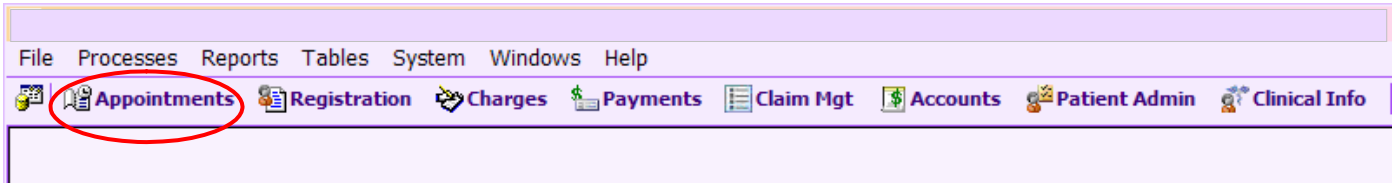


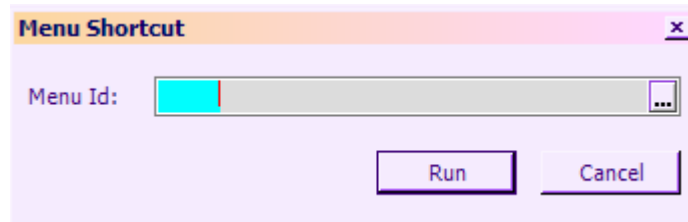
Appointment Scheduler – Making an Appointment

Open the Appointment Scheduler (AS):



OR

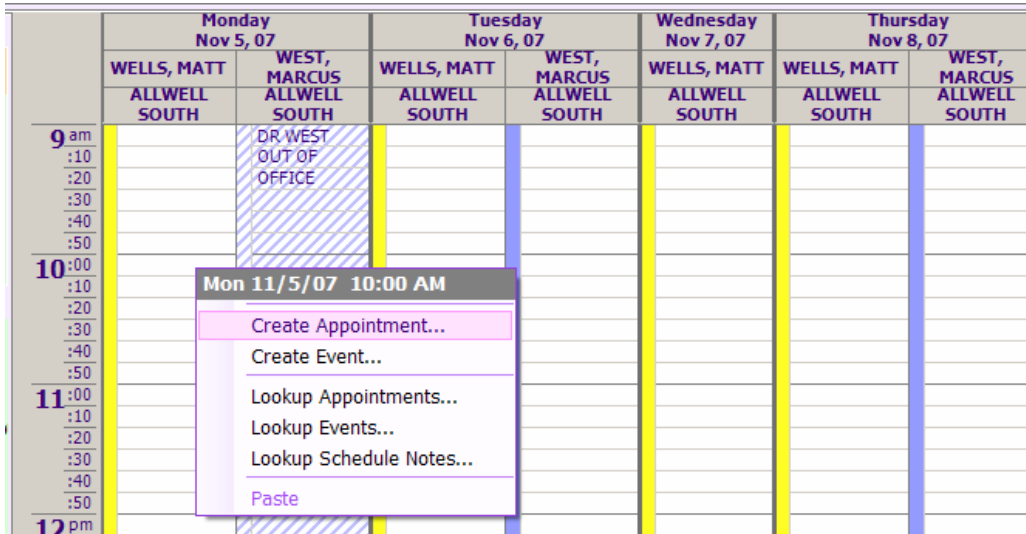
Select Short Cut Key (F12) Type in Menu Id:



AS and enter

To open the Appointment Entry menu:

a. Right click on the appointment time and select "Create Appointment":



OR

b. Double click on the appointment time

OR

c. Select Short Cut Key (F12) and type in the menu Id "AE"

The Appointment Entry screen will appear

The Appointment Entry menu (AE)

- An appointment entry ID for tracking will automatically be assigned.
- In the patient field, type in the patient's Id # if known, if you do not know the patient's Id # click on the **ellipse** and you will be brought to the Registration and Related Information screen
- Double click on the patient in the Registration Lookup, or click on the name then click "Select"
-

MDofficeManager.com – Section 2b - Appointment Scheduler

- The patient's registration information will default back to the Appointment Entry screen
- Complete the **Reason for Visit/Chief Complaint**, this will print on the scheduler report.
- Click on the **ellipse** next to Appt-Type to select the appointment type.

The screenshot shows the 'Appointment Entry' form for patient BRIDGES, GLORIA and provider WELLS, MATT. The form is divided into several sections:

- General:** Includes fields for Id (234), Patient (117 BRIDGES, GLORIA), Coverage (PC/TMSTER), Reason for Visit/Chief Complaint (circled in blue), Daytime Ph Num, Appt - Type (with a dropdown arrow circled in red), Duration (10, circled in red), Appt - Date/Day (11/05/2007 Monday), Time - Start/End (10:00 AM - 10:10 AM), Provider (MW WELLS, MATT MD), Resource, Facility (11S ALLWELL SOUTH), and Appt Status (B Booked, C/Pulled checkbox circled in red).
- Insurance Information:** A table showing insurance details for PCA-PACIFICARE PPO.
- Patient Alerts:** A section for alerts related to the patient.
- Ancillary Resources/Providers:** Sections for adding additional resources or providers (circled in blue).
- Special Instructions/Patient Reminders:** A text area for notes.
- Bottom Bar:** Includes buttons for Documents, Other Actions, Error Check, Save (circled in red), and Save-Next.

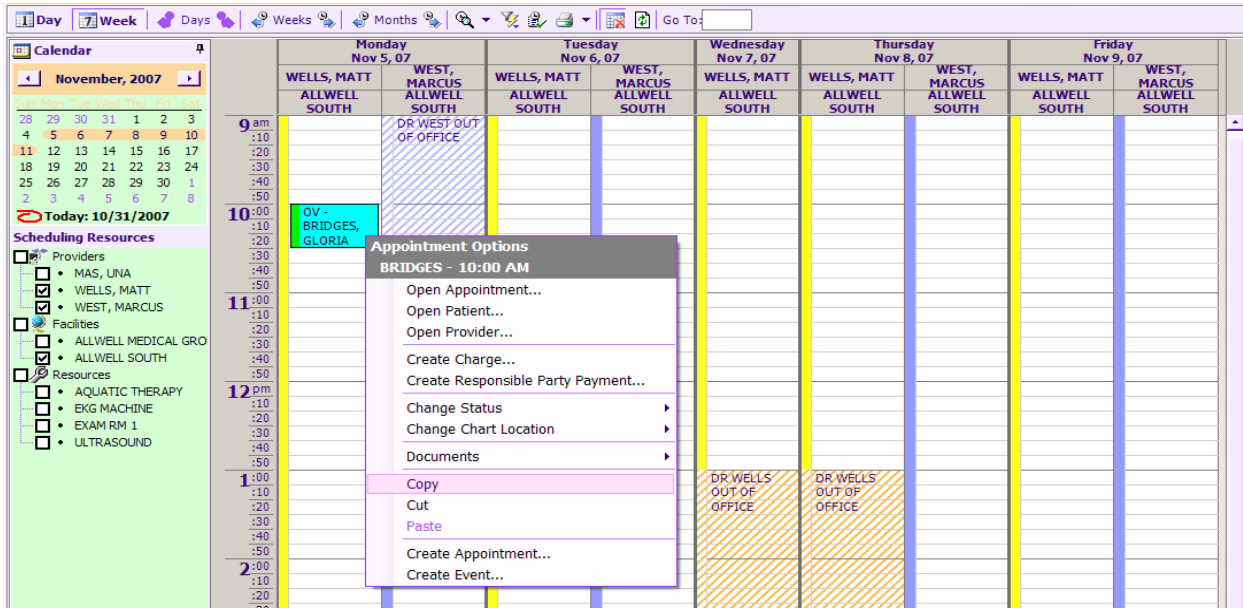
- The default Appointment-Type **duration** can be edited at the appointment level if necessary.
- Additional appointment specific **staff or resources** (e.g. Medical Assistant, EKG machine) can also be allocated from this screen.
- You can enter additional comments if necessary but these do not display on the schedule.
- Click on the **save** button (bottom right hand corner)
- After the patient's chart has been pulled, reopen the appointment and put a check mark in the **C/Pulled** box.
- Appointment details are displayed when the mouse hovers over the appointment in the AS.

The screenshot shows the 'Appointment Scheduler' interface. On the left, there is a 'Calendar' widget for November 2007. The main area is a grid showing appointments for Monday through Thursday. A tooltip is displayed over an appointment on Monday, Nov 5, 2007, at 10:00 AM. The tooltip contains the following information:

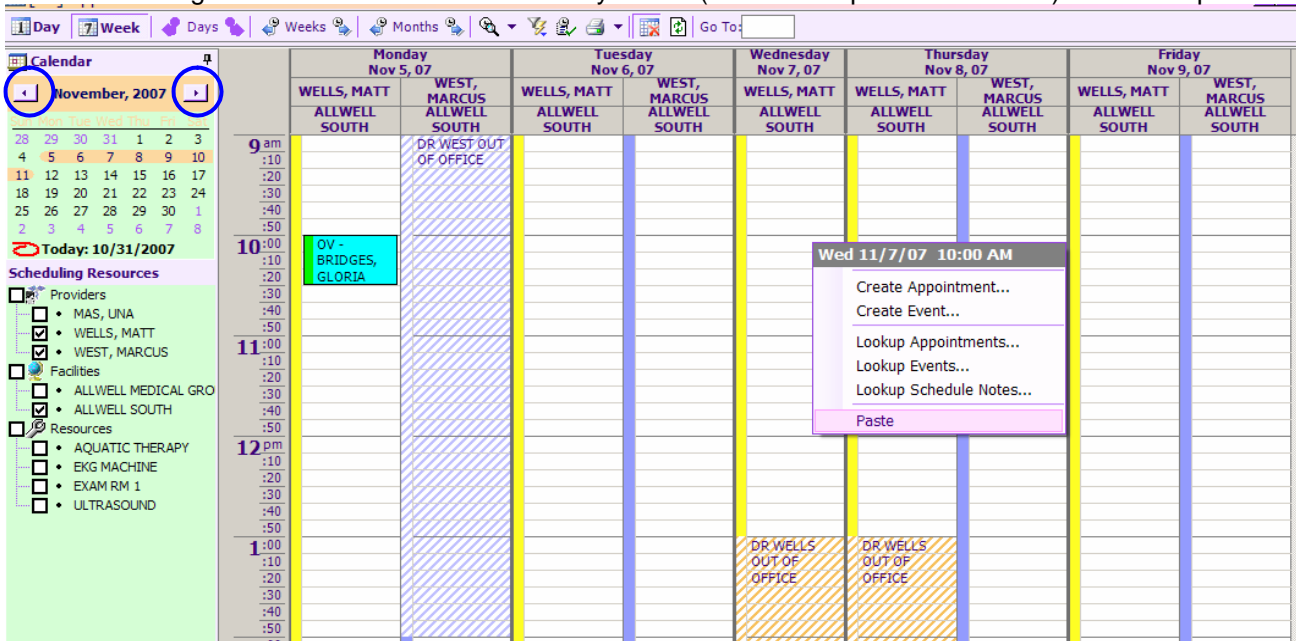
- Type:** OV - OFFICE VISIT
- Patient:** BRIDGES, GLORIA (Booked)
- Phone:** 520-999-9999
- Provider:** WELLS, MATT
- Facility:** ALLWELL SOUTH
- Date:** Monday, November 05, 2007
- Times:** 10:00 AM - 10:30 AM

- Edit Appointment:
 - Double click on the appointment OR right click on the appointment and select "Open Appointment", make changes and SAVE.
- Change Appointment Day / Time:
 - Left click on the appointment, hold the left mouse button down and drag the appointment to the desired time / date. Release left mouse button.
- Schedule Repeating Appointments:
 - Example: Schedule a patient for a 10am appt every MWF for 4 weeks

1. Right click on the appointment, select copy



2. Right click on the next scheduled Day / Time (in this example Wed at 10am) and select paste

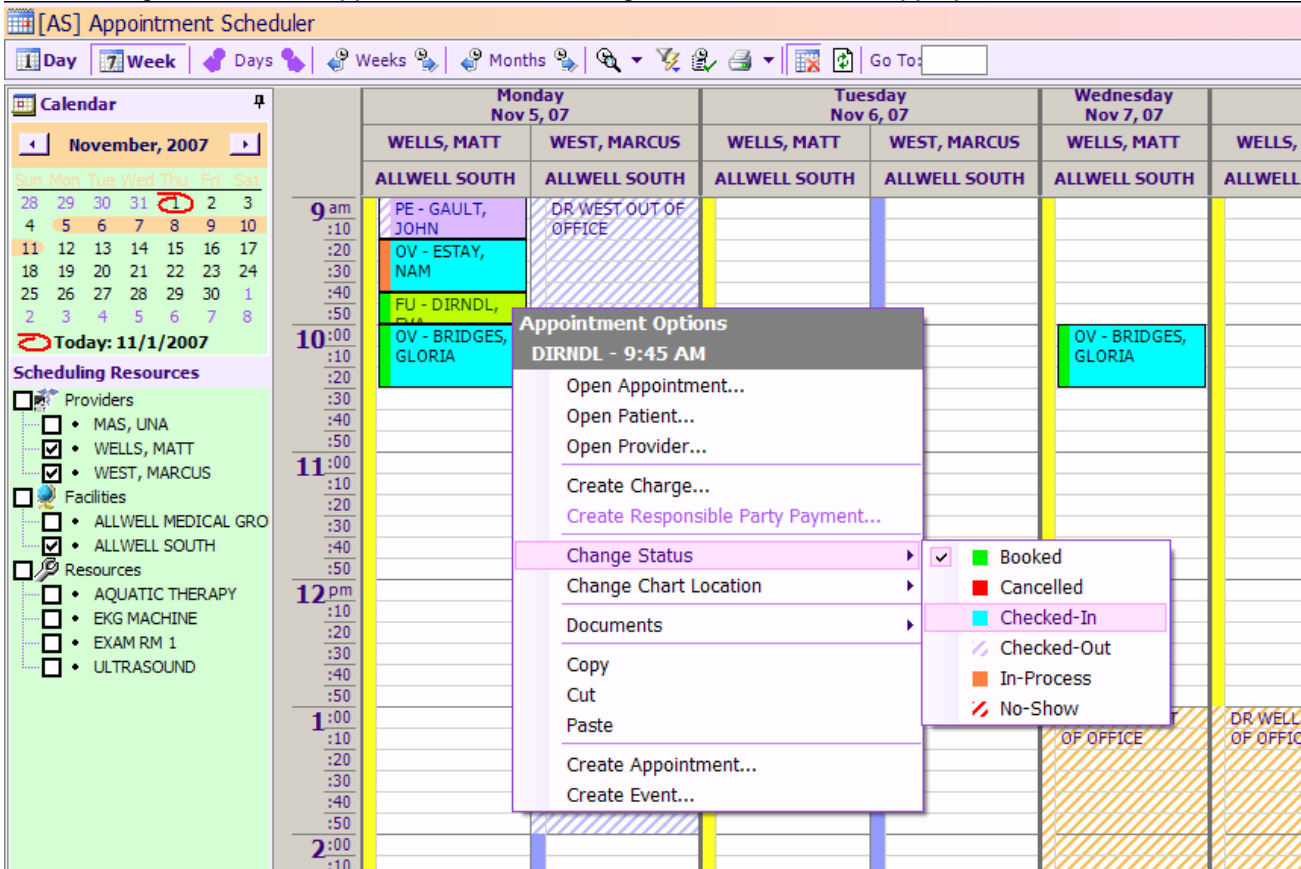


3. Continue to right click on next scheduled Day / Time and select paste until the appointment has been scheduled the required number of times.

- Tip: Use **Calendar Arrows** to move backward/forward from month to month. While in "Week" view mode, click on the week on the Calendar to move from week to week.

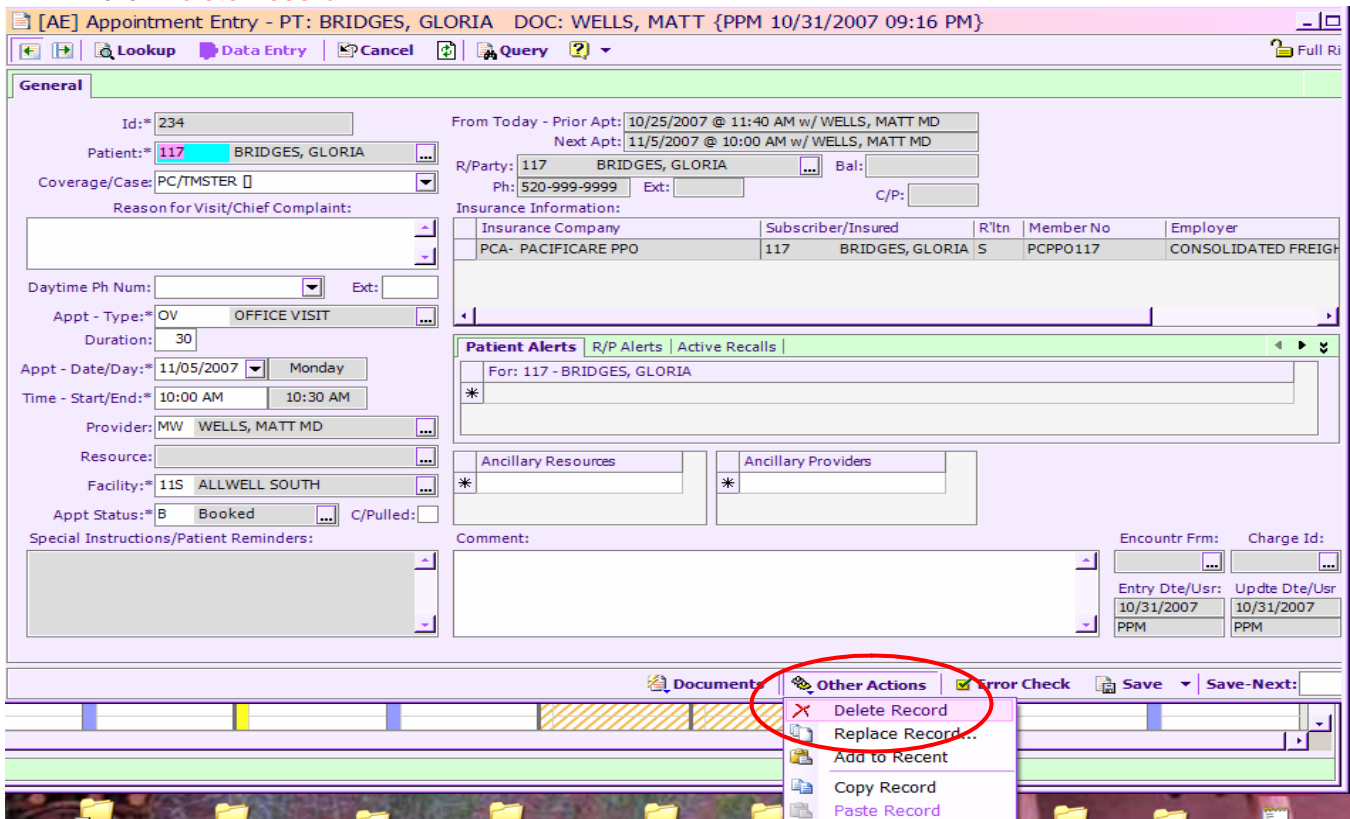
•Change Appointment Status

Right click on the appointment, select change status, click on the appropriate status



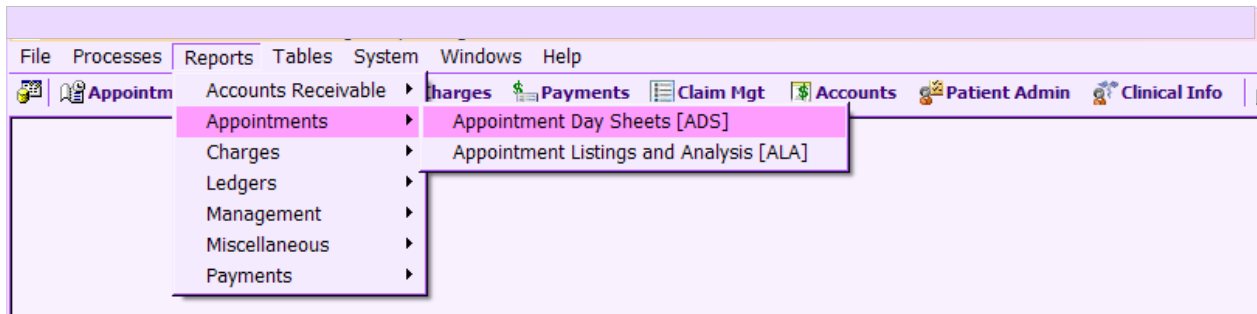
•Delete an Appointment

Open the appointment, at the bottom of the Appointment Entry screen, click on **Other Actions**, click **Delete Record**



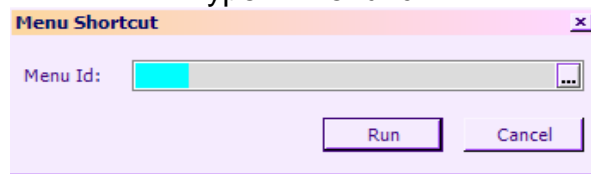
Print Daily Appointments

Reports \ Appointments \ Appointment Day Sheets (ADS)



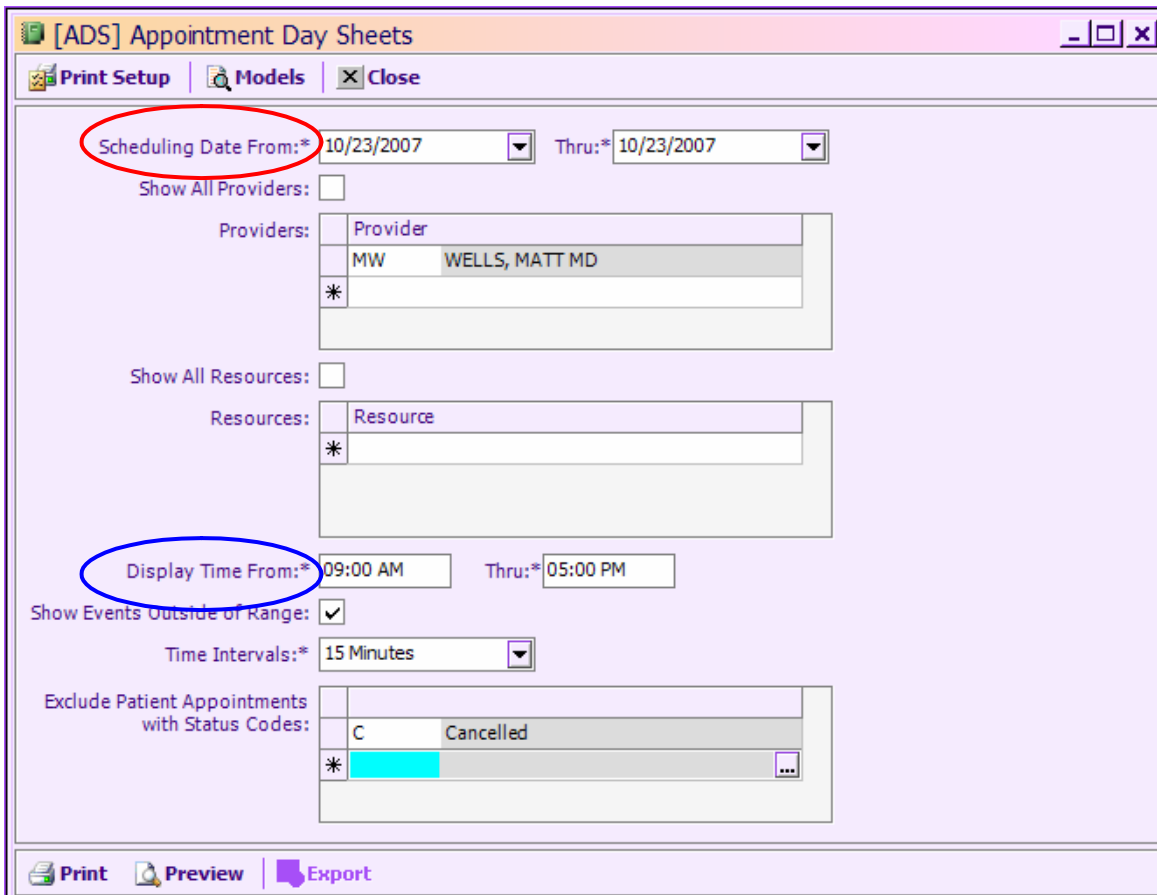
OR

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



ADS and enter

- Enter the schedule date that you would like to print in the **Scheduling Date From and Thru.**
- Check Show All Providers, or select specific Provider(s)
- Check Show All Resources, or select specific resource(s)
- Enter the time you would like to start the display at in **Display Time From and Thru.**
- Click on the Preview button on the bottom left to preview on the screen or select Print.



Appointment Day Sheet Preview

- Tip: Use **Print Setup** to select printer, adjust page margins, change Portrait/Landscape orientation

Appointments Registration Charges Payments Claim Mgt Accounts Patient Admin Clinical Info

Print Preview

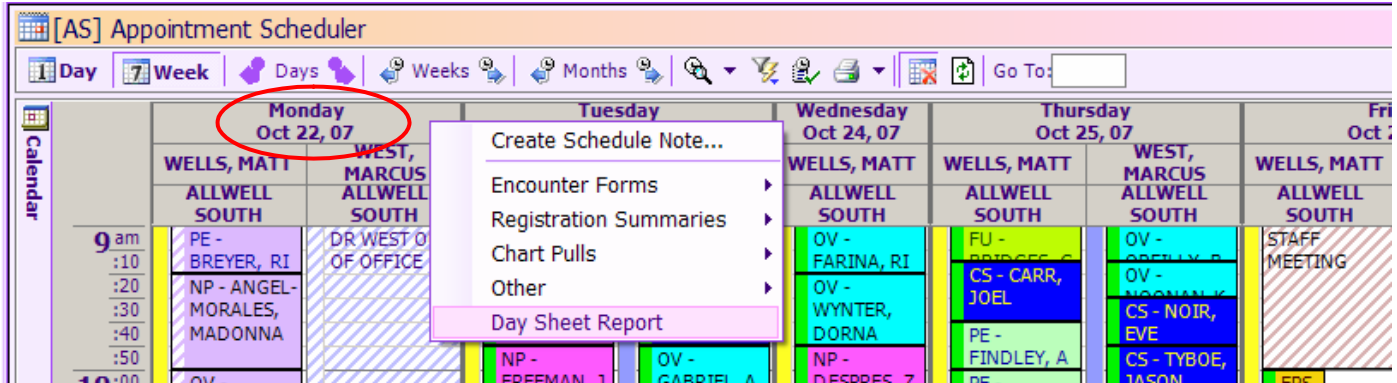
Print **Print Setup** Zoom Page 1 of 2 Close

ALLWELL MEDICAL GROUP
APPOINTMENT DAY SHEET
 Tuesday, Oct 23, 2007
 For: MATT WELLS MD

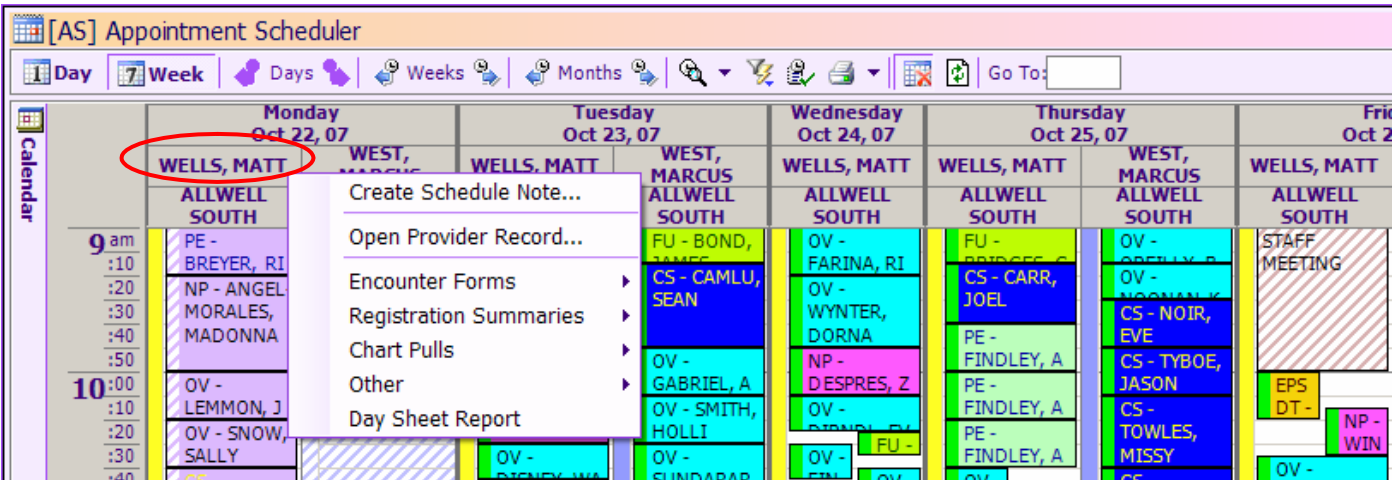
Schedule				Appointments				
Fac	Type	Time	Dur	Type	Pt Id	A	Patient/Phone	Reason/Coverage-Case
11S	OV	9:00 A	20	GYN	47		RAND, AYN Phone: 520-999-9999	Pelvic/PAP Coverage-Case: BCBS
		9:15 A						
11S	OV	9:20 A	30	NP	138		BRADY, HELEN Phone: 520-999-9999	NP w/HTN H/O CVA, Seizures, S/P Breast CA C/O C Coverage-Case:
		9:30 A						
		9:45 A						
11S	OV	9:50 A	20	NP	149		FREEMAN, JASON Phone:	NP - Get Acquainted C/O Leg pain Coverage-Case:
		10:00 A						
11S	OV	10:10 A	20	NP	135		WOODWARD, SAMUEL Phone: 520-999-9999	NP - Get Acquainted Coverage-Case: MCA/UHC
		10:15 A						
11S	OV	10:30 A	15	OV	34		DISNEY, WALT Phone: 520-999-9999	Back pain Coverage-Case: MC/TRIC
11S	OV	10:45 A	15	OV	59		WILLIAMS, ESTHER Phone:	ear& neck pain Coverage-Case:
11S	OV	11:00 A	20	NP	65		BLUMFIELD, MAE Phone:	NP - GA Coverage-Case:

Printing Reports from the Appointment Scheduler

- Right Click on the **Day** column header to bring up the report menu. These reports will include all information for all appointments, for all providers and all locations for that day.



- Right Click on the **Provider** column header to bring up the report menu. These reports will include all apt related information for that provider on that day. The provider record can also be accessed from this menu.



- Right Click on the **Facility** column header to bring up the report menu. These reports will include all apt related information for the facility for the provider in the same column on that day.

