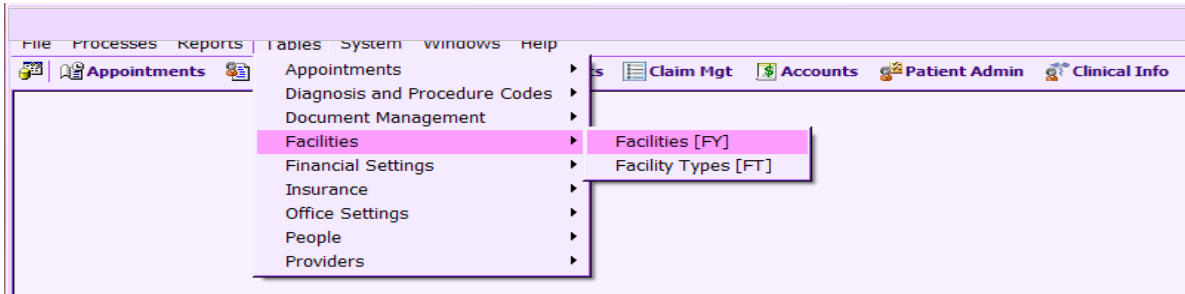


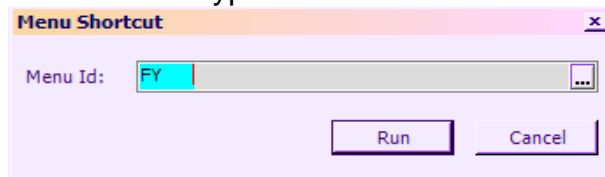
Appointment Scheduler – Set Up (FY) Facility

Tables\Facilities\Facilities [FY]



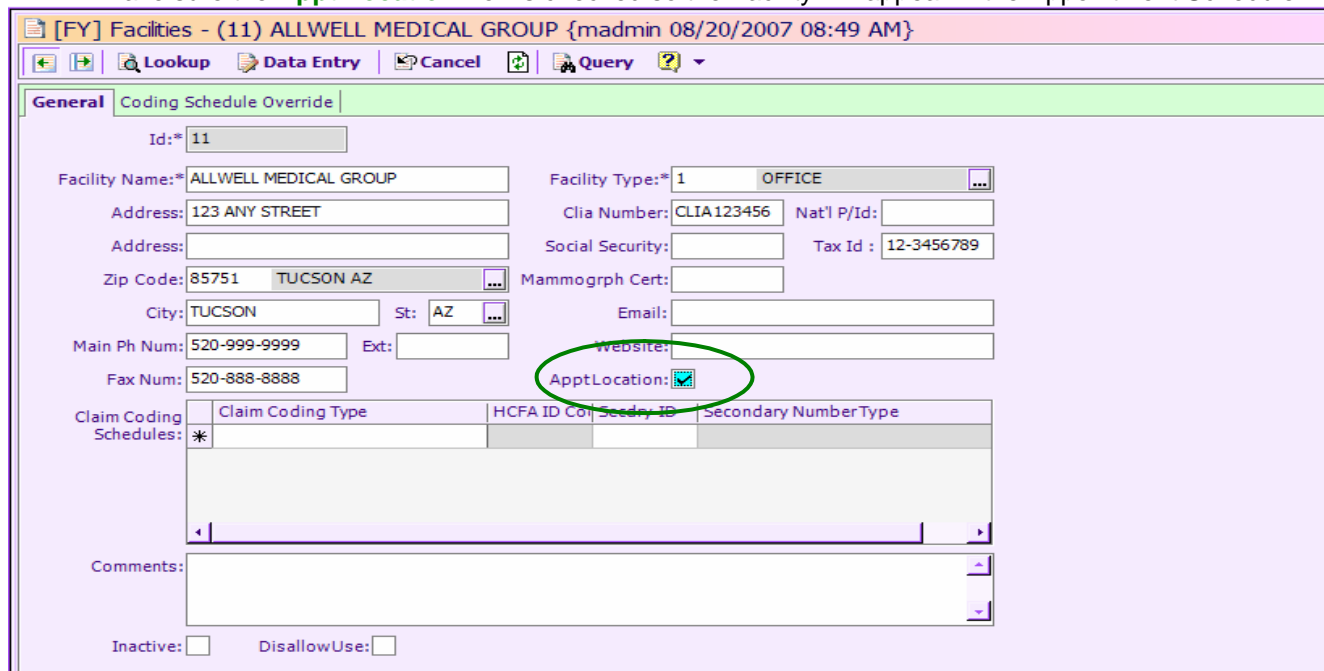
OR

Select Short Cut Key (F12)
Type in Menu Id:



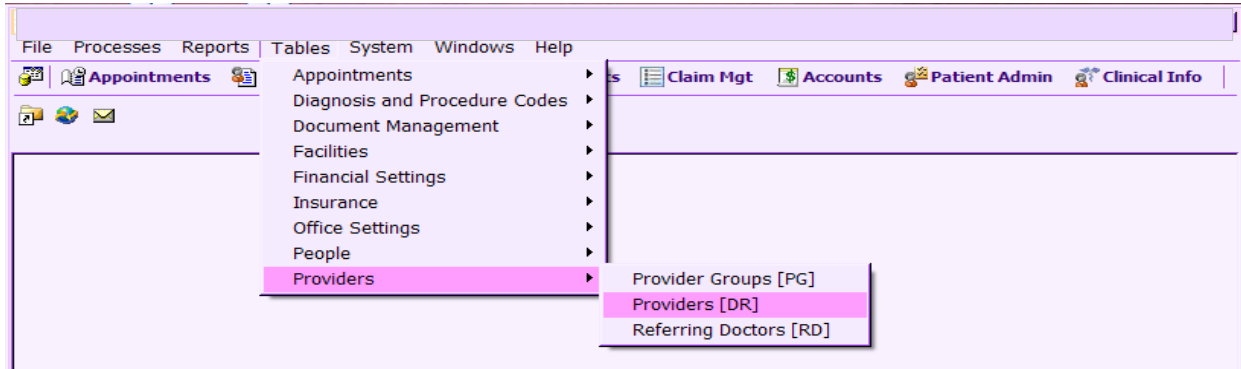
FY and enter

- You will also need to verify that all facilities you are scheduling for are Appointment Locations.
 - Make sure the **Appt Location** Box is checked so the Facility will appear in the Appointment Scheduler



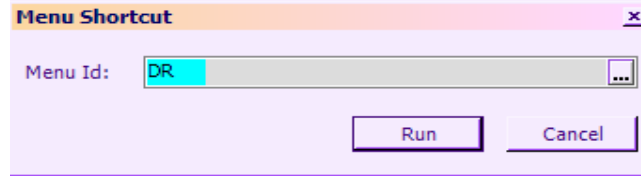
Appointment Scheduler – Set Up (DR) Provider

Tables\Providers\Providers [DR]



OR

Select Short Cut Key (F12)
Type in Menu Id



DR and enter

- You will need to make sure all providers that you are scheduling for are Appointment Providers.
- Make sure the **Appt Provider** Box is checked so the Provider will appear in the Appointment Scheduler

[DR] Providers - (MNW) WEST, MARK MD {PPM 10/27/2007 03:06 AM}

Look up Data Entry Cancel Query

General Claim Coding Overrides Schedules Schedule Exceptions Provider/Facility Claim Coding Schedules Sender Identifiers (Trading Partner Ids)

Id:* MNW

Name - Last: WEST Prof Lic Type: MD Lic Num: 122345
 First: MARK MI: N Social Security: Tax Id: 12-3456789
 Address: 123 ANY STREET UPIN: W12234 Nat'l P/Id: 1233456783
 Address: Payee:* 1 ALLWELL MEDICAL GRO
 Zip Code: 85751 TUCSON AZ Specialty: 020 Orthopedic Surgery
 City: TUCSON St: AZ Taxonomy Cde: 207X00000X Orthopaedic Surgery
 Ph Number: 520-999-9999 Ext: Provider Group: ORTHO ORTHOPEDIC SURGERY
 Cell Phone: **Appt Provider:** Non-person Entity:
 Email:

Claim Coding Schedules:*

Claim Coding Type	Prov Num	Group Num	Grp NPI	Credentials	P/Agmt	A/Assgn	SOF
D Default	123456789	123456789	<input checked="" type="checkbox"/>	MD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MC MEDICARE	45221	45219	<input checked="" type="checkbox"/>	MD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MD MEDICAID	333333	123456	<input checked="" type="checkbox"/>	MD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BCBS BLUE CROSS BLUE SHI	AZ33333	AZ12345	<input checked="" type="checkbox"/>	MD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WC WORKERS COMPENSA	122345	123456789	<input checked="" type="checkbox"/>	MD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HN HEALTH NET	AZ122345		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*							

Comment:

Inactive: Disallow Use:

- You will need to now set up the **Provider Schedule Tab**.

[DR] Providers - (MNW) WEST, MARK MD {PPM 10/27/2007 03:06 AM}

Lookup Data Entry Cancel Query

General Claim Coding Overrides **Schedules** Schedule Exceptions Provider/Facility Claim Coding Schedules Sender Identifiers (Trading Partner Ids)

Id:* MNW

Name - Last:* WEST Prof Lic Type: MD Lic Num: 122345
 First: MARK MI: N Social Security: Tax Id : 12-3456789
 Address: 123 ANY STREET UPIN: W12234 Nat'l P/Id: 1233456783
 Address: Payee:* 1 ALLWELL MEDICAL GRO
 Zip Code: 85751 TUCSON AZ Specialty: 020 Orthopedic Surgery
 City: TUCSON St: AZ Taxonomy Cde: 207X00000X Orthopaedic Surgery
 Ph Number: 520-999-9999 Ext: Provider Group: ORTHO ORTHOPEDIC SURGERY
 Cell Phone: Appt Provider: Non-person Entity:

- Give the Schedule a Title, e.g. by location (Main Office, Other Office), by Provider, or by Speciality.
- Set an Effective Date
- Set a Terminate Date if applicable
- Start the schedule on a Sunday. The normal set up would be 7 days, Sunday through Saturday.

[DR] Providers - (MNW) WEST, MARK MD {PPM 10/27/2007 04:24 AM}

Lookup Data Entry Cancel Query

General Claim Coding Overrides **Schedules** Schedule Exceptions Provider/Facility Claim Coding Schedules Sender Identifiers (Trading Partner Ids)

DR WEST

Title:* DR WEST
 Eff Date:* 01/08/2006
 Term Date: 01/03/2010

Day 1 - Sunday Day 2 - Monday Day 3 - Tuesday Day 4 - Wednesday Day 5 - Thursday Day 6 - Friday Day 7 - Saturday

Day: 1 Weekday: Sunday

Times	Start	End	Facility	Schedule Type
*				

DR WEST

Title:* DR WEST
 Eff Date:* 01/08/2006
 Term Date: 01/03/2010

Day 1 - Sunday **Day 2 - Monday** Day 3 - Tuesday Day 4 - Wednesday Day 5 - Thursday Day 6 - Friday Day 7 - Saturday

Day: 2 Weekday: Monday

Times	Start	End	Facility	Schedule Type
	09:00 AM	02:00 PM	H HOSPITAL	ORX ORTHO OUT OF OFFICE
	02:00 PM	05:00 PM	11S ALLWELL SOUTH	OR ORTHOPEDIC
*				

DR WEST

Title:* DR WEST
 Eff Date:* 01/08/2006
 Term Date: 01/03/2010

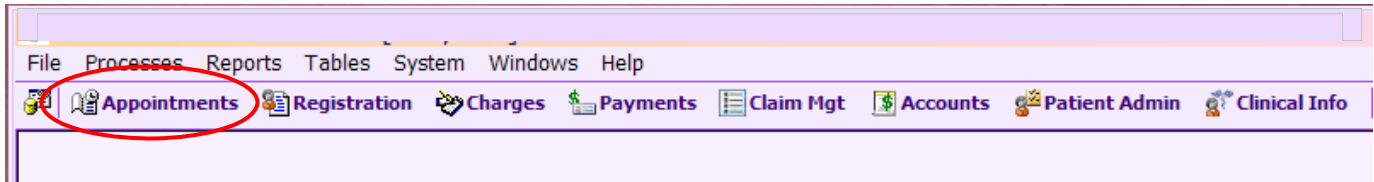
Day 1 - Sunday Day 2 - Monday **Day 3 - Tuesday** Day 4 - Wednesday Day 5 - Thursday Day 6 - Friday Day 7 - Saturday

Day: 3 Weekday: Tuesday

Times	Start	End	Facility	Schedule Type
*	09:00 AM	05:00 PM	11S ALLWELL SOUTH	OR ORTHOPEDIC

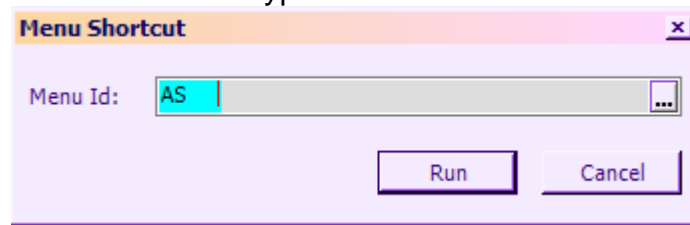
Appointment Scheduler – Set Up (AS) Appointment Scheduler

Appointments



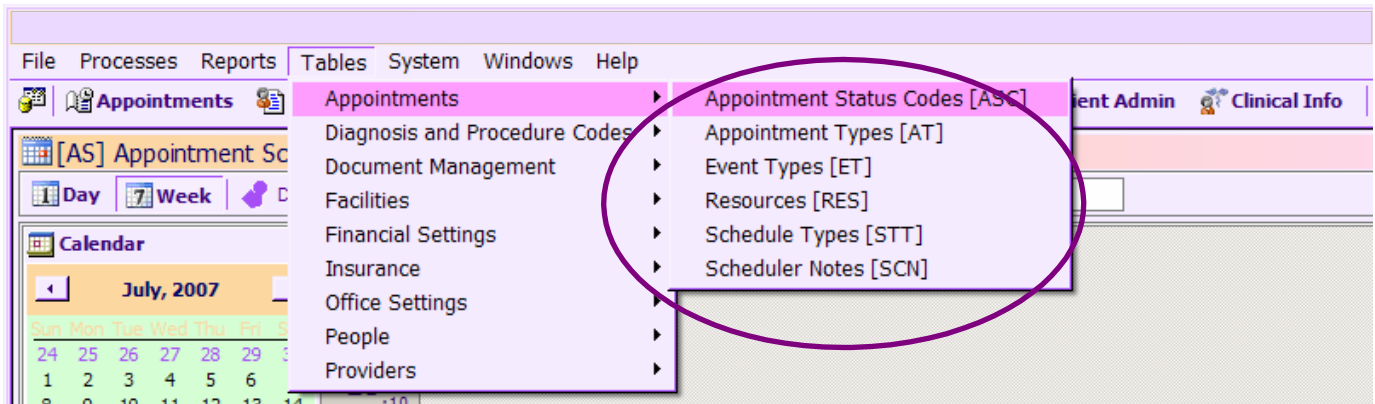
OR

Select Short Cut Key (F12)
Type in Menu Id



AS and enter

Before using the scheduler, set up the **Appointment menus**:



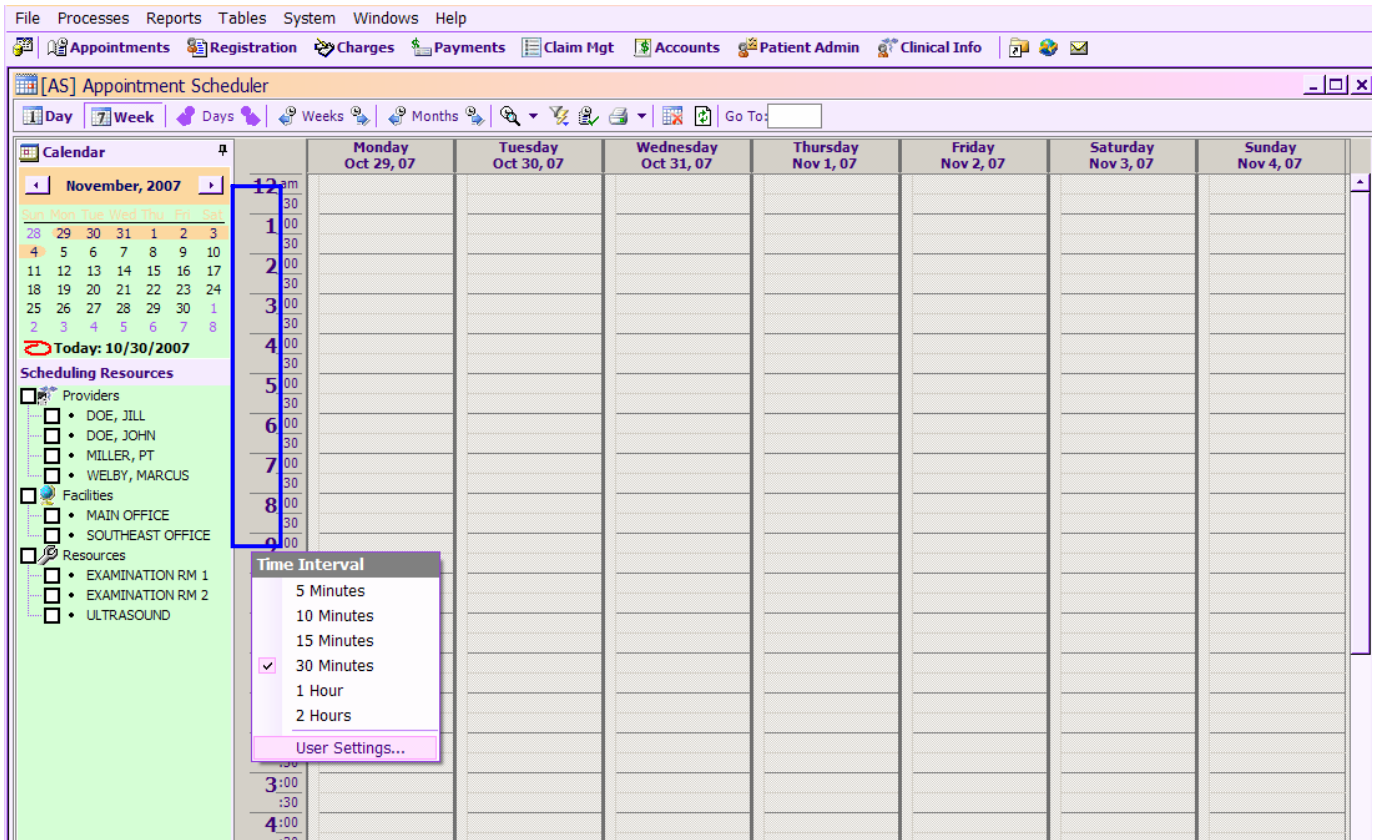
- ASC** – Appointment Status Codes - This is part of the initial setup and should not have to be touched
- AT** – Appointment Types - This is the different types of appointments that office would like to keep track of. This will come off of the client's worksheet. Please stress to the clients to not make the IDs too long
- ET** – Event Types - This is events that the office would like to keep track off (Holidays, Vacations, Drug Reps, etc.) This will also come off of the client's worksheet
- RES**– Resources - This is for keeping track of other Resources in the office such as a Medical Assistant, Nursing staff, special treatment rooms (e.g. whirlpool), equipment (e.g ultrasound, ekg)
- STT**– Schedule Types - This is to keep track of Types of Scheduling.

These menus can also be accessed via the F12 Menu Shortcut.

The **Shortcut Id** for each menu is enclosed in brackets following the name of the menu

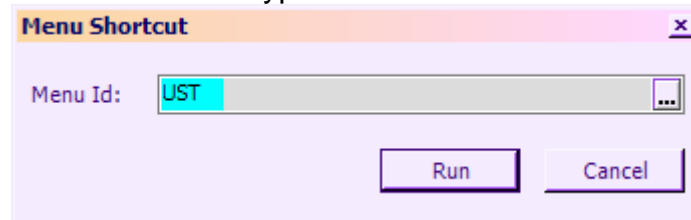
Define your User settings:

- Right click anywhere on the Time Interval bar on the left to access User Settings.



OR

Select Short Cut Key (F12)
Type in Menu Id

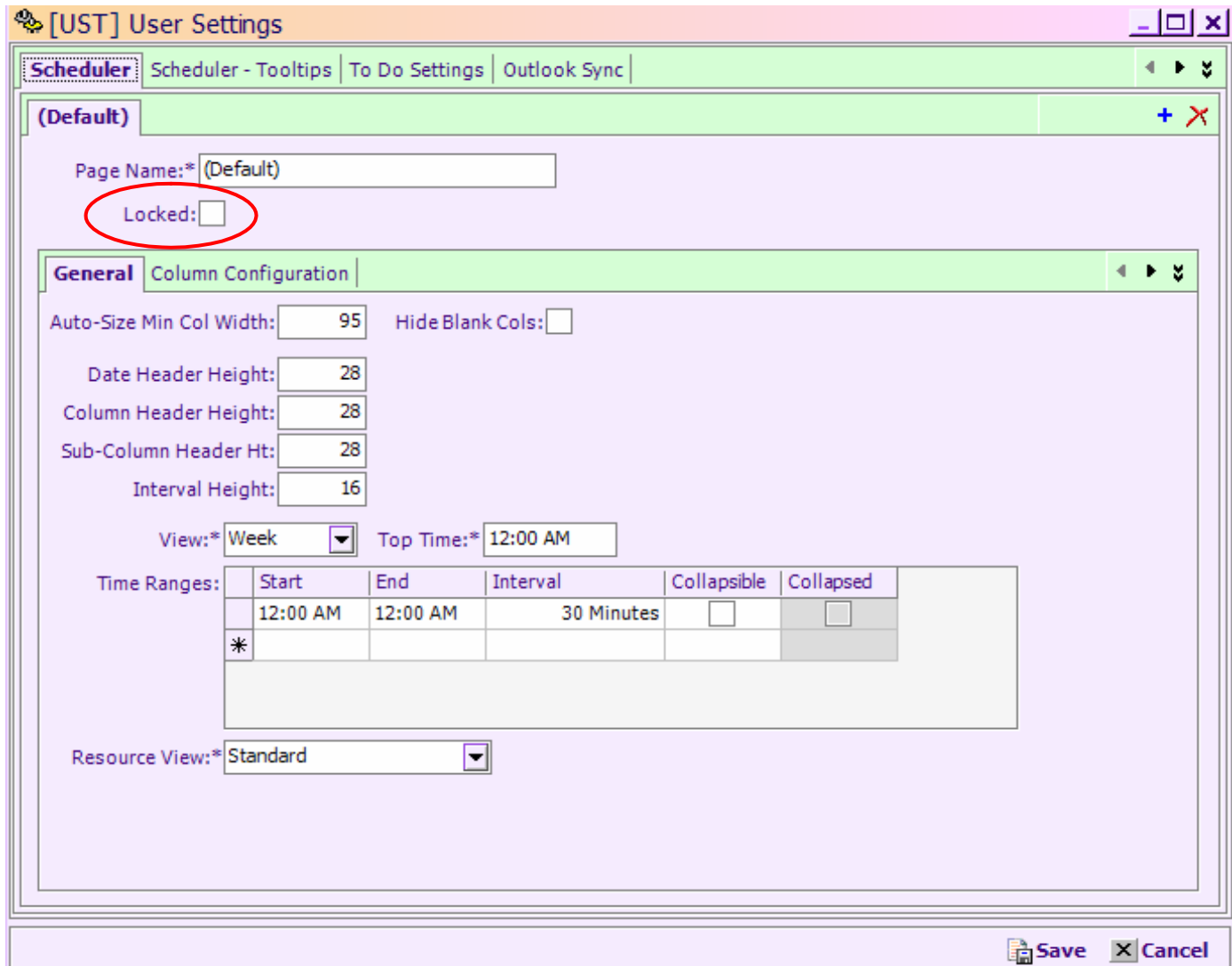


UST and enter

Note: These settings are specific to the User logged in, i.e. each User will have to set up their own User settings/preferences.

Appointment Scheduler User Settings: These settings are the default settings

when you log in and open the Appointment Scheduler.



1. Auto-Size Min Col Width: Determines the minimum column width when viewing in Week mode.
2. Hide Blank Cols: Hides columns with no active appointments, or active schedule.
3. Date Header Height, Column Header Height, Sub-Column Header Ht: Determine the amount of space the column headers occupy when viewing the Appointment Scheduler.
4. View: The default view when you open the AS, by week or day.
5. Top Time: The time when your appointment schedule begins
6. Time Ranges: Determines the hours visible in the AS. Default is 12 am to 12 am.
Example: To set the AS for scheduling Appts from 9 am to 5 pm, with 10 min intervals:

Time Ranges:	Start	End	Interval	Collapsible	Collapsed
	12:00 AM	09:00 AM	2 Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	09:00 AM	05:00 PM	10 Minutes	<input type="checkbox"/>	<input type="checkbox"/>
	05:00 PM	12:00 AM	2 Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*					

7. Resource View: Standard - Shows available resources in left panel; Advanced - hides resources.
8. Enter a Page Name for your settings if desired.
9. To lock your settings, place a check mark in the **Locked** box

AS: Week View showing all providers, all locations, and all resources:

•Tip: All Scheduling Resources Boxes Checked

The screenshot displays the Appointment Scheduler (AS) interface. On the left, a calendar for October 2007 shows the current date as Wednesday, 10/31/2007. Below the calendar is the 'Scheduling Resources' panel, which is divided into three sections: Providers, Facilities, and Resources. All items in these sections are checked, and a blue circle highlights the 'Facilities' section. The main area of the interface is a grid showing appointments for Monday (Oct 22, 07), Tuesday (Oct 23, 07), and Wednesday (Oct 24, 07). The grid is organized by time slots (from 9 am to 3:00 pm) and columns for different locations: Wells, Matt Allwell South; West, Marcus Allwell South; Cast Rm Allwell South; EKG Machine Allwell South; Exam Rm 1 Allwell South; Ultrasound Allwell South; Wells, Matt Allwell Medical G; and West, Marcus Allwell Medical G. Each cell in the grid contains a colored box representing an appointment, with text indicating the provider and location. For example, at 9:10 am on Monday, there is an appointment for 'PE - BREYER' at 'WELLS, MATT ALLWELL SOUTH'. The grid also shows 'LUNCH' periods for all locations between 12:00 pm and 12:30 pm. The top of the interface features a toolbar with various icons for navigation and editing, and a 'Go To' field.

AS: Week view showing 2 providers, 1 location and 1 resource:

- Tip: Click on **Push Pinto** Show / Hide Left Panel
- Tip: Let Mouse Hover Over **Icons** for Description

The screenshot displays the Appointment Scheduler (AS) interface. On the left, there is a calendar for October 2007, with the 27th highlighted. Below the calendar is a 'Scheduling Resources' panel with checkboxes for Providers (Wells, Matt; West, Marcus), Facilities (Allwell Medical Gro; Allwell South), and Resources (Cast Rm; EKG Machine; Exam Rm 1; Ultrasound). The main area shows a weekly view from Monday, Oct 22, 07, to Friday, Oct 26, 07. The columns represent providers: Wells, Matt Allwell South; West, Marcus Allwell South; Wells, Matt Allwell South; West, Marcus Allwell South; EKG Machine Allwell South; Wells, Matt Allwell South; West, Marcus Allwell South; EKG Machine Allwell South; Wells, Matt Allwell South; West, Marcus Allwell South. The rows represent time slots from 9:00 am to 3:40 pm. Appointment slots are color-coded and labeled with provider initials and appointment types (e.g., GYN, NP, CS, FU, LUNCH). A toolbar at the top contains various icons, with a red circle around the 'Push Pinto' icon and a blue circle around the 'Show/Hide Left Panel' icon.

AS with left Calendar/Resource panel closed

[AS] Appointment Scheduler											
Day Week Days Weeks Months Go To: []											
Calendar	Monday Oct 22, 07		Tuesday Oct 23, 07		Wednesday Oct 24, 07		Thursday Oct 25, 07		Friday Oct 26, 07		
	WELLS, MATT ALLWELL SOUTH	WEST, MARCUS ALLWELL SOUTH	WELLS, MATT ALLWELL SOUTH	WEST, MARCUS ALLWELL SOUTH	EKG MACHINE ALLWELL SOUTH	WELLS, MATT ALLWELL SOUTH	WELLS, MATT ALLWELL SOUTH	WEST, MARCUS ALLWELL SOUTH	EKG MACHINE ALLWELL SOUTH	WELLS, MATT ALLWELL SOUTH	WEST, MARCUS ALLWELL SOUTH
9:00 am	PE - BREYER,	DR WEST OUT OF OFFICE	GYN - RAND, AY	FU - RAND, AY		OV - FARINA, R	FU - RAND, AY	OV - BREYER,		STAFF MEETING	STAFF MEETING
:10	NP - ANGEL-MORALES, MADONNA		NP - BRADY, HELEN	CS - CAMLU, SEAN	NP - BRADY, HELEN	OV - WYNTER, DORNA	CS - CARR, JEFF	OV - BREYER,	CS - CARR, JEFF		
:20	OV - LEMMON,		NP - FREEMAN,	OV - GABRIEL,		NP - DESPRES,	PE - FINDLEY,	OV - BREYER,			
:30	OV - SNOW, SA		NP - WOODWA	OV - SMITH, H		OV - DESPRES,	PE - FINDLEY,	CS - NOIR, EVE			
:40	CS - SANCHEZ, LATOYA		OV - OSWALD,	OV - SUNDARA	OV - WILKINS	OV - OSWALD,	PE - FINDLEY,	CS - TYBOE, JA		EP	OV - OSWALD,
:50	FU - OSWALD,		NP - BLUMFIEL	OV - PEEPLES,		OV - OSWALD,	OV - OSWALD,	CS - TOWLES, MISSY		SD	NP - WILKINS
10:00 am	OV - V		OV - BLUMFIEL	CS - SMITH, H		OV - OSWALD,	OV - OSWALD,	CS - TOWLES, MISSY		NP - WILKINS	CS - J
:10			OV - BLUMFIEL	CS - SMITH, H		OV - OSWALD,	OV - OSWALD,	CS - AARONSO		GL	GL
:20			OV - BLUMFIEL	CS - OSAMBAM		OV - OSWALD,	OV - OSWALD,	GL - AARONSO		GL	GL
:30			OV - BLUMFIEL	FU - LEM		OV - OSWALD,	OV - OSWALD,	GL - AARONSO		GL	GL
:40			OV - BLUMFIEL			OV - OSWALD,	OV - OSWALD,	GL - AARONSO		GL	GL
:50			OV - BLUMFIEL			OV - OSWALD,	OV - OSWALD,	GL - AARONSO		GL	GL
11:00 am			OV - BLUMFIEL			OV - OSWALD,	OV - OSWALD,	GL - AARONSO		GL	GL
12:00 pm	LUNCH		LUNCH	LUNCH		LUNCH	LUNCH	LUNCH		LUNCH	LUNCH
:10											
:20											
:30											
:40											
:50											
1:00 pm	GYN - BUENA, E		OV - WYNTER,	OV - SONITE, S		DR WELLS OUT OF OFFICE	DR WELLS OUT OF OFFICE	OV - WYNTER,	CS - N	CS - PERU, ME	CS - PERU, ME
:10	OV - BROWN,		OV - SNOW, SA	CS - PENA -RIVERA, JORGE				OV - WYNTER,	EP	CS - KIRKPATR	CS - KIRKPATR
:20	OV - GAULT, JOHN	CS - S	OV - SNOW, SA	OV - P	OV - PEEPLES,			OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
:30	OV - FARINA,	CS - S	OV - SNOW, SA	OV - P				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
:40	GYN - ROSS, BE	CS - S	NP - RAYMUND, LIONEL	OV - FARINA, R				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
:50	PE - SPONGE,	CS - S	OV - BRIDGES,	OV - FLOWER,				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
2:00 pm	OV - TOWLES,	CS - S	OV - BRIDGES,	OV - JOHNSON,				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
:10		CS - S	OV - BRIDGES,	OV - JOHNSON,				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
:20		CS - S	OV - BRIDGES,	OV - JOHNSON,				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
:30		CS - S	OV - BRIDGES,	OV - JOHNSON,				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,
:40		CS - S	OV - BRIDGES,	OV - JOHNSON,				OV - WYNTER,	OV - WYNTER,	OV - WYNTER,	OV - WYNTER,