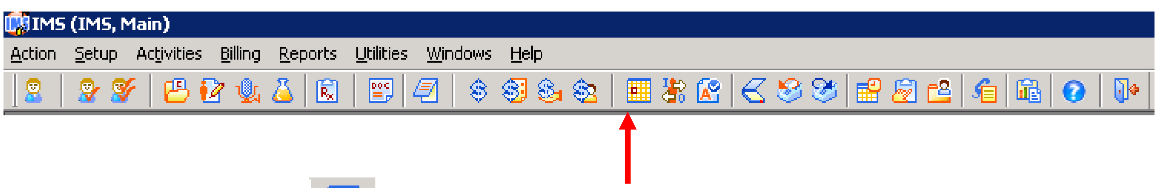
Scheduling Patients

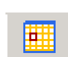
Objective:
- Navigation thru Scheduler
- Making appointments for existing vs. new patients
- Searching patient appointments
- Entering patient details
- Print forms for patients prior to visits
- Right Click Schedule Options
- Right Click Patient Options
- Initiating Authorization Tracking from Scheduler (if applicable)

Hot Keys

F2 - Patient Master
F5 - Open Search Window
F10 - Check In/Out
Ctrl + F3 - Patient Note
Ctrl + N - Add a New record
Ctrl + E - Edit a record
Ctrl + L - Cancel a record
Ctrl + H - Search a record
Ctrl + F5 - Refresh

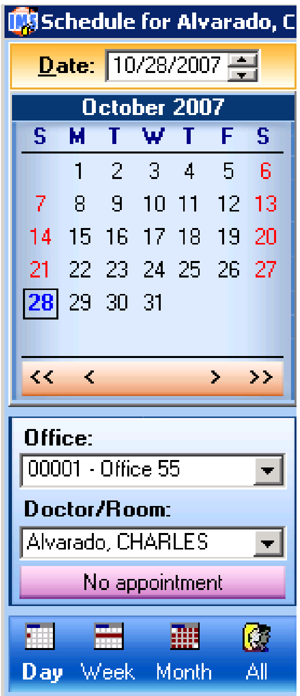
F3 - Select Patient
F9 - Schedule
Ctrl + F2 - Reminder
Ctrl + F6 - Patient Ledger
Ctrl + Del - Delete a record
Ctrl + S - Save a record
Ctrl + R - Retrieve all records
Ctrl + T - Sort



Click on Scheduling icon  on the toolbar or press F9.

NOTES:

Left Panel



The left window displays Date, Calendar, Office choices, and Doctor/Room choices.

The schedule defaults to today's date; to select another date, enter a date in the date field or select a date on the calendar. Use the arrows < > to move between months and the arrows << >> to move between years. Use the T to go back to today's date.

Blue day is Today, red days are weekends, pink days are office holidays, and dark red days are doctor's holiday.

Below the calendar, users can select which schedule to display. Select an office and then select from the available providers or rooms within that office.

Each users can have the scheduler open with to a different default provide based on user parameters.

The order of the doctors in this drop down list can also be set per user. See Setup > Schedule > My Doctor Sequence.

The pink box below Doctor/Room select shows the number of appointments in the display area.

Day / Week / Month / All – allows user to view weekly / monthly appointments for selected doctor / room, etc. All – will provide a choice of All Offices / All Doctors / All Rooms

The default view can be set for the office; the options are daily, weekly, monthly, all Dr, all Room, all Offices. See Setup > Schedule > Parameters.

The bottom of the left panel displays details of any appointment highlighted in the main display.

Color Legends

Click on any part of this area to customize the color.

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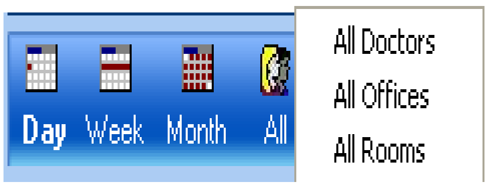
Background color can be set based on Procedure, Not Available and Blocked Slot. White background color represents time slots that are available. Text color varies on the appointment status (Confirm, Unconfirmed, Missed, Patient canceled, Doctor Canceled, Check In, In Room and Check Out).

Clicking on this button will show the patients waiting for an appointment. The number will depend on how many people are on the waiting list. This option can also be set per user. See Setup > Schedule > Parameters> Appointment Waiting = Yes/No.



Click each different view to change the views of the Scheduler screen by Day, Week, Month, All Doctors, All Offices, All Rooms

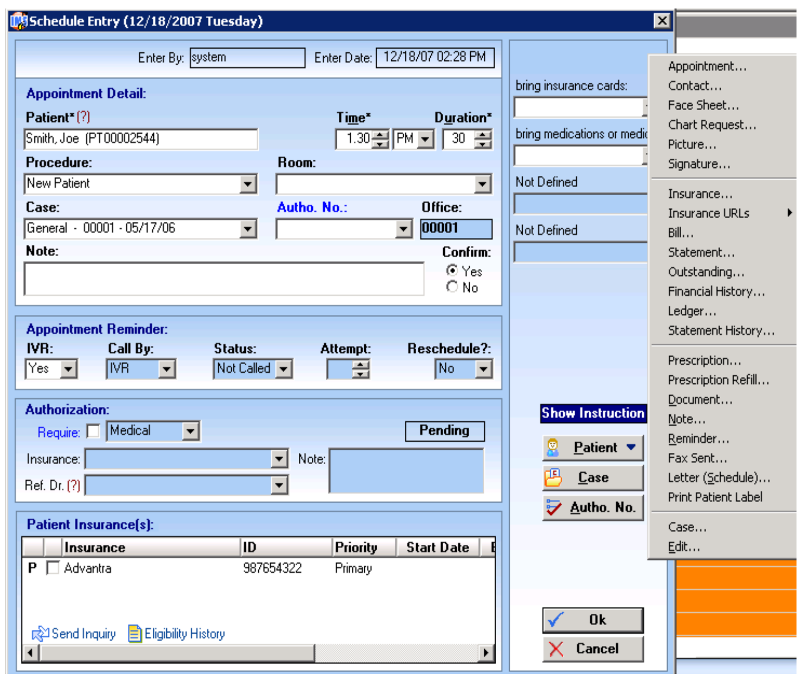
Schedule Appointment

To schedule an appointment double click in the desired time slot. The appointment window displays allowing user to choose the patient, the procedure, etc.

To **choose a patient**, begin typing in the last name and hit "tab key"; the patient selection window will display allowing user to choose the patient.

If the patient does not exist in the system, the user can simply type in a name and not create the patient in the database.

(To enter a new patient, see Creating a New Patient at the end of this document.)



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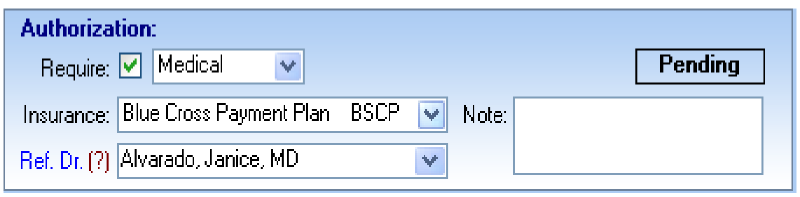
Understand what IVR is

IVR (Interactive Voice Reminder)

The integrated IVR system can assist your staff in preventing missed appointments and to run your business more efficiently. You can setup parameters, by patient, to call them between certain times or to use certain phone numbers and based on those settings, IVR will call patients to remind them of their appointment either 1 or 2 days prior to their appointment, based on your preference. IVR will allow patients to cancel their appointment, if necessary, by pressing one key. With early notice of cancellations, staff will be able to re-fill the canceled slot and avoid unfilled slots, due to no-shows and missed appointments. IVR can provide a complete report including when and how many times the system calls patients.

Initiate Authorization Tracking from the Schedule Entry window



Check the box beside "require" if the procedure for the visit needs an authorization number. Patient insurance will be defaulted. You can enter a referral doctor.

After scheduling is done the letter "P" displayed on the appointment area indicates that the authorization number is still pending.

Other options within the Schedule window include **Special Instructions** and **User Defined Columns**.

Special Instructions appear on the right; click on the blue button to view all instructions. Instructions can be specific to procedure, doctor, module (scheduler, check in, etc). They may be to remind the patient or staff.

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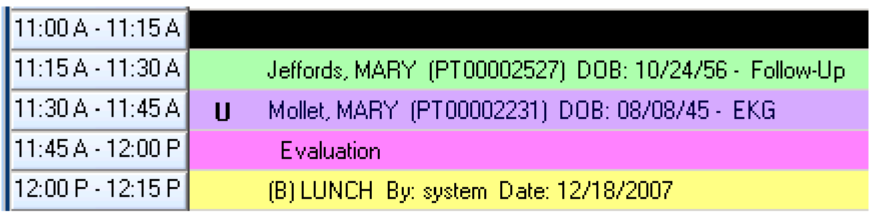
Another option is **User Defined Columns**. They are defined by procedure. They appear on the right of the schedule window and take a response. The response can be required. For example, perhaps one is to remind patient to bring insurance card. If a response is required, staff cannot complete scheduling until they mark give a response to the note.

Appointment Display

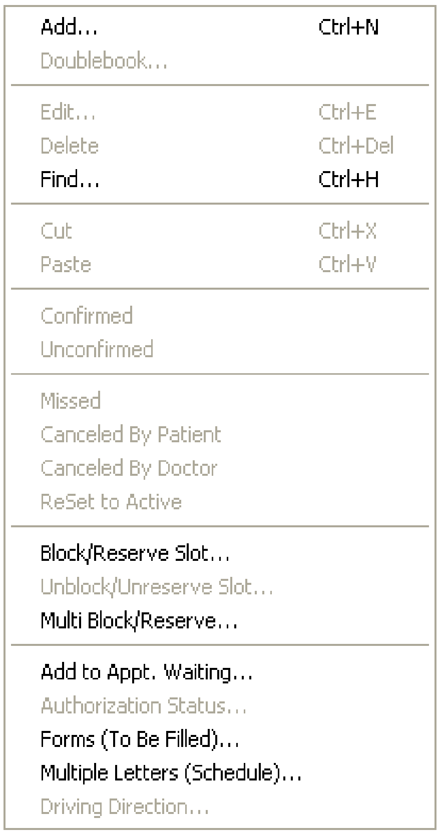


The display is color coded. The background color identifies the procedure (see Setup > Schedule > procedure). The font color shows the appointment status (see Setup > Schedule > Color) such as confirmed, checked in, etc. The status is also given by the letter: U for unconfirmed, B for blocked, etc. The bottom of the schedule has a legend for the status (both font color and letter are explained)

Available time slots have a white background or a colored background if they are reserved for certain procedures. For example, in the above screen shot, the time slot from 11:45 to 12 is available for evaluations but not any other procedure.

NOTES:

Understand Right Click Schedule options



These are the different actions that you can select every time you right click a certain time slot or click on this button 

which is located in the lower right corner of the scheduler window. Either option will give the same actions.

Available Options:

- Add a patient (aside from double clicking on the time slot).
- Doublebook the doctor's schedule.
- Edit an appointment.
- Delete an Appointment.
- Cut an appointment to move to a different day.
- Confirmed/Unconfirmed an appointment.
- Mark as Missed the appointment (preferable at Check in/out module).
- Canceled By Patient.
- Canceled By Doctor.
- Block/Reserve a single slot.
- Multi Block/Reserve time slots.
- Add Appointment Waiting.
- Select forms to be filled out.
- Print multiple letters and send it away to multiple scheduled patients.
- Driving Directions uses the office and patient address in the system to get directions from map quest or yahoo.
- Select means that when another activity is opened, this patient will populate automatically.

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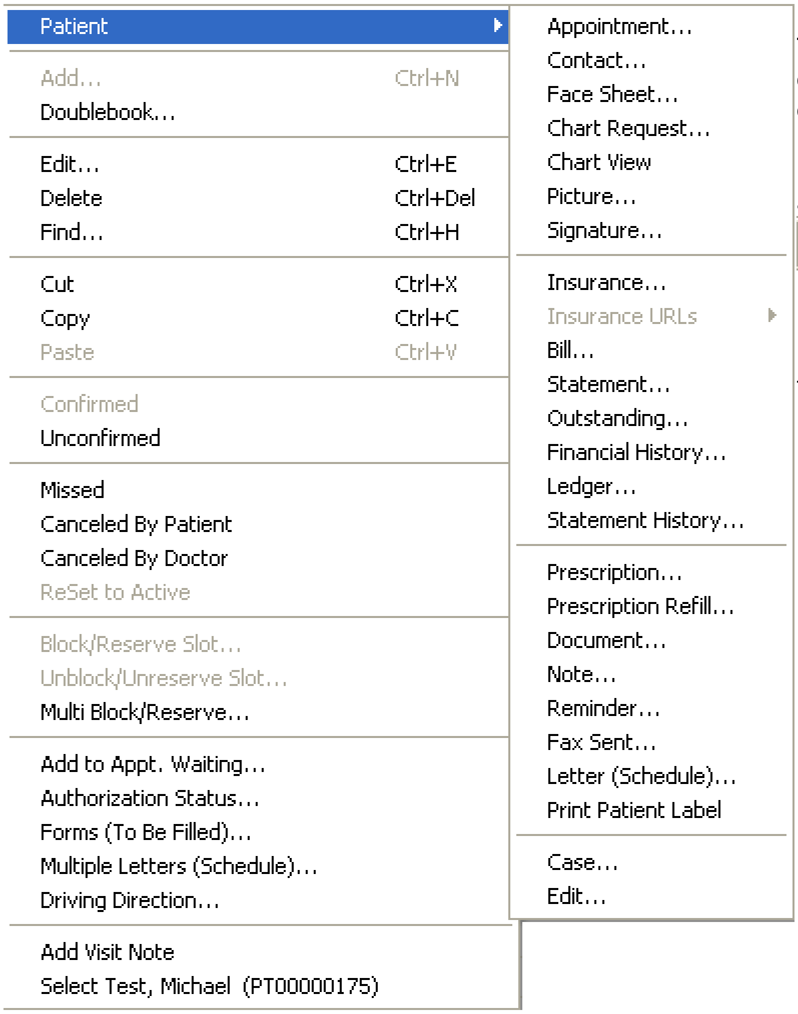
Understand Right Click Patient options



These are the different patient options. It helps you to access other modules or any information related to the particular patient. Patient options can also be accessed if you see this icon  in any window. We call this icon “Wally”.

Patient Options include the following:

- Contact information,
- Billing info
- Prescription
- Documents
- Letters
- Case
- Notes
- Edit patient demographic details
- and more…

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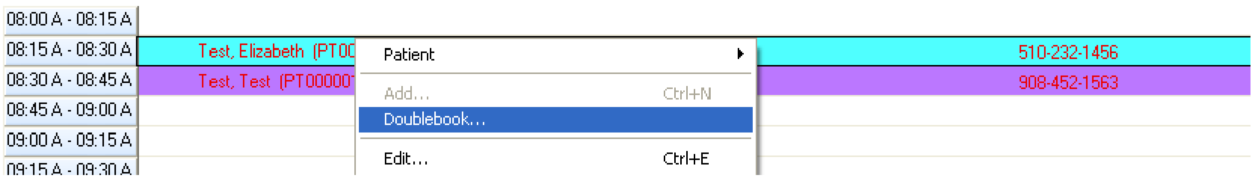
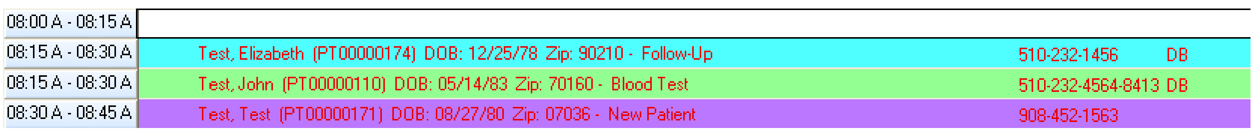
Double book appointments

To double book an appointment, right click on the desired time slot then select “doublebook”. A schedule entry window will open. Enter patient name, procedure, etc... The system will prompt the user that the schedule is already defined at this time and will ask if you want to continue. Click “yes”.



After double booking, the letters “DB” will appear which indicates that this time slot has been double booked. You can double book as many time slots as you want.



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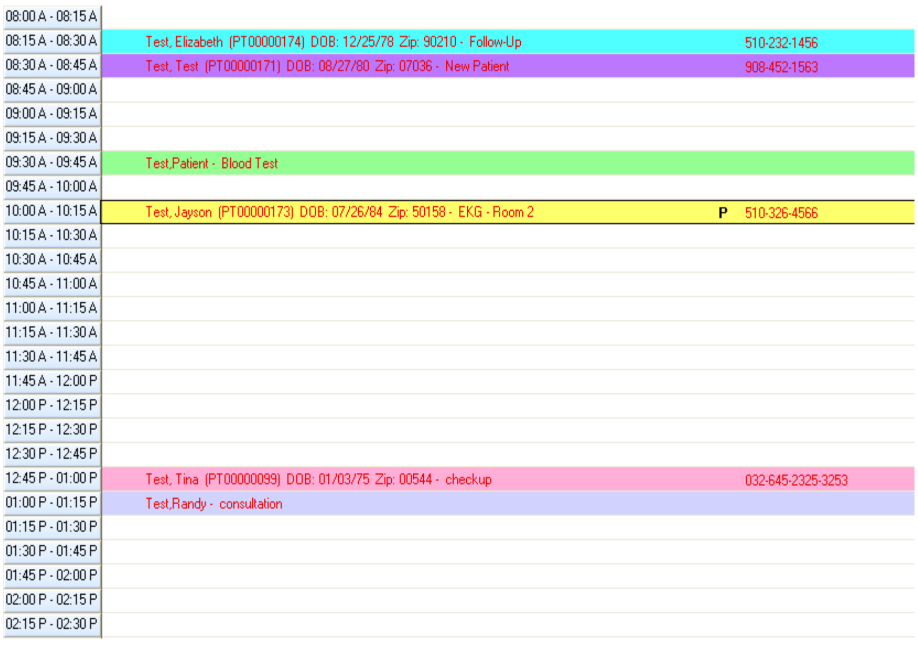
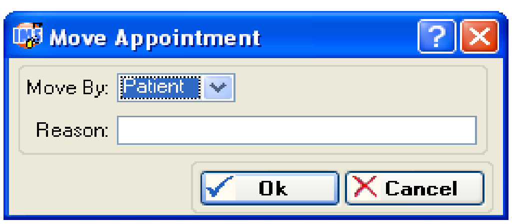
Reschedule appointments

Drag and Drop or Cut and Paste



To move an appointment within the same date, click and drag the specific appointment. While dragging, this icon will show . When you place the appointment on the new time slot, a message will prompt the user to put the reason for why the appointment was moved. It is not required to put a reason, but this will be recorded on the patient appointment history. This will help you track the patient appointment history as well.



From the move appointment window, you can select who moved the appointment, the doctor or the patient. This option can be set in a particular parameter according to the user preference.

Setup> Scheduler> Parameters> Ask reason when move appointment = Yes/No.

To cut an appointment, right click and select “cut”. Go to the desired time slot then right click and paste. The move appointment window will appear if you have set this in your parameter. Cutting an appointment is applicable if you transfer your appointment to another date.

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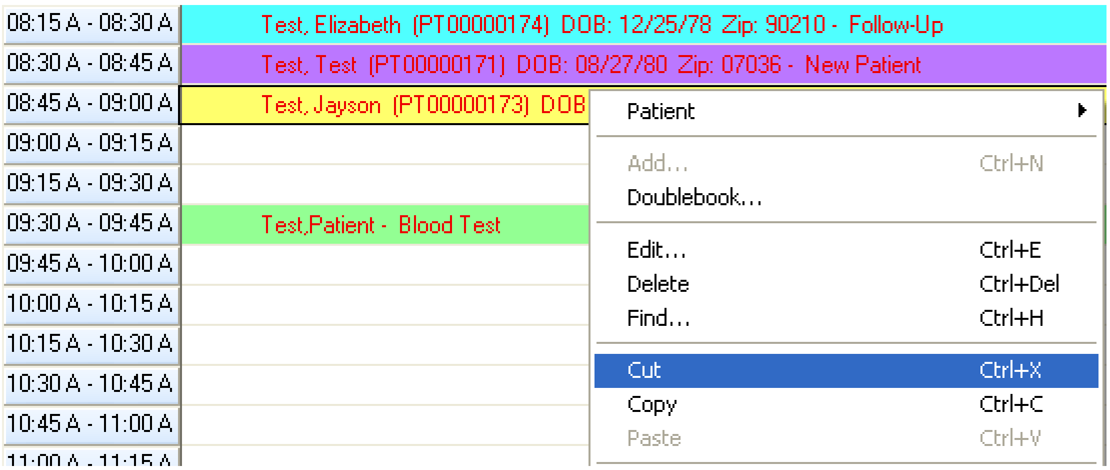
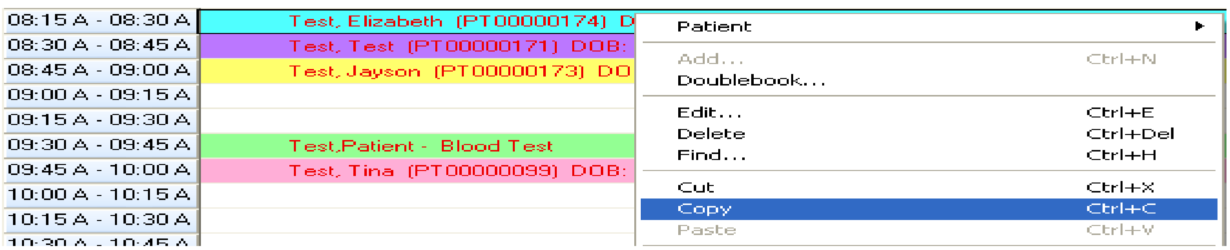


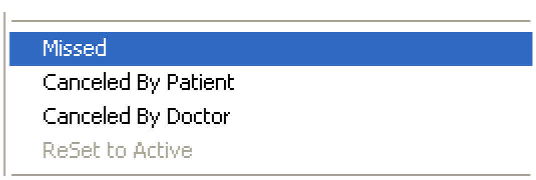
Copy Appointments

To copy an appointment, right click and select “copy”. Go to the preferred time slot, right click and select paste. The schedule entry window will show, then click on “Ok” if there are no changes.



Change the status of an appointment

Missed



To mark the appointment as Missed, right click and select “missed”. A pop up box will show and ask if you are sure you want to set the status as “missed”. If the user selects yes, then a letter “M” will display before the patient name on the scheduled appointment time slot. To set the status back to normal, right click and select “Reset to Active”.

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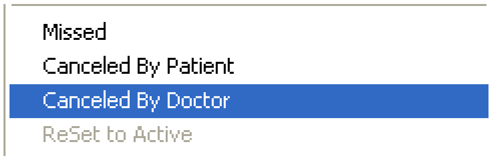
Canceled by doctor/ patient



To cancel an appointment by the patient or doctor, right click and select the appropriate option. A cancel appointment box will show and the user can put a reason on why it was canceled.

A letter P before the name indicates canceled by patient and letter D means canceled by the doctor.

Confirmed/unconfirmed

If the status is marked as unconfirmed by default, and the user wants to change it to confirmed, right click and select confirmed.

A message will appear and ask if you are sure that you want to set the appointment as confirmed. Just select yes to confirm the appointment.

The color of the text will change according to the text color that you set under “confirmed” status.

Block appointment times

To block a single time slot, right click and select “Block/Reserve Slot”. A box will appear and will allow you to put the reason for blocking. For blocking more than one slot, right click and select Mutli Block/ Reserve.

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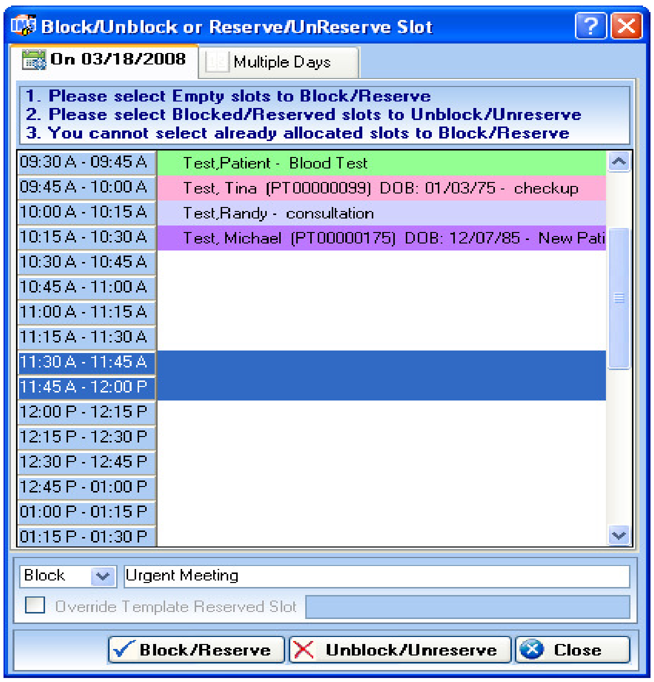
For single block or reserve window.



This window will show for multi block/reserve. Select on the time slots that you wish to block or reserve. Selected time slots will be highlighted. You can choose either Block or Reserve. To block a time slot, put a reason for blocking the time and click on this button 

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To unblock the blocked or reserved time slot, right click then select unblock for single block. For multi block, right click then select the block time slots and click on 

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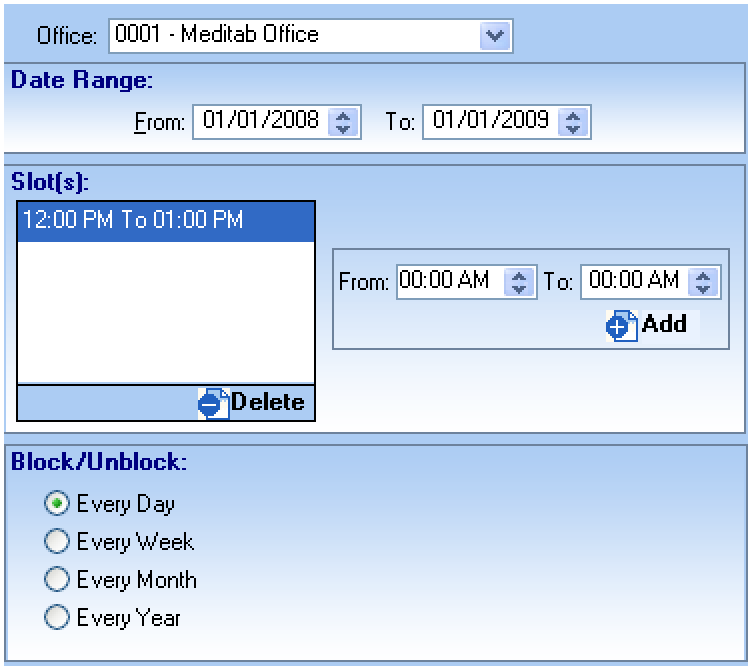
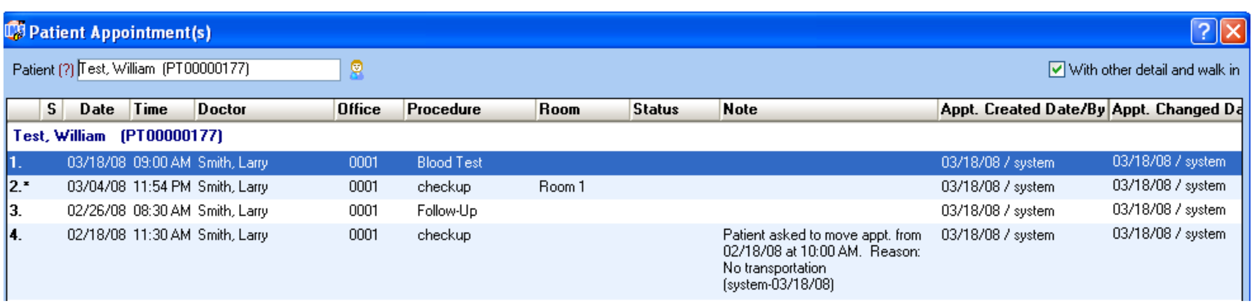
Reserve appointment times



To reserve an appointment for multiple days, right click and select multi days. Set the Date range and the time interval then click on the “add” button. The time slot will show in the Slot box. You can select different options depending on the frequency of reserving it. It could be every day, every week or alternate by week and so on. Select Reserve on the dropdown list and select a procedure. Click on block/reserve button.

Look up patient future and past appointments

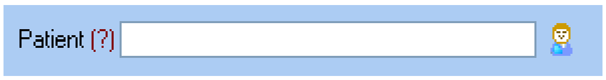
To check the patient appointment history, right click on the particular patient then go to patient options and select “appointment”. This will open the patient appointment window for the particular patient.



NOTES:

This window will give you the past and future appointments for the patient and will also show any walk in visits.

If a patient calls and asks when his/her next appointment is, to find it just click on the icon . It will open the patient appointment history. Enter the name of the patient first then press the tab key.

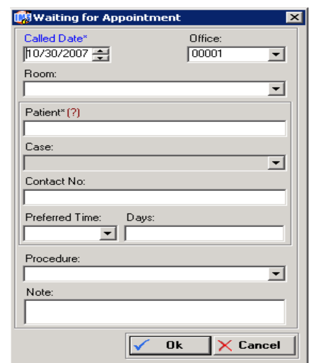


Select the correct patient then hit ok. It will display the past and future appointments for the patient.

Check the box beside this option With other detail and walk in in order to view other details like walk in visits and so on.

Schedule Options

The Option button located at the bottom right of the **Main Schedule Screen** lists some of the same features you will find when right clicking on an appointment slot.

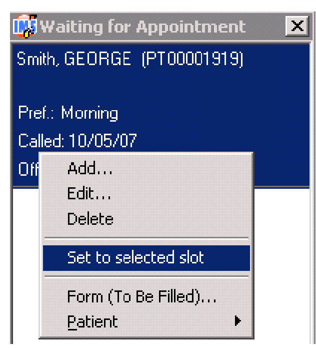


Adding Patient to Appt. Waiting:

Click on the Options button located at the bottom right and choose **Add to Waiting List.**

Enter patient, contact information, notes, etc for patients waiting for appoint.

Click on the **Appointment Waiting** box (located in the lower right corner) to open the list of patients waiting for an appointment. To schedule, drag an item to a time slot or right click and Set to selected slot.
Other right-click options include adding, editing and deleting patients to and from the list.



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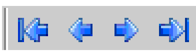
Top Bar Icons functions are:

Search icon brings up an additional appointment window with the “FIND time slots” active at the bottom left.

Print icon allows user to print appointments from this screen.

 **Arrows left** / **right** allows user to scroll up and down the screen.

 **Patient** icon brings up the Patient Appointment Window, allows user to search for specific patient and view past and future appointments. This ability will enable the user to quickly check a patient’s appointment.

 **Clipboard** icon -- Appointment by Visit Status Report

 **Paper with blue arrow** -- export to PDA

 **Refresh** clicking on this icon will refresh the appointment screen

 **Parameters --** this icon will display the Scheduler Parameters

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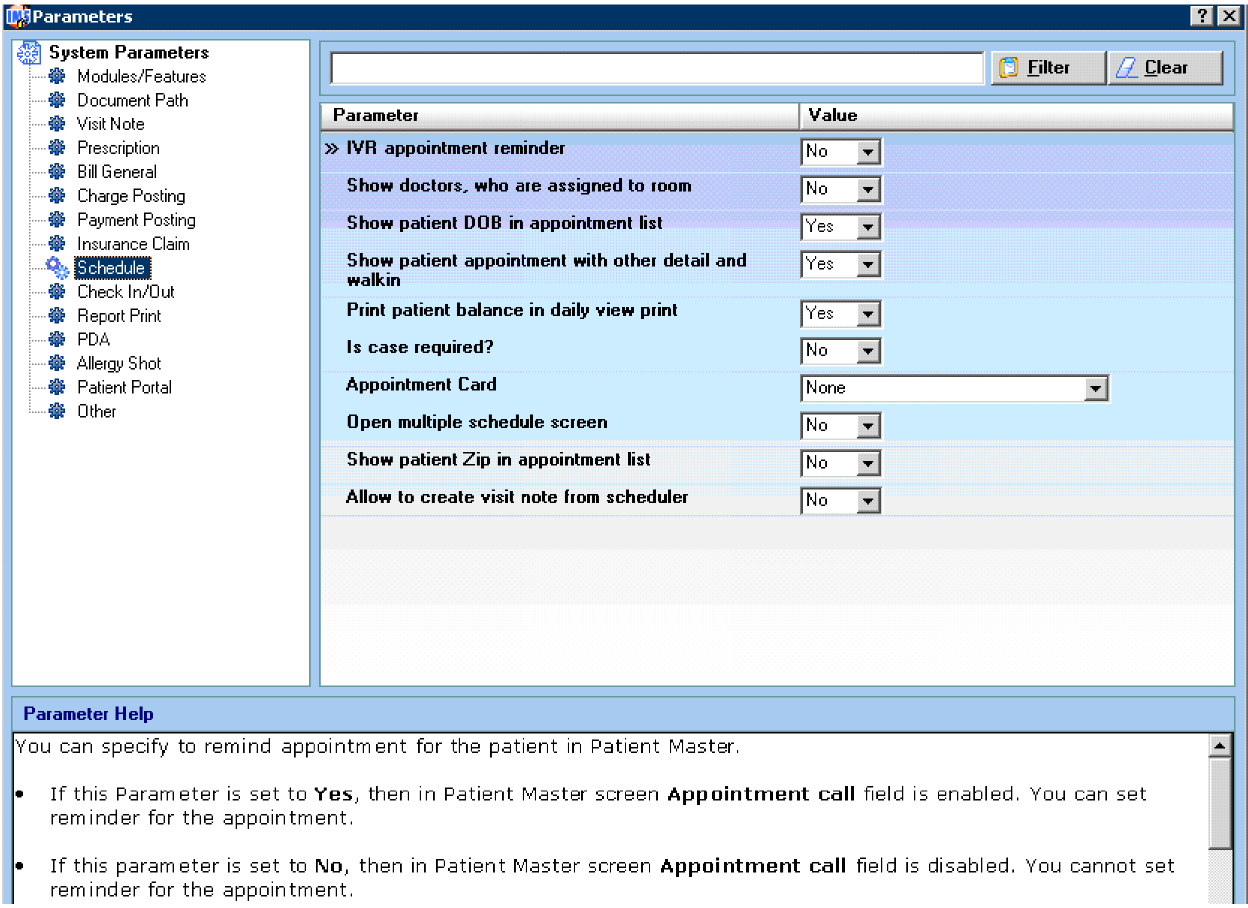
Parameters

System Parameters are shown below:



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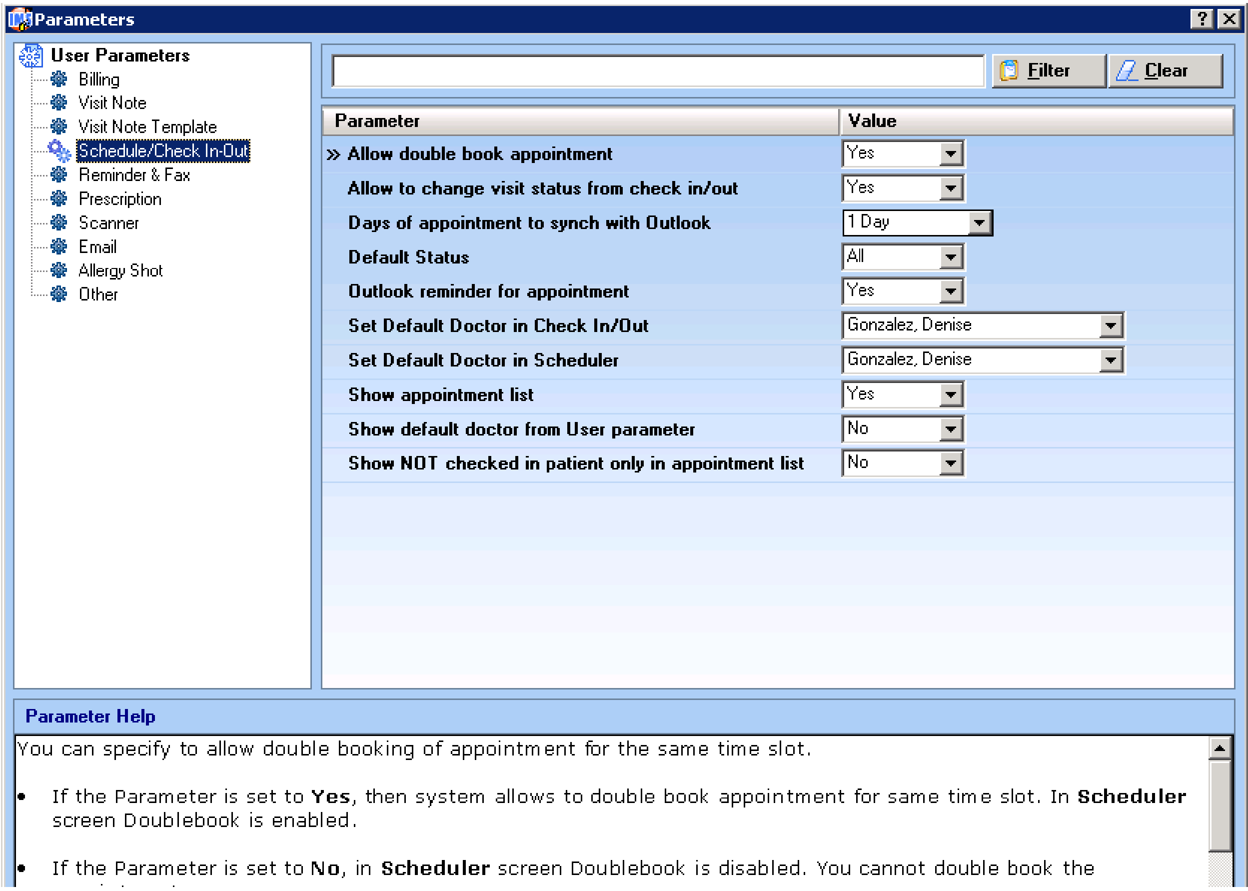
User Parameters are shown below:



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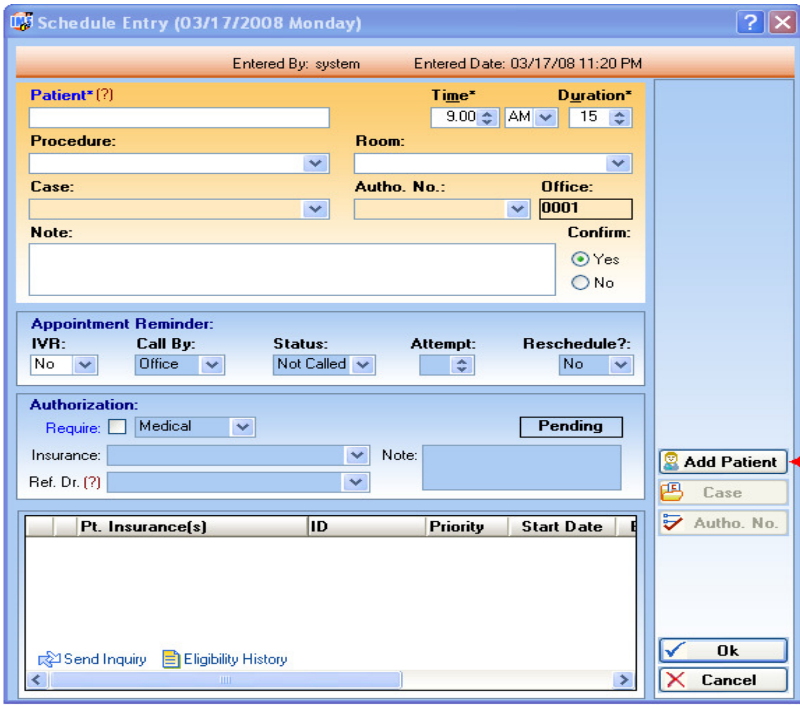
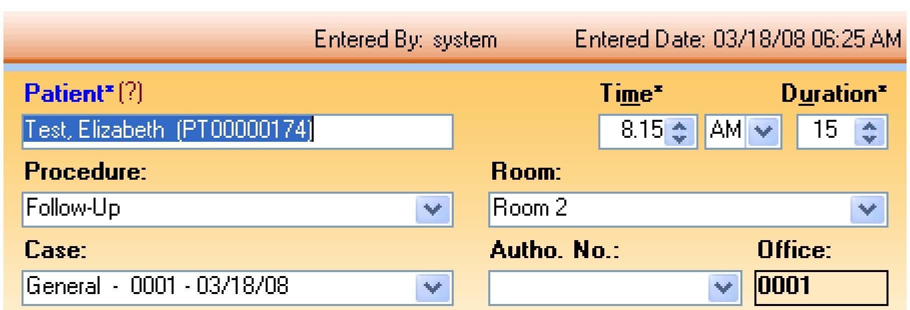
Creating a New Patient



To create a new patient through the Patient Master from the Schedule entry window, click on the button "Add Patient" and the Patient Master screen will pop up.

Enter the patient demographic details and fill out all the fields that have an asterisk (*). The system will not allow the user to complete the patient registration if there is missing information in one of the required fields.

With creating a new patient chart

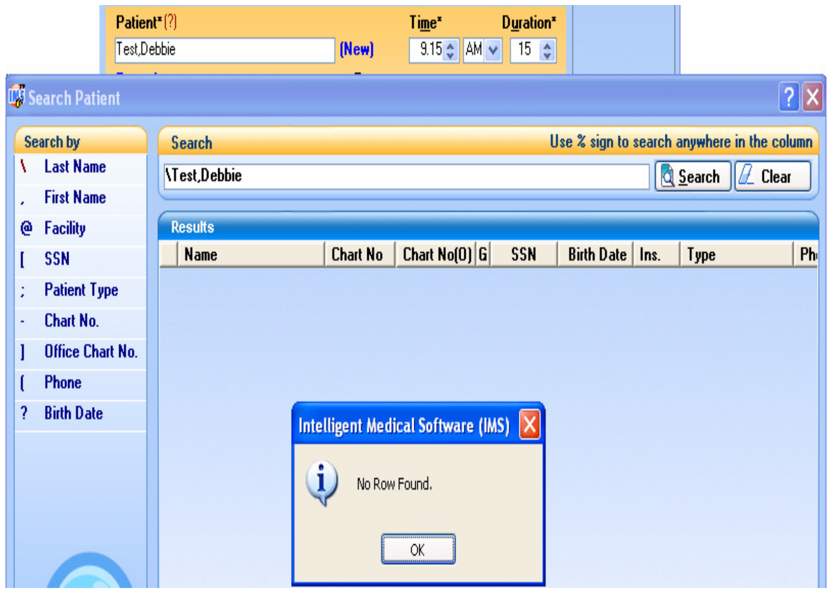


NOTES:

After you have saved the new patient through the Patient Master window, a chart number or patient chart will be assigned to that particular patient. The chart number is auto generated by the system. The Patient chart will be displayed beside the name of the patient.

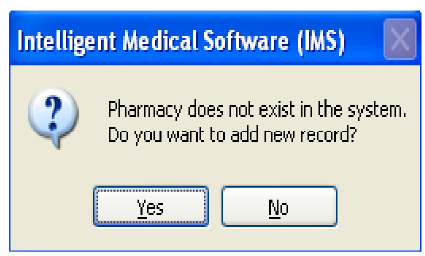
Without creating a chart

When a user tries to add a patient that does not yet exist in the database they will be directed to the Search Patient screen a “No Row Found” will show, click on “Ok” then hit “Cancel”. There will be no patient chart number beside the patient name and an indication “new” appears next on the patient name field.



Enter a New Patient Details

Pharmacy



The patient's pharmacy can be entered from the Patient Master window. The advantage of this is when the doctor has already created a prescription for the patient; this pharmacy will be defaulted from the prescription window.

If that pharmacy is not yet listed in the database, type the pharmacy name then hit tab. This box prompts. Click Yes.

The Patient Master window will open. Enter the pharmacy details like address, phone number, fax number and etc.

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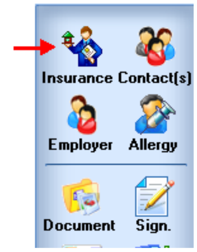
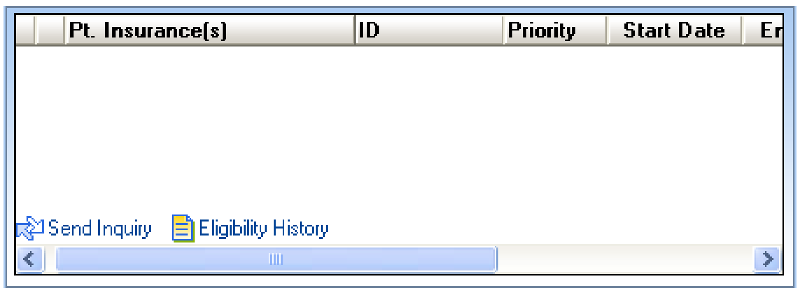
Insurance



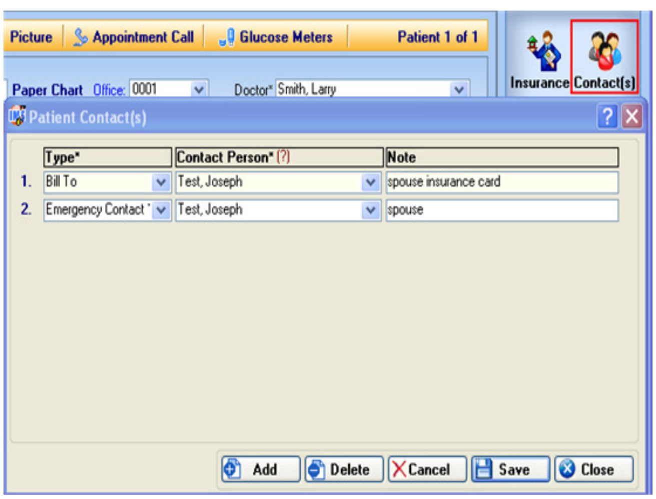
Patient Insurance can also be entered from the Patient Master screen. Just click on this icon and the Patient Insurance window will be displayed. Fill out the required fields. Click Save.

Assign Insurance at the time of scheduling

From the Schedule Entry screen, patient insurance can be entered. Double click anywhere in this area and the Patient Insurance window will show.



Contacts



When the user clicks on the icon "Contacts", it displays the Patient Contact screen. This allows the user to add a contact type like Emergency Contact.

If the patient statement will go somewhere else, the Bill To contact type is essential. This person should receive the patient statement.

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Next choose the **procedure**, **doctor**/**room**, **case** and **authorization** number (if required).

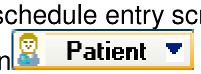
From this screen you can: mark the appointment as **confirmed**, fill out authorization information, view patient detail and more.

See separate training guide on Authorization for details on that module. Required authorizations are setup based on insurance and procedure.

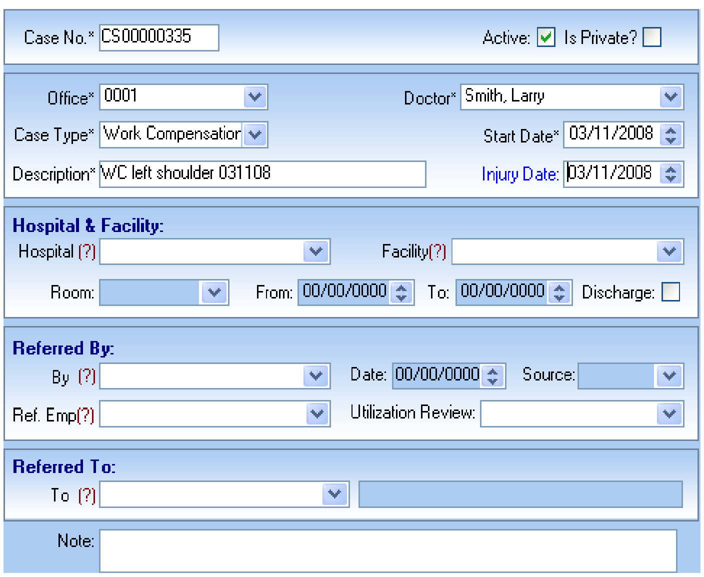
Within IMS, the **Case** holds important billing and authorization information. For example, within the case keep track of the number of visits under a certain authorization. Or use a special case for all visits related to workers compensation. For general sick visits, only one default case is necessary. But for visits with different insurance, referrals or other information, create a new case to use for that group of visits.

Understand Cases in IMS

To create a case, click on this button 

on the schedule entry screen. Another way to access the case master screen is to click on the patient button 

from the appointment window.



The case record stores many common billing details about a particular illness or occurrence for the patient, so you do not need to enter the same information again and again each time new charges are posted during their treatment.

You can select case type such as Illness, Personal Injury, Workers Comp or Physical insurance.

NOTES:

The case also allows user to enter authorization details for each case and to keep track of the history such as how many visits have already been used, authorization expiration date and etc.

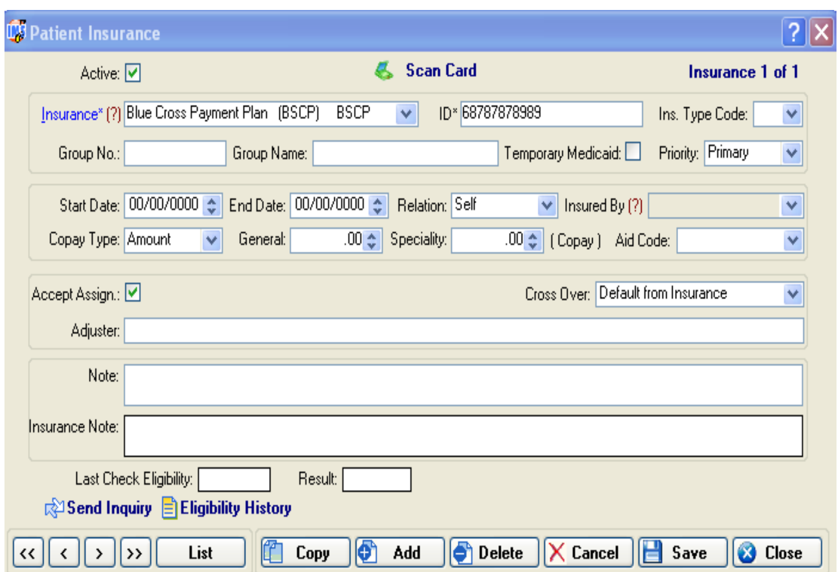
The Case allows user to enter Personal Injury or Worker Comp insurance information in the case record. These payers may be different from the Patient's insurance coverage. So if the patient visits you for a personal medical problem as well as a work injury problem, then you need to be careful to select the proper insurance payer for charge posting, depending on the nature of the visit or treatment. The ability to create multiple cases to cover such situations allows you to easily provide the correct information when posting charges for a specific visit.

You can also enter information about other doctors involved with the patient's case

Enter Referring physicians
You can enter referring physicians from the Case screen then click on this icon**.**

From the Patient Insurance window, click this 

button to add another patient insurance. You can directly edit the patient insurance details as well, especially the start date and the end date field. Always click on "save" to overwrite the previous details. **Add/edit patient insurances**



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