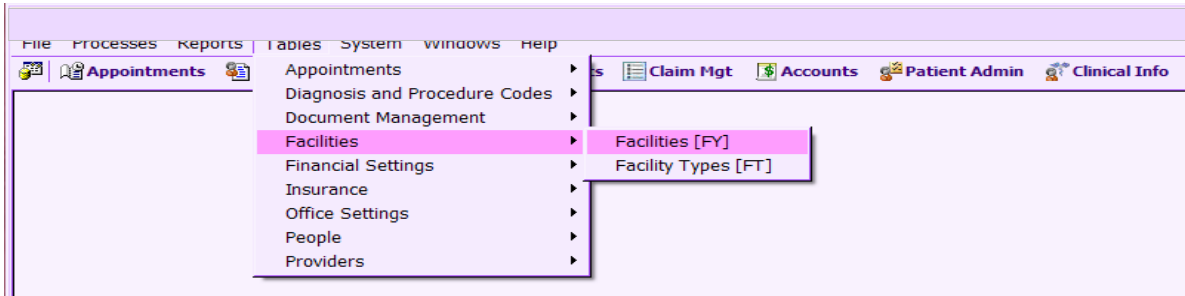


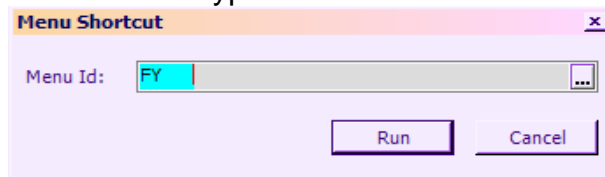
Appointment Scheduler – Set Up (FY) Facility

Tables\Facilities\Facilities [FY]



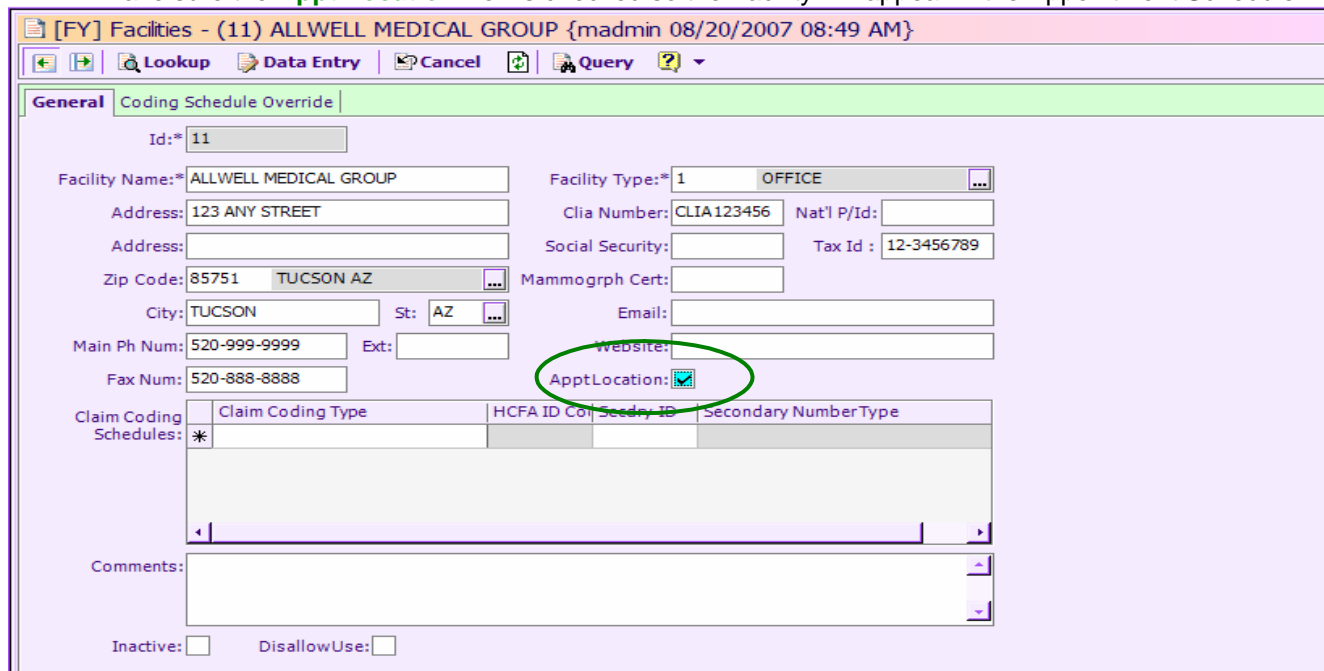
OR

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



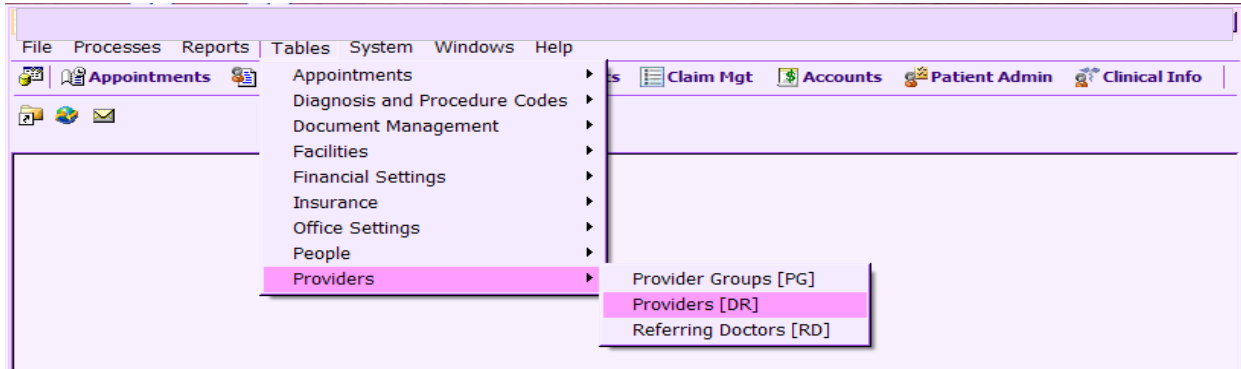
FY and enter

- 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



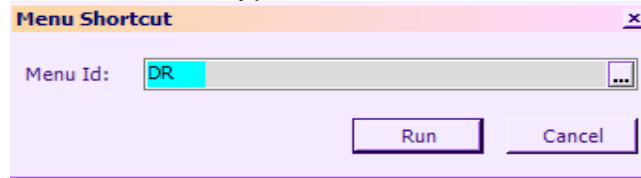
Appointment Scheduler – Set Up (DR) Provider

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}

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:
 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

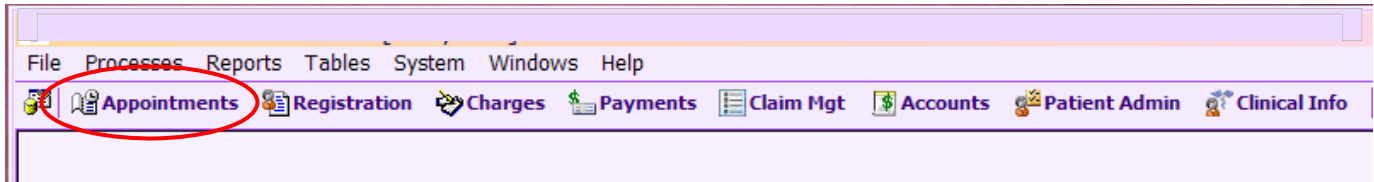
Day 1 - Sunday Day 2 - Monday **Day 3 - Tuesday** Day 4 - Wednesday Day 5 - Thursday Day 6 - Friday Day 7 - Saturday

Day: 3 Weekday: Tuesday

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

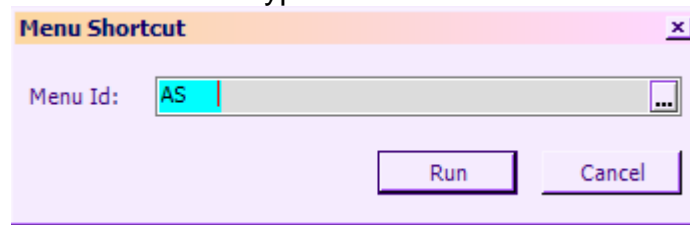
Appointment Scheduler – Set Up (AS) Appointment Scheduler

Appointments



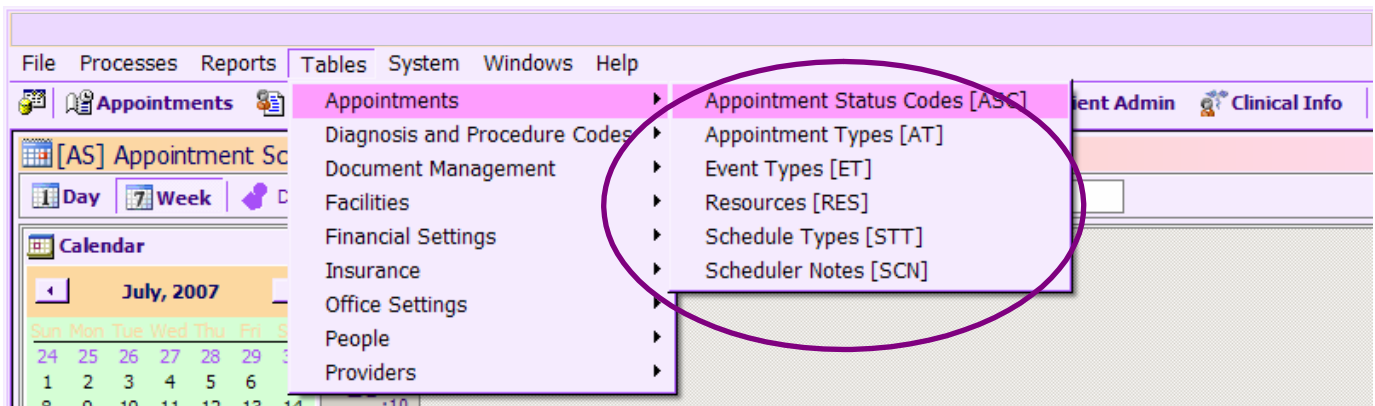
OR

Select Short Cut Key (F12)
Type in Menu Id



AS and enter

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



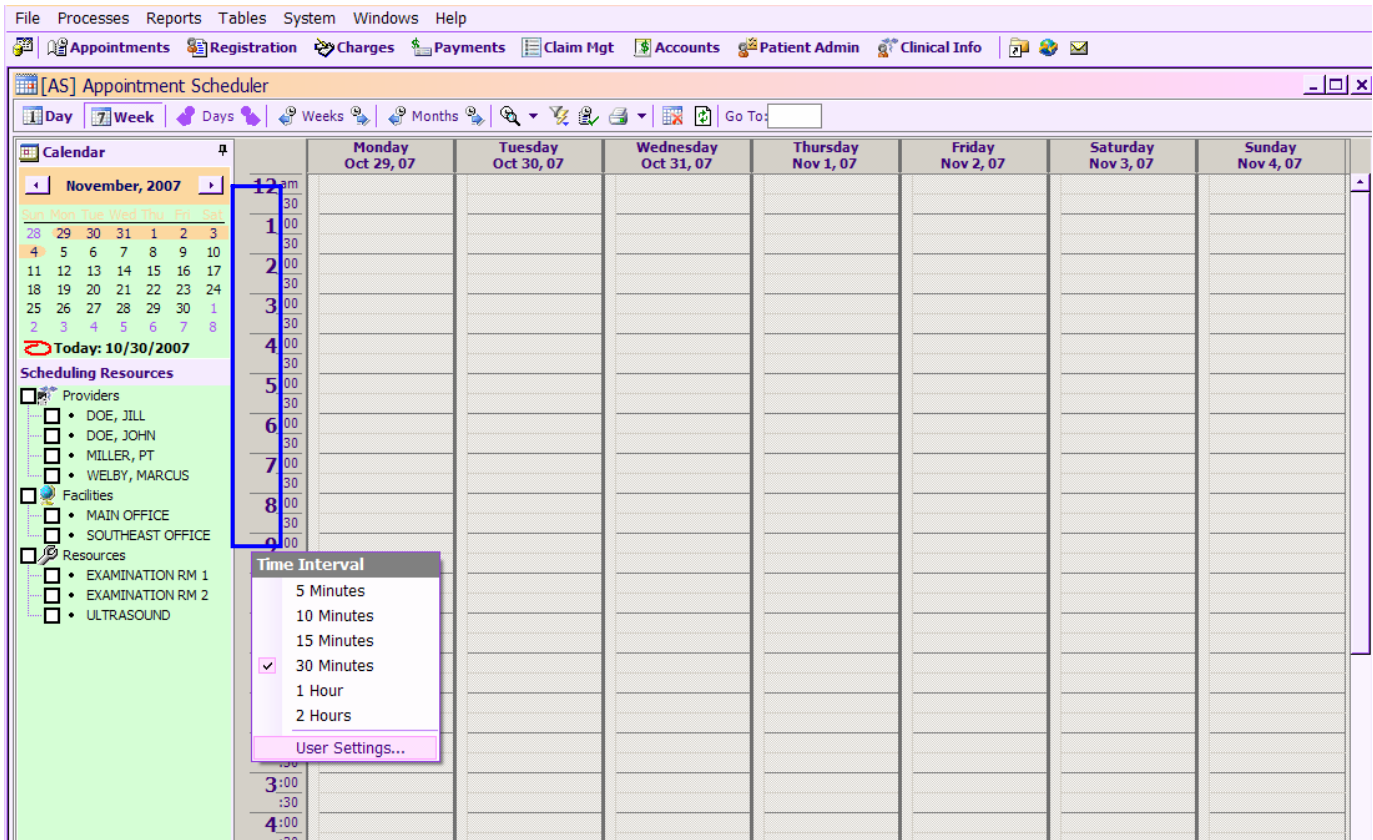
- ASC – Appointment Status Codes - This is part of the initial setup and should not have to be touched**
- AT – Appointment Types - This is the different types of appointments that office would like to keep track of. This will come off of the client's worksheet. Please stress to the clients to not make 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

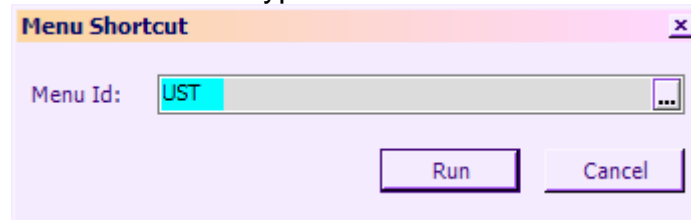
Define your User settings:

- 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

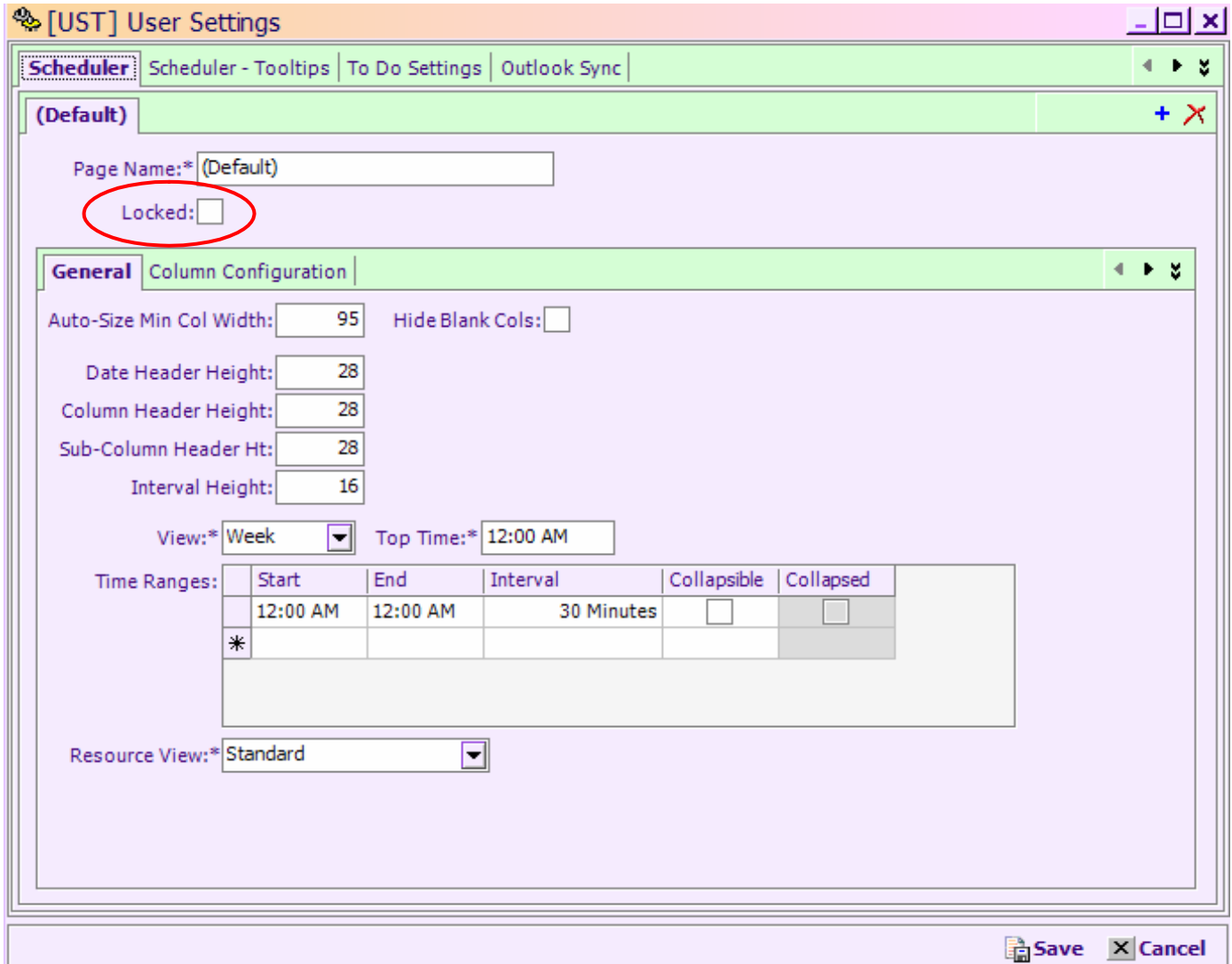


UST and enter

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 shows the month of October 2007, with the 31st highlighted. Below the calendar is the 'Scheduling Resources' panel, which is organized into three sections: Providers (Wells, Matt; West, Marcus), Facilities (Allwell Medical Gro, Allwell South), and Resources (Cast Rm, Ekg Machine, Exam Rm 1, Ultrasound). All checkboxes in this panel are checked, and a blue circle highlights the 'Facilities' section. The main area of the screen 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 9:00 am to 3:00 pm) and columns for different providers and locations. Appointments are represented by colored boxes with text indicating the provider and location, such as 'GYN - BUENA' or 'OV - FARINA'. Lunch breaks are indicated by red hatched boxes. The interface also includes a toolbar at the top with various navigation and editing tools.

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' panel showing the month of October 2007, with the 27th highlighted. Below it 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 is a grid view showing appointments for Monday (Oct 22, 07) through Friday (Oct 26, 07). The columns represent providers: Wells, Matt Allwell South and West, Marcus Allwell South. The rows represent time slots from 9:00 am to 3:40 pm. Appointments are represented by colored blocks with text labels such as 'GYN - RAND, A', 'NP - BRADY, HELEN', 'OV - FREEMA', etc. A toolbar at the top contains various icons, including a magnifying glass and a 'Go To' field. A blue circle highlights the 'Calendar' icon in the toolbar, and an orange circle highlights the magnifying glass 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		M
	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	
9:00 am	PE - BREYER,	DR WEST OUT OF OFFICE	GYN - RAND, AY	FU - []		OV - FARINA, R	FU - []	OV - []		STAFF MEETING	STAFF MEETING
:10	NP - ANGEL-MORALES, MADONNA		NP - BRADY, HELEN	CS - CAMLU, SEAN	NP - BRADY, HELEN	OV - WYNTER, DORNA	CS - CARR, []	OV - []	CS - CARR, []		
:20	OV - LEMMON,		NP - FREEMAN,	OV - GABRIEL,		NP - DESPRES,	PE - FINDLEY,	CS - NOIR, EVE			
:30	OV - SNOW, SA		NP - WOODWA	OV - SMITH, H		OV - []	PE - FINDLEY,	CS - TYBOE, JA		EP	OV - []
:40	CS - SANCHEZ, LATOYA		OV - []	OV - SUNDARA	OV - []	OV - []	PE - FINDLEY,	CS - TOWLES, MISSY		NP - []	CS - []
:50	FU - []		NP - BLUMFIEL	OV - PEEPLES,	OV - []	OV - []	OV - []	CS - AARONSO		OV - []	GL - []
10:00 am	OV - []		CS - SMITH, H	OV - []	OV - []	OV - []	OV - []	GL - []		OV - []	GL - []
:10	FU - []		OV - []	CS - OSAMBAM	OV - []	OV - []	OV - []	GL - []		OV - []	GL - []
:20	OV - []		OV - []	FU - LEM	OV - []	OV - []	OV - []	CS - []		OV - []	OV - []
:30	FU - []		OV - []		OV - []	OV - []	OV - []	OV - []		OV - []	OV - []
:40	OV - []		OV - []		OV - []	OV - []	OV - []	OV - []		OV - []	OV - []
:50	LUNCH		LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH		LUNCH	LUNCH
11:00 am	GYN - BUENA, E		OV - []	OV - SONITE, S		DR WELLS OUT OF OFFICE	DR WELLS OUT OF OFFICE	OV - []		CS - []	CS - []
:10	OV - BROWN,		OV - []	CS - PENA -RIVERA, JORGE	OV - PEEPLES,			OV - []		OV - []	CS - PERU, ME
:20	OV - GAULT, JOHN	CS - []	OV - []	OV - []				OV - RIVEROS, GERONIM		OV - []	CS - KIRKPATR
:30	OV - FARINA,	CS - []	OV - []	OV - SANCHEZ,				OV - []		OV - []	CS - MAGISTE
:40	GYN - ROSS, BE	CS - []	NP - RAYMUND, LIONEL	OV - FARINA, R				OV - []		FU - BRO	OV - []
:50	PE - SPONGE,	CS - []	OV - BRIDGES,	OV - FLOWER,				CS - LIST, CRAIG		OV - []	CS - []
12:00 pm	OV - []	CS - []	OV - []	OV - JOHNSON,				OV - []		EP SD	CS - []
:10	NP - TOWLES,	CS - []	OV - []	OV - WOODWA				CS - LAMAR, RENEE		OV - []	OV - []
:20			OV - []	OV - []						EP SD	OV - []
:30			OV - []	OV - []						OV - []	CS - []
:40			OV - []	OV - []						OV - []	CS - []