry D/37/DM15/M/46 Years/Blue Cross Blue Cross PPO

Appointment | Account | **Superbill** | Future Appointments | HM Rules | Service Orders

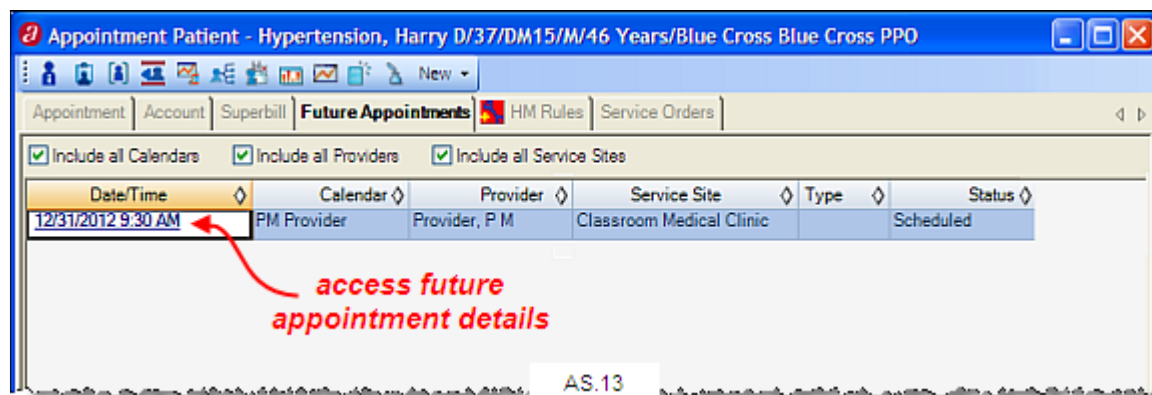
This is a list of all the Visit Notes and/or Superbills associated with this Appointment.

(This Appointment) New Superbill   
 Superbill 100: 10/4/2011, Preliminary   
 New Visit Note

*create superbill for appointment* *create note for appointment*

AS.12

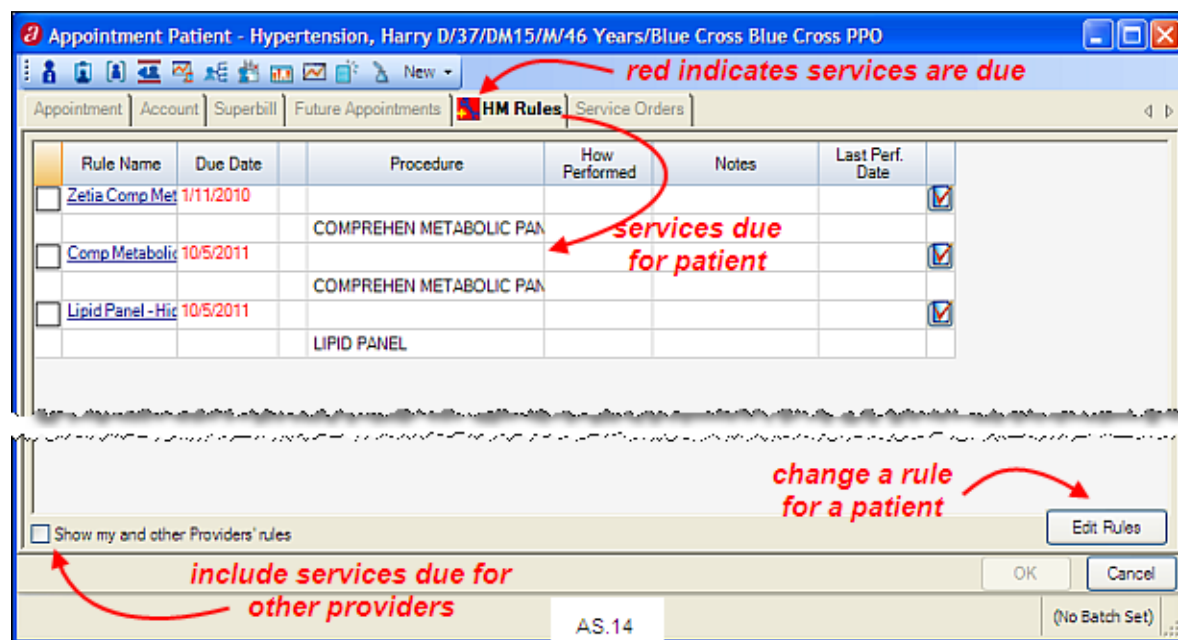
- Click on **Future Appointments**. This tab displays any future appointments for this patient. Summary information such as date and time, calendar, provider, service site and status display. Details for an appointment can be accessed by clicking on the hyperlink (AS.13).



- Click on **HM Rules**. This tab displays health maintenance rules which are reminders for services due or past due for the patient.

*Note: If health maintenance information does not display, click the checkbox labeled **Show my and other Providers' rules** located at the bottom of the screen (AS.14).*

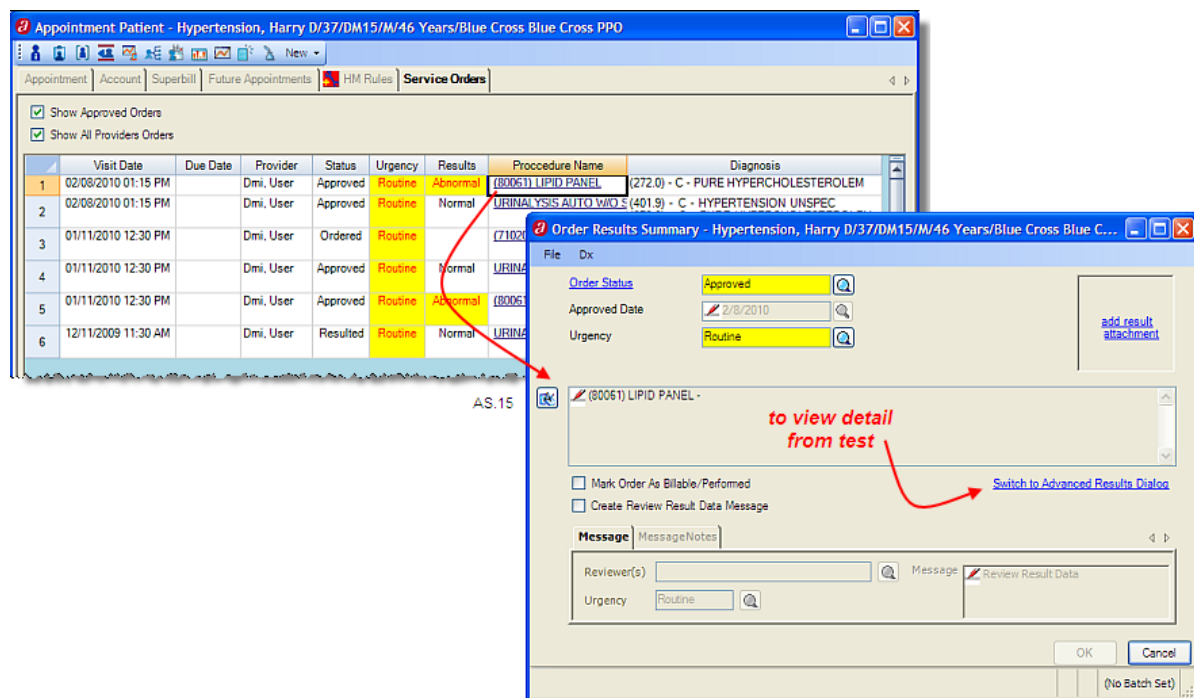
The rule name, due date, and procedure name display. The **Edit Rules** button is used to make changes to a rule associated with this patient. Health maintenance rules are discussed in detail in the EMR class.





*Note: Overdue Health Maintenance rules display a bright red square on the tab.*

- Click on **Service Orders**. This tab displays a list of previous orders for the patient. The visit date, due date, provider status urgency, results, procedure name and

diagnosis related to the order all display. It is helpful to view lab and test orders to verify that all work has been performed before the patient comes in for an appointment to review results (AS.15).



- Click on **Appointment** to re-access appointment details.
- In the **Appointment Status** field, click on  and select **Checked In** to indicate the patient has been checked in at the front desk. The new patient status displays.

*Note: Since there are only two appointment status codes that start with "c", you could simply type "ch" in the Appointment Date field and click on  to assume "checked in".*

- Click on  to save this updated status and return to the **Schedule** window.

## Exercises


- Use the following information to schedule appointments for PM Provider on today's schedule.





Schedule Type:  
Primary Calendar:  
Appointment Type:  
Appointment Date:  
Time Span:  
Provider:  
Service Site:  
Financial Center:  
Name:  
Phone:  
Reason:

**Patient Visit** (assumed)  
**P M Provider**  
**Established Patient** (optional)  
(this Monday)  
**10:15 – 10:30 am**  
**Provider, P M** (assumed)  
**Classroom Medical Clinic** (assumed)  
**Main** (assumed)  
**Streptthroat, Sally M**  
**615.345.3214, cell** (assumed)  
**sore throat**

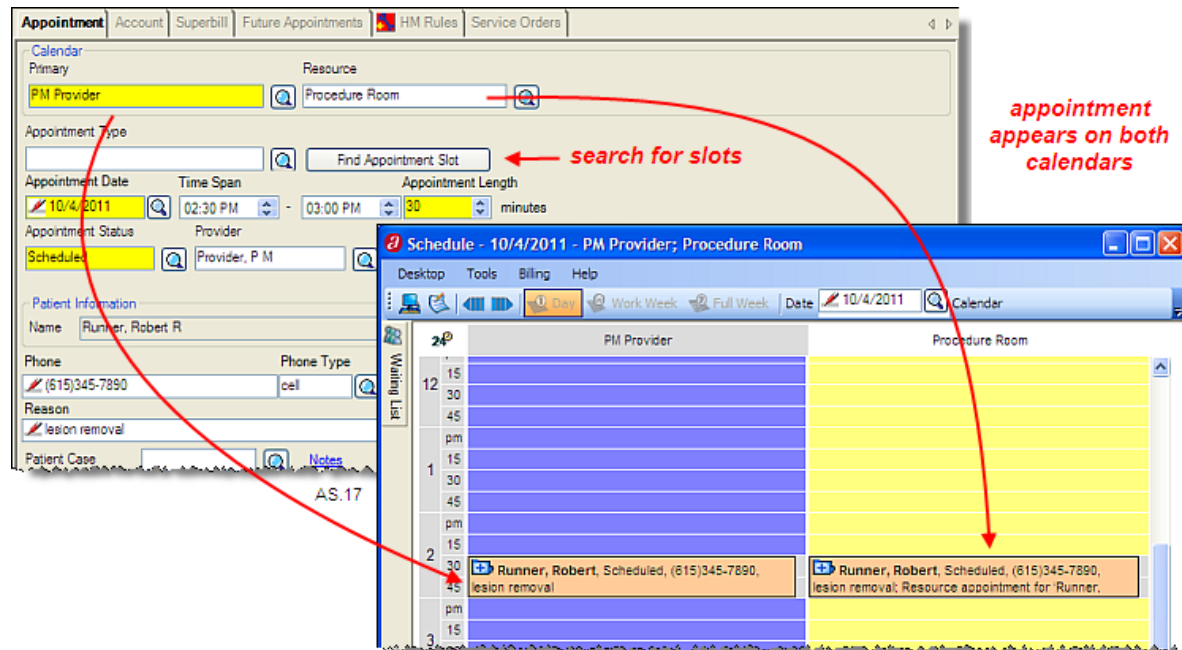
Schedule Type: **Patient Visit** (assumed)  
 Primary Calendar: **P M Provider**  
 Appointment Type: **Established Patient** (optional)  
 Appointment Date: (this Monday)  
 Time Span: **11:00 – 11:15 am**  
 Provider: **Provider, P M** (assumed)  
 Service Site: **Classroom Medical Clinic** (assumed)  
 Financial Center: **Main** (assumed)  
 Name: **Bobby Bloodpressure**  
 Phone: **615.554.2213, home** (assumed)  
 Reason: **medication review**

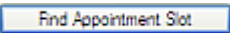
## View Multiple Schedules

Multiple schedules can be viewed in  mode. This is convenient when trying to coordinate schedules between a provider and a resource(s).

- Click on  then click on the  down arrow to display the calendar(s) available to display in this window.
- Click on  to view all available calendars, select **Procedure Room** and click on .

*Note: Multiple resources can be selected so if the room, a nurse, and a provider were required for the visit, the appointment could be scheduled on all calendars.*




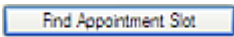
*Note: The  button can be used to search for appointments on a single calendar or to coordinate an appointment for two calendars.*

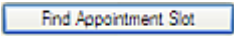


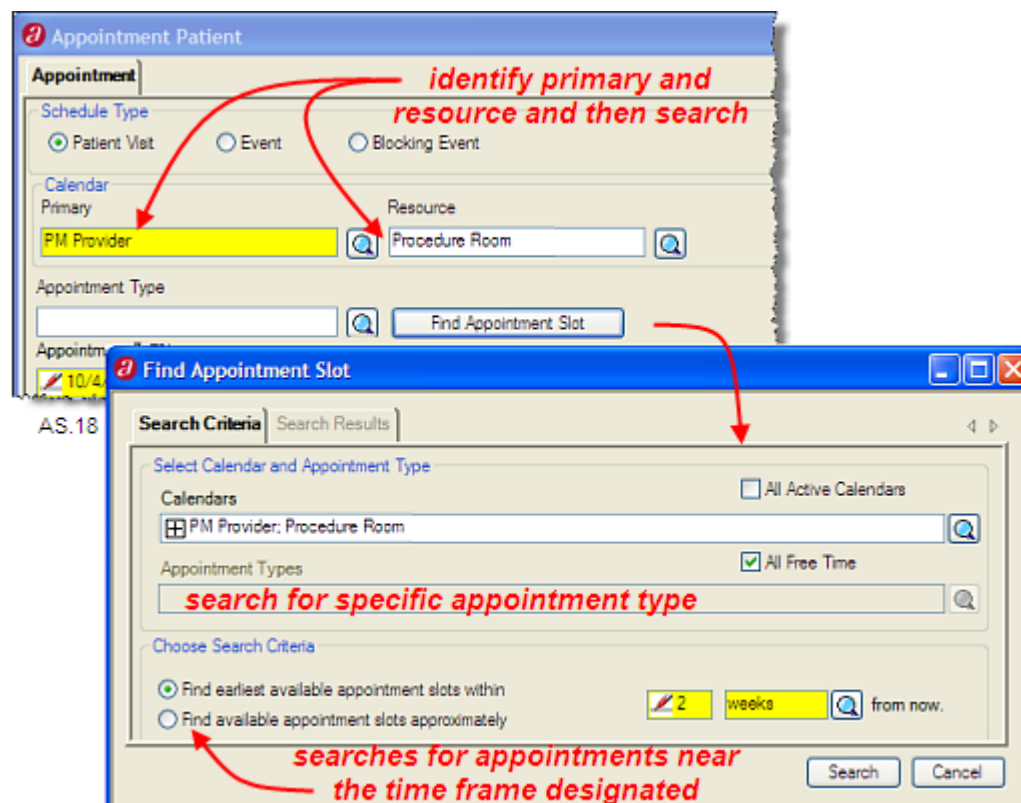
- Schedule the following appointment for **Robert Runner** with **PM Provider** in the **Procedure Room** (AS.17):

Schedule Type:	<b>Patient Visit</b> (assumed)
Resource:	<b>Procedure Room</b>
Appointment Date:	(this Monday)
Time Span:	<b>2:30 – 3:00 pm</b>
Provider:	<b>Provider, P M</b> (assumed)
Service Site:	<b>Classroom Medical Clinic</b> (assumed)
Financial Center:	<b>Main</b> (assumed)
Name:	<b>Runner, Robert</b>
Phone:	<b>615.345.7890, cell</b> (assumed)
Reason:	<b>lesion removal</b>

- Click on  to save the appointment on both calendars.

The  initiates a search for specific appointment types within a certain timeframe. To search for and schedule an appointment for a primary calendar and a resource, enter the pertinent information in those fields before starting the search.

- Click on an open appointment slot to access the **Appointment Patient** window.
- In the **Resource** field, enter **Procedure Room**.
- Click on the  button. The **Find Appointment Slot** window displays (AS.18).

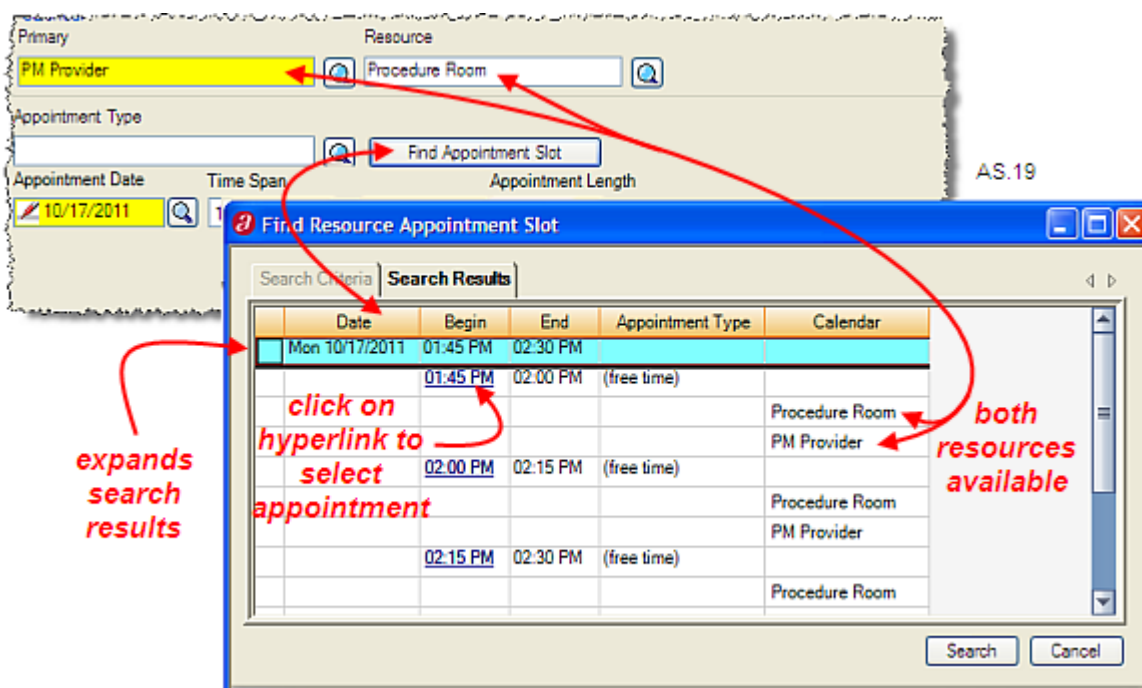







The **Search Criteria** tab allows you to search by multiple calendars to coordinate providers and resources for an appointment. The **Calendars** field is used to search for and identify the calendars for the appointment. The **All Calendars** checkbox is available when all calendars are required for the search. When it is checked, the calendars field is not accessible.

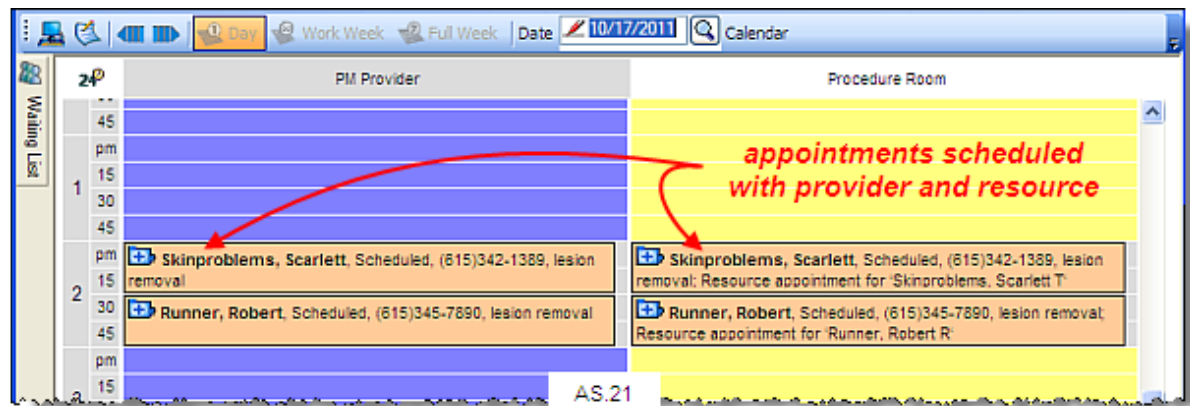
The **Appointment Types** field is available when a certain type of appointment is required (New Patient, FU). The system will search for slots specifically reserved for that appointment type. The **All Free Time** checkbox looks for all appointments available regardless of appointment type and suppresses the Appointment Types field.

The **Find earliest available appointment slots within** radiobutton allows you to specify a time frame from the current date. The **Find available appointment slots approximately** field starts searching for slots around the timeframe specified.

- ❑ In the **Search Criteria** window, in the **Calendars** field, assume **PM Provider** and **Procedure Room**.
- ❑ Check the box to indicate you are searching for **All Free Time**.
- ❑ Click on the radiobutton for **Find earliest available appointment slots within 2 weeks**.
- ❑ Click on **Search** to display available appointments. The **Search Results** window displays available appointment dates, calendar beginning and ending times. When a line is selected, the individual available appointments display with appointment types (when requested) and calendar names.
- ❑ If necessary, click on the ☐ associated with the first available Monday displayed. Click on an appointment hyperlink to schedule a 30 minute appointment. (AS.19).










- ❑ In the **Appointment Length** field enter **30 minutes**.
- ❑ In the **Name** field, type **Skinproblems** to schedule this appointment for Scarlett Skinproblems.
- ❑ In the **Reason** field, type **lesion removal**.
- ❑ Click on  to schedule the appointment for PM Provider and the Procedure Room.
- ❑ Click on  associated with the    button and click on the Monday that was selected for the appointment to view the schedule (AS.21).








Be aware that when searching for free times, booked slots will be considered if the calendar allows for overbooking, even when reserved for specific appointment types, although an warning displays indicating that you are overriding the appointment type for the slot. When searching for appointment type, the search is specific for slots reserved for the specified appointment type.

## View Weekly Schedules


The  **Work Week** and  **Full Week** options allow you to view an entire week of appointments in the window. The difference between a work week and a full week is that the work week displays just the days available on the schedule. The full week displays days that the schedule is unavailable (weekends, days off, etc.) For class purposes, all days of the week are considered work days for PM Provider. In order to display a  **Work Week** schedule, only one calendar can display.

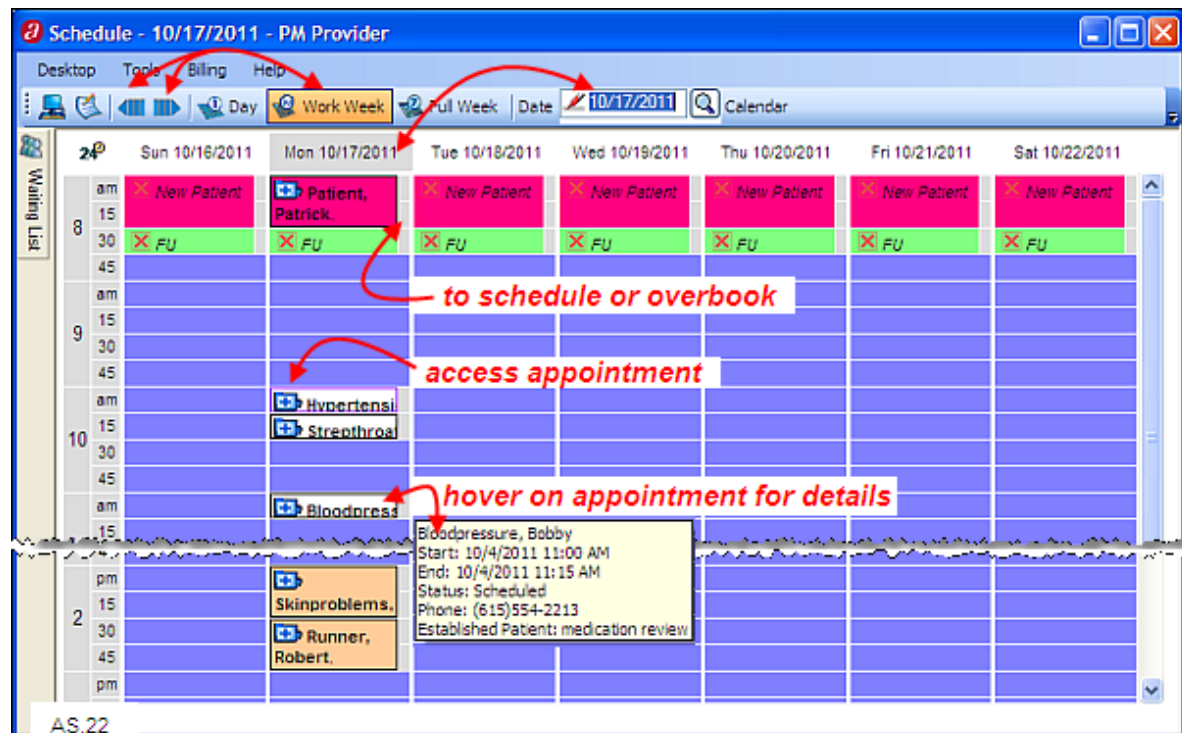
- Click on the  down arrow and click on the  associated with the calendars displayed and click on the  associated with **Procedure Room** to remove it from the Schedule window.
- Click on  to display **PM Provider's** entire week schedule.

The  and  buttons move the schedule forward or backward based on the view mode displayed. In  Day mode, the schedule moves forward or backward a day at a time. In  Work Week mode it moves forward or backward a week at a time. Use the

 button to select a specific date. That date is highlighted at the top of the calendar. Click on any date displayed on the calendar to schedule for that date.

To schedule for a slot designated for a specific appointment type, click on the gray area at the right of the slot. This gray area displays on existing appointments in order to overbook an appointment slot when necessary.

Since limited appointment information is available in the week modes, you can hover the cursor on a scheduled appointment slot and get information about the appointment without clicking on  to access the appointment record (AS.22).



- Use the following information to schedule a new patient appointment:

Date:	<i>this Monday</i>
Schedule Type:	<b>Patient Visit</b> (assumed)
Primary Calendar:	<b>P M Provider</b>
Appointment Type:	<b>New Patient</b>
Time Span:	<b>8:00 – 8:30 am</b>
Provider:	<b>Provider, P M</b> (assumed)
Service Site:	<b>Classroom Medical Clinic</b> (assumed)
Financial Center:	<b>Main</b> (assumed)
Name:	<b>Patient, Patrick</b>
Phone:	<b>615.345.3211, cell</b> (new)
Reason:	<b>annual exam</b>

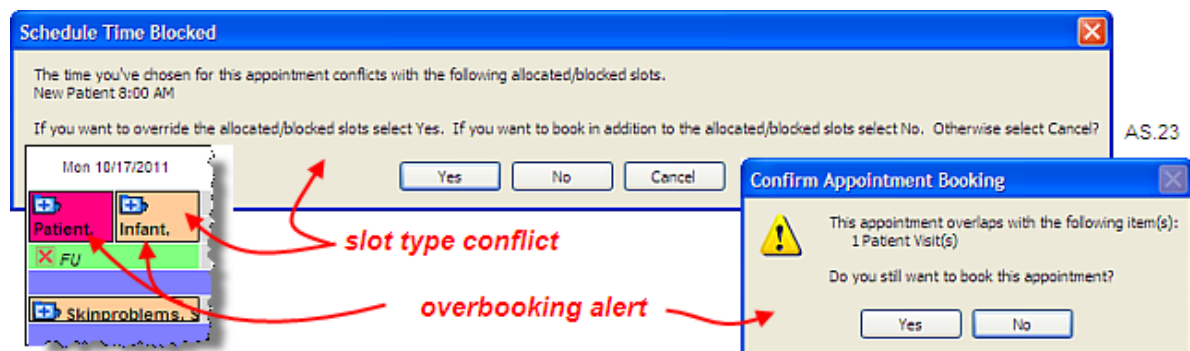
## Double Book Appointments

Calendars can be set up to allow overbooking. To overbook an appointment slot (or to book an appointment in a slot with an assigned appointment type), click on the gray area at the right of the appointment slot. Setting up calendars for overbooking is an administrative function and is not covered in this class.

- Use the following information to overbook an appointment slot because a patient is only available this Monday at 8:00 am.

Date:	<i>this Monday</i>
Schedule Type:	<b>Patient Visit</b> (assumed)
Primary Calendar:	<b>P M Provider</b>
Appointment Type:	<b>Work In</b> (optional)
Time Span:	<b>8:00 – 8:30 am</b>
Provider:	<b>Provider, P M</b> (assumed)
Service Site:	<b>Classroom Medical Clinic</b> (assumed)
Financial Center:	<b>Main</b> (assumed)
Name:	<b>Ian Infant</b>
Phone:	<b>615.458.6659, home</b> (assumed)
Reason:	<b>well visit</b>

A message displays indicating a conflict with an allocated/blocked tie.



- Click on  to override the allocated slot. Another warning displays because you are overbooking a slot.
- Click on  to overbook the slot.

## Exercises

- Use the following information to schedule appointments for PM Provider preferably on the same day.

Schedule Type: **Patient Visit** (assumed)  
Primary Calendar: **P M Provider**  
Time Span: **15 minutes**  
Provider: **Provider, P M** (assumed)  
Service Site: **Classroom Medical Clinic** (assumed)  
Financial Center: **Main** (assumed)  
Name: **Uti, Ursula**  
Phone: **615.589.1254, home** (assumed)  
Reason: **urinary problems**

Schedule Type: **Patient Visit** (assumed)  
Primary Calendar: **P M Provider**  
Time Span: **15 minutes**  
Provider: **Provider, P M** (assumed)  
Service Site: **Classroom Medical Clinic** (assumed)  
Financial Center: **Main** (assumed)  
Name: **Lung, Larry**  
Phone: **615.455.3821, cell** (new)  
Reason: **chest congestion**

- Please schedule the following patients in the same time slot:

Schedule Type: **Patient Visit** (assumed)  
Primary Calendar: **P M Provider**  
Time Span: **15 minutes**  
Provider: **Provider, P M** (assumed)  
Service Site: **Classroom Medical Clinic** (assumed)  
Financial Center: **Main** (assumed)  
Name: **Mishap, Matilda**  
Phone: **615.498.2874, home** (assumed)  
Reason: **flu shot**

Schedule Type: **Patient Visit** (assumed)  
Primary Calendar: **P M Provider**  
Time Span: **15 minutes**  
Provider: **Provider, P M** (assumed)  
Service Site: **Classroom Medical Clinic** (assumed)  
Financial Center: **Main** (assumed)  
Name: **Sick, Ima**  
Phone: **615.652.3214, home** (assumed)  
Reason: **headache**



- Please schedule the following patients in the same time slot:

Schedule Type: **Patient Visit** (assumed)  
 Primary Calendar: **P M Provider**  
 Time Span: **15 minutes**  
 Provider: **Provider, P M** (assumed)  
 Service Site: **Classroom Medical Clinic** (assumed)  
 Financial Center: **Main** (assumed)  
 Name: **Female, Frannie**  
 Phone: **615.332.4589, cell** (assumed)  
 Reason: **pregnancy test**

Schedule Type: **Patient Visit** (assumed)  
 Primary Calendar: **P M Provider**  
 Time Span: **15 minutes**  
 Provider: **Provider, P M** (assumed)  
 Service Site: **Classroom Medical Clinic** (assumed)  
 Financial Center: **Main** (assumed)  
 Name: **Hicholesterol, Herbert**  
 Phone: **615.789.5584, work** (assumed)  
 Reason: **medication review**

## Blocking Appointments

Calendars can be designed to block times for events such as lunch or a regular afternoon or day off. The process of imbedding those events into a calendar is an administrative function and is not covered in this class. However, times can be blocked from the Scheduler as well. You can block with an appointment type or simply block a time so that everyone knows those appointment slots are not available. If your calendar allows overbooking, you will have the option of scheduling an appointment during the blocked time but a warning will display prior to scheduling the appointment. This is helpful if the provider is in the office and not seeing patients but agrees to see someone who can't come in at any other time. There are two options for reserving times when appointments are not available. They are Event and Blocking Event.

An Event is used to block out time for a special event. A Blocking Event is used to block out time for an event associated with an appointment type

## Event

- Use the following information to indicate a block of time is unavailable on the schedule; no appointment type will be used (AS.24):

Date: **this Friday**  
 Schedule Type: **Event**  
 Primary Calendar: **P M Provider**  
 Time Span: **11:00 am – 1:00 pm**  
 Reason: **Meeting Downtown**

## Blocking Event

- Use the following information to indicate a block of time is unavailable on the schedule. The appointment type is a required field with a blocking event (AS.24):

Date: *this Friday*  
 Schedule Type: **Blocking Event**  
 Primary Calendar: **P M Provider**  
 Appointment Type: **Closed**  
 Time Span: **3:00 pm – 7:00 pm**  
 Reason: **Annual Meeting**

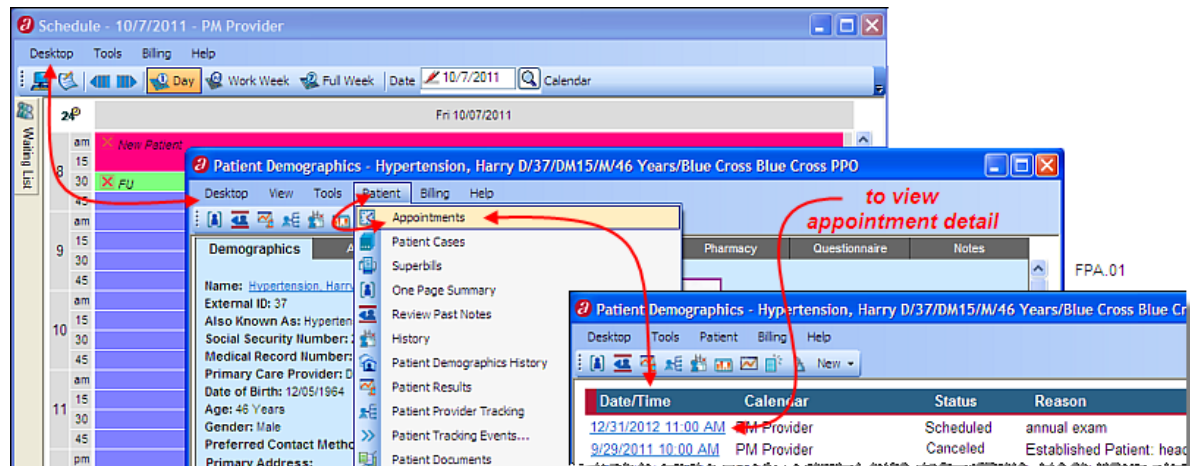
## Find and Reschedule Existing Appointments


Up until now we have been selecting times on the schedule and assigning patients to those appointment slots. There are times when it is necessary to find an existing appointment for a patient. Individual patient appointment information is available from the **Patient** menu which is accessible from the Demographics or Find Patient window for a specified patient.

- To find a patient's appointment from the **Schedule** window when it does not display on the schedule, click on **Desktop** then **Find Patient**.
- Search for **Harry Hypertension**, then click on the patient hyperlink to access the **Patient Demographics** window for this patient, then click on **Patient** and **Appointment** to view appointments for this patient (FPA.01).

The **Patient Demographics** window displays all existing (past and future) appointments for this patient. The date, time, calendar associated with the appointment, status and reason all display. To access detail about the appointment, click on the hyperlink for the specific appointment.

- Click on the hyperlink for Harry's appointment for **12/31/2012**. The **Appointment Patient** window displays details about this appointment. Appointment details could be changed at this time.



There are times when an appointment must be rescheduled. Appointments can be rescheduled from the Appointment Patient window. This window can be accessed from the Patient Demographics window or by clicking on the appointment or the associated  in the Schedule window. Rescheduling the appointment is accomplished by changing the appointment calendar, date and/or time. If you know the calendar, date and/or time for the new appointment, that can be entered manually. If you need to find an available appointment slot, the **Find Appointment Slot** button can be used to search for available slots within a specified time frame.

- With the existing appointment for **Harry Hypertension** displayed on the calendar for **12/31/12**, move the appointment to **01/02/2013** at **9:00 am** (FPA.02). If the patient knows the date of the existing appointment it is easiest to go directly to the scheduling window.
- Verify that the slot he has requested is available.

**Schedule - 12/24/2012 - PM Provider**

Desktop Tools Billing Help

Work Week Full Week Date 12/31/2012 Calendar

Waiting List

24P Sun 12/30/2012 Mon 12/31/2012 Tue 01/01/2013 Wed 01/02/2013 Thu 01/03/2013

am New Patient New Patient New Patient New Patient New Patient

15 X FU X FU X FU X FU X FU

45

9 am

15

30

45

10 am

15

30

45

11 am

15

30

Hypertension.

**Patient Demographics - Hypertension, Harry D/37/DM15/M/46 Years/Blue Cr**

Desktop Tools Patient Billing Help

New

Date/Time	Calendar	Status	Reason
12/31/2012 11:00 AM	PM Provider	Scheduled	annual exam
9/29/2011 10:00 AM	PM Provider	Canceled	Established P
2/8/2010 1-15 PM	DMI	Ready to	hypertension

when date is unknown, find patient appointments

when appointment displays on schedule, click on slot or blue icon to update appointment

RA.01

- From the **Schedule** window, click on the appointment slot for Harry's existing appointment, or click on the associated and click on .

- From the **Appointment Patient** window and change the appointment date to **01/02/13** (RA.02).
- Change the **Time Span** field to begin at **09:00 AM**.
- Click on to reschedule this appointment for 01/02/13.
- Re-access the **Appointment Patient** window to see that the **Last Modified** information has been updated.

**Appointment Patient - Hypertension, Harry D/37/DM15/M/46 Years**

Appointment Account Superbill Future Appointments HM Rules Service

Calendar

Primary Resource

PM Provider

Appointment Type

Appointment Date 1/2/2013 Time Span 09:00 AM - 09:30 AM Appointment Length 30 min

Appointment Status Scheduled Provider Provider, P M Service Site Classroom Medical Clinic

Patient Information

Name Hypertension, Harry D From Waiting List

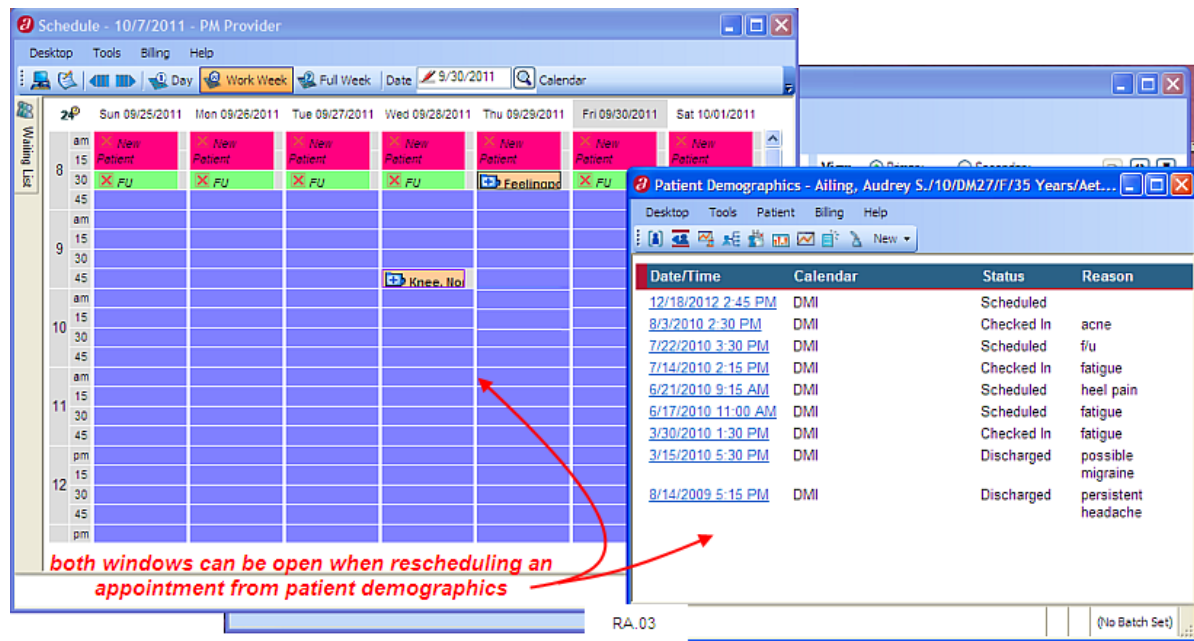
Phone Type

access calendar

change start time

RA.02

When existing appointment information is accessed from Patient Demographics, the Schedule window remains active which makes it easy to toggle between the two screens when rescheduling appointments (RA.03).



## Exercise

- Use a blocking event to block out New Years Day, 2013 with the appointment type, **Closed** from **8:00 am** to **7:00 pm**.

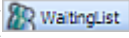
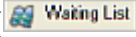
*Note: This could have been done from the List Editor; using the List Editor is an administrative function and is not covered in this class.*


- Use the following information to reschedule an existing appointment for Audrey Ailing and change it to the PM Provider calendar.

Existing Appointment:	<b>02/17/2012, DMI Calendar</b>
Primary Calendar:	<b>P M Provider</b>
New Appointment Date:	<i>(current week)</i>
Provider:	<b>Provider, P M (assumed)</b>
Reason:	<b>headache</b>

## Waiting List

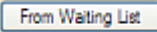
A waiting list or lists can be created to keep track of patients waiting for appointment slots to become available. These lists are user defined, but if a provider is associated with the waiting list there must be an active calendar and template associated with the provider. Creating calendars and calendar templates are administrative functions and are not covered in this class.

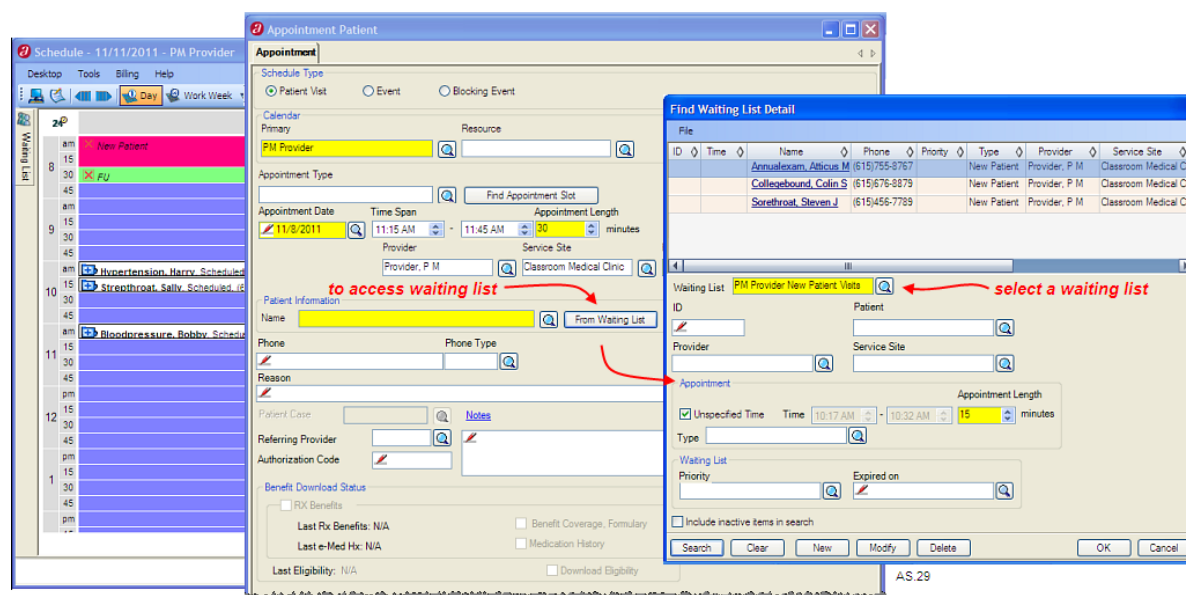
When a waiting list is available, an icon (  ) displays at the top of the calendar window. A slider (  ) is also available and can be tacked down to display continuously in the window.

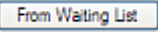
- Find the day with appointments for Harry Hypertension, Sally Strephroat and Bobby Bloodpressure then click on  to return to a one-day schedule for that day.






## Schedule from the Waiting List

The waiting list can be displayed and appointments selected from there or it can be accessed from the **Appointment Patient** window.

- To schedule an appointment for the day displayed, click on a slot with 30 minutes available (two 15 minute slots) and click on the  button (AS.29).

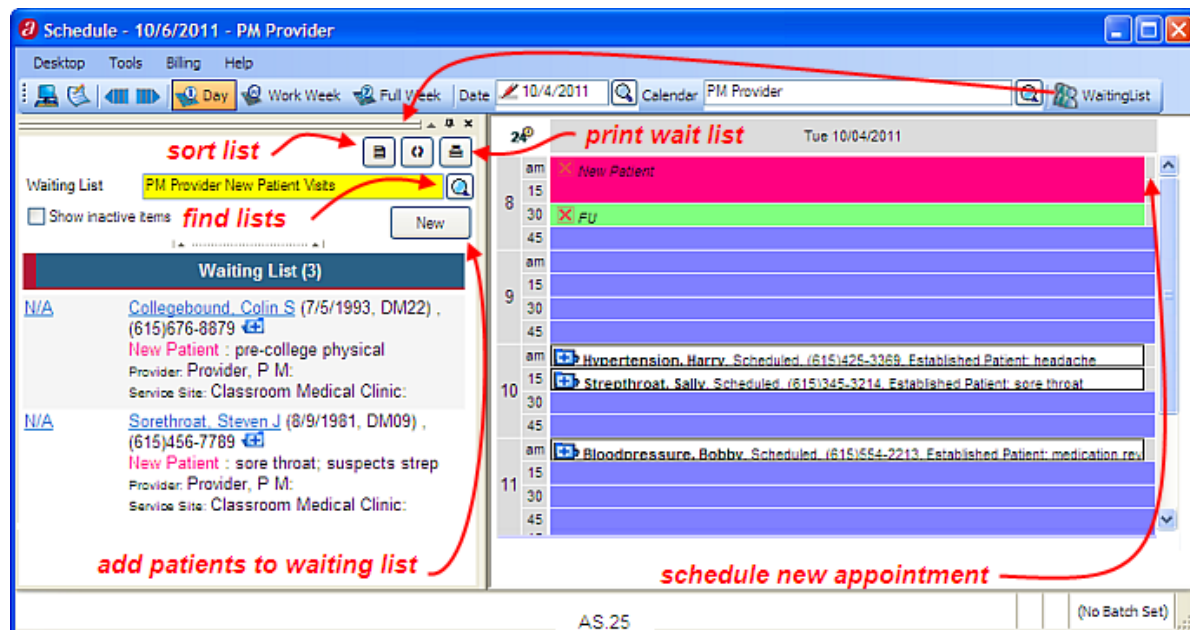


To pull the appointment information from the waiting list, click on . the **Find Waiting List Detail** window displays.

- From the **Find Waiting List Detail** window, in the **Waiting List** field, click on  to search for and select **PM Provider New Patient Visits**.
- Click on  to display a list of patients on the waiting list.
- Click on the hyperlink for **Annulexam, Atticus M**. His appointment information displays in the **Appointment Patient** window.
- Change the appointment reason to: **annual exam** and click on . The appointment now displays on the schedule and he is no longer on the waiting list.
- To access and schedule appointments directly from the waiting list, click on  slider. The waiting list window displays in the left portion of the window (AS.25).
- Click on  associated with the **Waiting List** field and search for and select **PM Provider New Patient Visits**. A list of patients waiting for initial visits displays.

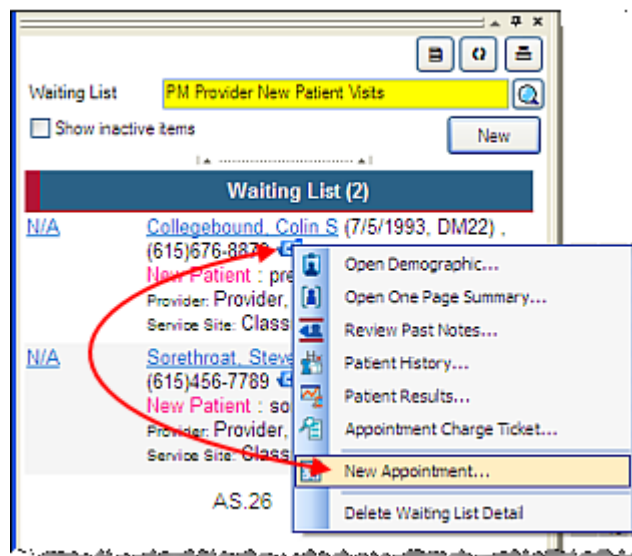


Note: To tack down the Waiting List slider, click on the to keep the waiting list in the Schedule window. The thumbtack is a toggle. Click on it again to close the waiting list window.



The associated with the patient can also be used to schedule this patient from the waiting list but you will need to delete him manually from the waiting list (AS.26).

- Click on associated with **Colin Collegebound**, and click on
- Click on to pull in his appointment details.
- Schedule **30 minutes** for some time early afternoon and click on .



Note: Select any 30 minute open time; it is not necessary to find a slot reserved for New Patient appointment types.

- To remove him from the waiting list, click on and click on .


An appointment can also be scheduled from the waiting list itself, but again, it must be removed manually.

- From the waiting list, click on the **N/A** hyperlink associated with **Steven Sorethroath** and click on the .



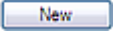
- Use the following information to schedule the appointment for any open time slots:

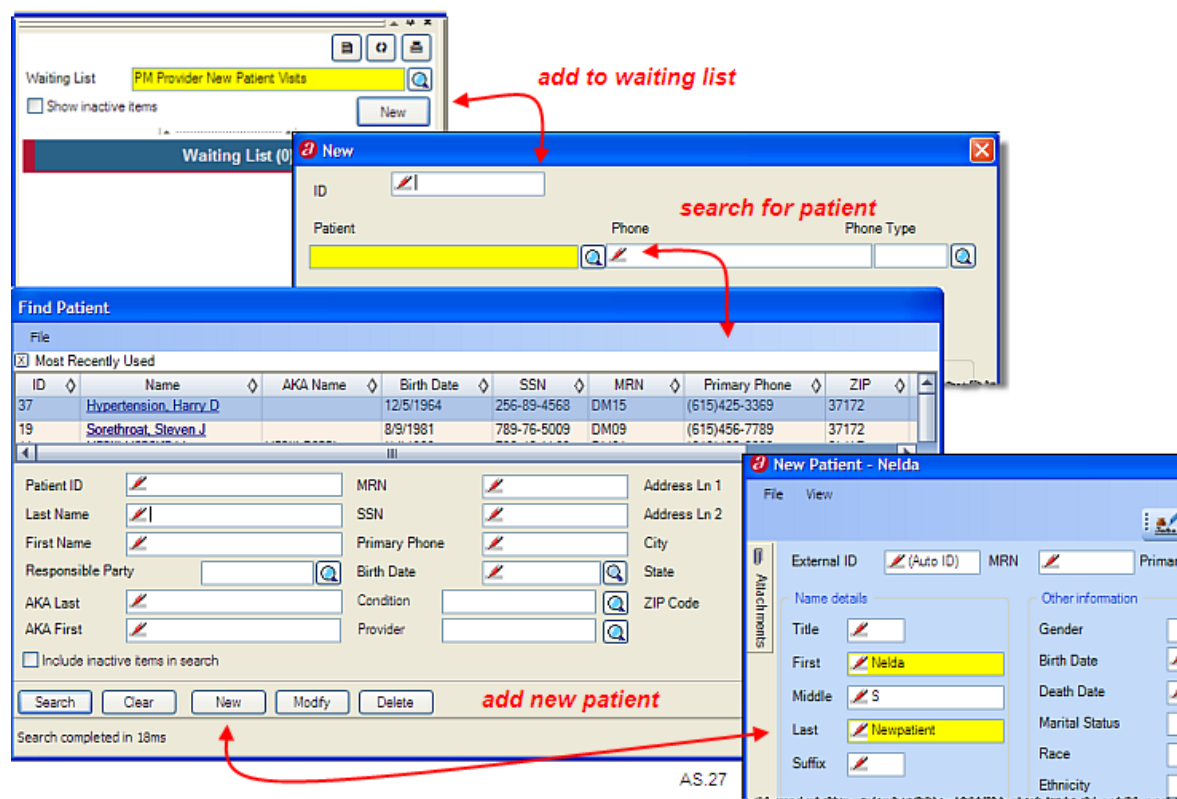
Appointment Type: **New Patient**  
 Appointment Date: *(same date as previous patient)*  
 Time Span: *(30 minutes in the morning)*

- From the Waiting List, click on  associated with **Steven Sorethroat** and click on **Delete Waiting List Detail**.

## Add a Patient to the Waiting List

New and existing patients can be added to the waiting list. A patient not yet registered at the practice can be added to the patient file and the wait list all at the same time.


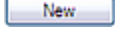
- From the waiting list, click on  to add someone to the list (AS.27).



The screenshot illustrates the workflow for adding a new patient to the waiting list. It shows three overlapping windows:

- Waiting List (0) New**: The top window where the 'New' button is clicked to initiate the process.
- Find Patient**: The middle window showing a search interface with fields for ID, Patient, and Phone. A red arrow points to the search icon.
- New Patient - Nelda**: The bottom window showing the patient entry form. Red arrows point to the 'New' button and the 'Add' button.

Red annotations include: 'add to waiting list' pointing to the 'New' button, 'search for patient' pointing to the search icon, and 'add new patient' pointing to the 'Add' button.

- In the **New** window, click on the  associated with the **Patient** field. The **Find Patient** window displays.
- Search for **Nelda S. Newpatient**. She is not set up in the system, so click on  to add minimal information at this time.

*Note: It is very important to get a phone number at this time in order to call when an appointment slot becomes available.*

*Note: Insurance information might be collected at this time.*

- Add her first and last name and middle initial. Use the following information to complete other required fields:

Gender: **Female**  
 Birth Date: **02/15/40**  
 Race: **Not Provided**  
 Ethnicity: **Not Provided**  
 Language: **English**  
 Phone Number: **615.487.0090, cell**

- Click on **OK** to save the new patient information and return to the **Find Patient** window. The **Find Patient** window displays.
- Click on **Nelda Newpatient**. The **New** window displays (AS.28).

The **Patient Name** displays. If a **Phone Number** was included during registration it will be assumed here. This number can be changed at this time.

The **Provider** field is available to specify a provider for this waiting appointment.

The **Service Site** associated with this provider is assumed.

In the **Appointment** section, a specific time for the appointment can be designated as well as an **Appointment Length**. Check the box for **Unspecified Time** if no time has been specified.

The **Type** field identifies the appointment type for this appointment.

A **Priority** can be set for waiting lists. Priorities are not covered at this time. Access on-line help for more information on waiting list priority.

The **Expired on** field is used to indicate the date this patient is to be removed from the waiting list. The accesses a calendar in order to select a date. The name will be removed at midnight on the date designated in this field.

The **Reason** field is available to provide a reason for the visit.

- Add the following information for this patient:

Provider:  
Service Site:  
Type:




**Provider, PM**  
**Classroom Medical Clinic (assumed)**  
**New Patient**

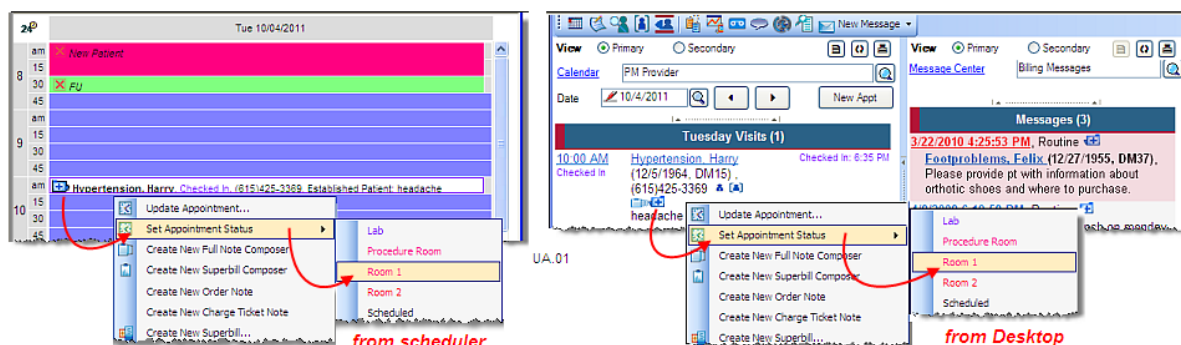
- Click on  to save this new entry to the waiting list.

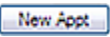
## Update Appointment Status from Schedule or Desktop

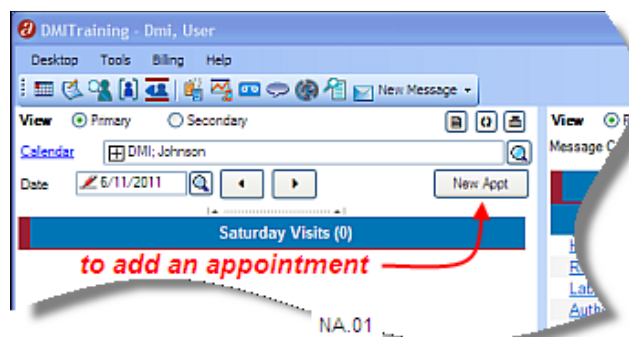
As a patient moves through the clinic, the appointment status can be updated. This starts at the front desk when a patient is checked in. When the patient is taken back to an exam room or procedure room, the status may be updated again; this time by the Medical Assistant, Nurse or other office personnel. This keeps everyone apprised of the patient's progress throughout the visit. When a visit note is closed the system can assume an appointment status of *Ready to Discharge* so the checkout desk is aware there is a patient on the way.

It is not always necessary or even convenient to access all the appointment detail from the **Appointment** tab to simply update a status. A status can be changed from the Schedule window or from the Desktop.

- To update an appointment status, from the **Schedule** or the **Desktop**, click on the  associated with **Harry Hypertension (UA.01)**.
- Select  and then select . The new appointment status displays in pink in the Schedule window and on the Desktop.



From the Desktop, the  key is handy when you need to schedule an appointment quickly and is often used to schedule a last minute appointment for that day, for example, a walk in patient (NA.01).



## Mass Appointment Update

The system allows you to move a group of appointments, by date range, to a new calendar, provider or status. A message can be sent when this update is processed. This feature is used when a provider is unexpectedly unavailable or a calendar changes and appointments are already scheduled. This option is accessed from the **Tools** menu.

- Click on **Tools**, then select **Mass Appointment Update**. Use the following information to move appointments from the DMI calendar the PM Provider calendar for one day (MAU.01).

From Calendar: **DMI**  
 Start: **01/02/2013**  
 End: **01/02/2013**  
 To Calendar: **PM Provider**  
 To Provider: **Provider, PM**  
 To Status: **DMI Unavailable**  
 Create Msg: ☒  
 Assign To: **Biller, BA**  
 Comment: **DMI extended vacation by one day; please let patients know they are being moved to PM Provider schedule.**

**Mass Appointment Update**

Choose Appointments to Modify **to be rescheduled**

Calendar: **DMI**

Start: **1/2/2013** 08:00 AM

End: **01/02/2013** 05:00 PM

What Should Change?

Calendar: **PM Provider** **new calendar**

Provider: **Provider, P M** **new provider**

Status: **DMI Unavailable** **new status**

☒ Create a Message After Processing **message details**

Assign To: **Biller, BA**

Comments: **DMI extended vacation by one day; please let patients know they are being moved to PM Provider schedule.**

Process Close

MAU.01 (No Batch Set)

- Click on **Process** to move the appointments and send a message about the update.

**Schedule - 1/2/2013 - PM Provider; DMI**

Desktop Tools Billing Help

Work Week Full Work Date: **1/2/2013** Calendar

Waiting List

PM Provider

8:00 am New Patient

8:15 am X FU

8:45 am Wrist, Rita, DMI Unavailable, (615)334-9945, FU, 6 mon

9:00 am Hicholesterol, Herbert, DMI Unavailable, (615)789-5584, annual exam

9:30 am Rheumatoid, Randy, DMI Unavailable, (615)548-3385

10:00 am

10:30 am Prettyhealthy, Prudence, DMI Unavailable, (615)429-3

11:00 am

11:15 am Inhaler, Isaac, DMI Unavailable, (615)334-2212, medica

12:00 pm

12:15 pm

12:30 pm

12:45 pm

12:55 pm

appointments moved

message sent

new appointment status

MAU.02

View Primary Secondary

Message Center My Tasks

Messages (1)

10/10/2011 10:12:06 AM, Routine

(?, ?), Mass Appointment Update: DMI extended vacation by one day; please let patients know they are being moved to PM Provider schedule.

Selection Criteria:  
DMI, 1/2/2013 8:00 AM to 1/10/2013 5:00 PM

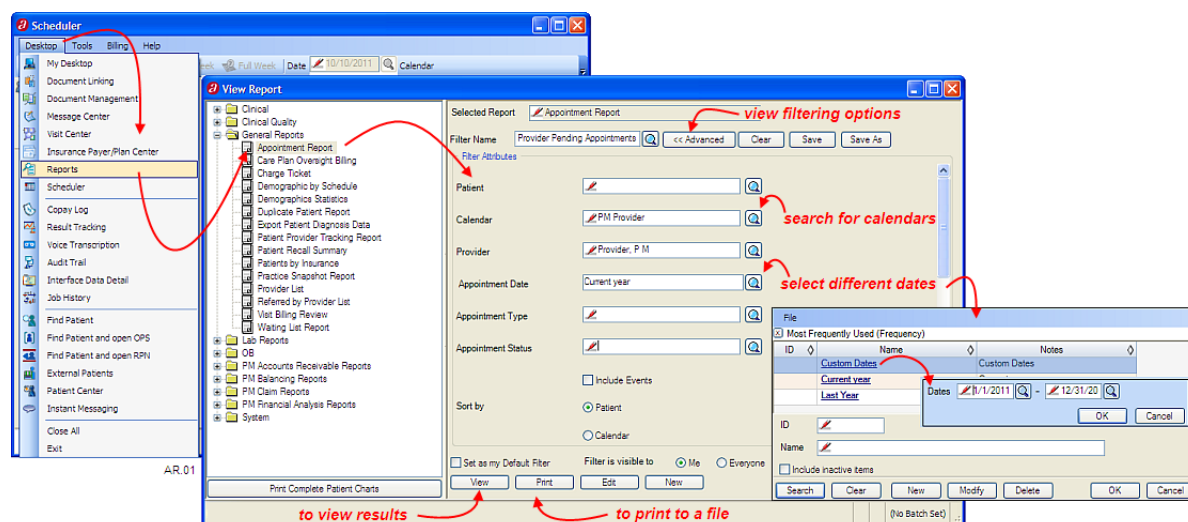
Modification Criteria:  
Move to PM Provider  
Provider changed to Provider, P M  
Status changed to DMI Unavailable


5 Appointment(s) Processed:  
Appointment Start Date/Time: Patient Name; Reason  
1/2/2013 8:45 AM; Wrist, Rita; 6 month follow up  
1/2/2013 9:00 AM; Hicholesterol, Herbert; annual exam  
1/2/2013 9:30 AM; Rheumatoid, Randy R; medication review  
1/2/2013 10:30 AM; Prettyhealthy, Prudence M; physical  
1/2/2013 11:15 AM; Inhaler, Isaac; medication review

- Access the **PM Provider** calendar for **01/02/2013** to view the appointments that have been moved. Patient phone numbers display in order to contact the patient about the change of providers (MAU.02).
- From the **Desktop**, change the message filter to **My Tasks** to view the message about the updated appointments. The list of appointments displays in the message.

## Appointment Reports

There may be times when you need to print an appointment report. For class purposes, we are going to print a report to determine when we have scheduled appointments for our patients. Then, with the help of the report, we will be able to move all of our appointments to one day to simplify our charge and payment posting exercises in future sections of this class.



- From the **Desktop** menu, click on **Reports**, **General Reports**, **Appointment Report**. The default filter for this report displays. This filter can be changed if necessary.
- Click on **Advanced >>** to view filtering options if they do not display. This button works as a toggle. It displays and suppresses search options. Selection criteria can be accessed for any field by clicking on the associated .

The **Clear** button clears all the search criteria in the window.

The **Save** button saves any changes to the filter displayed.

The **Save As** button saves the search criteria to a new or existing name.

The **Patient** field is used to print an appointment report for a specific patient(s).

The **Calendar** field is used to specify a calendar for this report.

The **Provider** field is used to specify a provider for this report.

The **Appointment Date** field is used to specify a specific date or date range for this reports. Custom dates can be used. Custom dates can be selected by clicking on the **Custom Dates** option and indicating the dates.

*Note: When changing dates you may need to enter the end date before the beginning date as the system will not accept a beginning date that is later than an ending date.*

The **Appointment Type** field is used to specify a specific appointment type(s) for this report.

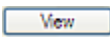
The **Appointment Status** is used to specify a status or statuses for this report.

The **Include Events** checkbox allows you to include or exclude events in the report.


The report can be sorted by **Patient** or **Calendar**.

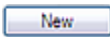
The **Set as my Default Filter** checkbox allows you to set up a filter to be assumed as the default when this report is accessed. The default information can be changed at any time.


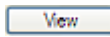
The **Filter is visible to** filter allows you to create a filter that is only available to you or to **Everyone** in the practice.

The  button allows you to view the report on the screen.

The  option allows you to print the report.

The  button allows you to edit the report format (editing report formats is an administrative function and is not covered in this class).

The  button is used to create a new report format (report formatting is an administrative function and is not covered in this class).




- Verify that the **Appointment Date** field encompasses the dates that you have been scheduling appointments for this class. If not, click on the associated  and use the **Custom Dates** option to specify the appropriate date range.
- Click on  to view this report (AR.02).

Appointment Report							
Sort by Patient							
Patient(s): All							
Calendar(s): PM Provider							
Provider(s): Provider, PM							
Appointment Date: 01/01/2011 - 12/31/2011							
Appointment Type(s): All							
Appointment Status(s): All							
Appointment Time: All							
Patient	DOB	Date/Time	Status	Calendar	Provider	Appointment Type	Reason
Ailing, Audrey S.	12/02/1975	10/17/2011 02:45 PM	Scheduled	PM Provider	Provider, PM	-	headache
Annulexam, Atticus M	09/02/1952	10/17/2011 11:30 AM	Scheduled	PM Provider	Provider, PM	New Patient	annual exam
Bloodpressure, Bobby B	09/08/1953	10/17/2011 11:00 AM	Scheduled	PM Provider	Provider, PM	Established Patient	medication review
Collagebound, Colin S	07/05/1993	10/17/2011 01:00 PM	Scheduled	PM Provider	Provider, PM	New Patient	pre-college physical
Female, Frannie	03/08/1970	10/17/2011 01:30 PM	Scheduled	PM Provider	Provider, PM	-	pregnancy test

AR.02



## Section Three Review Exercises

1. Run an Appointment Report for the PM Provider Calendar, for the date of 01/02/2013 for Provider, PM, all appointment types, all appointment statuses, and all appointment times. Print the report to a pdf named **Section 3 Moved Appointments**.
2. Access the PM Provider New Patient Visits waiting list and use the print icon () to print it to a pdf filed named **Section 3 PMProvider Waiting List**.
3. Find appointment for Matilda Mishap; access the Desktop for that day and use the print icon () to print the Schedule pane of the Desktop to a pdf named, **Section 3 MMishap Doublebook**.
4. Find appointment for Frannie Female; access the Desktop for that day and use the print icon () to print the Schedule pane of the Desktop to a pdf named, **Section 3 FFemale Doublebook**.
5. Run an Appointment Report for the current year which includes the calendars for both PM Provider and the Procedure Room. If your class spans more than one calendar year, use the custom dates option to indicate dates for all appointments you have scheduled. Print the Report to a pdf named **Section 3 Appointment Report for Provider and Procedure Rm**.
6. Please email the PDF files to your instructor with a subject line: **Section 3 Review Exercises**.

**This concludes Section Three of this class**

Please see next page for Instructor's Notes



## Instructor's Notes

### Section Three Content Overview

This section covers in detail the different options available for scheduling appointments in a clinic. Almost all stated objectives can be demonstrated from an appointment report covering the timeframe the student has been scheduling appointments. If the appointments have been made but are not on the report, the student should use Find Patient and the Patient Menu in Demographics to locate the appointment and appointment details to determine why it is not on the report. It may be scheduled for the wrong provider, calendar or on a date not included in the date range specified for the report. Another option to view appointments is to do a print screen of the Desktop when the appointment date and calendar are displayed.

Points assigned to these exercises are arbitrary. Use your discretion when grading the student assignments. Additional information may appear in the files submitted for these exercises. Because of space restrictions, only pertinent information is displayed in the answer guides.


### Section Three Review Exercises

1. Run an Appointment Report for the PM Provider Calendar, for the date of 01/02/2013 for Provider, PM, all appointment types, all appointment statuses, and all appointment times. Print the report to a pdf named **Section 3 Moved Appointments**. (fulfills Obj 7, mass appointment update to different calendar)


Appointment Report							
Sort by Patient							
Patient(s): All							
Calendar(s): PM Provider 2 pts							
Provider(s): Provider, P M							
Appointment Date: 01/02/2013 - 01/02/2013							
Appointment Type(s): All							
Appointment Status(s): All							
Appointment Time: All							
Patient	DOB	Date/Time	Status	Calendar	Provider	Appointment Type	Reason
Hicholesterol, Herbert 2 pts	01/11/1955	01/02/2013 09:00 AM	DMI Unavailable	PM Provider	Provider, P M	-	annual exam
Hypertension, Harry D	12/05/1964	01/02/2013 09:00 AM	Scheduled	PM Provider	Provider, P M	- 4 pts	annual exam
Inhaler, Isaac 2 pts	11/18/1982	01/02/2013 11:15 AM	DMI Unavailable	PM Provider	Provider, P M	-	medication review
Prettyhealthy, Prudence M 2 pts	06/08/1975	01/02/2013 10:30 AM	DMI Unavailable	PM Provider	Provider, P M	-	physical
Rheumatoid, Randy R. 2 pts	04/18/1942	01/02/2013 09:30 AM	DMI Unavailable	PM Provider	Provider, P M	-	medication review
Wrist, Rita 2 pts	11/20/1955	01/02/2013 08:45 AM	DMI Unavailable	PM Provider	Provider, P M	FU	6 month follow up
							16 pts total

2. Access the PM Provider New Patient Visits waiting list and use the print icon () to print it to a pdf filed named **Section 3 PMProvider Waiting List**. (fulfills Obj 6, add new patient to waiting list)


<b>WaitingList: PM Provider New Patient Visits</b>		<b>Section 3 PMProvider Waiting List</b>
<b>Print Date: 10/20/2011</b>		
N/A	Newpatient, Nelds S (2/15/1940, ?) , (615)487-0090	<b>1 pt each</b>
	<b>New Patient :</b>	
	Provider: Provider, P M:	
	Service Site: Classroom Medical Clinic:	<b>6 pts total</b>

3. Find appointment for Matilda Mishap; access the Desktop for that day and use the print icon () to print the Schedule pane of the Desktop to a pdf named, **Section 3 MMishap Doublebook**. (fulfills Obj 5, double book appointments)

<b>1 pt</b>	<b>Calendar: PM Provider</b>	<b>Section 3 MMishap Doublebook</b>
	<b>Date: 10/17/2011</b>	
<b>times must be the same</b>	<b>11:15 AM</b>	Mishap, Matilda (6/30/1925, DM23) , (615)498-2874
	Scheduled	flu shot <b>2 pts</b>
	<b>11:15 AM</b>	Sick, Ima (2/7/1948, DM13) , (615)652-3214
	Scheduled	headache <b>2 pts</b>
		<b>5 points total</b>

4. Find appointment for Frannie Female; access the Desktop for that day and use the print icon () to print the Schedule pane of the Desktop to a pdf named, **Section 3 FFemale Doublebook**. (fulfills Obj 5, double book appointments)

<b>1 pt</b>	<b>Calendar: PM Provider</b>	<b>Section 3 MMishap Doublebook</b>
	<b>Date: 10/17/2011</b>	
<b>times must be the same</b>	<b>11:15 AM</b>	Mishap, Matilda (6/30/1925, DM23) , (615)498-2874
	Scheduled	flu shot <b>2 pts</b>
	<b>11:15 AM</b>	Sick, Ima (2/7/1948, DM13) , (615)652-3214
	Scheduled	headache <b>2 pts</b>
		<b>5 points total</b>

5. Find appointment for Patrick Patient; access the Desktop for that day and use the print icon () to print the Schedule pane of the Desktop to a pdf named, **Section 3 PPatient**.

	<b>Section 3 PPatient</b>
Patient, Patrick (1/28/1951, DM29) , (615)345-3211	<b>3 pts</b>
<b>New Patient:</b> annual exam	<b>2 pts each</b>
	<b>7 points total</b>

6. Find appointment for Larry Lung; access the Desktop for that day and use the print icon (🖨) to print the Schedule pane of the Desktop to a pdf named, **Section 3 LLung**.

<b>Section 3 LLung</b>		
Lung, Larry (8/25/1980, DM12) ,	(615)455-3821	<b>3 pts</b>
chest congestion	<b>2 pts</b>	
<b>5 points total</b>		

7. Run an Appointment Report for the current year which includes the calendars for both PM Provider and the Procedure Room. If your class spans more than one calendar year, use the custom dates option to indicate dates for all appointments you have scheduled. Print the Report to a pdf named **Section 3 Appointment Report for Provider and Procedure Rm.** (fulfills Obj 1, schedule appts for existing patients; Obj 2, change appt status for patient; Obj 3, schedule for provider and resource; Obj 4, schedule from wait list)

Appointment Report								
Sort by Patient								
Patient(s): All								
Calendar(s): PM Provider and Procedure Room <b>3 pts</b>								
Provider(s): Provider, P M								
Appointment Date: 01/01/2011 - 12/31/2011								
Appointment Type(s): All								
Appointment Status(s): All								
Appointment Time: All								
<b>2 pts for each appointment; 34 pts total</b>								
Ailing, Audrey S.	12/02/1975	10/17/2011 02:45 PM	Scheduled	PM Provider	Provider, P M	-	headache	<b>3 pts</b>
Annual exam, Atticus M	09/02/1952	10/17/2011 11:30 AM	Scheduled	PM Provider	Provider, P M	New Patient	annual exam	<b>3 pts</b>
Bloodpressure, Bobby B	09/08/1953	10/17/2011 11:00 AM	Scheduled	PM Provider	Provider, P M	Established Patient	medication review	
Collegebound, Colin S	07/05/1993	10/17/2011 01:00 PM	Scheduled	PM Provider	Provider, P M	New Patient	pre-college physical	<b>3 pts</b>
Female, Frannie	03/08/1970	10/17/2011 01:30 PM	Scheduled	PM Provider	Provider, P M	-	pregnancy test	
Higholesterol, Herbert	01/11/1955	10/17/2011 01:30 PM	Scheduled	PM Provider	Provider, P M	-	medication review	
Hypertension, Harry D	12/05/1964	10/17/2011 10:00 AM	Room 1	PM Provider	Provider, P M	Established Patient	headache	<b>3 pts</b>
Infant, Ian	07/19/2009	10/17/2011 08:00 AM	Scheduled	PM Provider	Provider, P M	Work In	well visit	
Lung, Larry D	08/25/1980	10/17/2011 10:45 AM	Scheduled	PM Provider	Provider, P M	-	chest congestion	
Mishap, Matilda	06/30/1925	10/17/2011 11:15 AM	Scheduled	PM Provider	Provider, P M	-	flu shot	
Patient, Patrick	01/28/1951	10/17/2011 08:00 AM	Scheduled	PM Provider	Provider, P M	New Patient	annual exam	
Runner, Robert R	05/07/1955	10/17/2011 02:30 PM	Scheduled	Procedure Room	Provider, P M	-	lesion removal; Resource appointment for Runner, Robert R	<b>3 pts</b>
	05/07/1955	10/17/2011 02:30 PM	Scheduled	PM Provider	Provider, P M	-	lesion removal	
Sick, Ima B	02/07/1948	10/17/2011 11:15 AM	Scheduled	PM Provider	Provider, P M	-	headache	
Skinproblems, Scarlett T	11/22/1955	10/17/2011 02:00 PM	Scheduled	Procedure Room	Provider, P M	-	lesion removal; Resource appointment for 'Skinproblems, Scarlett T'	<b>3 pts</b>
	11/22/1955	10/17/2011 02:00 PM	Scheduled	PM Provider	Provider, P M	-	lesion removal	
Sorethroat, Steven J	08/09/1981	10/17/2011 09:30 AM	Scheduled	PM Provider	Provider, P M	New Patient	sore throat; suspects strep	<b>3 pts</b>
Streptthroat, Sally M	06/09/1988	10/17/2011 10:15 AM	Scheduled	PM Provider	Provider, P M	Established Patient	sore throat	
Uti, Ursula	11/22/1961	10/17/2011 10:30 AM	Scheduled	PM Provider	Provider, P M	-	urinary problems	
<b>56 points total</b>								

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## Simon

Simon was a Ragdoll kitty who lived in Southern Georgia. He left us in the spring of 2011 at the age of 5. While he was here, he had a wonderful life with people who cherished him. Simon loved to be held and to drink water from the bathtub faucet. In fact, if the people weren't cooperating, he'd attempt to turn the water on all by himself. He was a one-of-a-kind-kitty who didn't mind getting wet (which is very unusual for cats). He made sure he snuggled and slept with his humans every night. New smells and sounds both frightened and excited him. In fact, once when a new piece of furniture was placed in his domain, he frantically tried to climb under his human for safety. Simon is gone, but we'll never forget the joy and love he gave us.



## About the Author

M. Jill Jaunty received her B.S. Degree in Elementary Education at the University of Nebraska at Lincoln. She began her career in 1983 developing courseware for computer software products. Over the past 20 years, she has consulted with Fortune 500 companies on the design, development and presentation of effective training programs. Her emphasis has been in the healthcare industry where she has worked with numerous medical software providers, for both practice management and electronic health records products, to create customized solutions to meet their needs.

Jill develops courseware that can be used as internal training or end-user training in both large and small software development and reseller organizations. She not only writes the classes but often teaches them as well.



[info@goteachpeople.com](mailto:info@goteachpeople.com)



423.521.5656

[www.PhysicianTechGroup.com](http://www.PhysicianTechGroup.com)

[info@physiciantechgroup.com](mailto:info@physiciantechgroup.com)