RESOURCE AND PATIENT MANAGEMENT SYSTEM

Practice Management Application Suite

(BPRM)

Scheduling Module User Manual

Version 4.0 Patch 1
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Office of Information Technology
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Preface

The Practice Management Application Suite (BPRM) is a browser-accessible graphical user interface (GUI) for the Indian Health Service (IHS) Resource and Patient Management System (RPMS) applications.

BPRM provides for the entry of new patients and editing the records of those already registered at a medical facility. The patient data managed with BPRM is crucial to the third-party billing and follow up treatment of patient care. Appropriate caution and checking should be employed to ensure that accurate data is entered into the patient registration system and, subsequently, transmitted to the National Patient Information Resource System.

1.0 Introduction

BPRM represents a forward step in the streamlining of IHS record and patient management. Through the use of a consistent GUI and module-based architecture, it simplifies record and patient management and allows for future expansion of the scope and capabilities of the system.

This user manual describes the use of the **BPRM Scheduling** module, scheduling-related reports provided by the **Reports** module, and options in the **Settings** module that affect appointment scheduling. A separate user manual gives an overview of the **BPRM application suite**, and individual user manuals are available for other modules in the suite.

2.0 Scheduling Module Operation

This section describes the features and functions of the **BPRM Scheduling** module.

2.1 Scheduling Toolbar

Click **Scheduling** from the **Taskbar** (lower-left corner) and the **Scheduling Toolbar** (Figure 2-1) displays the top of the **Scheduling Module**. Using the **Scheduling Toolbar** controls how (and what) patient scheduling information displays.

Figure 2-1: Scheduling Toolbar

The **Scheduling Toolbar** contains the following:

- Full Screen
- Calendar Selector
- Workspace View
- Waiting List
- Search Slot Availability
- Letters
- Zoom
- Assigned Clinics
- Refresh

2.1.1 Full Screen

Click the **Full Screen** control to view the clinic schedules without the **Scheduling Toolbar**, and the **Selection** and **Filtering** pane. Click the **control** again (now displayed on the top-right corner of the screen) to return to **normal** view.

2.1.2 Calendar Selector

Use the **Calendar Selector** (Figure 2-2) of the **Scheduling Toolbar** to quickly navigate to the current date, as well as dates in the future.

Figure 2-2: Calendar Selector

Click the controls in the **Calendar Selector** to navigate as follows:

- **Today**. Click **Today** to jump back to the current date.
- **From Today**. Click the **drop-down arrow** next to **Today** to jump from the current date to another date in the future. This opens a list of the following points in the future:
  - 1 Day
  - 2 Day
  - 1 Week
  - 2 Week
  - 3 Week
  - 1 Month
  - 3 Month
  - 4 Month
  - 6 Month
  - 1 Year

  Select any of these **options** to jump to that point from the current date.

2.1.3 Workspace View

Schedules are available in five different views:

- Day (one day with option to view additional days)
- Work Week (five days)

- Week (seven days)
- Month
- List view

Access each of the views in the **Scheduling Toolbar** (Figure 2-3) to switch between the modes.

Figure 2-3: Workplace View

The different views are described as follows.

2.1.3.1 Day

Click the **Day** control to see one day view of the **Scheduling Workspace** for the selected clinics. The **Day** view provides maximum detail for a single-day schedule.

Click the **drop-down arrow** next to the **Day** control (Figure 2-4) to view **Today**, plus a number of days. For example, select **2 days** to view the **schedule** for today and tomorrow, and so on.

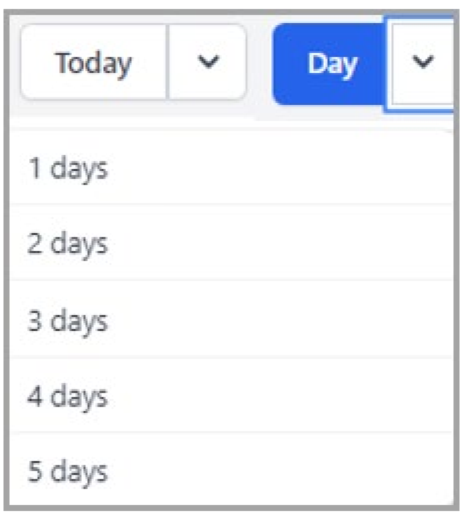


Figure 2-4: Day Control dialog

2.1.3.2 Work Week

Click the **Work Week** control to see a **one-week view** of the **Scheduling Workspace** for the selected clinics to display **Monday through Friday** only.

2.1.3.3 Week

Click the **Week** control to see a **one-week view** of the **Scheduling Workspace** for the selected clinics to display **Sunday through Saturday**.

2.1.3.4 Month

Click the **Month** control to see a **one-month view** of the **Scheduling Workspace** for the selected clinics.

Note: The **Month** view only displays one clinic at a time.

2.1.3.5 List

Click the **List** control to see a **visual report of appointments** for the selected clinics displaying these columns:

- Patient
- Appointment Date/Length
- Status/Type
- Created On/By
- Check In Time/By
- Check Out Time/By
- No Show/Cancel Time/By
- Comments
- Cancellation Reason/Remarks

Note: It may be necessary to use the horizontal scroll bar at the bottom of the page to view the full width of the **List** view.

In addition to the column display, there are multiple filter options available. The first filter is by **Date**, which provides the following options:

- Today
- Past
- Future
- All

The **Clinic** filter provides selections based on the user's **Preferred Resource List**. Users can only select one clinic at a time.

The user can continue filtering the data by selecting an **Appointment Status**. The **Appointment Status** options display, as noted below:

- All
- Scheduled
- Checked In
- Checked Out
- No Show
- Cancelled by Patient
- Cancelled by Clinic

Finally, the user can select to sort the data in various ways by using the **Sort By** filter that provides the following options:

- Appt Date/Time Desc
- Appt Date/Time
- Check-In Time
- Check-Out Time
- No-Show/Cancel Time
- Patient Name

The **List View** also offers a variety of options for working with patient appointments.

> **Note:** These options are only available if the patient is in a clinic that the user has access to.

Right-click anywhere on an existing **appointment line** to open a context menu. Availability and options of context menus are dependent on the appointment status. Refer to Table 2-3 for additional information.

2.1.4 Waiting List

Use the **Waiting List** of the **Scheduling Toolbar** (Figure 2-5) to add a patient to a **Clinic's Waiting List** or to manage the **Waiting List** entries as needed.

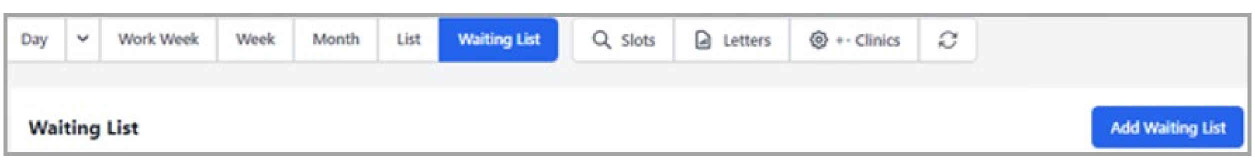


Figure 2-5: Waiting List

Important points about using the **Waiting List** include using the options along the **Navigation Menu** (Figure 2-6) on the left-side of the page to view the **Waiting List** using various filter options, as well as **Sort By** options (see Section 2.7 for information about using the Waiting List from the Scheduling workspace).

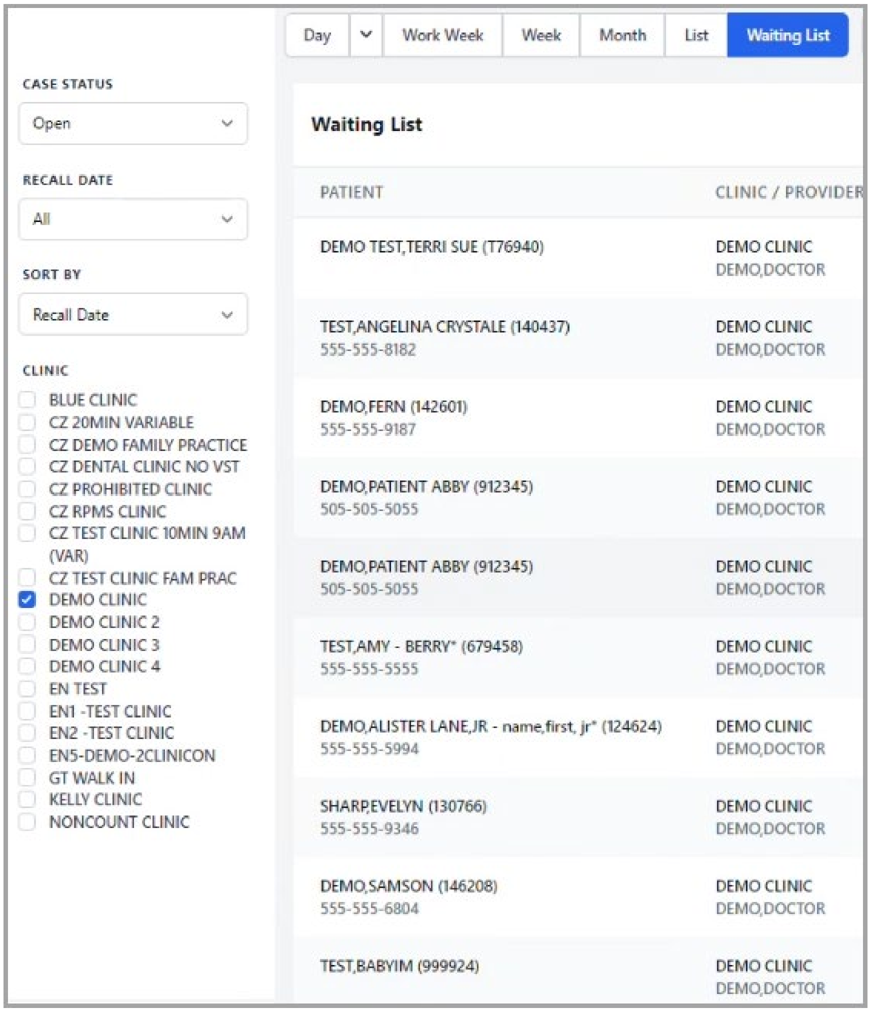


Figure 2-6: Waiting List left navigation menu

- The **Case Status** filter provides the ability to view **Open**, **Closed** or **All** Waiting List entries.
- The **Recall Date** filter provides the ability to view **Waiting List** entries for **All Recall Dates** or **Recall Date = Today**.
- The **Sort By** options provide a way to sort the listing by these criteria:
  - Recall Date
  - Patient Name
  - Date Added to List
  - Priority
  - Date Removed
- The **Clinic filter** provides the ability to view a single or multiple **Clinic Waiting List** entries.

2.1.4.1 Add a Patient to a Waiting List

Select the **Add Waiting List** button to add a patient to a clinic's **Waiting List**. This displays the **Add to Waiting List** dialog (Figure 2-7). A **Recent Patients** list is available for selection when the user selects the **Select Patient** search box. Refer to Section 2.6 for additional information.

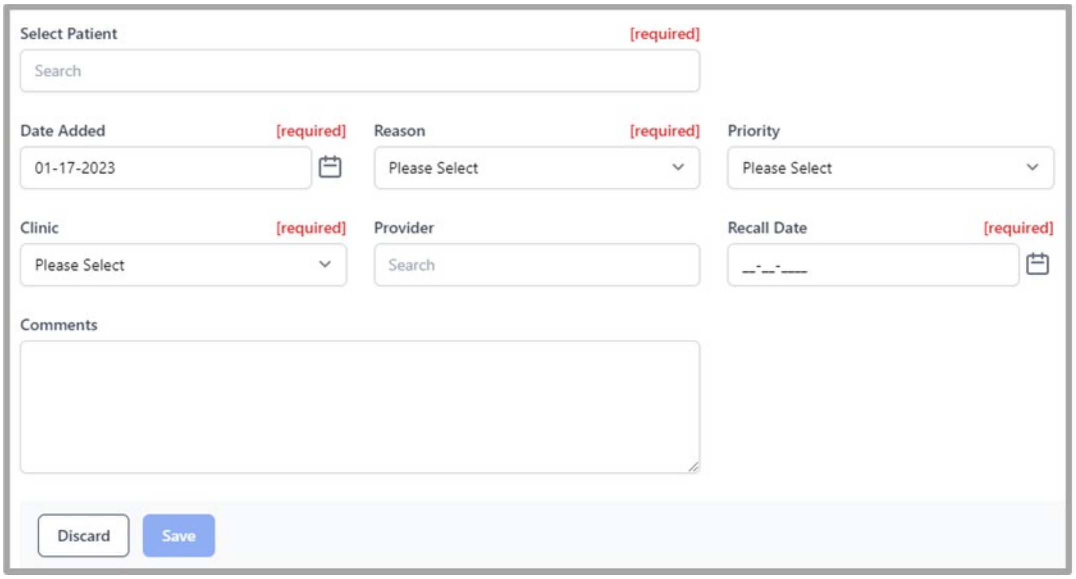


Figure 2-7: Add to Waiting List dialog

The **Add to Waiting List** dialog provides these fields:

- Patient
- Date Added
- Reason
- Priority
- Clinic (selections include only clinics with an active Waiting List)
- Provider (if available)
- Recall Date (the date by or on which the patient should be scheduled)
- Comments (as necessary)

Click **Save** to transfer the information to the **Waiting List** (Figure 2-8).

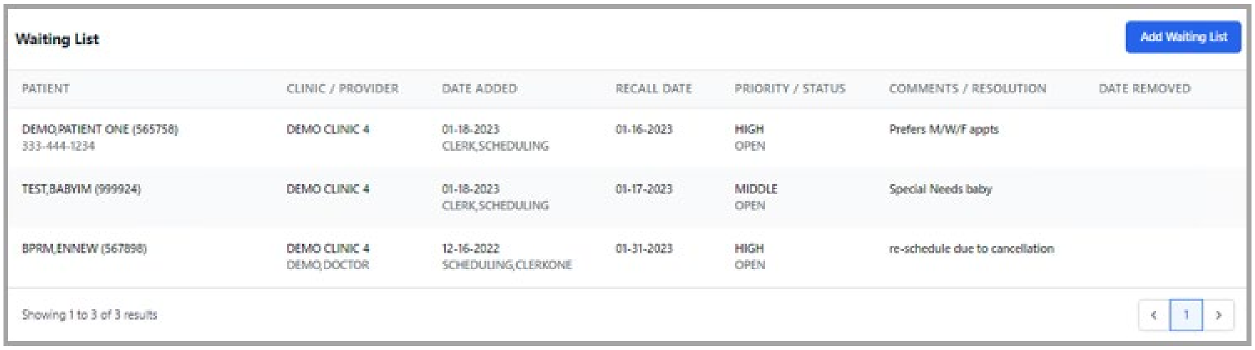


Figure 2-8: Waiting List example

Each entry in the **Waiting List** shows the following information (if available):

- Patient (Name, HRN, Residence Phone Number)
- Clinic/Provider
- Date Added (Date Added, Added By)
- Recall Date
- Priority/Status
- Comments/Resolution
- Date Remove (Date Removed, Removed By)

2.1.4.2 Managing the Waiting List

Right-click an entry in the **Waiting List** to display a context menu offering several options to manage the **Waiting List** entries. Figure 2-9 shows an example of the **Waiting List** context menu.

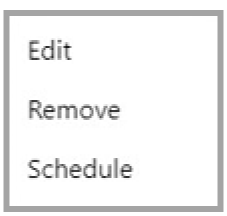


Figure 2-9: Waiting List context menu

The **Waiting List Context Menu** (Table 2-1) contains the following options:

Table 2-1: Waiting List Context Menu

Option	Description
Edit	Use this option to edit the details for an existing Waiting List entry.
Remove	Use this option to remove a patient from the Waiting List.
Schedule	Use this option to add an appointment for the selected patient in the Waiting List.

2.1.4.2.1 Edit a Waiting List Entry

1. Select a **patient** from the **Waiting List** pane (Figure 2-10).
2. Right-click the **entry** and select **Edit**.
3. Edit **Reason**, **Priority**, **Recall Date**, **Provider**, and **Comments** as needed.
4. Click **Save** to save the edits or **Discard** to exit without saving the edits.

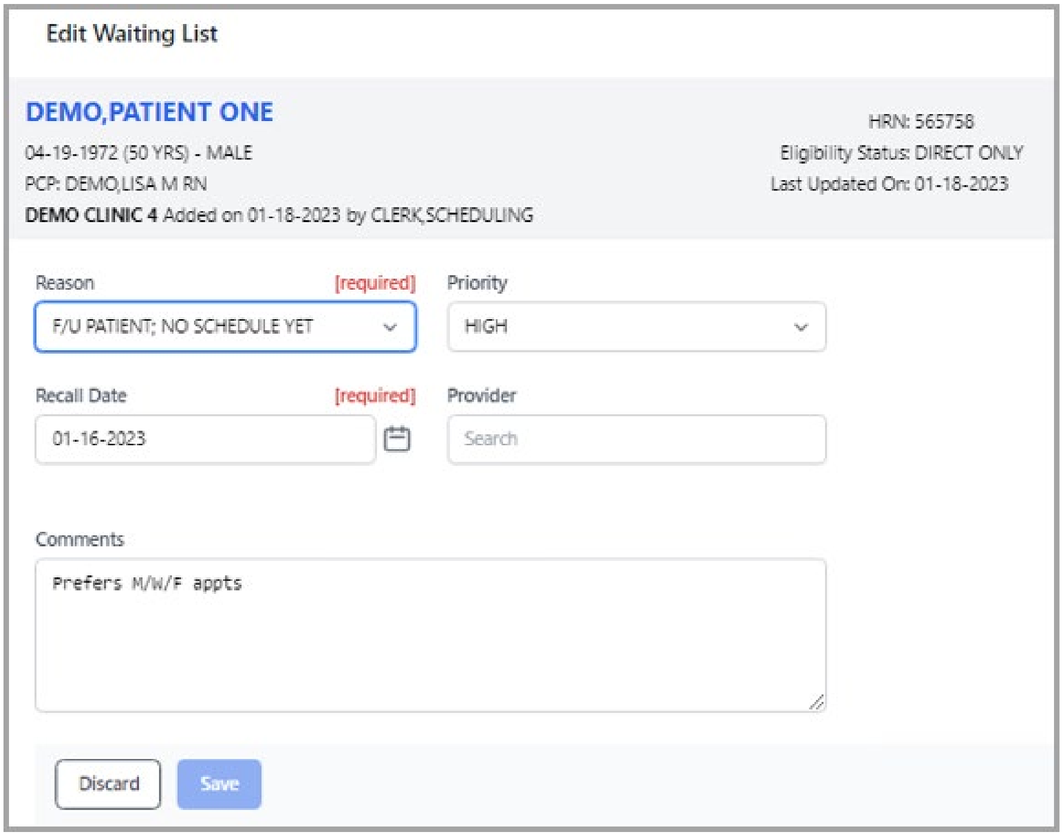


Figure 2-10: Edit Waiting List example

2.1.4.2.2 Remove a Waiting List Entry

1. To remove a patient from the **Waiting List** without creating a **scheduled appointment** (Figure 2-11), right-click the **entry** and select **Remove**.
2. Type the **Date Removed**, **Resolution**, **and Comments**, as needed.
3. Click **Save** to remove the patient from the **Waiting List** or click **Discard** to keep the patient on the list.

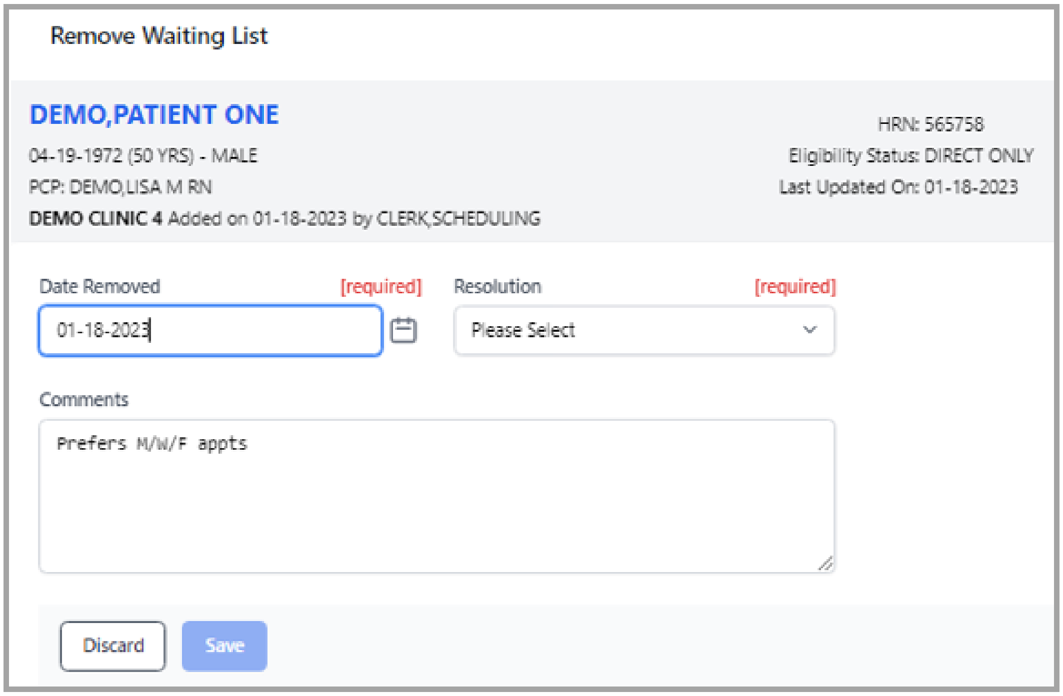


Figure 2-11: Remove Waiting List example

2.1.4.2.3 Schedule a Waiting List Entry

1. Select a **patient** from the **Waiting List** pane.
2. Right-click the **entry** and select **Schedule**.
3. Select a **Clinic**.
4. Select an **Appointment Length** if the clinic is set up utilizing a variable appointment length.
5. Search for, and select, the appropriate **Access Type**.
6. Select the **Time of Day**.
7. Click **Search** to view open **appointment slots**.
8. Select an **open slot** and click **Schedule** at the bottom of the dialog (Figure 2-12). A **dot** displayed in the calendar also indicates an open slot.

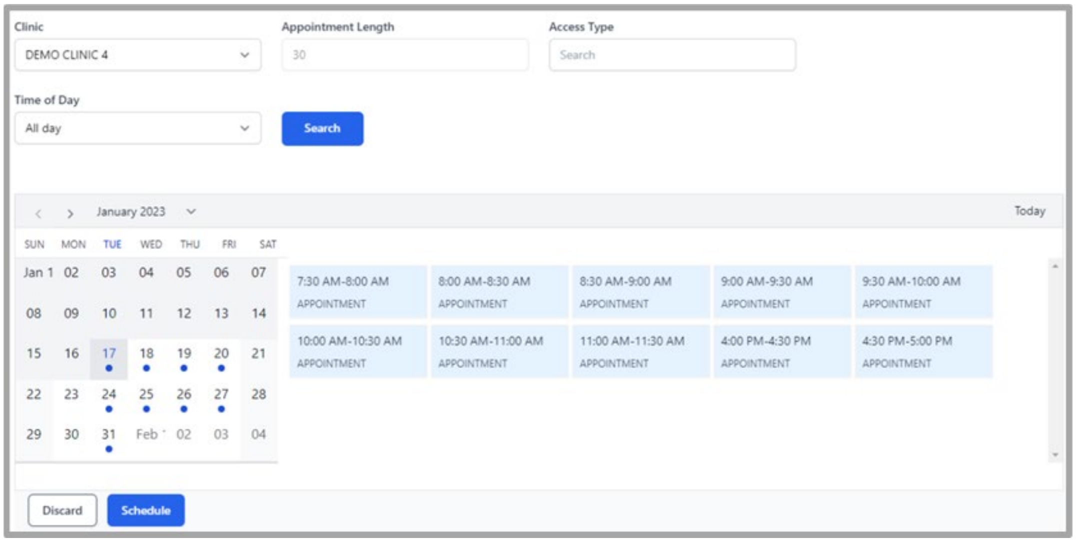


Figure 2-12: Schedule Appointment from Waiting List

9. A **scheduling dialog** displays (Figure 2-13) with **patient name**, **date**, **time**, and **appointment length**. The option to remove the patient from the waiting list for a specific clinic is defaulted or the user can choose to leave the patient on the waiting list. The user may choose to do this because the patient was scheduled into another clinic.

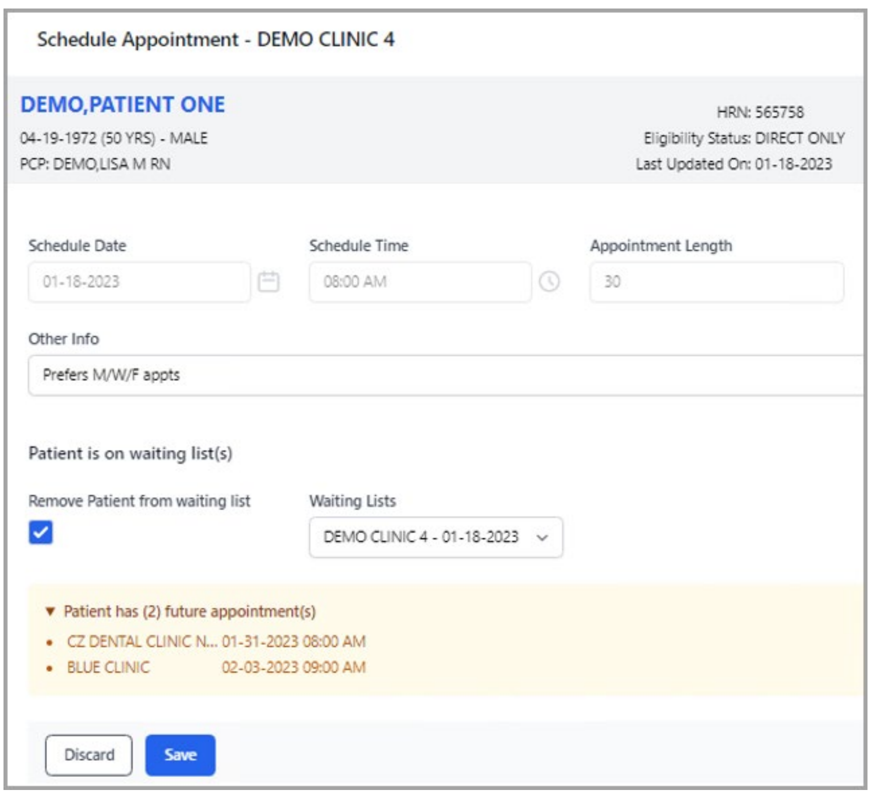


Figure 2-13: Scheduling dialog

10. Click **Save** to create the scheduled appointment for the patient and remove the patient from the **Waiting List** (if checked) or click **Discard** to NOT create the appointment keep the patient on the Waiting List.

2.1.5 Search Slot Availability

Search Slots (Figure 2-14) allows a search for open slots to schedule new appointments.

Figure 2-14: Search Slots button

Click **Slots** to open the **Search Appointment Slots** dialog (Figure 2-15).

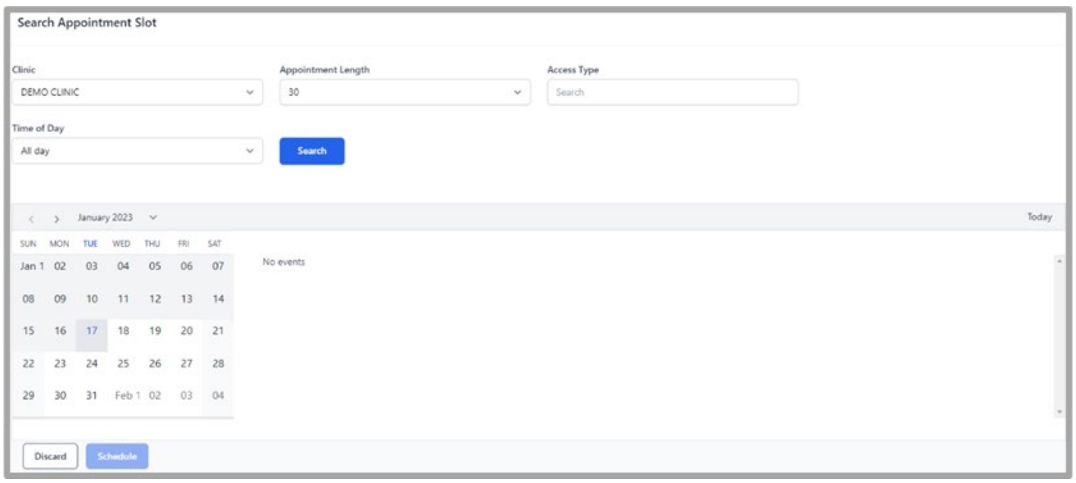


Figure 2-15: Search Available Slots dialog

To set up a **search** for available appointment slots:

1. Choose one **clinic** from the list of available clinics on the left.
2. If the selected clinic is set up utilizing a variable appointment length, select an **Appointment Length** that is needed for the appointment (for example, 15 minutes or 30 minutes). Otherwise, the selected clinic's default appointment length will be displayed and not editable.
3. Search for, and select, the appropriate **Access Type**, if applicable, to limit the search to a specific appointment type.
4. Select **All Day**, **AM**, or **PM** to further limit the search.
5. Click **Search**. When complete, a listing of available appointment times and dates displays (Figure 2-16). Dots on the calendar indicate availability on those days.

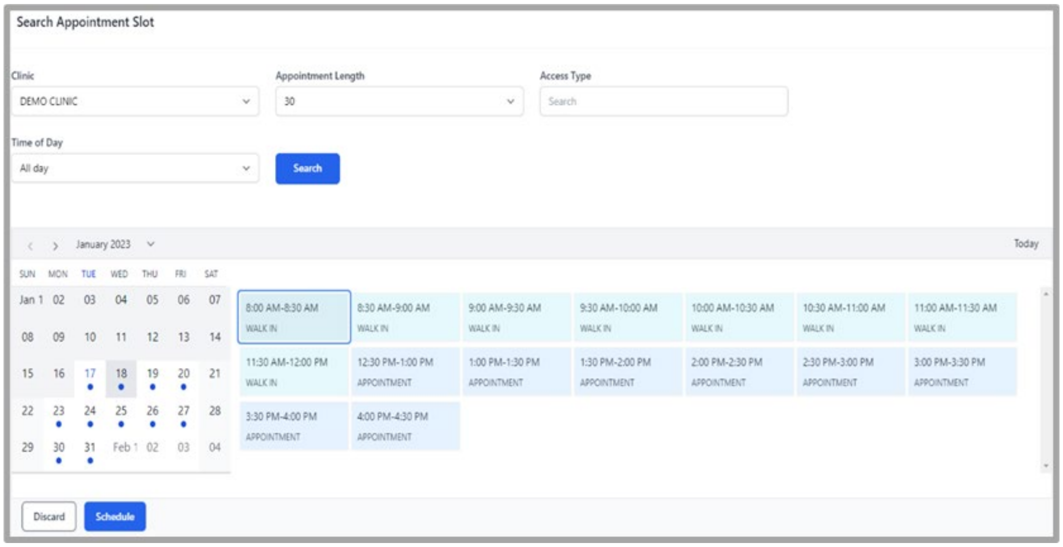


Figure 2-16: Select an Available Slot

6. Select the desired **available appointment** to highlight it, and then click **Schedule**. The **Schedule Appointment** dialog (Figure 2-17) displays.

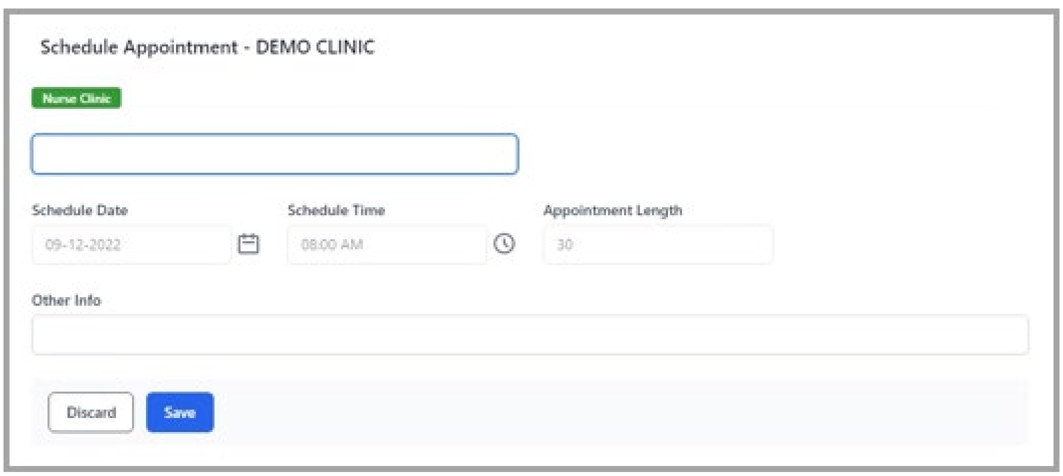


Figure 2-17: Schedule Appointment dialog

7. Use the **Patient Search** field to specify the **patient** to schedule for this slot or use the **Recent Patient** list to select a patient. Refer to Section 2.6 for additional information.

8. Verify the **Schedule Date**, **Schedule Time**, and **Appointment Length** and add any additional information necessary.

9. Click **Save** to create the appointment or click **Discard** to exit without creating the appointment.

2.1.6 Letters

The **Letters** button on the **Scheduling Toolbar** provides the user with **Batch Letter Printing** ability for all **Letter Types** (**Pre-Appointment**, **Clinic Cancelled**, **Appointment Cancelled**, and **No-Show**).

Batch Letter Printing provides the ability to print one or more pre-configured appointment letters to be sent to patients. These letters can serve as reminders about upcoming or missed appointments.

The **Print Letters** option on the Scheduling **Reports** menu works the same as the **Letters** button on the **Scheduling Toolbar**. See Section 4.2.6 for additional details on **Batch Letter Printing**.

> **Note:** Each letter type must be configured before it can be used at the clinic. See Section 3.5 for more information about configuring **Letter Templates** in the **Settings** module.

2.1.7 Zoom

Use the **Zoom** button (Figure 2-18) to zoom in and out of the **Scheduling Workspace**.

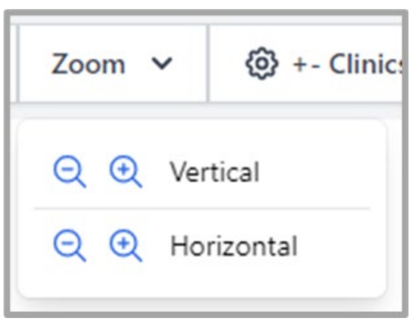


Figure 2-18: Zoom buttons

Zoom provides following options:

- Vertical. Use the **Vertical (+)** and **(-)** buttons to zoom in and out of the vertical view of the **Scheduling Workspace**.
- Horizontal: Use the **Horizontal (+)** and **(-)** buttons to zoom in and out of the horizontal view of the **Scheduling Workspace**.

2.1.8 Assigned Clinics

Use the **Assigned Clinics** of the **Scheduling Toolbar** (Figure 2-19) to **Add/Remove** clinics from the user's **Preferred Resource List**.

Figure 2-19: Assigned Clinics

The **Assigned Clinics** group has these options:

- Add. Click **Add** then enter the desired clinic to add to the user's **Preferred Resource List**.
- Remove. Click **Remove** next to the clinic to remove from the user's **Preferred Resource List**.

2.1.9 Refresh

Use the **Refresh** button (Figure 2-20) to refresh the **schedule listing**. This is useful to ensure that the latest scheduling changes are displayed, including those made by others.

Figure 2-20: Refresh button

2.2 Status Panel

To view the **appointment status** (Figure 2-21) look at the top of the page to the right of the **Scheduling Toolbar**.

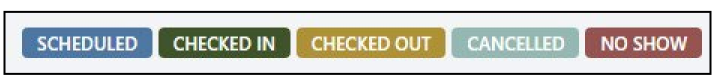


Figure 2-21: Status Legend

Use the **Status panel** to identify the **Appointment Status**, as each type is identified by color. Each option on the **Status panel** is an option button. Select or clear these options to filter appointments that display in the **Scheduling Workspace** based on the status.

The different status options shown are listed below:

- Scheduled – SC
- Checked In – CI
- Checked Out – CO
- Cancelled – CN
- No Show – NS

2.3 Selection and Filtering Pane

The **Selection and Filtering** pane (Figure 2-22) on the left side of the **Scheduling** module display provides a means to select dates and clinics, and filter the information displayed in the **Scheduling Workspace**.

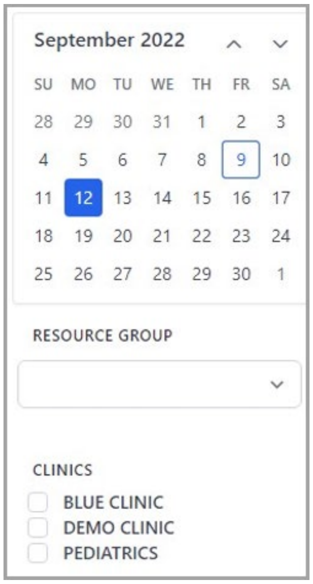


Figure 2-22: Selection and Filtering pane

2.3.1 Calendar Panel

The **Calendar** panel (Figure 2-23) is at the top of the **Selection and Filtering** pane.

Figure 2-23: Calendar panel

In most cases, the **Calendar** panel shows the current month.

- Use the **Up** and **Down arrows** at the top of the calendar to navigate to a particular month (and year), then click the **date** to view.

2.3.2 Resource Group Panel

Use the **Resource Group** panel (Figure 2-24) to select the **Resource Group** that you want to view, which is a group of clinics assigned to a resource group.

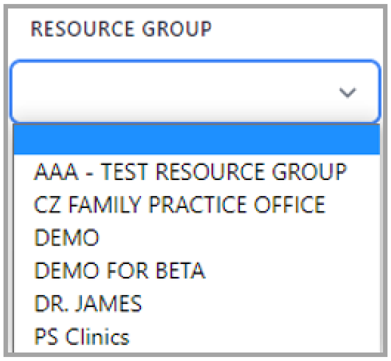


Figure 2-24: Resource Group panel

If you no longer want to view a particular resource group, clear the **Selection Resource group** drop-down by selecting the first entry that is blank.

2.3.3 Clinics Panel

Use the **Clinics** panel (Figure 2-25) to select the clinics that you want to view or set patient appointments. The list of clinics displayed in the **Clinics** panel is your **Preferred Resource List**.

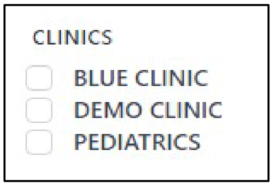


Figure 2-25: Clinics panel

The clinics included in the preferred resource list (and displayed in the **Clinics** panel) will vary, depending on the access level granted to you.

If you no longer want to view appointments for a particular clinic, clear the **selection box** to the left of the clinic name. To remove the clinic permanently from the preferred resource list, use the **Assigned Clinics** option in the **Scheduling** toolbar.

2.4 Scheduling Workspace

The **Scheduling Workspace** (Figure 2-26) is the primary calendar and appointment display space of the **Scheduling module**.

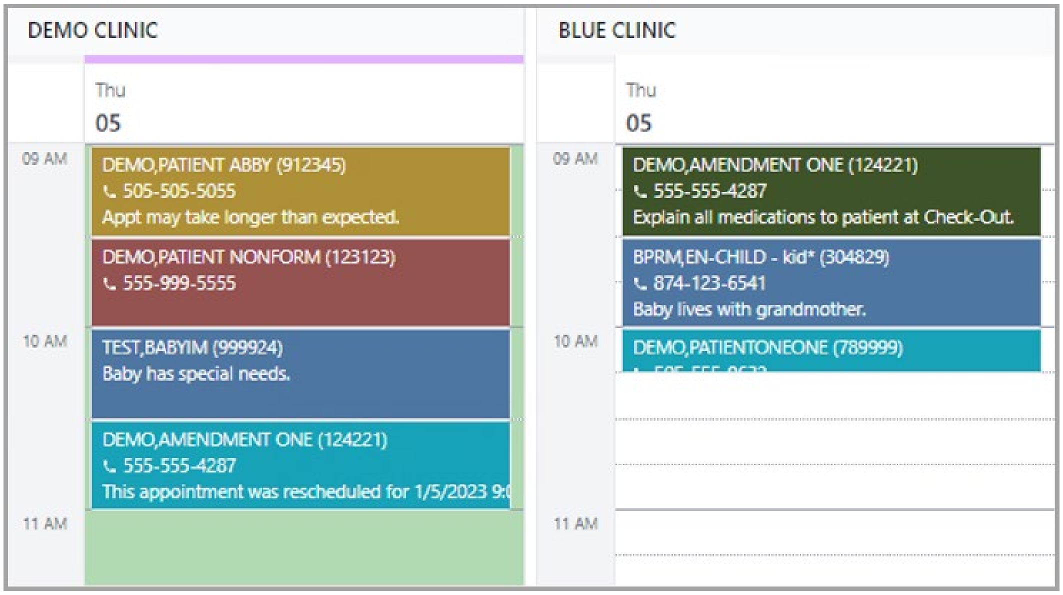


Figure 2-26: Scheduling Workspace

2.4.1 Appointment Slots

Each **appointment slot** (Figure 2-27) within the **Scheduling Workspace** shows the **Patient Name** and **HRN**, and when sufficient space permits, the patient's **Phone Number** and appointment's **Other Info**.

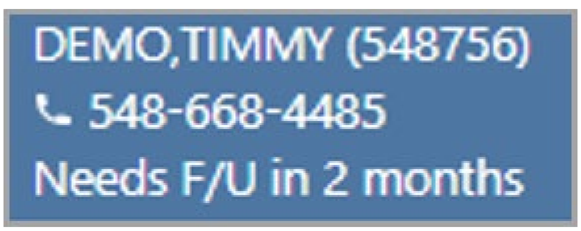


Figure 2-27: Appointment Slot example

The color of each **appointment slot** varies depending on the status of that appointment. Different colors are displayed for **Scheduled**, **Checked In**, **Checked Out**, **Cancelled**, and **No Show** appointments. See Section 2.2 and Figure 2-21.

To see more detail about an individual appointment, hover the mouse cursor over the **Appointment Panel**. This displays a pop-up window showing additional details about the appointment.

Note: An **Overbook** indicator will display if the appointment is an overbook.

Figure 2-28 shows an example of a typical **Appointment Details** pop-up window.

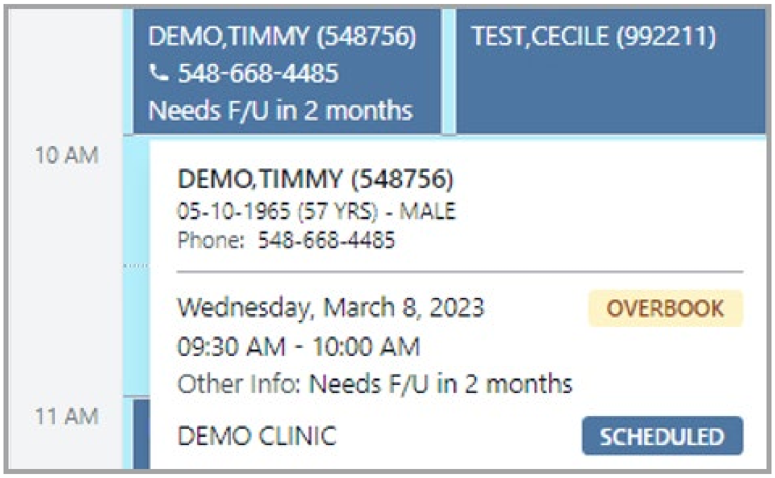


Figure 2-28: Appointment Details example

The **Appointment Details** pop-up window includes the following information:

- Patient Name (Patient HRN)
- DOB (Age)
- Sex
- Patient home phone number
- Appointment date (with Overbook indicator if available)
- Beginning and ending times of the appointment
- Other Info (such as any comments added to the appointment listing)
- Remarks if available for No-show and Cancelled appointment
- Clinic name
- Appointment status

2.5 Using the Context Menus

Right-click within the **Scheduling Workspace** to open a context menu (Figure 2-30) offering a variety of options for creating and working with patient appointments. The options available will vary, depending on whether you right-click a blank appointment slot or in a previously scheduled appointment slot.

2.5.1 Blank Appointment Slot Context Menu

When you right-click a blank appointment slot, the options shown in Figure 2-29 are offered:

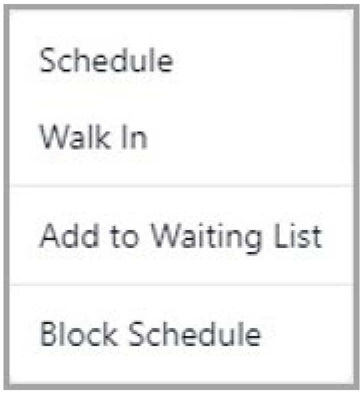


Figure 2-29: Blank appointment slot context menu example

In this example, the context menu offers the options shown in Table 2-2:

Table 2-2: Blank appointment slot context menu options

Option	Description
Schedule	Select this option to schedule an appointment for a patient.
Walk-In	Select this option to schedule a walk-in appointment for a patient. Note that this option is only available for the current day.
Add to Waiting List	Select this option to add a patient to the Waiting List. Once a patient is added to the Waiting List, the patient can be given an appointment slot from the Waiting List option in the Scheduling Toolbar. See Section 2.7.2 for how to move patients off the Waiting List.
Block Schedule	Select one or more unscheduled access blocks then use this option to block schedule availability for the selected access blocks. This option is only available to Scheduling Supervisors. This also creates a new schedule entry in the Clinic Availability that is only in effect for that specific week. Requires the Scheduling Supervisor Key (SDZSUP).

2.5.2 Scheduled Appointment Slot Context Menu

The **Context Menu** changes the options available based on the action taken on the scheduled appointment. The options shown in Figure 2-30 are offered when the initial appointment is made:

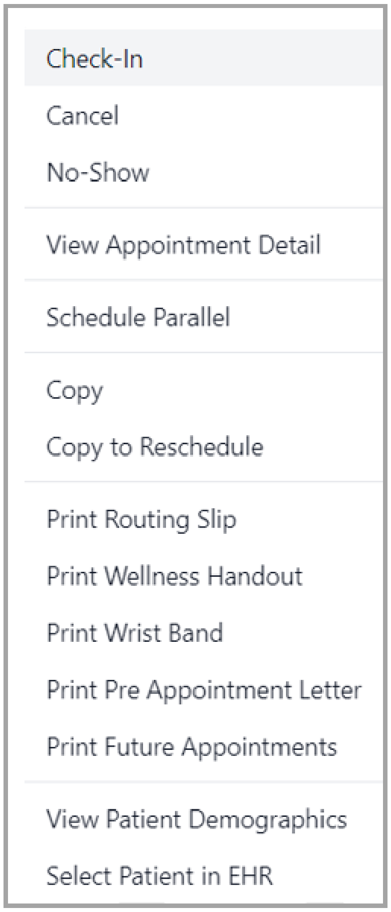


Figure 2-30: Scheduled appointment slot context menu example

Table 2-3 lists the available **Context Menu** options depending on the status of the appointment:

Table 2-3: Context menu options

Option	Description
Check-In	Select this option to mark an appointment as checked in. Note that this option is only available for the current day or earlier. This action also creates the visit for this appointment in PCC if the Create Visit at Check In option has been selected in the Clinic Configuration. See Section 3.2 for more information about Clinic Configuration. In EHR, the status will update to Ambulatory once that appointment has been checked in.

Option	Description
Check-Out	Select this option to mark an appointment as checked out. This will only show as an option for a patient who has already been Checked-In. Note that this option is only available for the current day or earlier.
Cancel	Select this option to mark an appointment as cancelled.
No-Show	Select this option to mark an appointment as a no-show. This option only shows for an appointment where the patient has not been Checked In/Checked Out. Note that this option is only available for the current date/time or earlier.
Undo Check-In	Select this option to reverse a checked in appointment. In EHR, the status will be removed. This option will only show for patients who have been Checked-In.
Undo Check-Out	Select this option to reverse a checked-out appointment. This option will only show when a patient has been Checked-Out.
Undo No-Show	Select this option to reverse a no-show appointment. This option will only show when an appointment has been marked as a No-Show.
Undo Cancel	Select this option to reverse a cancelled appointment. This option only shows when an appointment has been Cancelled.
View Appointment Detail	Select this option to see detailed information about the selected appointment.
Schedule Parallel	Select this option to schedule an appointment for an additional patient in the selected appointment slot. The number of allowable parallel appointments is controlled by the number of slots designated for that Access Block. See Section 3.3.2 for more information about Access Blocks.
Parallel Walk-In	Select this option to schedule a walk-in appointment for an additional patient in the selected appointment slot. Note that this option is only available for the current day. The number of allowable parallel appointments is controlled by the number of slots designated for that Access Block. See Section 3.3.2 for more information about Access Blocks.
Copy	Use this option to copy the selected patient’s information for an appointment in order to pasted into one or more other appointment slots on the same clinic or another clinic.

Option	Description
Copy to Reschedule	Select this option to copy the appointment details and reschedule the appointment to a different date and/or time. This option will cancel the original appointment as well as create the new appointment.
Print Routing Slip	Select this option to print a routing slip for the selected patient. The routing slip includes current appointment including checked -in time and future appointments.
Print Wellness Handout	Select this option to print a patient wellness handout (PWH) for the selected patient. Depending on the PWH setup at your site, the list of handouts may vary.
Print Wrist Band	Select this option to print a Wrist Band for the patient.
Print Pre-Appointment Letter	Select this option to print the Pre-Appointment letter. This option shows when an appointment has been scheduled but the patient has not been Checked-In. These letters can serve as reminders about upcoming or missed appointments and are configured in the Settings module via Letter Templates described in Section 3.5. If a Letter Template default is NOT set for the clinic for the Pre-Appointment letter type, the user will be given a drop-down list to select the appropriate Pre-Appointment Letter Template to use for printing. See Section 3.2.7 for information on setting Letter Defaults for the clinic.
Print No-Show Letter	Select this option to print the No-Show letter. This option shows when an appointment has been updated to No-Show status. These letters can serve as reminders about upcoming or missed appointments and are configured in the Settings module via Letter Templates described in Section 3.5. If a Letter Template default is NOT set for the clinic for the No-Show letter type, the user will be given a drop-down list to select the appropriate No-Show Letter Template to use for printing. See Section 3.2.7 for information on setting Letter Defaults for the clinic.

Option	Description
Print Cancellation Letter	Select this option to print the Cancellation letter. This option shows when an appointment has been updated to Cancellation status. Cancellations can be made by the Clinic or by the Patient. These letters can serve as reminders about upcoming or missed appointments and are configured in the Settings module via Letter Templates described in Section 3.5. If a Letter Template default is NOT set for the clinic for the Clinic Cancelled/Appointment Cancelled letter type, the user will be given a drop-down list to select the appropriate Clinic Cancelled/Appointment Cancelled Letter Template to use for printing. See Section 3.2.7 for information on setting Letter Defaults for the clinic.
Print Future Appointments	Select this option to print a Future Appointments report for the selected patient. The report will display a list of the patient's upcoming appointment date and times.
View Patient Demographics	Select this option to view and edit patient demographics for the scheduled patient. User requires the Registration Key (AGZMENU).
Select Patient in EHR	Select this option to open the patient's record in the Electronic Health Record (EHR) application. EHR must be running for the same user in order to run options. User requires EHR access.

2.5.3 Schedule an Appointment

To create a patient appointment:

1. Select the **clinic** in which you want to create the appointment from the **Clinics** panel (see Section 2.3.3).
2. Right-click the access block for the time and day the appointment will start and select **Schedule**. (Select **Schedule Parallel** if there are already one or more appointments scheduled during the desired time slot.) The **Schedule Appointment** dialog (Figure 2-31) displays.

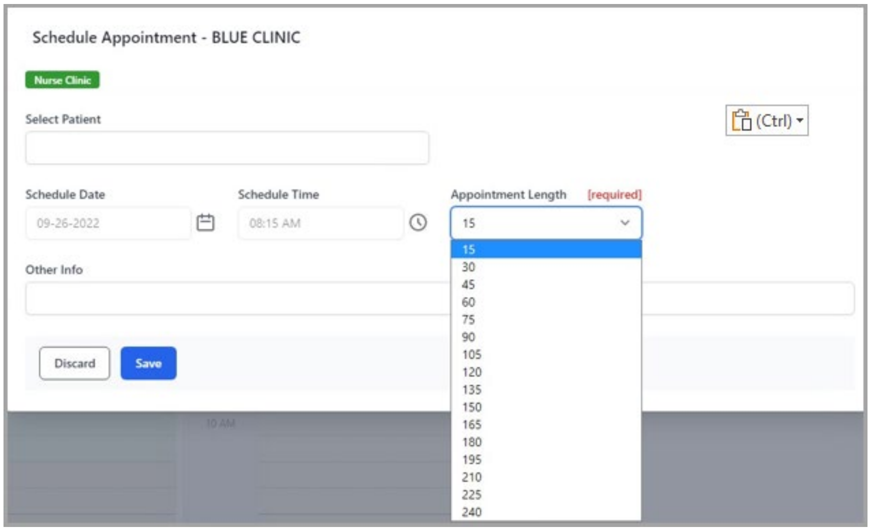


Figure 2-31: Schedule Appointment dialog with Appointment Length drop-down

3. Type all or part of the patient's name (using a LAST,FIRST format) in the **Select Patient** field. If the name is found, click the patient's name in the listing displayed. If the name is not found, you are given the option to register the patient via the **Mini Registration** option shown in Figure 2-36.

   A **Recent Patients** list (Figure 2-32) is also available to select a patient from. The list includes patients that have been previously selected. The list displays a maximum of **five patients**, with the latest patient that was accessed displaying first on the list.

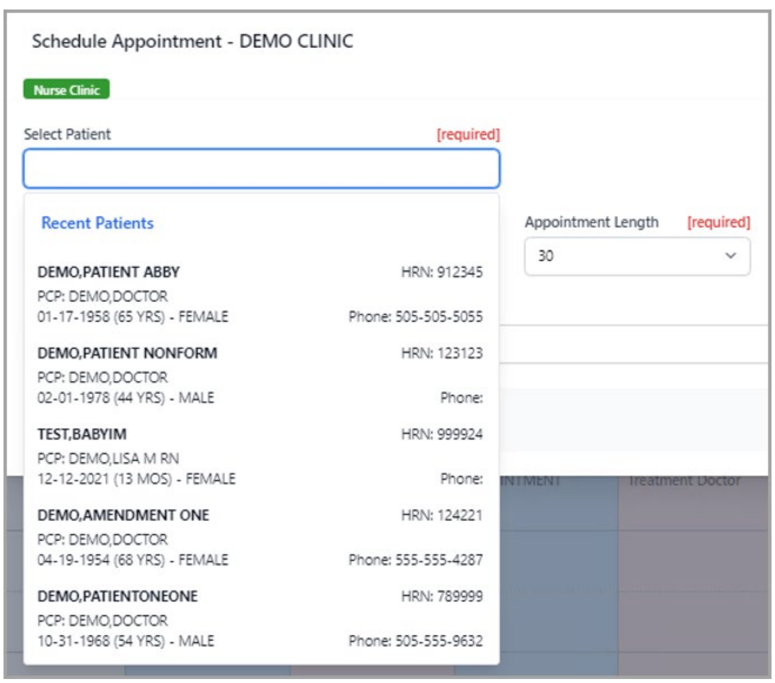


Figure 2-32: Recent Patients list

4. Verify the **schedule date** and **time** in the respective fields and specify the appointment length. If the clinic is a variable length clinic, use the drop-down option for **Appointment Length**. The **Appointment Length** drop-down options are based on the specified **Display Increments** up to the maximum **Appointment Length** defined for your clinic. An appointment can be increased up to 240 minutes if the clinic has been defined to allow up to 240 minutes for **Appointment Length**. For example, if a Clinic is set with an Appointment Length of 240 and Increments/Display of 30, the drop-down options will show 30, 60, 90, 120, 150, 180, 210, and 240.

   - Use the **Other Info** field to enter other information if necessary.

5. Optional. If the patient is on one or more **waiting lists**, users may choose to remove the patient from any of those lists by selecting the **Remove Patient from Waiting List** check box (Figure 2-33) and choosing the appropriate **waiting list** using the **clinic name** and **recall date**. If the patient has one or more **Future Appointments**, the appointments are listed (Figure 2-33 and Figure 2-34) when the **down-arrow** key is clicked.

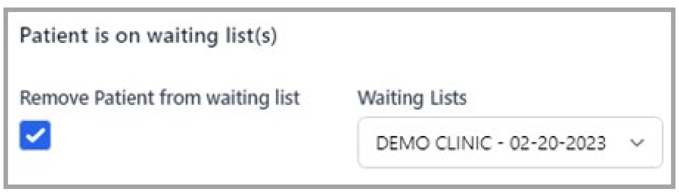


Figure 2-33: Removed Patient from Waiting List dialog

Figure 2-34: Future Appointment list

6. Click **Save** to save the scheduled appointment or click **Discard** to return to the **Scheduling Workspace** without saving the appointment.

2.5.4 Schedule an Appointment – Register New Patient

To schedule a patient appointment for a specific clinic, the patient must first be registered at that facility. If the patient is not registered or their record cannot be found when you attempt to schedule an appointment, the **Register New Patient** option (Figure 2-35) displays.

Figure 2-35: Register New Patient option

Select the **patient's name** to open the **Register New Patient** form (Figure 2-36).

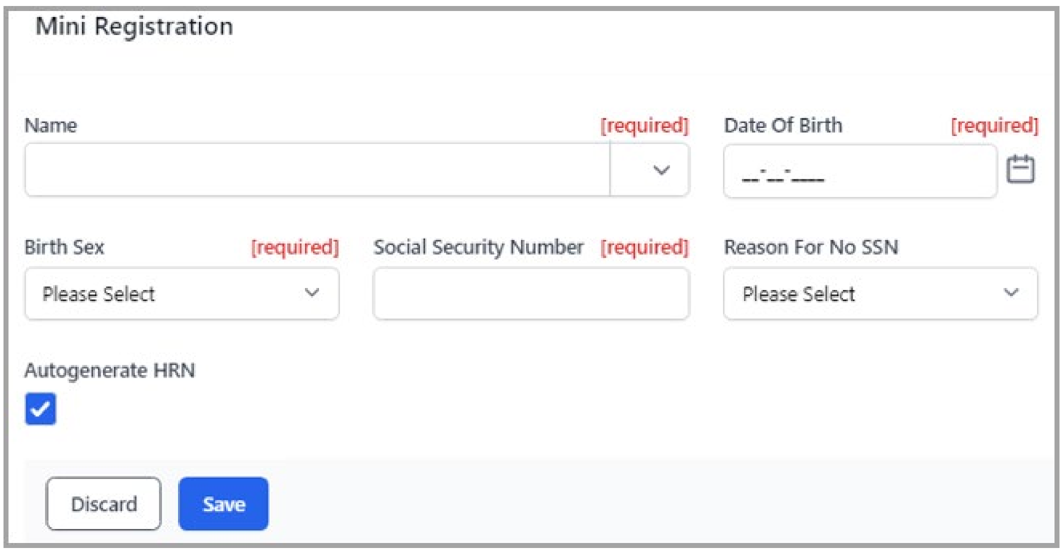


Figure 2-36: Mini Registration form

Enter the patient's **registration** information in the appropriate fields on the form. Required fields are noted on the form. If the **Auto generate HRN** option is enabled, a temporary **Health Record Number** is automatically generated for the patient. If the option is not enabled, a field is provided for you to enter the patient's HRN.

Note: Check with your **HIMS department** for HRN policy and procedures.

Once the form is completed, click **Save** to save the new patient registration, or click **Discard** to cancel the registration and return to the **Scheduling Workspace** without saving the registration.

2.6 Manage Scheduled Appointments

The **BPRM Scheduling** module has several features to simplify how you manage patient appointments. These features are discussed in this section.

2.6.1 Change the Length of an Appointment

To lengthen or shorten an appointment (variable length clinic only):

1. Position the **mouse cursor** on the top or bottom edge of the **scheduled appointment slot**.
2. Click and hold the left-mouse button and move the edge of the slot to the desired time. This is based on the **Length of Appointment** defined in **Clinic Settings**.
3. At clinics that allow variable length appointments, the appointment slot can be overlapped with other appointments, up to the limit of slots allowed for that **Access Block**. See Section 3.3.2 for more information about **Access Blocks**.

2.6.2 Copy and Paste Patient Information

Use this option to copy any patient's information within an appointment. It will also copy any Other Information entered on the appointment being copied. The copied appointment can be pasted on another appointment slot from one day to another or to a different week at the same clinic or another clinic. Only one patient appointment can be copied at a time.

To copy and paste an appointment (one patient appointment only at a time):

1. Right-click the **current patient appointment** and select the option **Copy** from the right-click menu.
2. Search for an **appointment slot** in the desired **Clinic schedule**.
3. Right-click the **appointment slot** and select the option **Schedule <Lastname,Firstname> (HRN #)** (Figure 2-37).

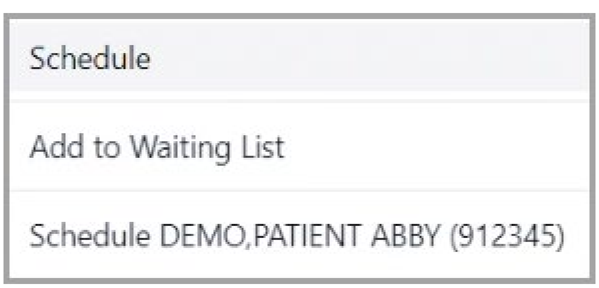


Figure 2-37: Copy context menu example

Figure 2-31, Schedule Appointment dialog, then displays.

4. Click **Save** to schedule the appointment or **Discard** to return to the scheduling workspace without saving.

2.6.3 Copy to Reschedule

To move (reschedule) an appointment from one appointment slot to another:

1. Right-click the **old appointment** and select **Copy to Reschedule**.
2. Right-click the **new appointment slot** and select **Reschedule Patient Name**. The **Reschedule Appointment** dialog (Figure 2-38) displays.
    - Optional. Using an alternate method, the user can drag and drop the original appointment to the new slot. Once the appointment is in the new slot, the **Reschedule Appointment** dialog (Figure 2-38) displays.

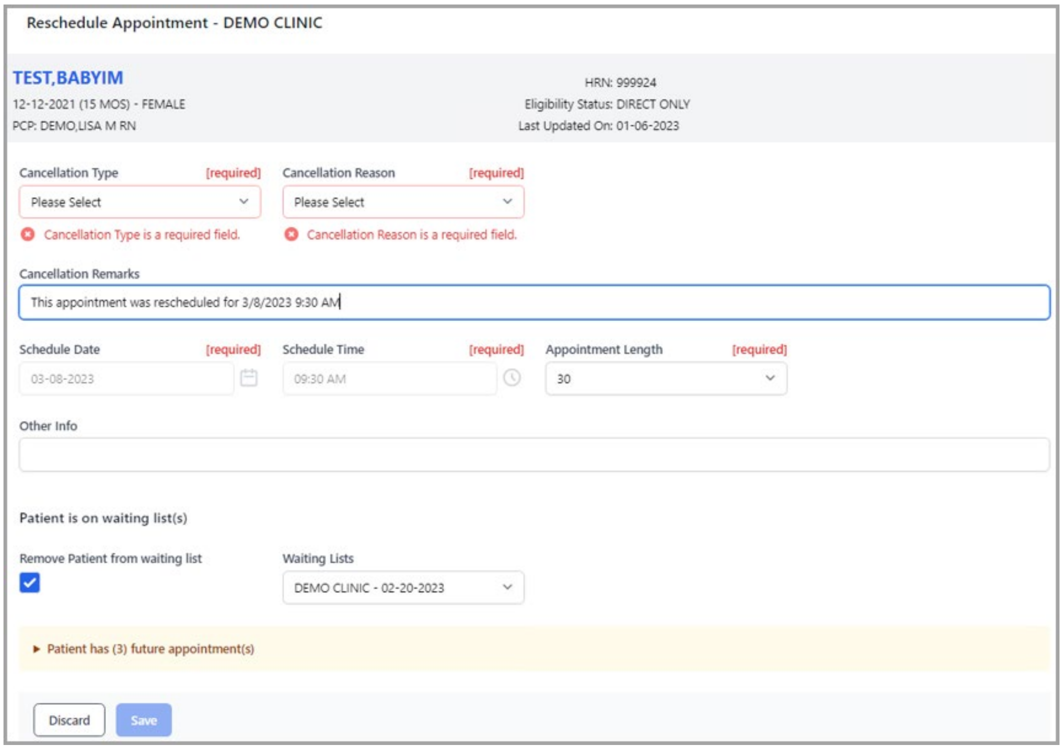


Figure 2-38: Reschedule Appointment dialog

3. Complete the required **Cancellation** type and **Cancellation Reason** from the drop-down options in the **Reschedule Appointment** dialog. The cancellation remarks defaults with a reschedule comment for **date/time**.
4. Verify the new **date/time**, **appointment length**, and provide **other info** as needed.

5. If the patient is on one or more **waiting list**, users may choose to remove the patient by selecting the check box and choosing the appropriate **waiting list** using the **Clinic Name** and **Recall Date**.

6. If the patient has one or more **Future Appointments**, the appointment will be listed when the **down-arrow** key is selected.

7. Click **Save** to save the scheduled appointment or click **Discard** to return to the **Scheduling Workspace** without cancelling the original appointment or creating the new appointment.

Notes: The rescheduled appointment will be displayed in two locations (and two different colors). The original appointment slot will be displayed as canceled, and the new appointment slot will be displayed as scheduled.

If you are moving an appointment to the same date and time, but to a different clinic, the original appointment will be deleted instead of cancelled.

Also, appointments can only be moved in the Day or Week display modes.

2.6.4 Appointment Check-In

The appointment **Check-in** option can be used to update the appointment status to **Check In**, and to create a **PCC/EHR** visit if this is setup under the **Clinic Configuration**.

Right-click the **appointment** and select **Check-in**.

Figure 2-39 shows an example of the **Check-In Appointment** dialog.

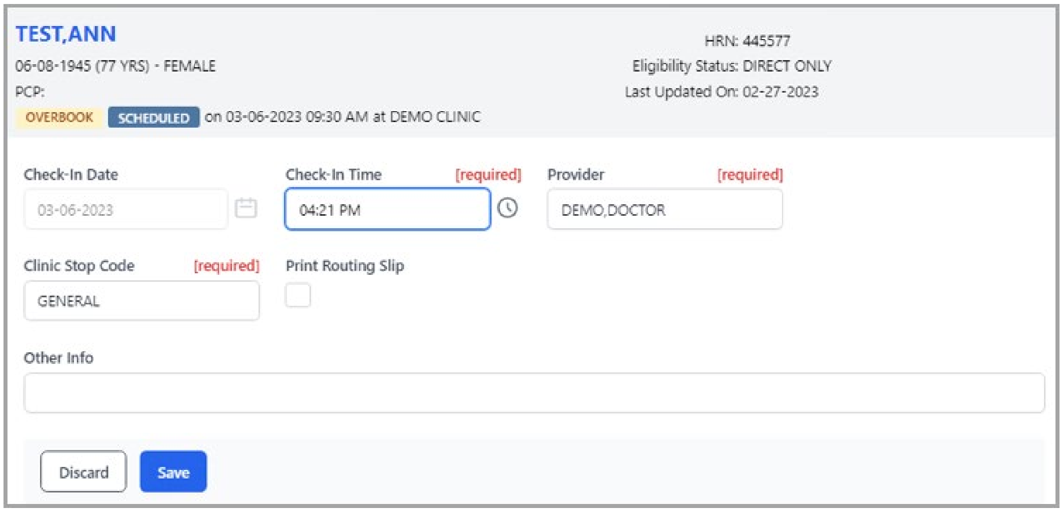


Figure 2-39: Check-in Appointment dialog

The form displays the **clinic** and **appointment date/time** that is selected. Information from the patient header is also displayed at the top of the form. The form contains the following fields:

Table 2-4: Fields on the **Check-in Appointment** form

Field	Description
Check-in Time	Date field defaults to current time. User can change the time if needed for a Clinic set up to *Ask for Check-In/Check-Out Time*. See Section 3.2.3 for more information on Clinic Configurations.
Provider	Field will auto-populate if a default provider is specified in Clinic Configurations. User can change the default provider or search for a different provider if needed. This field can be set as required under Clinic Configurations and is needed to create a visit. See Section 3.2.3 for more information on Clinic Configurations.
Clinic Stop Code	Field will auto-populate with the specified clinic code set in the Clinic Configuration. If the Multiple Clinic Code Used field is selected under Clinic Configurations, then the user is allowed to search for and select other clinic codes. See Section 3.2.3 for more information on clinic configurations.
Print Routing Slip	Select this check box to print the routing slip on an RPMS Device printer after clicking Save. The routing slip includes current appointments, future appointments, and check-in time. See Figure 2-40.
Other Info	Use this field to enter additional information related to the appointment.

Once the fields have been populated, click **Save** to complete the check-in or click **Discard** to return to the previous window.

```
                    **Confidential Patient Data**
FACILITY: 2013 DEMO HOSPITAL
PAGE 1    OUTPATIENT ROUTING SLIP

DEMO,PATIENT ABBY                            HRCN:  912345
DOB: 01/17/1958                           APPT DT:  3/6/2023
123456 BAKER STREET TANG PANG KO
PEACH, NEW MEXICO  92112

         **CURRENT APPOINTMENTS**
TIME      CLINIC                   CHECK-IN  LOCATION          PHONE
9:00 AM   DEMO CLINIC              03:58 PM  DEMO
             Abby is diabetic.

         **FUTURE APPOINTMENTS**
===============================================================================
DATE         TIME      CLINIC                          LOCATION

03/09/2023   11:00 AM  DEMO CLINIC                     DEMO

DATE PRINTED: Mar 07, 2023@16:01
Requested by: SCHEDULING,CLERKTWO
```

Figure 2-40: Sample Patient Routing slip displaying Current and Future Appointments

2.6.5 Appointment Check-Out

The appointment **Check-Out** option can be used to update the appointment status to **Checked Out**. To do this, right-click the **Checked-In appointment** and select **Check-Out**. The **Check-out Time** field auto-populates with the current time. You can also select a different time for a clinic set up to **Ask for Check-In/Check-Out Time**. See Section 3.2.3 for more information on Clinic Configurations.

Figure 2-41 shows an example of the **Check-Out Appointment** dialog.

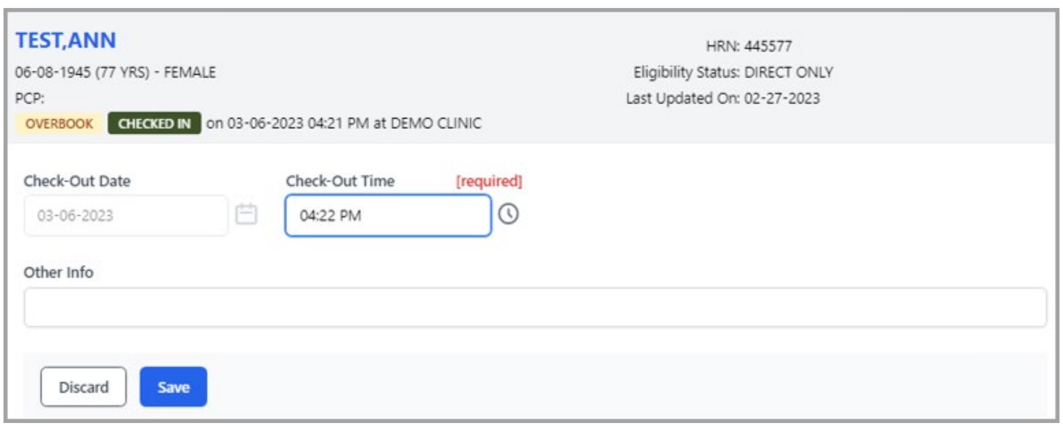


Figure 2-41: Check-out Appointment dialog

Once the fields have been populated, click **Save** to complete the check-out or click **Discard** to return to the previous window.

2.6.6 Appointment Cancel

The appointment **Cancel** option can be used to update the appointment status to **Cancelled.** There are two types of cancelled appointments: **Cancelled by Patient** or **Cancelled by Clinic**. To do this, right-click the **Scheduled appointment** and select **Cancel**. Select the appropriate **Cancellation Type** and **Cancellation Reason**. Enter **Cancellation Remarks** as needed.

Figure 2-42 shows an example of the **Cancel Appointment** dialog.

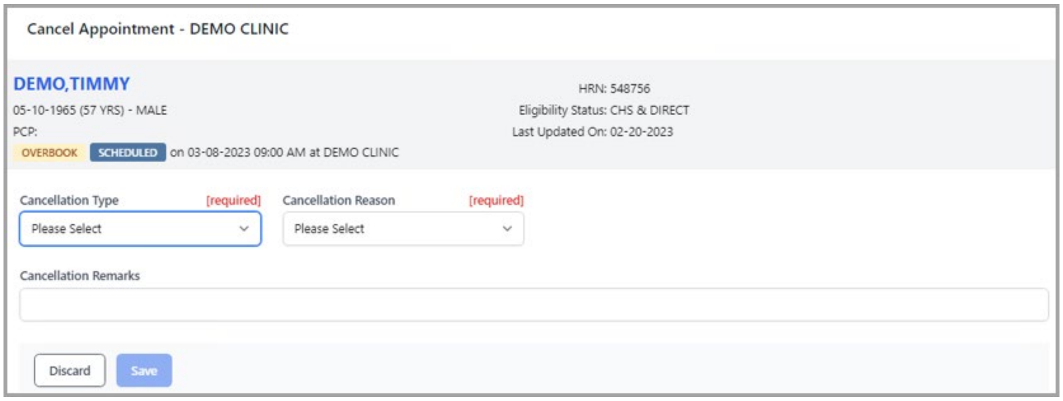


Figure 2-42: Cancel Appointment dialog

Once the fields have been populated, click **Save** to complete the cancellation or click **Discard** to return to the previous window.

2.6.7 Appointment No-Show

The appointment **No-Show** option can be used to update the appointment status to **No-Show.** To do this, right-click the **Scheduled appointment** and select **No-Show**. Enter **No-Show Remarks** as needed.

Figure 2-43 shows an example of the **No-Show Appointment** dialog.

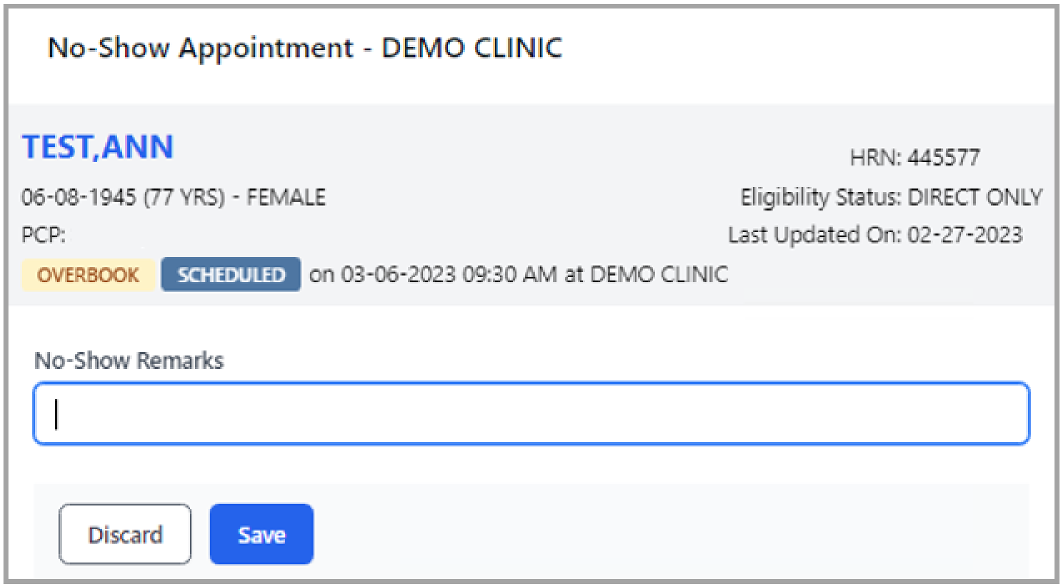


Figure 2-43: No-Show Appointment dialog

Once the fields have been populated, click **Save** to complete the no-show or click **Discard** to return to the previous window.

2.6.8 View Appointment Detail

Select this option to see detailed information about the selected appointment. Users are also able to add or edit an appointment's **Other Info** or add/edit **Remarks for No-show** and **Cancelled** appointments.

2.6.8.1 Add/Edit Comments to an Existing Appointment

When users create an appointment, the **Other Info** field is used to add comments about the appointment. You can add comments to an existing appointment in a similar manner. To do this, right-click the appointment and select **View Appointment Detail**. The **View Appointment Detail** (Figure 2-44) dialog displays. Use the **Other Info** field to add comments about the appointment in the dialog displayed.

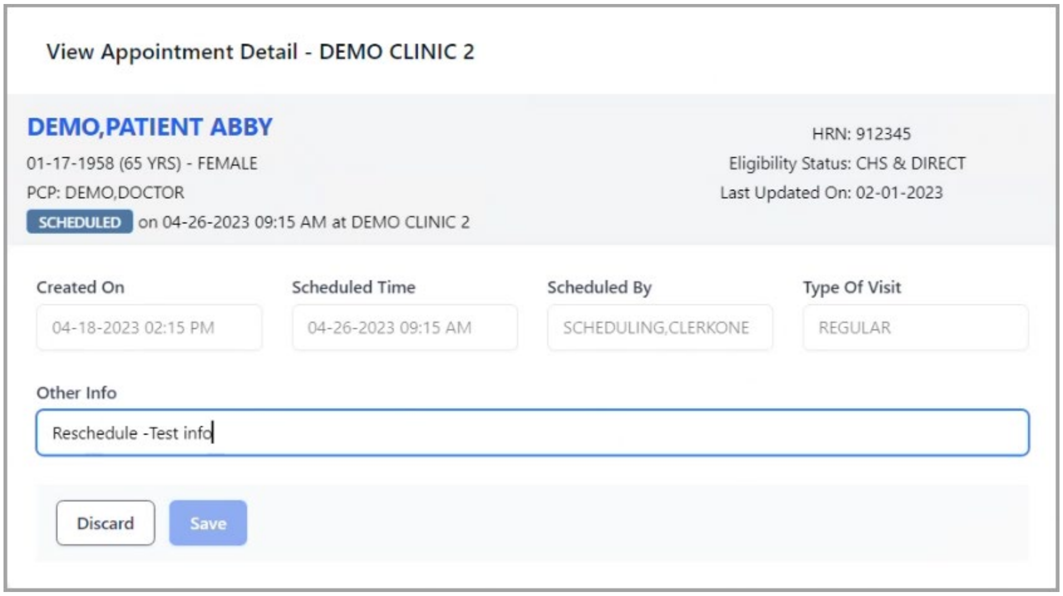


Figure 2-44: View Appointment Detail dialog

2.6.8.2 Add/Edit Cancelled Remarks

When an appointment is **cancelled** users can also add comments to the dialog in the **Cancelled Remarks** field (Figure 2-45). Click **Save** once all comments have been added.

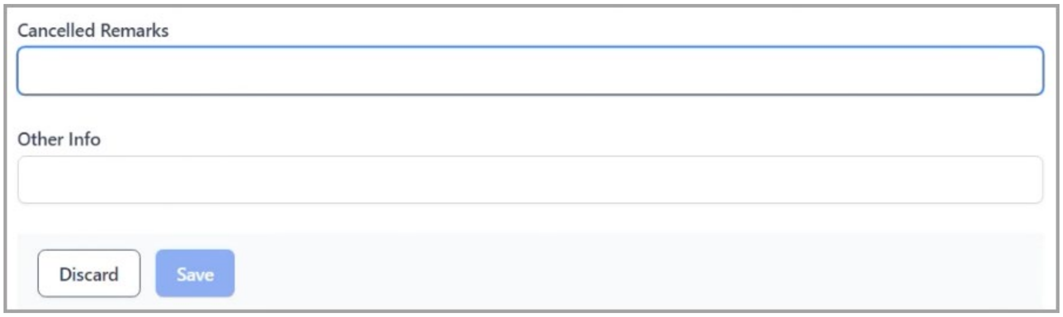


Figure 2-45: Cancelled Remarks field example

2.6.8.3 Add/Edit No Show Remarks

When a patient is a **no show**, users can also add comments to the dialog in the **No Show Remarks** field (Figure 2-46). Click **Save** once all comments have been added.

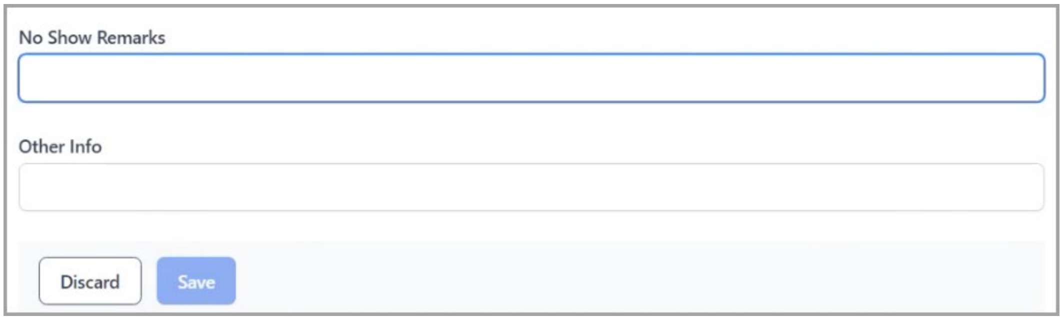


Figure 2-46: No Show Remarks field example

2.7 Clinic Waiting List

Use the **Clinic Waiting List** option to drag and drop a patient from the **waiting list** to the **Scheduler Workspace**. The option is available on the **Clinic**, on **Day and Week mode**, and when only **one clinic** is selected in the **Scheduler Workspace**.

2.7.1 Open/Close Clinic Waiting List

After selecting a **clinic**, click the **Open/Close** button to alternately display or hide the **Clinic Waiting List** pane (Figure 2-48) on the right side of the **Scheduler Workspace**. The **Clinic Waiting List** pane shows patients (if any) waiting for an appointment at the selected clinic sorted by **Recall Date** then **Priority**.

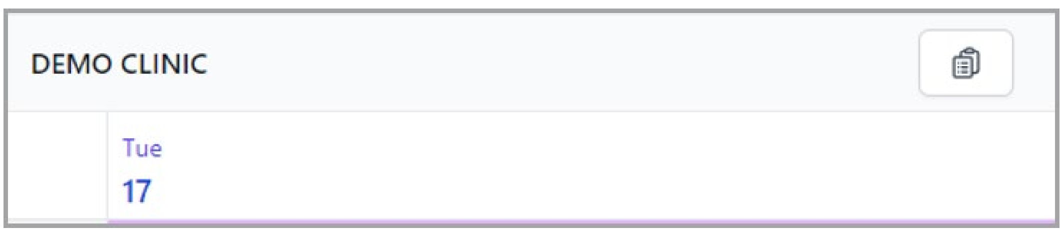


Figure 2-47: Open/Close Waiting List example

2.7.2 Using the Clinic Waiting List

When enabled, the **Clinic Waiting List** displays on the right side of the **Scheduling Workspace**. An example of a typical waiting list is shown in Figure 2-49.

The **Waiting List** displayed defaults to the selected clinic. However, the user may access the **Waiting List** of a different clinic by using the drop-down.

Figure 2-48: Clinic Waiting List example

Each entry in the waiting list shows the following information (if available)

- Patient Name
- Patient HRN
- Patient Phone Number
- Appointment Priority
- Added By
- Added On
- Reason
- Recall Date
- Comments

When an **appointment** becomes available, select a patient from the **Waiting List**, then **drag and drop** the selection into the appropriate time slot for the clinic.

To remove the **patient** from **Waiting List** without scheduling an appointment, right-click an **entry** and click **Remove**. The entry can also be edited by clicking **Edit**.

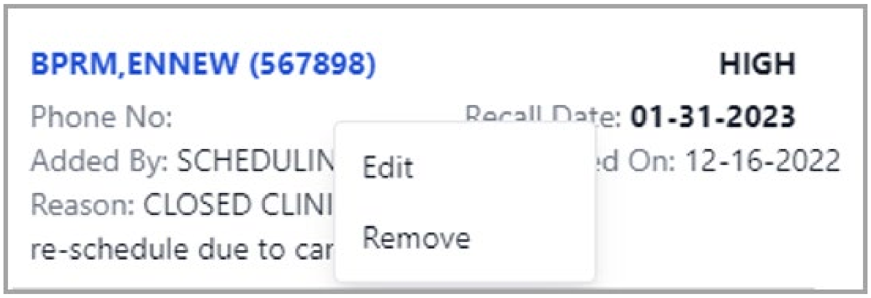


Figure 2-49: Waiting List Menu example

The **Clinic Waiting List context menu** (Table 2-5) contains the following options:

Table 2-5: Clinic Waiting List context menu options

Option	Description
Edit	Use this option to edit the details for an existing Waiting List entry.
Remove	Use this option to remove a patient from the Waiting List.

The following are some important points about using the **Clinic Waiting List**.

- Use the **drop-down** at the top of the **Clinic Waiting List** to select the **clinic** for which the **waiting list** is displayed.
- The **waiting list** displays five entries per page and a **pager** will display at the bottom to select more entries.
- The **waiting list** is sorted based on the **Recall Date**, then **Priority**.

3.0 Scheduling Configuration

The **Scheduling Settings** control a variety of application settings for scheduling, allowing users to change or add such things as access types, holiday configurations, letter templates, resource groups, and clinics. Changes made within the Settings module are typically done by a supervisor or site manager. In most cases, once these settings have been established, they will rarely need to be changed.

Notes: The options available in the **Settings** module may vary for different users, depending on the RPMS functionality enabled at your site, and the access permissions granted to each user.

You must log off and log back in to the BPRM application for any scheduling configuration changes to take effect.

Open the **Settings** module by clicking **Settings** in the lower-left corner, as shown in Figure 3-1.

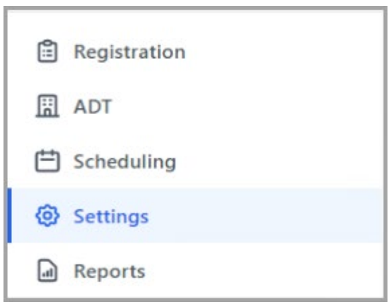


Figure 3-1: Taskbar with Settings module highlighted

The **Scheduling Selection** pane (Figure 3-2) located above the **Settings** module displays a list of available options. The information displayed on the right side of the window varies, depending on the option selected.

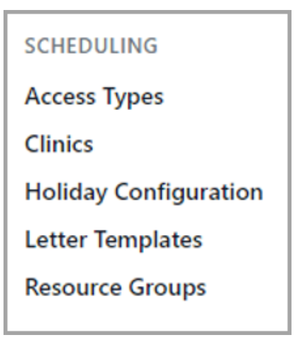


Figure 3-2: Scheduling Selection pane

3.1 Access Types

As described in **Configure Clinic Availability**, scheduling availability for a clinic is divided into **Access Blocks**, which are color-coded representations of the amount of time allotted for a specific type of clinic access (such as appointments).

Selecting the **Access Types** option on the **Settings** module opens the Access Types window (Figure 3-3). This provides a way to define the types of **Access Blocks** available. You can add new **Access Types** and edit existing ones.

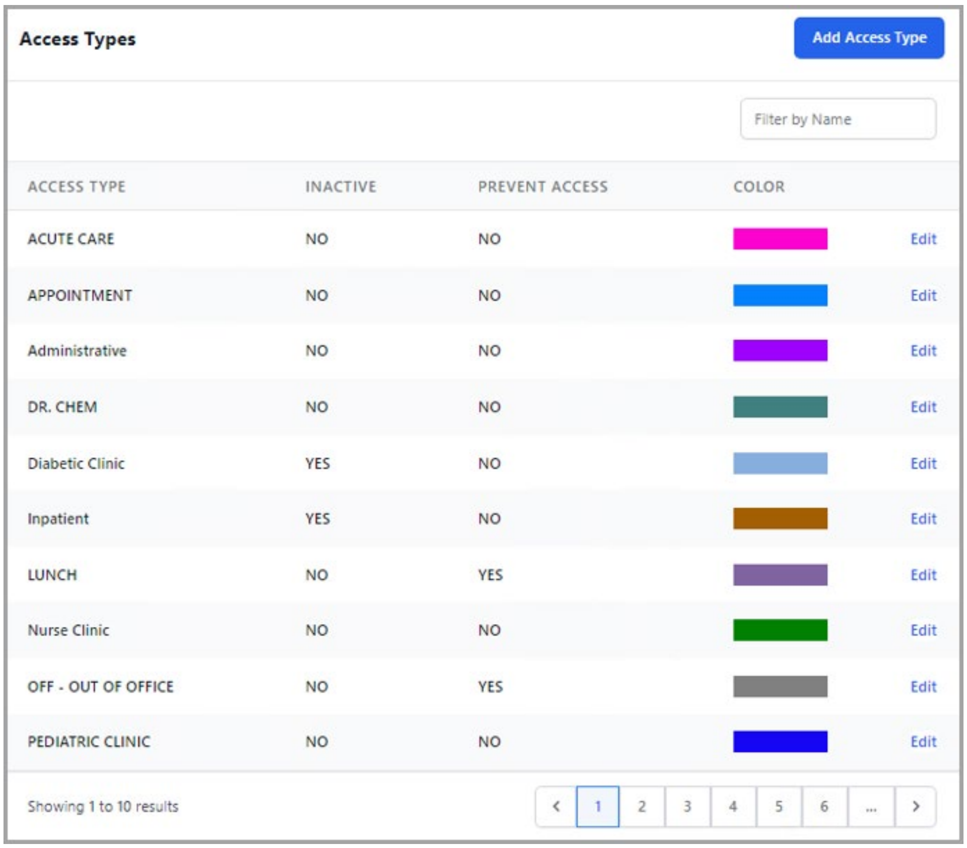


Figure 3-3: Access Types window

3.1.1 Add an Access Type

To add a new **Access Type**:

1. From the **Access Types** window of the **Settings** module, select **Add Access Type** in the upper-right corner of the window. The **Access Type** dialog (Figure 3-4) displays.

Figure 3-4: Access Type dialog

2. Type a **name** for the new **Access Type** in the **Name** field.
    - Optionally, at the Inactive toggle, click **Yes** to create the new **Access Type** without making it active. Select No if it will be active.
    - Also optionally, at the **Prevent Access** toggle, select **Yes** to use this **Access Block** as a time period during which appointments cannot be scheduled.
3. Select a **color** from the **Color** selection dialog (Figure 3-5).

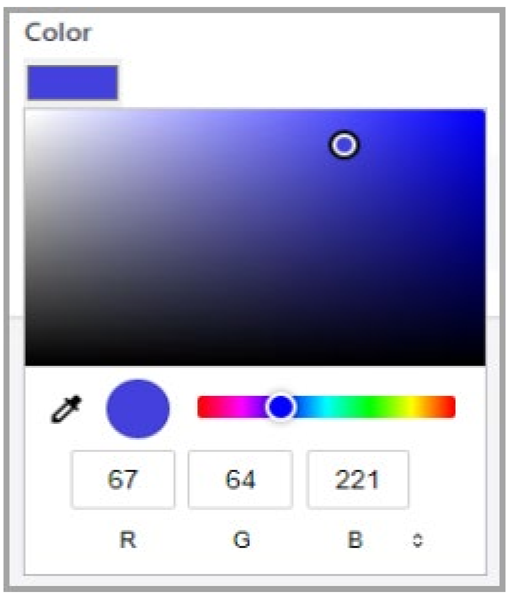


Figure 3-5: Color Selection dialog

4. When done, click **Save** to save the new **Access Type** or click **Discard** to close the window without saving.

3.1.2 Edit an Access Type

To edit an existing Access Type:

1. On the **Access Types** window of the **Settings** Module, select the **Access Type** to edit. One of these methods can also be used to find the **Access Type** you want to edit:

   - Use the **Left** and **Right arrows** in the lower-right corner of the window to navigate through each window of the **Access Type** listing.
   - Type the first few letters of the **Access Type** name in the **Filter by Name** field in the upper-right corner of the window, and then press **Enter**.

2. Select the **Access Type** to edit and click **Edit** to the right of the name. The **Access Type** dialog (Figure 3-3) displays again and can be edited.

3. Make any changes necessary to the **Access Type name**, **color**, **Inactive** status, and **Prevent Access**.

4. Click **Save** to save the changes or click **Discard** to close the window without saving the changes.

   In the example shown in Figure 3-6, the name has been changed from **TEST ACCESS TYPE** to **DENTAL SPECIALTY** and the color has been changed from pale blue to bright red.

Figure 3-6: Access Type after editing

3.2 Configure Clinics

Click **Settings** then **Clinics** (under **Scheduling**) to access the **Clinics** window. An example of the **Clinics** window is shown below in Figure 3-7.

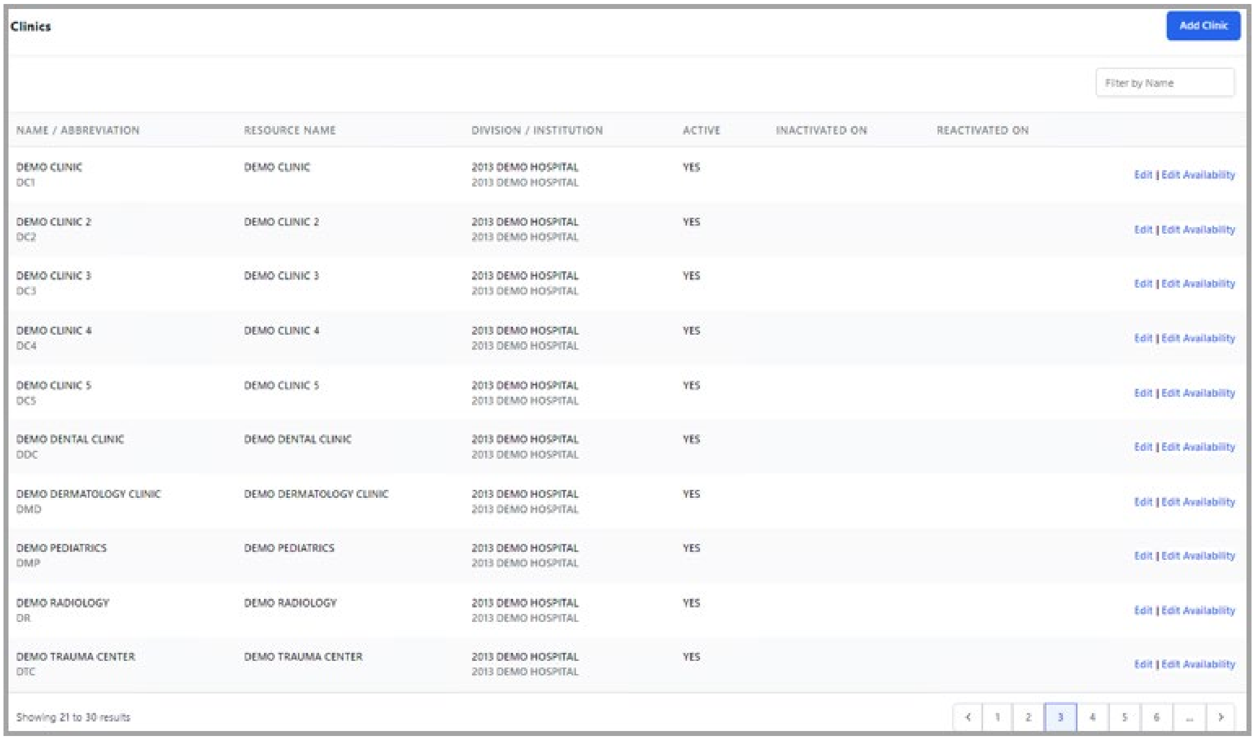


Figure 3-7: Settings Module – Clinics window

Use the **Clinics** window of the **Settings** module to add or remove clinics from those available to the BPRM suite, and to set or modify various parameters for each clinic.

3.2.1 Search for a Clinic

The **Clinics** window of the **Settings** module lists all of the clinics in the **RPMS** database. Each window of the display shows 10 clinics. Use the **left** and **right** arrows or select a **number** at the lower-right corner of the window (Figure 3-8) to navigate to other windows. The current window number is highlighted.

Figure 3-8: Clinic window navigation

Use the **Filter by Name** field (Figure 3-9) in the upper-right corner of the window to narrow down the search for a specific clinic. Type any part of a **clinic name** in the field and press **Enter**. The filtered list of clinics displays.

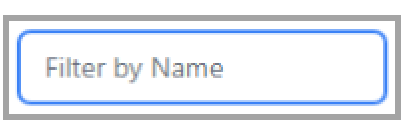


Figure 3-9: Filter by Clinic field

3.2.2 Add a New Clinic

To add a new clinic, click the **Add Clinic** button (Figure 3-10) in the upper-right corner of the **Clinics** window to set up a new clinic.

Figure 3-10: Add Clinic button

The **Add Clinic** dialog (Figure 3-11) displays.

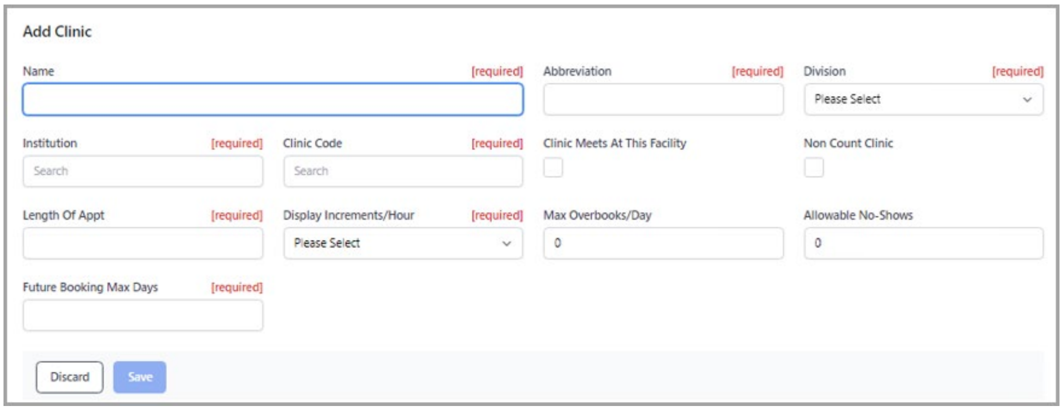


Figure 3-11: Add Clinic dialog

3.2.2.1 Fields On the Add Clinic Dialog

The fields on the **Add Clinic** dialog are shown in Table 3-1. Many of these fields affect the **Scheduling** module in regard to this clinic. Required fields are noted on the dialog:

Table 3-1: Fields on the **Add Clinic** dialog

Field	Description
Name	Required field. Use this field to enter the name of the clinic. **Note:** BPRM automatically assigns the Clinic name to the Resource name. Some earlier versions of scheduling software allowed the Clinic and Resource names to be different. This is no longer the case.
Abbreviation	Required field. Use this field to enter the abbreviated name of the clinic.
Division	Required field. Use this field to specify the division with which the clinic is associated. Click within the field then choose one of the divisions shown on the list to populate this field.
Institution	Required field. This field can be different from the Division mostly used for multi-divisional sites.

Field	Description
Clinic Code	Required field. Use this field to specify the Stop Code for the clinic. Click within the field then choose one of the codes shown on the list to populate this field.
Clinic Meets at This Facility	Select this check box if the clinic meets at this facility.
Non Count Clinic	Select this check box if the clinic is a non-count clinic for workload purposes. Clear the check box if this clinic is to be included in workload statistics.
Length of Appt	Required field. Use this field to specify the default length of appointment (in minutes) used by the clinic. Maximum length allowed is 240 minutes.
Display Increments / Hour	Required field. Use this field to specify the number of increments per hour to show when viewing schedules set for the clinic. Click within the field then choose one of the increments shown on the list to populate this field.
Max Overbooks / Day	Use this field to set the maximum number of overbooks that will be allowed per day. If overbooks are not allowed at this clinic, set this field to zero.
Allowable No-Shows	Use this field to set the number of times in a row a patient can be a no-show before being flagged for possible discharge from the clinic. The Allowable No-Shows number is used in combination with the No-Show Waiting Period field described in Clinic Configuration-Scheduling Parameters.
Future Booking Max Days	Required field. Use this field to specify the number of days into the future that appointments can be booked. This will be the maximum number of days that will be available when searching for open appointment slots in the future.

After entering the appropriate information, click **Save** to save the new clinic or click **Discard** to close the form without saving the entries.

3.2.3 Edit Clinic Configuration

Select a clinic from the **Clinics** window as described in **Search for a Clinic** and then click **Edit** to the right of the clinic name to edit the parameters for that clinic. This opens the **Clinic Configuration** dialog.

The **Clinic Configuration** dialog provides access to a variety of clinic parameters and is displayed in multiple sections:

- General Parameters
- Waiting List
- Scheduling Parameters
- Letters Templates

- Clinic Users
- Clinic Providers

The parameters available in each pane are described in the following sections:

- Clinic Configuration – General Parameters (Section 3.2.4)
- Clinic Configuration – Waiting List (Section 3.2.5)
- Clinic Configuration – Scheduling Parameters (Section 3.2.6)
- Clinic Configuration – Letter Defaults (Section 3.2.7)
- Clinic Configuration – Clinic Users (Section 3.2.8)
- Clinic Configuration – Clinic Providers (Section 3.2.9)

When editing the parameters, you are given these options at the bottom of the window:

- **Save**. Use this option to save the changes, close the **Clinic Configuration** dialog, and return to the **Clinics** window.
- **Discard**. Use this option to close the **Clinic Configuration** dialog and return to the **Clinics** window without saving any of the changes.

3.2.4 Clinic Configuration – General Parameters

When first opened, the **Clinic Configuration** dialog (Figure 3-12) initially displays the general parameters section as shown below:

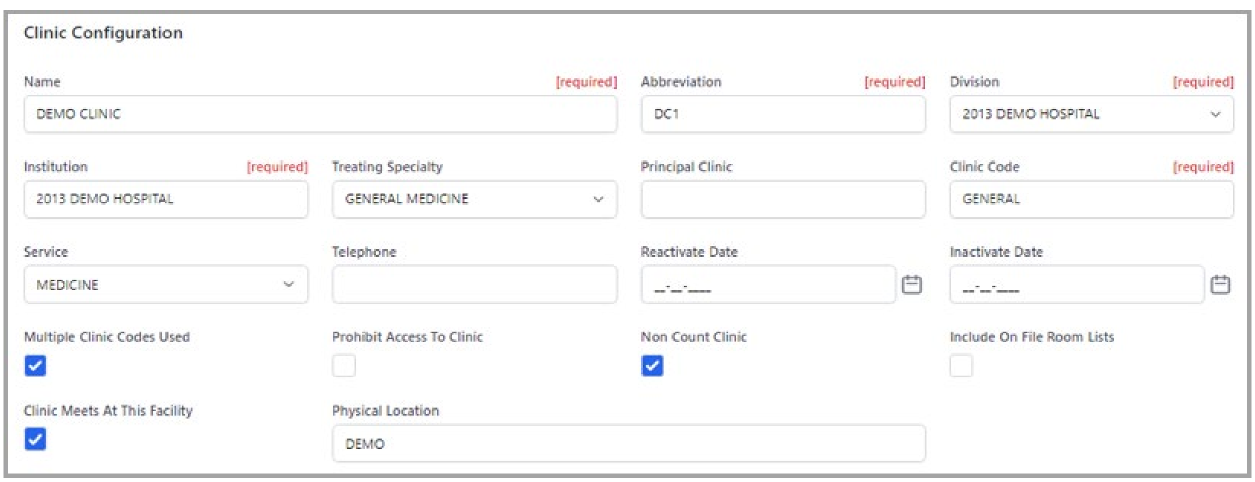


Figure 3-12: General Parameters dialog

The parameters in the **General** section of the **Clinic Configuration** dialog are shown in Table 3-2. Some of these fields are populated when the clinic is first added to the RPMS system. Required fields are noted in the dialog.

Table 3-2: Clinic Configuration – General tab fields

Field	Description
Name	Required field. Shows the name of the clinic, as entered when the clinic was added to the system.
Abbreviation	Required field. Shows the abbreviated name of the clinic, as entered when the clinic was added to the system.
Division	Required field. Shows the division with which the clinic is associated, as entered when the clinic was added to the system.
Institution	Required field. This field shows the institution with which the clinic is associated, as determined when the clinic was added to the system. This field can be different from the Division mostly used for multi-divisional sites.
Treating Specialty	Use this field to specify the treating specialty of the clinic. Click within the field then choose one of the specialties shown on the list to populate this field.
Principal Clinic	Use this field to specify the principal clinic with which this clinic is associated (if any). If enrollment in this clinic is equivalent to enrollment in a larger one, this field should contain the name of the larger clinic. To search for a principal clinic, click within the field and type one or more of the letters contained in the clinic name to display a list of search results. Select a clinic name to populate the field.
Clinic Code	Required field. This is the clinic Stop Code assigned to a specific location, as entered when the clinic was added to the system.
Service	Use this field to specify the service provided by the clinic. Click within the field then choose one of the options shown on the list to populate this field.
Telephone	Use this field to enter the telephone number for the clinic.
Reactivation Date	Use this field to indicate the date on which an inactivated clinic was reactivated.
Inactivation Date	Use this field to indicate the date on which the clinic was inactivated.
Multiple Clinic Codes Used	Select this check box to allow the user to select a clinic Stop Code when a patient is checked in for an appointment.
Prohibit access to clinic	Select this check box to allow only users with sufficient access rights to add this clinic to the Preferred Resource List or book appointments at this clinic.
Non-Count Clinic	Select this check box if the clinic is a non-count clinic for workload purposes. Clear the check box if this clinic is to be included in workload statistics.
Include on File Room list	Select this check box if this is a non-count clinic that should be included on the file room lists.
Clinic Meets at this Facility	Select this check box if the clinic meets at this facility.
Physical Location	Use this field to show the physical location of the clinic.

After entering the appropriate information, click **Save** to save the clinic data or click **Discard** to close the form without saving the entries.

3.2.5 Clinic Configuration – Waiting List

Select the **Waiting List** check box to activate the **Waiting List** for the clinic. Activating this functionality allows users to add patients to the clinic's **Waiting List**. Figure 3-13 shows the **Waiting List** check box.

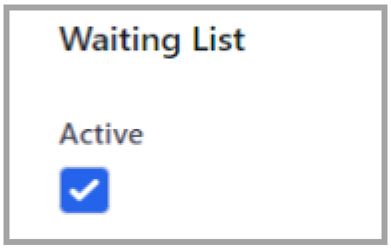


Figure 3-13: Waiting List pane

3.2.6 Clinic Configuration – Scheduling Parameters

Use the **Scheduling** portion of the **Clinic Configuration** dialog to configure various scheduling parameters for the selected clinic. Figure 3-14 shows an example of the **Scheduling** dialog.

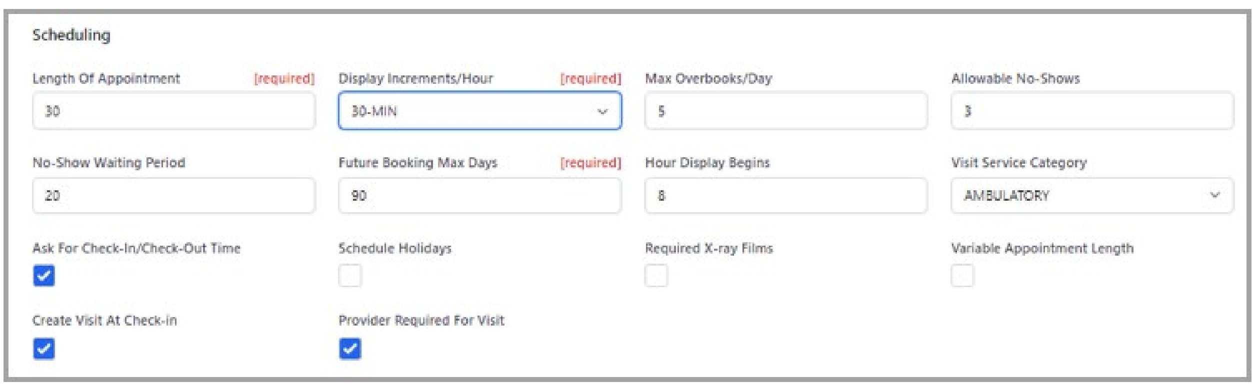


Figure 3-14: Scheduling Parameters dialog

The parameters in the **Scheduling** section of the **Clinic Configuration** are shown in Table 3-3. Some of these fields are populated when the clinic is first added to the **RPMS** system. These settings affect the **Scheduling** module in regard to the selected clinic. Required fields are noted in the dialog.

Table 3-3: Clinic Configuration – Scheduling parameters

Field	Description
Length of Appointment	Required field. Use this field to specify the default length of appointment (in minutes) used by the clinic. The maximum length is 240 minutes.

Field	Description
Display Increments / Hour	Required field. Use this field to specify the number of increments per hour to show when viewing schedules set for the clinic. Click within the field then choose one of the options shown on the list to populate this field. If variable appt length is set, this field will also set the display of the appointment length when scheduling an appointment.
Max Overbooks / Day	Use this field to set the maximum number of overbooks that will be allowed per day. If overbooks are not allowed at this clinic, set this value to zero.
Allowable No-Shows	Use this field to set the number of times in a row a patient can be a no-show before being flagged for possible discharge from the clinic. The Allowable No-Shows number is used in combination with the No-Show Waiting Period field.
No-Show Waiting Period	Use this field to specify the number of days in the past to be included when searching for previous no-shows at this clinic.
Future Booking Max Days	Required field. Use this field to specify the number of days into the future that appointments can be booked. This will be the maximum number of days that will be available when searching for open appointment slots in the future.
Hour Display Begins	Use this field to specify the time of day when the clinic availability schedule for this clinic begins. This field accepts whole numbers from 0 through 16, representing times from 12:00 midnight to 4:00 PM, respectively. This parameter works in conjunction with the Appointment Access Blocks established with the Clinic Availability Configuration window.
Visit Service Category	Use this field to specify the visit service category for the clinic. Click within the field then choose one of the categories shown on the list to populate this field.
Ask for Check In / Out Time	This option is used during patient Check-In and Check-Out events. The Check-In/Check-Out date and time will default to the current date and time. When this option is enabled, the user can edit the time only. When this option is not enabled, the user cannot edit anything and must take the current date/time. If an appointment is scheduled retroactively, then the same rules apply. The only difference is that the default date will be the date of the appointment. The default time will be the current time.
Schedule Holidays	Select this check box to allow appointments to be scheduled on holidays at this clinic.
Required X-ray Films	Select this check box if x-ray films are required for patients at the selected clinic.

Field	Description
Variable Appt Length	Select this check box to allow appointments of variable lengths to be set at the selected clinic. This allows users to change the length of appointment.
Create Visit at Check In	Select this check box to automatically create a PCC/EHR visit when a patient checks in at this clinic.
Provider Required for Visit	Select this check box if the Create Visit at Check In option has also been selected. This will require that a provider is specified when checking in an appointment as part of the PCC visit creation process.

After entering the appropriate information, click **Save** to save the clinic data or click **Discard** to close the dialog without saving the entries.

3.2.7 Clinic Configuration – Letter Defaults

Once the letter template is created for a specific letter type, you can use the **Letter Templates** section of the **Clinic Configuration** dialog to set the default for these appointment letters for the clinic as shown in Figure 3-15. See Section 3.5for additional information on how to create the letter templates.

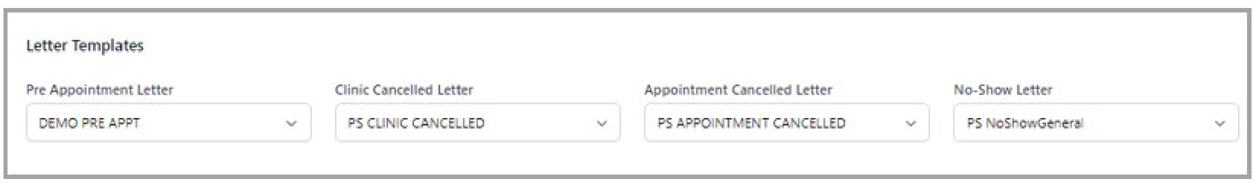


Figure 3-15: Letter Defaults dialog

For each letter type, use the drop-down selection list to select the **Letter Template** to use for the selected clinic. Users should consider the information in the following table (Table 3-4) when selecting the clinic default for each letter type.

Table 3-4: Clinic Defaults for Letter Types

Field	Description
Pre-Appointment Letter	Use this letter type to print a letter for an appointment that was scheduled but the patient was not Checked-In. (Appointment status = SCHEDULED).
Clinic Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled by the clinic. (Appointment status = CANCELLED BY CLINIC).
Appointment Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled. (Appointment status = CANCELLED BY PATIENT).
No-Show Letter	Use this letter type to print a letter for an appointment that was marked a No Show due to the patient not showing up. (Appointment status = NO SHOW).

3.2.8 Clinic Configuration – Clinic Users

Use the **Clinic Users** section of the **Clinic Configuration** dialog to specify scheduling users for the selected clinic. Figure 3-16 shows an example of the **Clinic Users** section. **Clinic Users** are displayed alphabetically by last name.

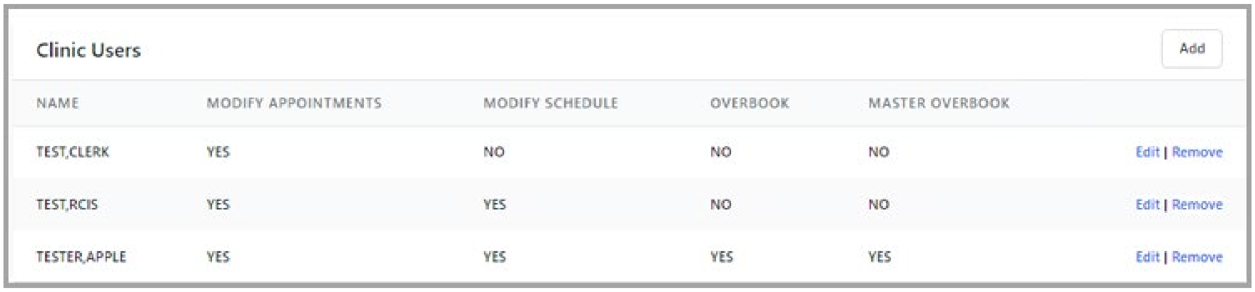


Figure 3-16: Clinic Users window

Use the **Clinic User** dialog (Figure 3-17) to name the **BPRM Scheduling** users at the selected clinic, and to specify the access rights each user is granted. These access rights apply to users assigned to the **Scheduling Clerk** role.

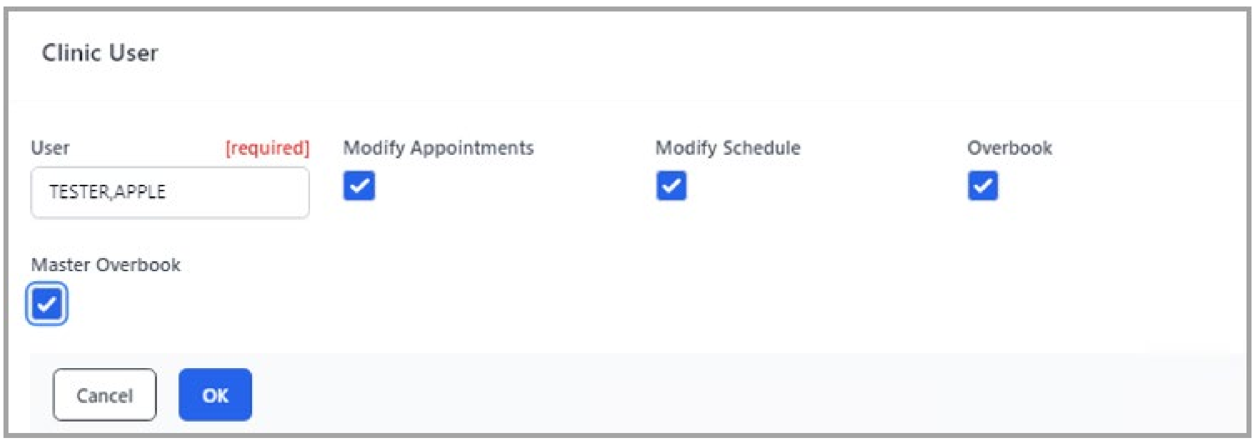


Figure 3-17: Clinic User dialog

To access the **Clinic User** dialog, perform one of the following actions:

- Click **Add** in the upper-right corner of the **Clinics Users** section to add a new **Clinic User**. Within the **User** field, type some or all of the user's name, using a **LAST, FIRST name** format.
- Click **Edit** (on the right) for an existing user.

The parameters in the **Clinic User** section of the **Clinic Configuration** are shown in Table 3-5. Required fields are noted in the dialog.

Enter or verify the **user's name** in the **User** field (required field) then select the appropriate check boxes (Table 3-5) for each user to grant these access rights:

Table 3-5: Clinic Configuration – Clinic User parameters

Field	Description
User	Required field. This is the Clinic User's name.
Modify Appointments	Users with Modify Appointment rights can change appointment times and dates, and also change other aspects of patient appointments.
Modify Schedule	Users with Modify Schedule rights can add and change Access Blocks to manage Clinic Availability.
Overbook	Users with Overbook rights are allowed to overbook appointment slots in the Scheduling module. They can overbook slots up to the limit established by the Max Overbooks/Day parameter set up as part of Clinic Configuration.
Master Overbook	Users with Master Overbook rights are allowed to overbook appointment slots in the Scheduling module. They are also allowed to bypass any limits established by the Max Overbooks/Day parameter set up as part of Clinic Configuration.

Note: If a user is set up in a **Scheduling Supervisor** role via **RPMS** security keys, the security keys override any of the user settings established in the Users panel. See the *BPRM Technical Manual* for more information about security keys.

To remove a **Clinic User**, click **Remove** to the right of the user's name on the list.

After entering the appropriate information, click **Ok** to save the **Clinic User** or click **Cancel** to close the dialog without saving the entries.

3.2.9 Clinic Configuration – Clinic Providers

Use the **Clinic Providers** section of the **Clinic Configuration** dialog to specify the medical providers associated with the clinic. Figure 3-18 shows an example of the **Clinic Providers** section.

Figure 3-18: Clinic Providers window

To access the **Clinic Provider** dialog as shown in Figure 3-19 below, perform **one** of the following actions:

- Click **Add** in the upper-right of the **Clinic Providers** section to add a new **Clinic Provider**. Within the Provider field, type some or all of the provider's name, using a **LAST,FIRST name** format.
- Click **Edit** (on the right) for an existing Provider.

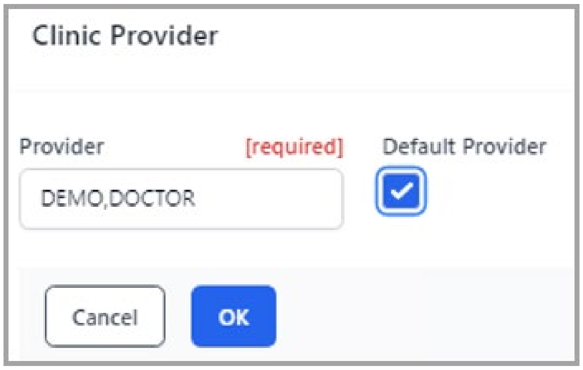


Figure 3-19: Clinic Providers dialog

- Select the check box on the right side of the provider's name to specify the **Default Provider** for the clinic.
  - To remove a provider from the list, click **Remove** to the right of the provider's name on the list.

If you have enabled the **Create Visit at Check In** and **Provider Required for Visit** options on the **Scheduling** tab, it is recommended to specify a default provider. This helps to ensure that a visit is properly created when an appointment is checked in. Be aware however, that you still have the option to choose a different provider when you check in the appointment.

After entering the appropriate information, click **Ok** to save the **Clinic Provider** or click **Cancel** to close the dialog without saving the entries.

3.3 Configure Clinic Availability

3.3.1 Select Clinic and Availability Timeframe

Click **Settings** then **Clinics** (under **Scheduling)** to access the **Clinics** window. An example of the Clinics window is shown below in Figure 3-20.

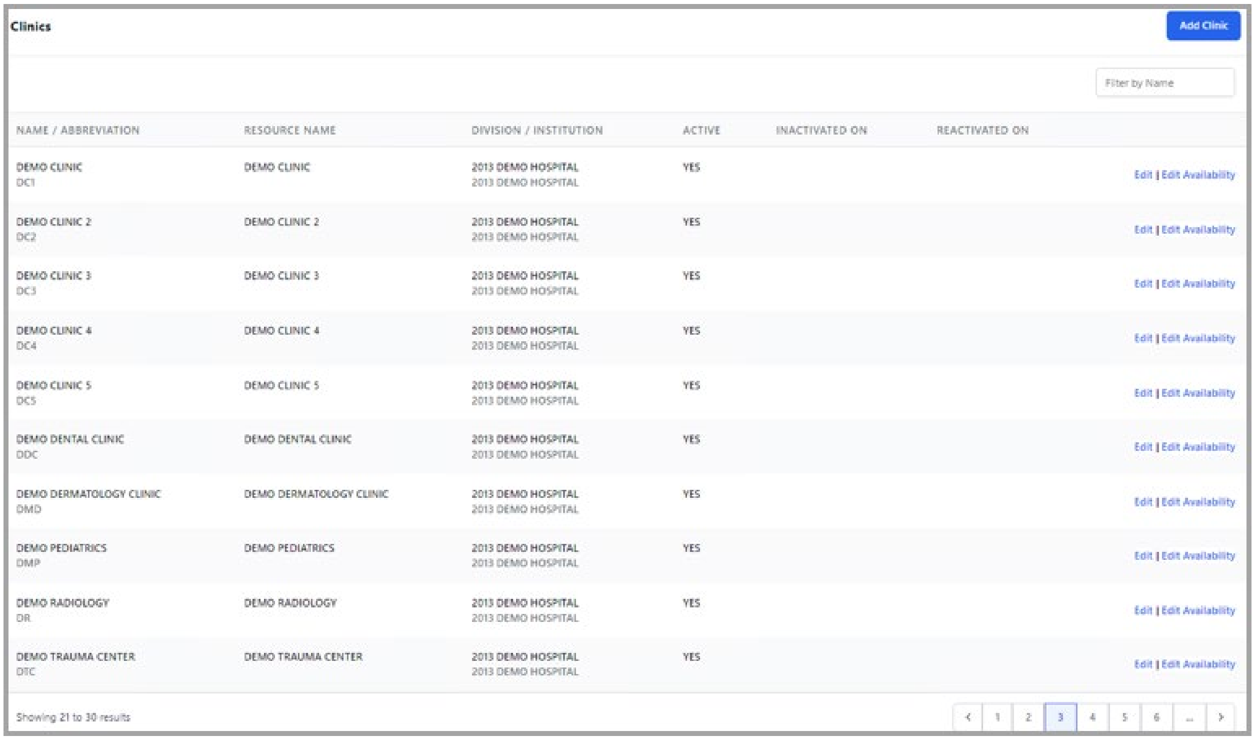


Figure 3-20: Settings Module – Clinics window

Click **Edit Availability** to the right of the desired **Clinic** name to establish the periods of time the selected clinic will be available for patient appointments and other scheduled events. Figure 3-21shows an example of a Clinic with no availability set up.

Figure 3-21: Clinic with No Availability example

In the top-right corner of the **Clinic Availability Configuration** window, Click **Add** to begin setting up a new **Clinic Availability Timeframe**. Once availability is set, you can click **Edit** to modify an existing **Clinic Availability Timeframe**.

Note:	The **Add**, **Edit**, and **Delete** buttons will be disabled if you do not have the appropriate access rights to manage **Clinic Availability** for the selected clinic.

Select the desired **Start Date**. Use the **Calendar** panel of the **Clinic Availability Configuration** window (Figure 3-22) to quickly navigate to a specific date.

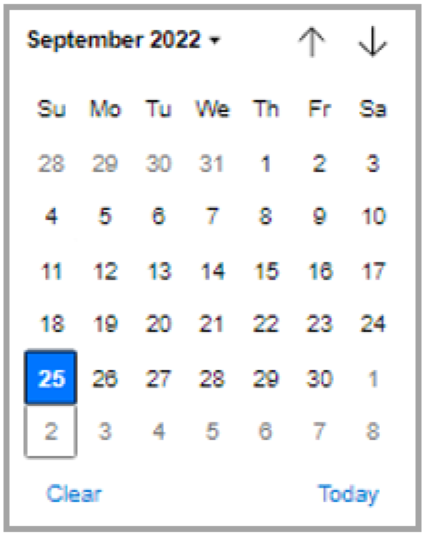


Figure 3-22: Calendar panel

Clinic availability is displayed as a schedule in a week-long grid.

Note:	Once an availability schedule has been created, it will remain in effect week after week until a new one is created, or until a previous one is re-used.

Before setting appointment schedules for a clinic, it is necessary to establish the times of day when appointment slots are available. Scheduling availability for a clinic is divided into **Access Blocks**, which are color-coded representations of the amount of time allotted for a specific type of clinic access (such as appointments). See Section 3.1 for additional information.

Each **Access Block** can represent one or more appointment slots. In essence, **Access Blocks** are sections of the clinic schedule that are available for patient appointments or other events. Different colors represent different types of access, and the colors can be customized.

3.3.2 Create an Access Block

The user must create **Access Blocks** to specify the times and days of the week the clinic will be available, and what types of access (such as appointment types) it will be available for.

To create a new **Access Block**:

1. In the blank **grid** displayed, select the **grid cells** that you want to create an **Access Block** for. In the example shown in Figure 3-23, **Clinic Availability** will begin on Monday 9/26/2022 with the selected cells representing Mondays from 8:00 AM to 12:00 PM.

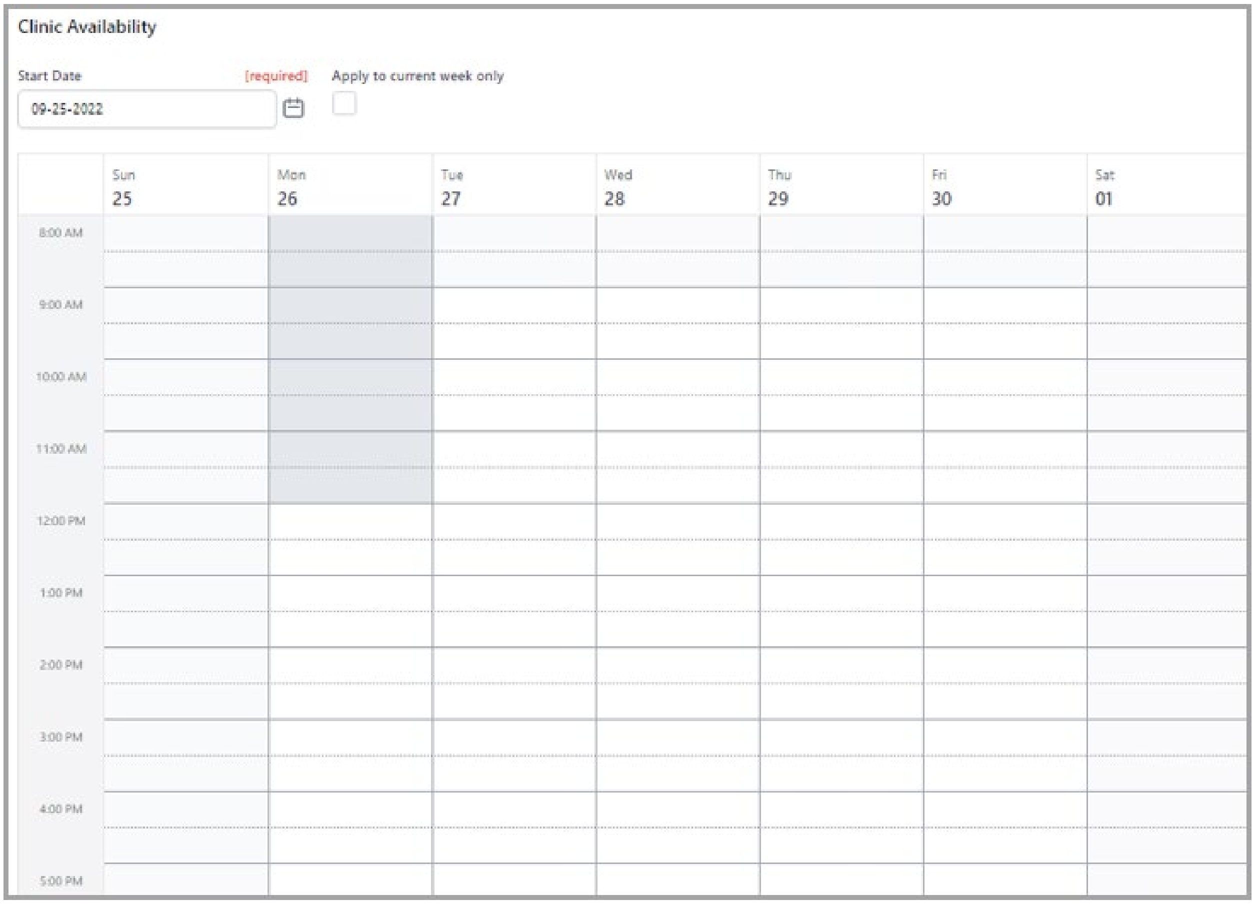


Figure 3-23: Access block times selected

To select multiple grid cells, either click and drag the **cursor** through the cells you want to select or hold the **Shift key** and click the **cells** you want to select.

2. Right-click within the selected cells and select **Create Access Block** from the menu displayed to specify the access type. The **Configure Access Block** dialog shown in Figure 3-24 displays:

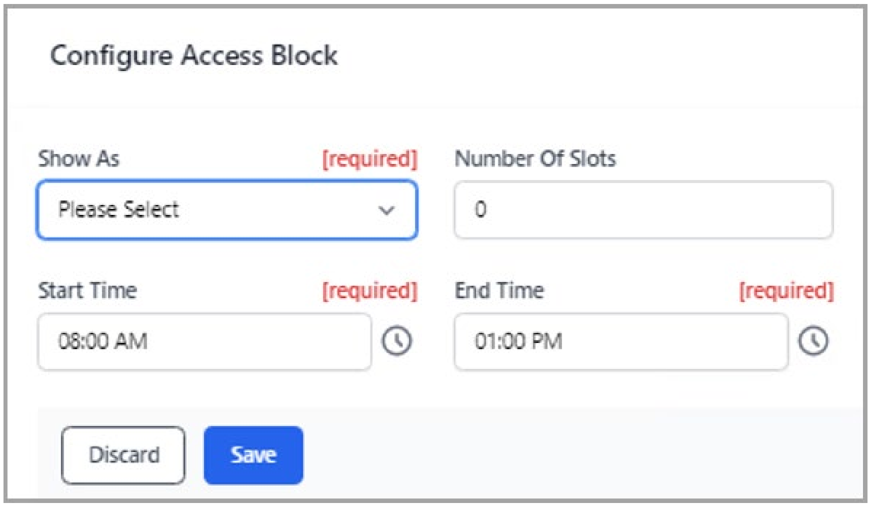


Figure 3-24: Configure Access Block dialog - incomplete

3. Use the **Show As** list to select the access type for the selected schedule cells. In the example shown in Figure 3-25, **APPOINTMENT** is being selected:

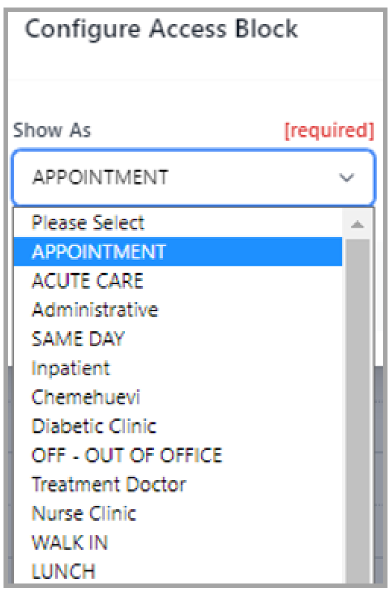


Figure 3-25: Configure Access Block dialog with APPOINTMENT selected

Note: The different **Access Types** available on the list are established in the **Access Types** window of the **Settings** module. See **Access Types** for additional information about setting up different Access Types.

4. After selecting the **Access Type**, specify the number of appointment slots for this **Access Block** in the Number of Slots field, and make any changes necessary to the Start time and End time fields. Figure 3-26 shows a typical **Configure Access Block** dialog after selecting the access type (APPOINTMENT) and **Number Of Slots**.

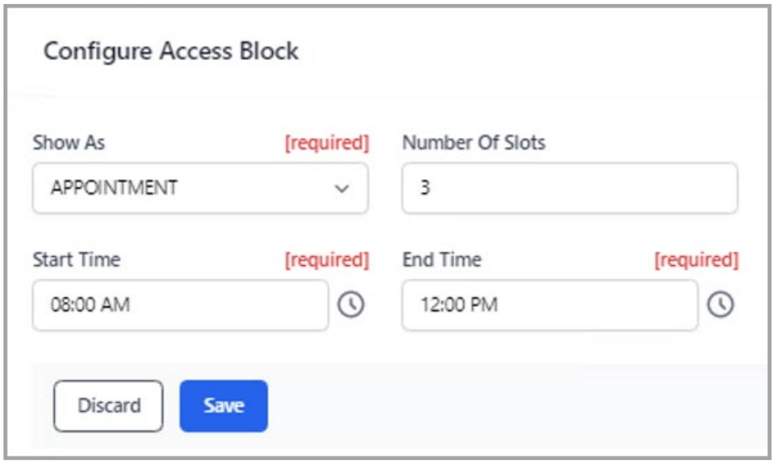


Figure 3-26: Configure Access Block dialog – completed

Note: If the **Number of Slots** field is set to zero, only users with overbook capability can schedule appointments for that **Access Block**. The Number of Slots represents how many appointments can be made for **EACH** Display Increment/Hour.

For example: If the clinic is set up for 30-minute appointments and display is in 30-MIN increments, setting the Number of Slots = 3 means that 3 appointments can be scheduled between 8:00-8:30, 9:00-9:30, etc.

5. When finished, click **Save** to accept the settings for the new **Access Block** and return to the schedule grid. Figure 3-27 shows the results of adding the Access Block used in this example:

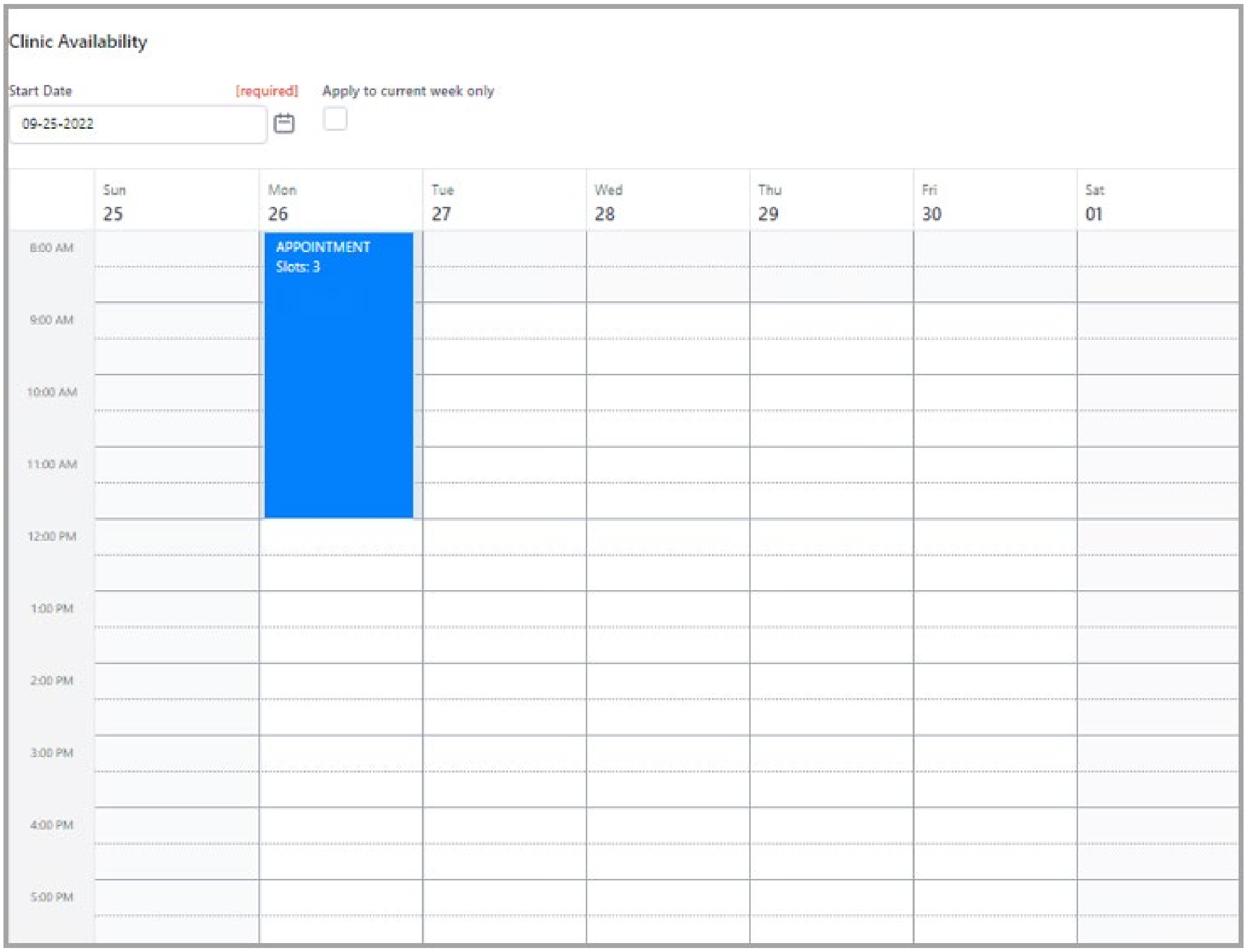


Figure 3-27: Availability schedule with new Access Block added

6. Create any other **Access Blocks** necessary to complete the clinic's **Availability** schedule.
7. Use the **Copy from** to apply the same schedule for each day as needed.
8. Click the **Apply to current week** only button at the top of the window to have the new availability schedule affect only the selected week. Used in cases where a clinic is only changed for a specific week. Otherwise, leave this button cleared to cause the availability schedule to affect the selected week, as well all other weeks afterward, until another availability schedule is established.
9. Scroll to the bottom of the **Clinic Availability** window and click **Save** to save the availability grid or click **Discard** to exit without saving the changes.

An example of completed **Clinic Availability** is shown in Figure 3-28 below:

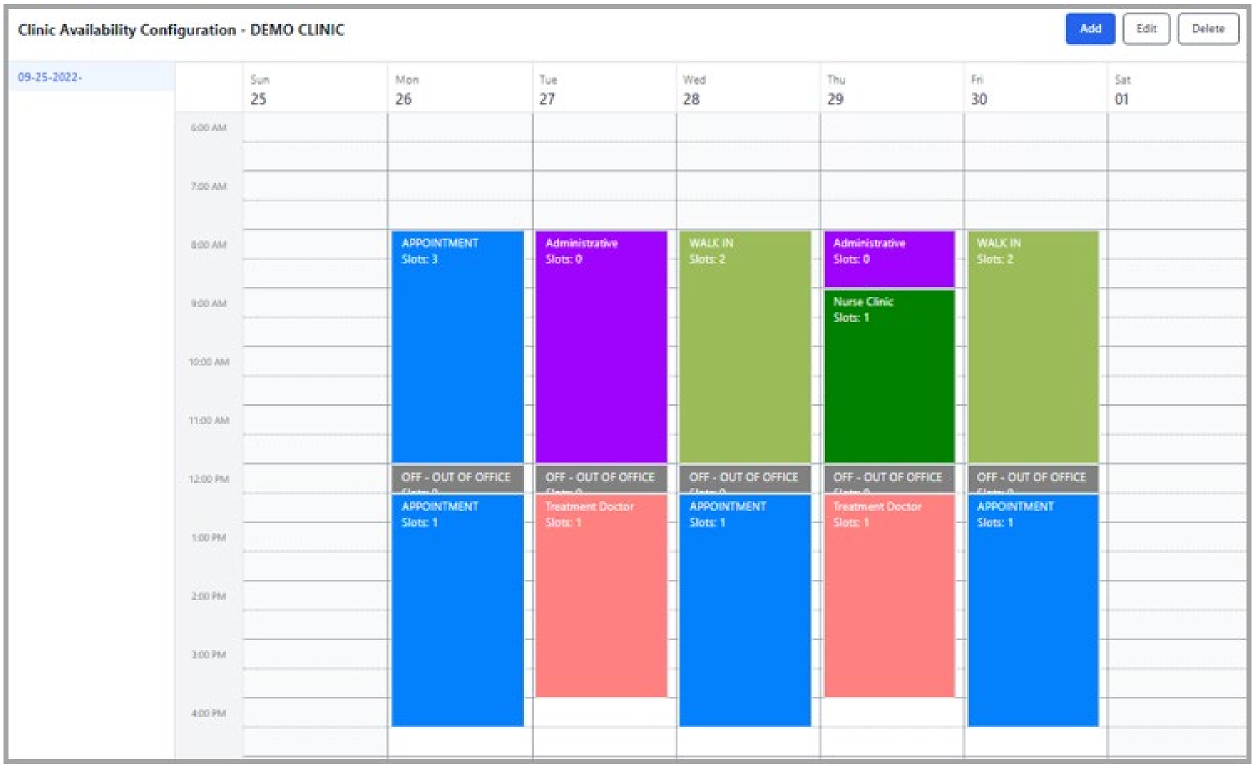


Figure 3-28: Clinic with Completed Availability schedule

3.3.3 Edit an Access Block

To edit an **Access Block** after it has been created, click **Edit** for the correct timeframe that requires edits. Right-click the block you want to edit and select **Change Access Block**. The **Configure Access Block** dialog displays (Figure 3-26) and allows you to change the **Access Type**, **Number of Slots**, **Start time**, and **End time** fields. Click **Save** to close the dialog to save the changes or click **Discard** to close the dialog without saving any changes.

3.3.4 Copy Access Blocks

You can copy a single **Access Block** or a day's worth of existing **Access Blocks** to a different day of the schedule availability grid. To do so, right-click an **empty grid cell** for the day where you want the **Access Block** to be copied. Select the **Copy From** option then select the day you want to copy. In the example shown in Figure 3-29, all of the Access Blocks from the Monday column of the grid will be copied to the selected day.

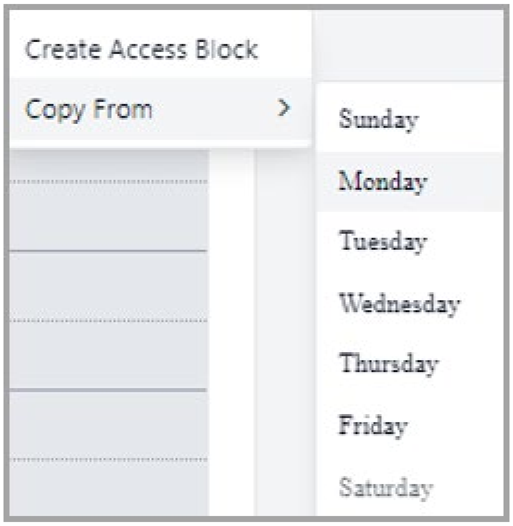


Figure 3-29: Copying Access Blocks

3.3.5 Delete an Access Block

To delete an **Access Block**, click **Edit** for the correct timeframe that requires the deletion. Right-click the **block** to delete and select **Delete Access Block**. At this point, the following **Confirm Delete** warning message (Figure 3-30) displays for the user to confirm the deletion.

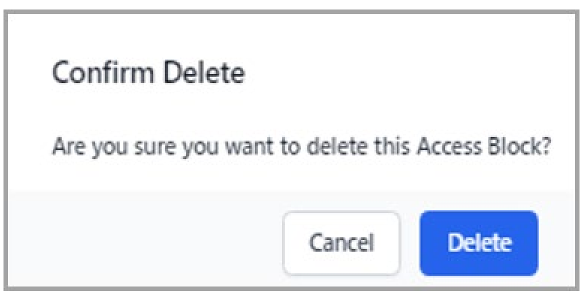


Figure 3-30: Confirm Delete warning message

- Select **Delete** to delete the **Access Block** or select **Cancel** to leave the **Access Block** intact.
- Click **Save** to close the dialog to save the changes or click **Discard** to close the dialog without saving any changes.
- To delete multiple **Access Blocks**, press **<Ctrl>** on the keyboard and select **Access Blocks**. Right-click and select **Delete Selected Access Blocks** (Figure 3-31).

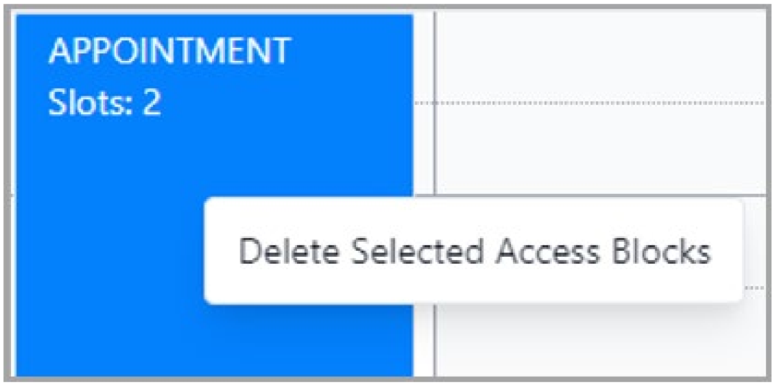


Figure 3-31: Delete Selected Access Blocks

The following message (Figure 3-32) displays. Click **Delete** or click **Cancel**.

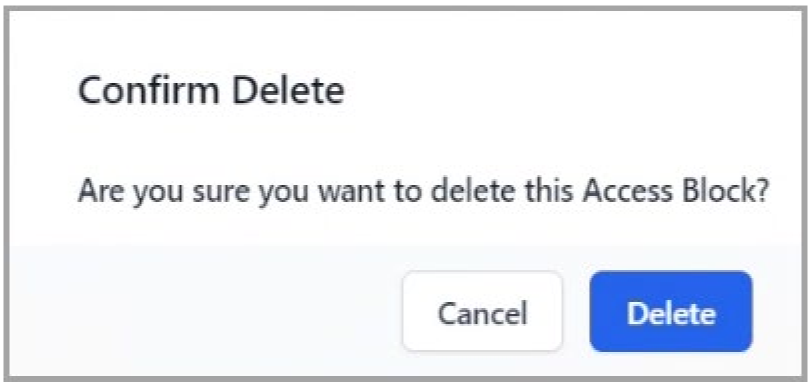


Figure 3-32: Confirm Access Blocks Delete message

3.3.6 Delete an Availability Time Frame

Using the **Clinic Availability Configuration** window (Figure 3-33):

- Select the **desired timeframe** to delete (from the time periods listed on the left).
- Click **Delete** (in upper-right corner) to delete the entire timeframe.

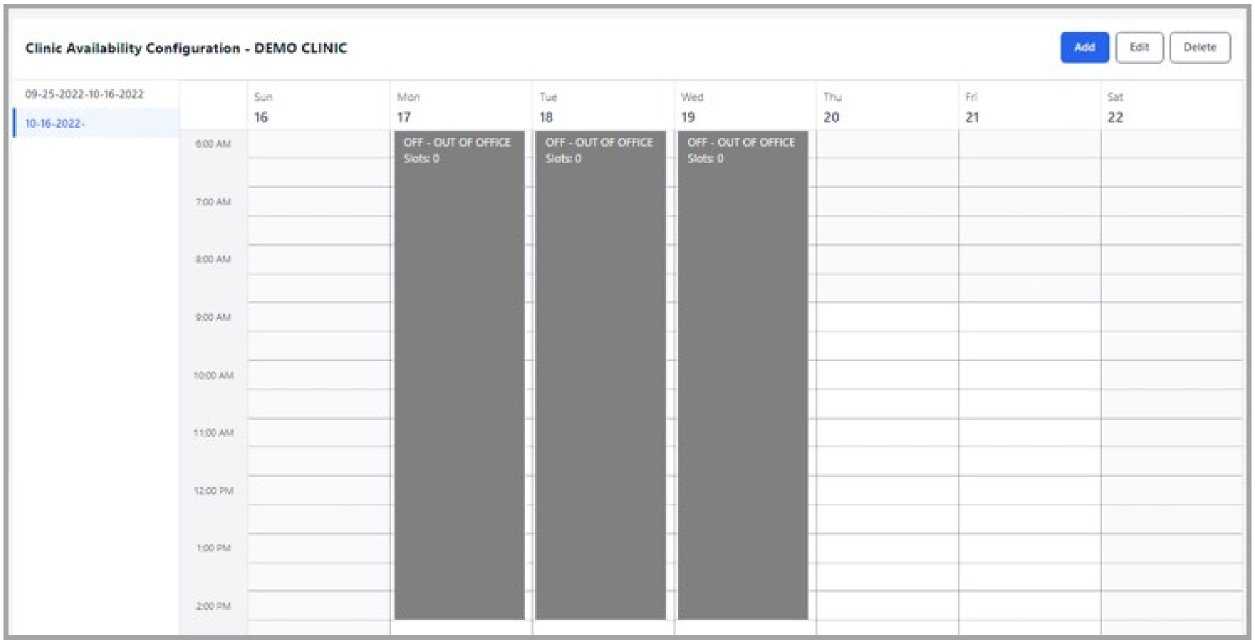


Figure 3-33: Delete an Availability Timeframe

In this example, the user wants to delete the **10-16-2022 timeframe** from the **Clinic Availability** schedule.

- Once the user clicks the **Delete** button, the following warning message (Figure 3-34) is presented for the user to confirm the removal of the selected timeframe.

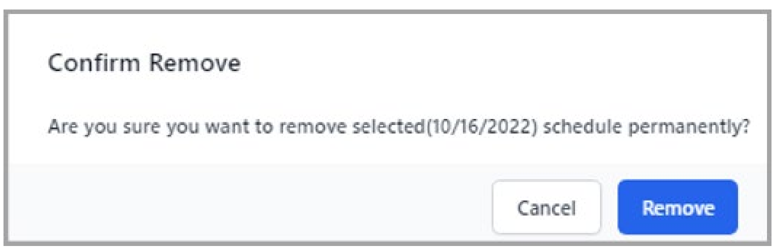


Figure 3-34: Confirmation for Removing an Availability Timeframe

The user should select **Remove** to remove the timeframe or select **Cancel** to leave the timeframe intact.

Warning: This process is irreversible. Once the timeframe is removed, it cannot be retrieved. If necessary, the timeframe will have to be rebuilt.

Once the user confirms that the timeframe should be removed, the timeframe is removed, and the previous **Clinic Availability** becomes open-ended as displayed in Figure 3-35.

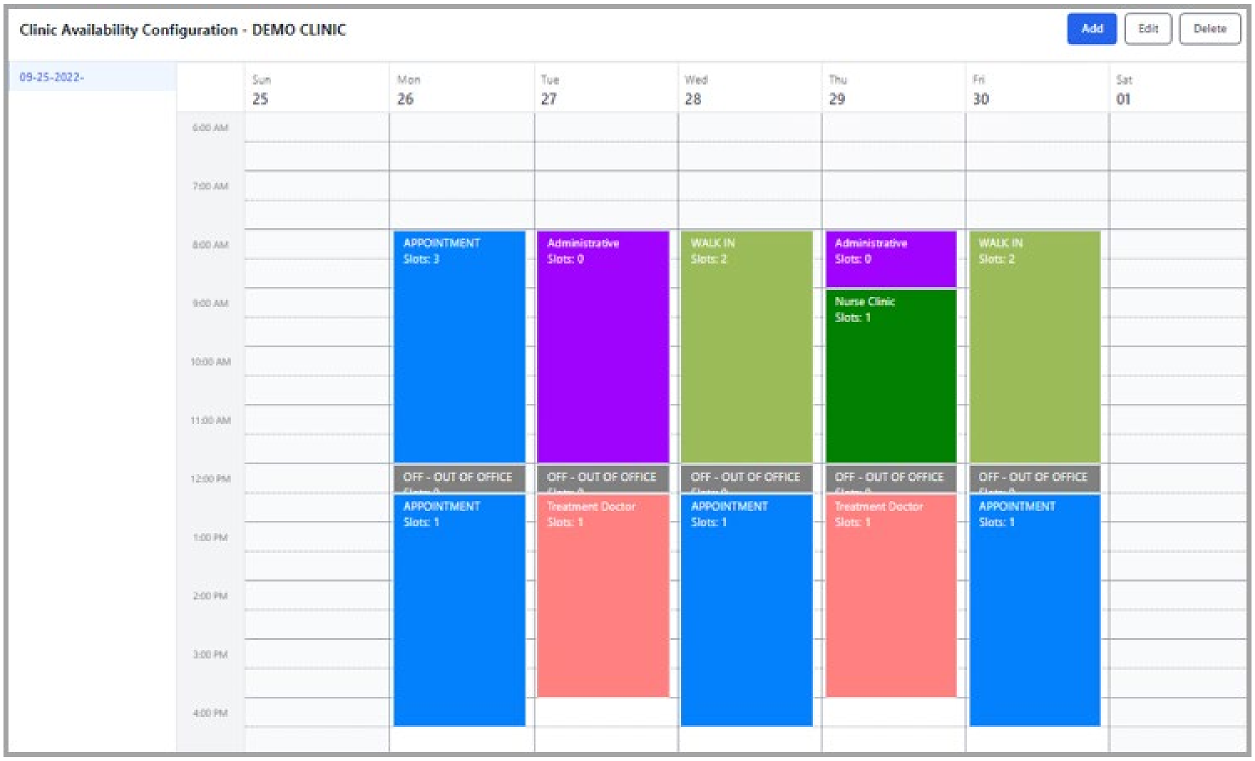


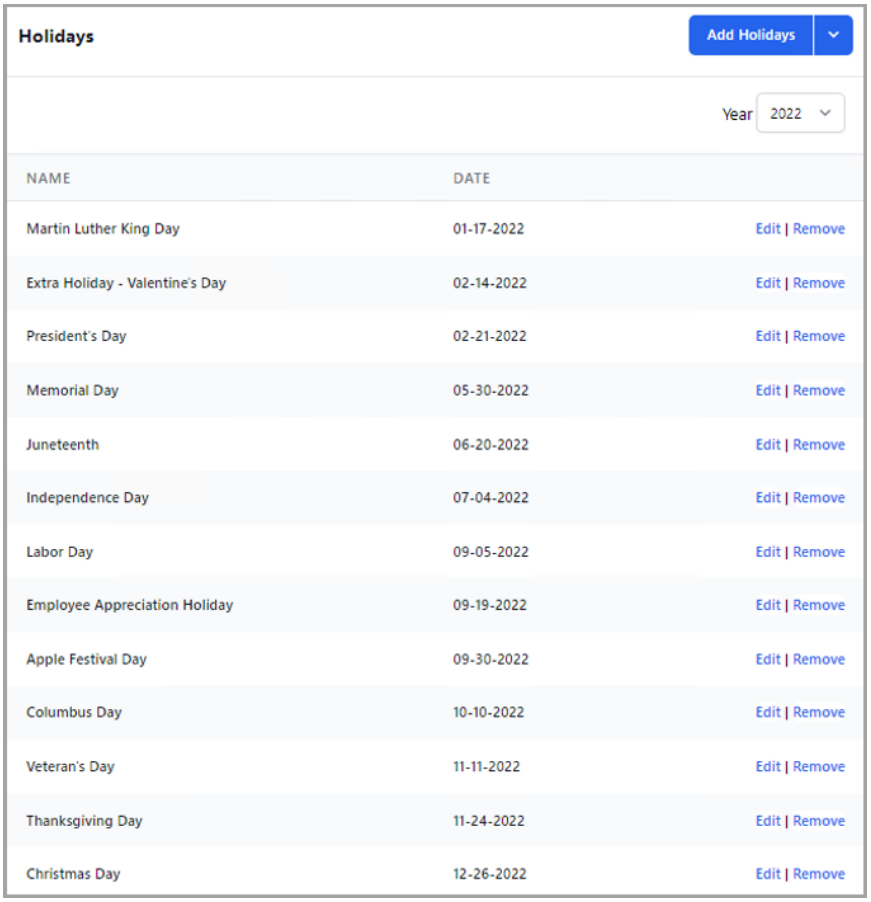
Figure 3-35: Availability Timeframe after Deletion

3.4 Holiday Configuration

Holiday Configuration allows users to configure a customized list of holidays that are recognized by the site. The recognized holidays can be used in conjunction with the **Clinic Configuration – Schedule Holiday** parameter to restrict appointment scheduling on certain days.

To access the **Holiday Configuration**, select **Holiday Configuration** in the **Settings** Module. A **Holidays** listing window similar to the one shown in Figure 3-36 displays.

Use the **Year** filter list at the top of the window to display a list of holidays for the selected calendar year. The list can display up to five years of holidays from the current year.



Holidays

Add Holidays

Year 2022

NAME	DATE	
Martin Luther King Day	01-17-2022	Edit | Remove
Extra Holiday - Valentine's Day	02-14-2022	Edit | Remove
President's Day	02-21-2022	Edit | Remove
Memorial Day	05-30-2022	Edit | Remove
Juneteenth	06-20-2022	Edit | Remove
Independence Day	07-04-2022	Edit | Remove
Labor Day	09-05-2022	Edit | Remove
Employee Appreciation Holiday	09-19-2022	Edit | Remove
Apple Festival Day	09-30-2022	Edit | Remove
Columbus Day	10-10-2022	Edit | Remove
Veteran's Day	11-11-2022	Edit | Remove
Thanksgiving Day	11-24-2022	Edit | Remove
Christmas Day	12-26-2022	Edit | Remove

Figure 3-36: Sample Holidays listing window

Use the **Year** filter list at the top of the window (Figure 3-37) to display a list of holidays for the selected calendar year.

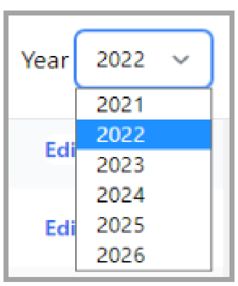


Figure 3-37: Year filter list

The list can display up to **five years** of holidays starting with the current year.

3.4.1 Add Federal Holidays

To add **Federal Holidays** to a clinic's schedule:

1. Click the **Add Holidays drop-down arrow** (Figure 3-38) in the upper-right corner of the **Holidays** window.

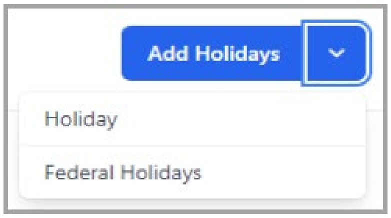


Figure 3-38: Add Holidays drop-down list

2. Select **Federal Holidays** to display the **Federal Holidays** dialog (Figure 3-39). The system defaults to the current year.

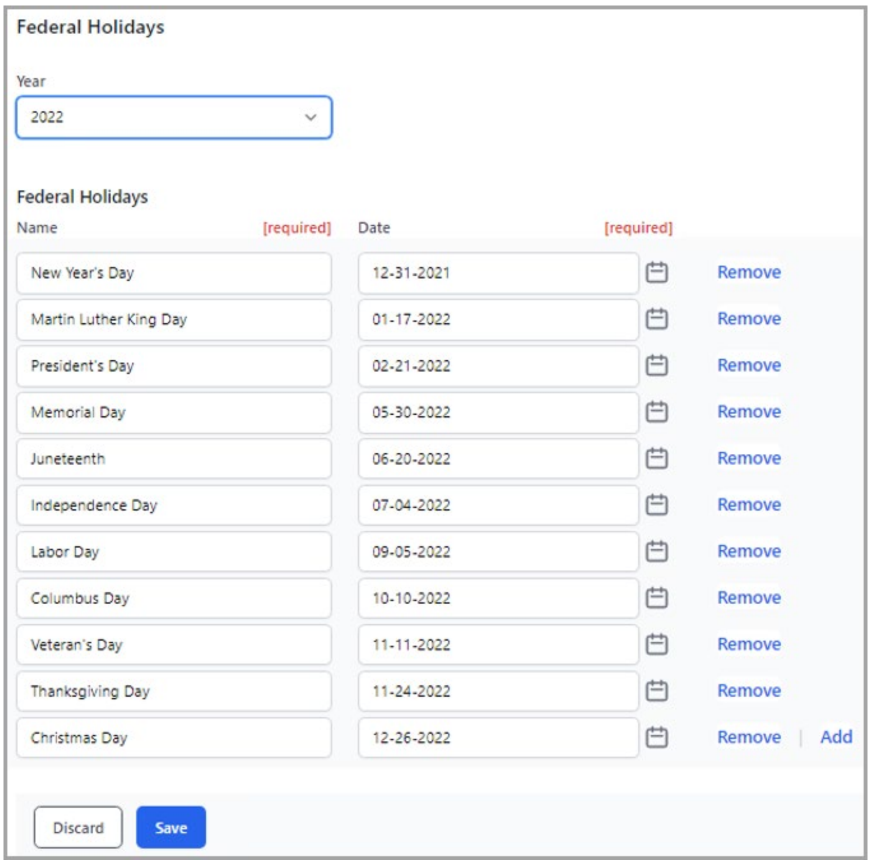


Figure 3-39: Federal Holidays listing dialog

3. Select the **Year** from the **drop-down list** to select which calendar year to apply the federal holidays for all clinic schedules. In the example (Figure 3-40), the year 2023 has been selected to apply federal holidays to.

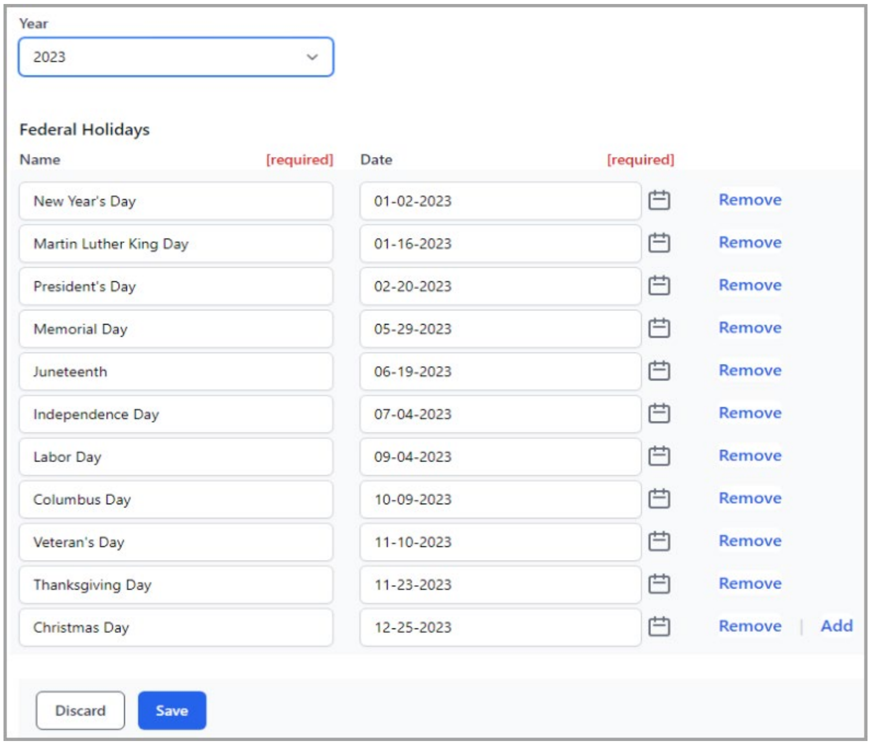


Figure 3-40: Edit Federal Holidays dialog

4. Click **Remove** to the right of any holiday date that is not recognized as a **federal holiday** for the particular clinic schedule.

5. Click **Add** at the bottom right of the dialog to add a holiday not listed in the current federal holidays. The **Add Holiday** dialog (Figure 3-41) displays with two required fields.

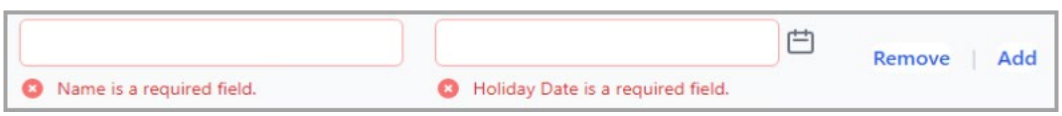


Figure 3-41: Add Holiday dialog

- **Name:** This is a required field. Add the name of the new holiday.
- **Holiday Date:** This is a required field. Add the date of the new holiday.

6. Once you have completed the edit, click **Save** to confirm the changes or **Discard** to close the section without saving. The **Confirm Closing** message (Figure 3-42) displays.

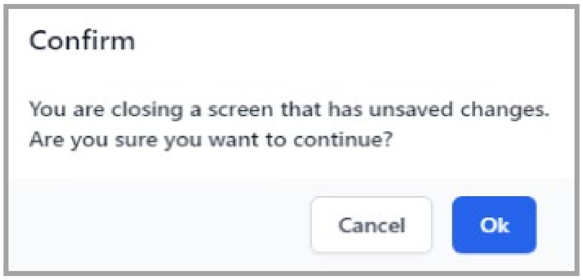


Figure 3-42: Confirm Closing message

7. Click **OK**.
8. The **Federal Holidays** window (Figure 3-43) displays with any changes made applied to the **clinic schedules** for the selected year.

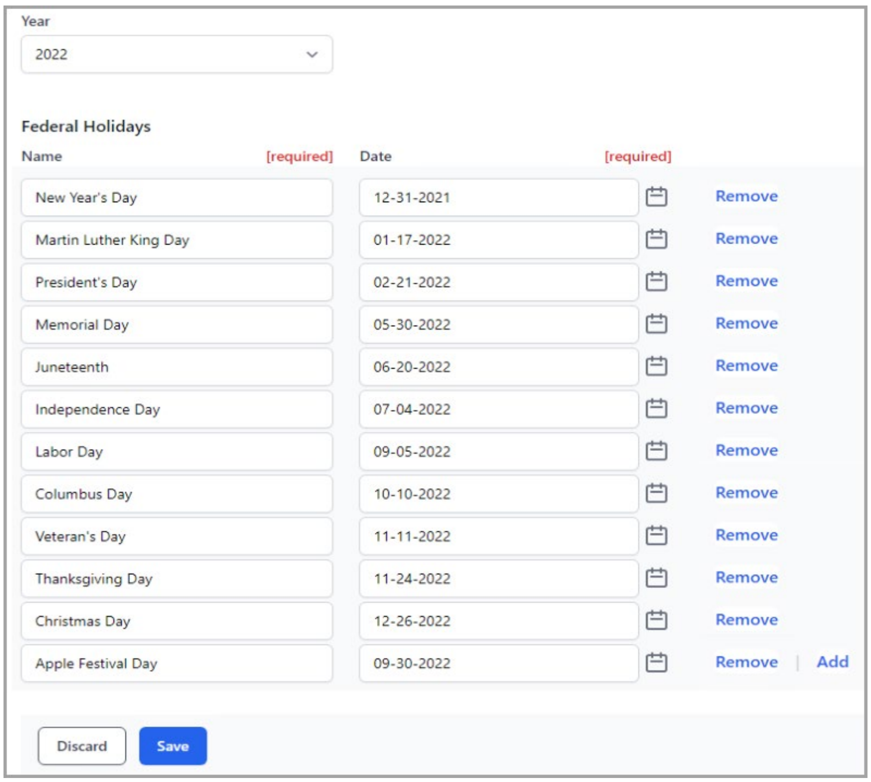


Figure 3-43: Federal Holidays listing window – New dates added

3.4.2 Add Site-Specific Holidays

To add non-federal holidays to clinic schedules:

1. Click **Add Holidays** in the upper-right corner of the **Holiday** window and then select **Holiday** to display the **Holidays** dialog (Figure 3-44).

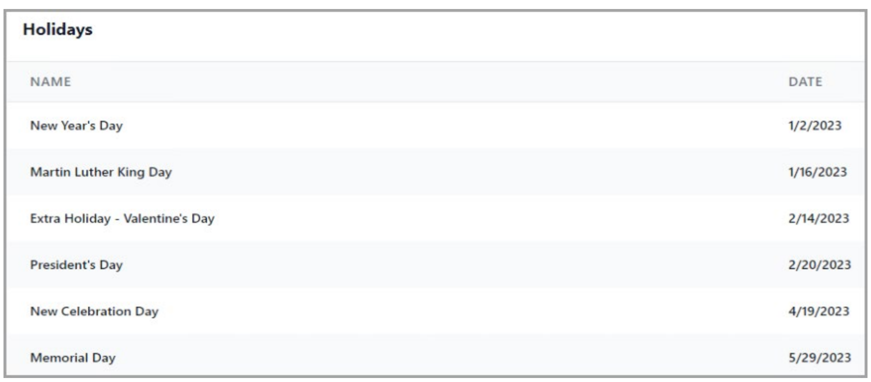
Figure 3-44: Add Holidays dialog

2. Type a **name** for the site-specific holiday in the **Name** field (Figure 3-45) and select the **date** that this holiday will occur.

Figure 3-45: Add Holiday dialog new holiday

3. Once you have completed the edit, click **Save** to confirm the changes or click **Discard** and the changes will not be saved.

   The **Holidays** window now displays the newly added holiday for the selected year (Figure 3-46).



NAME	DATE
New Year's Day	1/2/2023
Martin Luther King Day	1/16/2023
Extra Holiday - Valentine's Day	2/14/2023
President's Day	2/20/2023
New Celebration Day	4/19/2023
Memorial Day	5/29/2023

Figure 3-46: Holidays listing window – New holiday added

3.4.3 Edit Holiday Name

To edit the name for an existing **Holiday**:

1. Decide on the **Holiday** you want to edit and click **Edit** to the right of the name. The **Holiday** dialog displays (Figure 3-47).

Figure 3-47: Editing an Access Type

2. Make any changes necessary to the **Holiday** name, and then click **Save** to save the changes or click **Discard** to close the window without saving the changes.

3.4.4 Delete Holidays

To delete an existing **Holiday** and remove it from the clinic schedules:

1. Decide on the **Holiday** you want to delete and click **Remove** to the right of the name. The following Alert (Figure 3-48) displays.

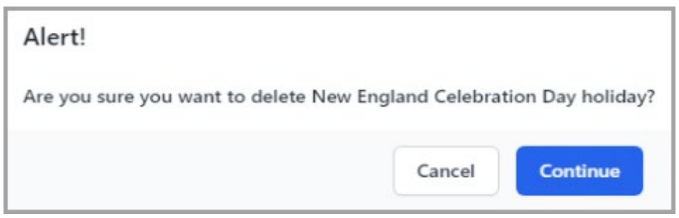


Figure 3-48: Confirm Holiday deletion warning message

2. Click **Continue** to confirm deletion or click **Cancel** to close the window without saving the change.

3.5 Letter Templates

A variety of appointment letters can be generated and printed. The **Letter Templates** option allows users to create the following types of appointment letter templates as described in Table 3-6. These letters can serve as reminders about upcoming or missed appointments.

Table 3-6: Clinic Letters pane fields

Field	Description
Pre-Appointment Letter	Use this letter type to create a letter template for an appointment that was scheduled but the patient has not been Checked-In. (Appointment status = SCHEDULED)
Clinic Cancelled Letter	Use this letter type to create a letter template for an appointment that was cancelled by the clinic. (Appointment status = CANCELLED BY CLINIC)

Field	Description
Appointment Cancelled Letter	Use this letter type to create a letter template for an appointment that was cancelled. (Appointment status = CANCELLED BY PATIENT)
No-Show Letter	Use this letter type to create a letter template for an appointment that was marked a No Show due to the patient not showing up. (Appointment status = NO SHOW)

Once the **Letter Templates** are created, users can print both **Batch** and **Individual Letters** in the following ways:

- **Batch Letters** can be printed from **Reports – Print Letters** option (see Section 4.2.6) or from the **Scheduling Workspace** by using the **Letters button** (see Section 2.1.5).
- **Individual Letters** can be printed by using the **Context Menu** (See Section 2.5.2) from the **Scheduling Workspace** and **List** views.

> **Note:** Once the **Letter Templates** are created, the user should pre-select the **Letter Template** to use at the selected clinic for each **Letter Type** as described in Section 3.2.7.

3.5.1 Create a New Letter Template`

Each type of appointment letter template uses a similar format. The **date printed**, **patient HRN**, **patient name**, **appointment date and time**, and **clinic name** are automatically inserted into the text of the letter. You can add or edit additional text as necessary for each type of appointment letter template.

The examples shown in this section show the creation of a new **No-Show** letter template. The steps are the same for each of the different letter types.

To create a new **Letter Template**:

1. Click **Settings** and then **Letter Templates**.
2. Click **Add Letter Template** on the top-right side of the window. The **Add Letter Template** dialog (Figure 3-49) displays. **No-Show** has been selected.

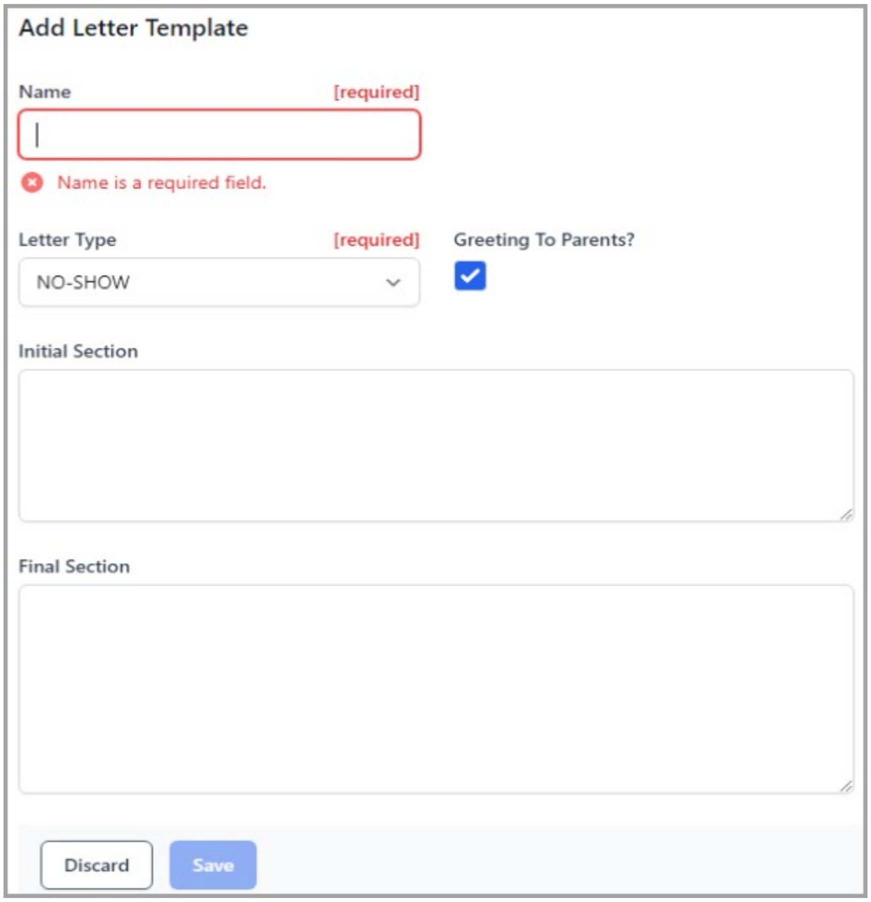


Figure 3-49: Add Letter Template dialog

3. Select the **Letter Type** from the list (Figure 3-50) and type the name you want to give the new letter template in the **Name** field.

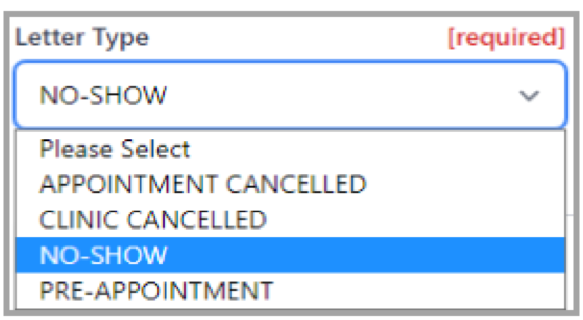


Figure 3-50: Letter Type drop-down list

For this example, the letter template is named **NO SHOW EXAMPLE**.

4. Select the **Greetings to parents?** check box if you want the salutation of the letter to be addressed to the patient's parents. This is useful for letters sent to pediatric patients.

5. Type the text you want to appear in the letters in the **Initial Section** and **Final Section** fields of the **Letter Configuration** dialog.

   The text you type in the **Initial Section** is displayed after the salutation of the letter, but before the appointment date, time, and clinic section (which is automatically generated by the system). Text in the **Final Section** will be displayed after the appointment date, time, and clinic section.

   Figure 3-51 shows an example of the letter configuration dialog after adding text to the appropriate fields.

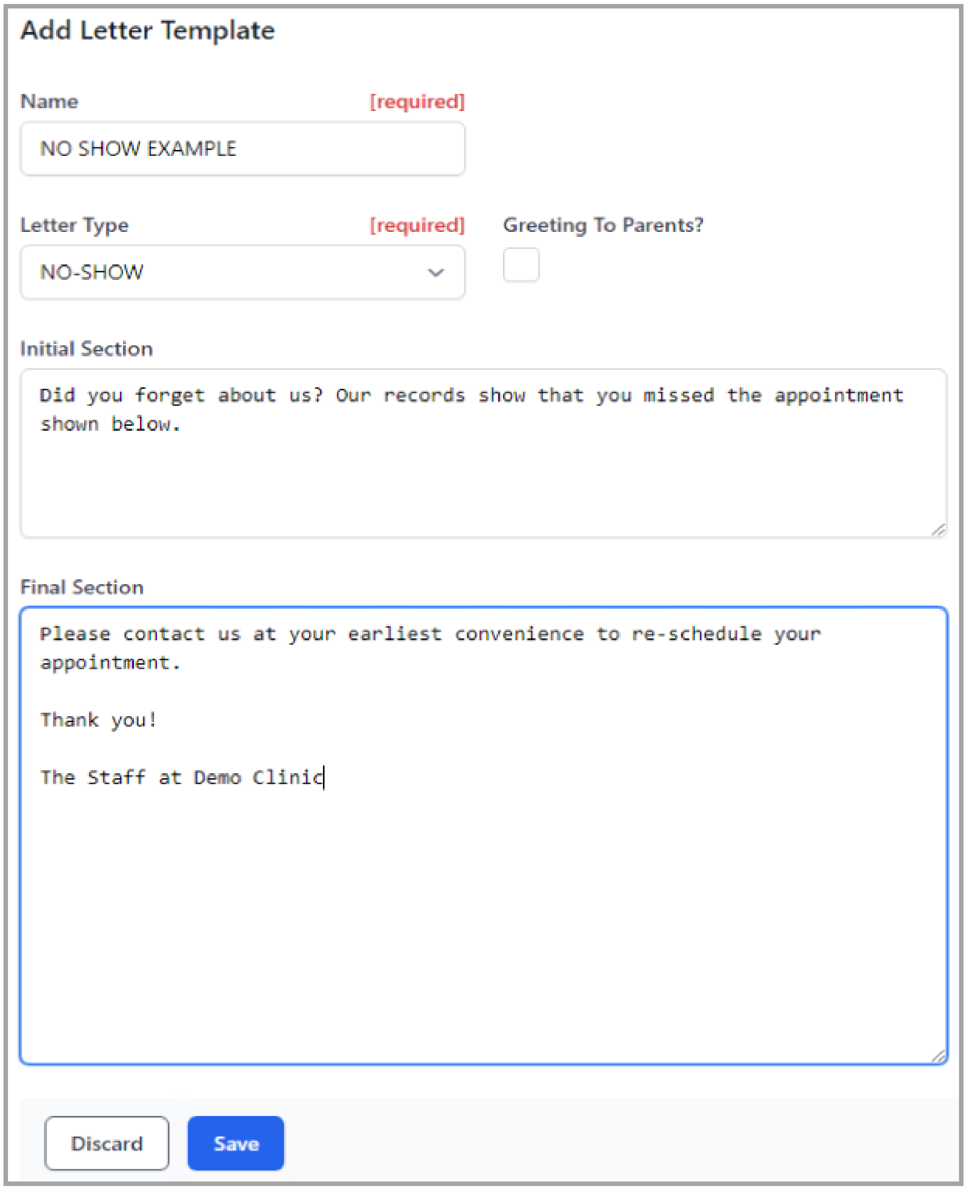


Figure 3-51: Completed Letter Template Configuration dialog

6. After adding the desired text, click **Save** to save the new letter template and close the dialog or click **Discard** to close without saving.

3.5.2 Modify an Existing Letter Template

Existing letter templates are modified in a manner similar to creating a new one. To edit a **Letter Template**:

1. Click **Settings** and then **Letter Templates**.
2. Use the **Filter by Name** search to find the **Letter Template** to modify. You can also use the scroll bar at the bottom of the screen.
3. Select **Edit** for the **Letter Template** you want to modify.
4. Make any desired changes to the **text** of the letter template.
5. Click **Save** to save the **Letter Template** and close the **Letter Configuration** dialog or click **Discard** to close without saving.

3.6 Resource Groups

Resource Groups (Figure 3-52) are user-defined lists of clinic resources grouped together to streamline appointment scheduling for those resources.

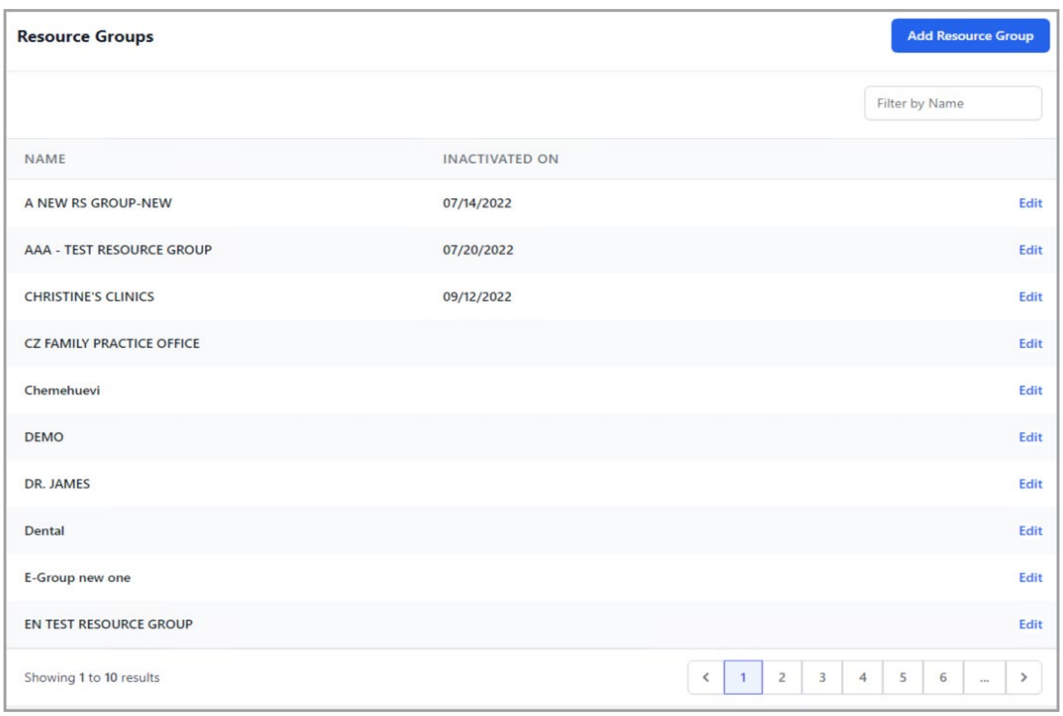


Figure 3-52: Resource Groups window

These resources can include providers (such as dentists and physicians), facilities, equipment, or other kinds of scheduled services.

> **Note:** A resource must first be on the **Clinics** list before it can be included in a **Resource Group**.

By grouping resources/clinics together, appointment schedules for these combined resources can be easily selected and displayed at the same time in the **Scheduling** module.

3.6.1 Add a Resource Group

To add a new **Resource Group**:

1. Click **Settings** and then **Resource Groups**.
2. Click **Add Resource Group** on the top-right side of the window. The **Resource Group** dialog (Figure 3-53) displays.

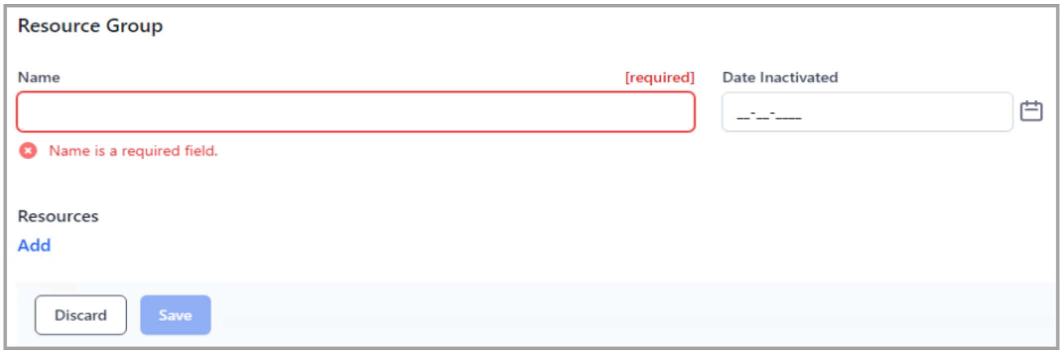


Figure 3-53: Resource Group dialog

3. Type the **Name** of the **Resource Group** and the **Date Inactivated**.
4. Click **Add** under **Resources** in the lower-left corner of the **Resource Group Name** dialog to add a **Resource Name** (Figure 3-54).

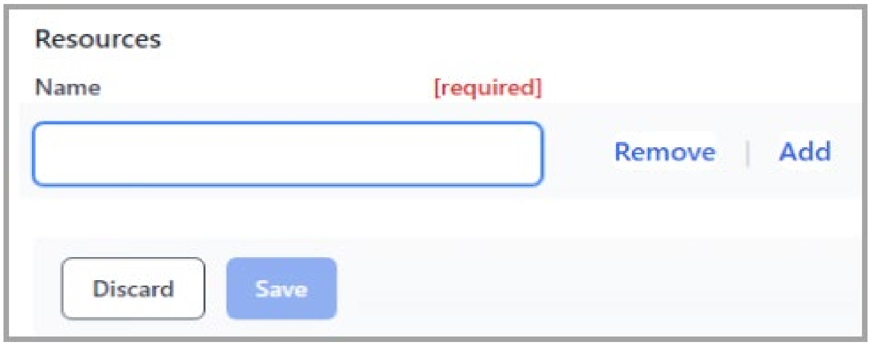


Figure 3-54: Resource Group name dialog

5. Type a name for the **Resource Group** in the **Name** field.

6. Use the **Group Resources** search field to find and select one or more clinics or resources to add to the **Resource Group**.

   In the example shown in Figure 3-55, a **Resource Group** named **XYZ GROUP** was created. The **DEMO CLINIC** has been added to the group.

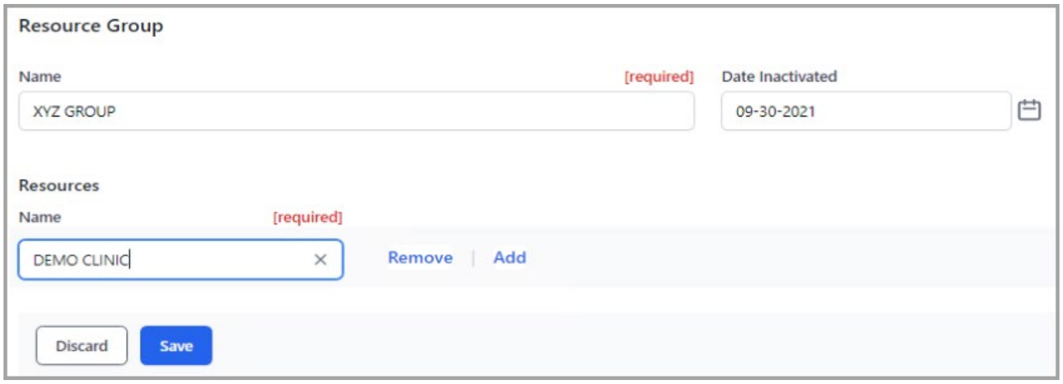


Figure 3-55: Adding a Group Resource

7. When all the desired resources have been added to the group, click **Save** to save the group or click **Discard** to close the window without saving the changes.

3.6.2 Edit a Resource Group

To edit an existing **Resource Group**:

1. Select **Settings** and then **Resource Groups**.

2. Use the **Filter by Name** search to find the **Resource Group** to modify. You can also use the scroll bar at the bottom of the screen.

3. Select **Edit** for the **Resource Group** you want to edit.

   The **Resource Group** edit dialog (Figure 3-56) displays.

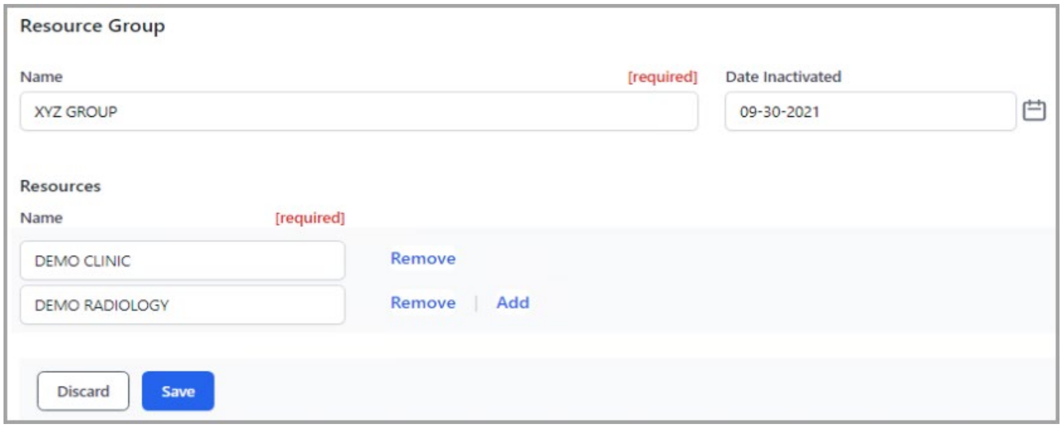


Figure 3-56: Resource Group edit dialog

4. From this window, you can edit the **Name** of the **Resource Group**, add resources to the group as described in **Add a Resource Group** or remove resources by clicking **Remove** to the right of the resource name.

   - Optionally, you can inactivate the **Resource Group** by entering a date in the **Inactivation Date** field. To re-activate a **Resource Group**, clear the date in this field.

5. When the desired changes are complete, click **Save** to save the changes or click **Discard** to close the window without saving the changes.

Note: You must log out and then log back in to BPRM for any changes made to take effect.

4.0 Scheduling Reports

The Practice Management Application Suite includes the **Reports** module, which produces a variety of reports regarding practice management. This chapter describes the scheduling-related reports available from the **Reports** module.

4.1 Reports Module Overview

The **Reports** module collects specific information from the RPMS database, and then formats the information for on-screen viewing or printing. You can also print reports as well as save them in a variety of different file formats.

Open the **Reports** module by clicking **Reports** (lower-left corner), as shown in (Figure 4-1).

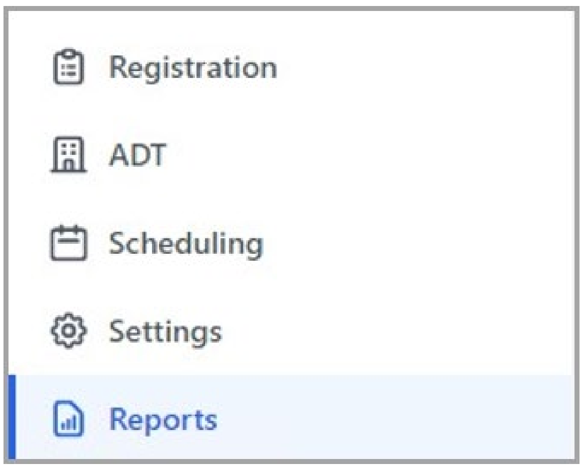


Figure 4-1: Accessing the Reports module

4.1.1 Reports – Preview and Print Options

For every report in **Reports** module, the user can view the report results in a couple of ways. After selecting the appropriate report parameters:

- Click **Preview** to view the report on the screen
- Click **Print** to print the report to an RPMS Device or to the Browser

Figure 4-2 shows the Preview and Print options for all reports.

Figure 4-2: Preview and Print options

4.1.2 Reports – Page Selection

For every report in the **Reports** module, the user can utilize the following **Page Selection** buttons (Figure 4-3) to navigate through multi-page reports.

- Use the **middle arrows** ( ) to move through the report one page at a time.
- Use the **arrows with the bar** ( ) to quickly go to the beginning or the end of the report.

Figure 4-3: Page Selection buttons

4.1.3 Reports – Zoom Options

For every report in the **Reports** module, the user can utilize the following **Zoom In** and **Out** functions (Figure 4-4) to either **Zoom In** or **Zoom Out** within the page view of the report.

- Use the and buttons to manually adjust the report view.
- Use the **100% picklist** option to set a specific report view (includes **Fit Page** and **Fit Width**).

Figure 4-4: Zoom buttons

4.2 Scheduling Report Types

Once the **Reports** module is open, a listing of the available scheduling-related reports displays as shown in Figure 4-5.

Figure 4-5: Scheduling Reports

Click any **report name** to open that report. After opening a report, you must provide additional parameters (such as **Start** and **End** dates, **Status**, **Sort By**, etc.) in order to view the report.

4.2.1 Appointments Requiring Actions Report

The **Appointments Requiring Actions** report shows detailed information about patient appointments for a specific date.

4.2.1.1 Appointments Requiring Actions Report Parameters

The **Appointments Requiring Action Report** has fields for these parameters:

- Clinics
- Start Date
- End Date

Figure 4-6 shows the parameters of the **Appointments Requiring Actions Report**.

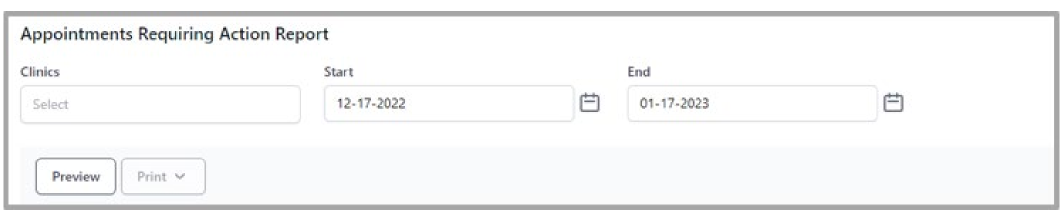


Figure 4-6: Appointments Requiring Action Report parameters dialog

1. Select a **single clinic** or **multiple clinics** from the **Clinics** list or choose **<Select All>** to quickly select all clinics.
2. Specify the **Start** and **End dates** for the period of time you want reflected in the report. By default, the **Start date** is set to last month and the **End date** is set to today’s date.

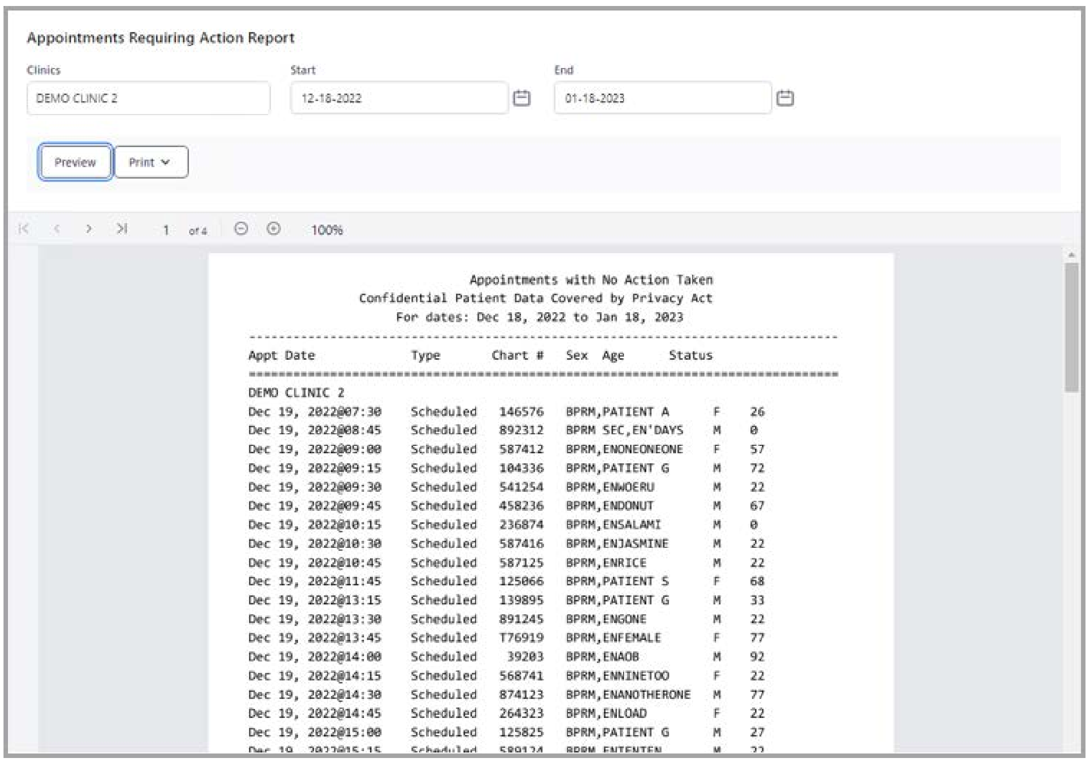
3. After selecting the appropriate **report parameters**, click **Preview** to view the report.

4.2.1.2 Information in the Appointments Requiring Action Report

The **Appointments Requiring Action Report** includes the following information for each appointment matching the specified report parameters:

- Clinic Name
- Appointment Date
- Appointment Time
- Appointment Type
- Patient Chart #
- Patient name
- Sex

Figure 4-7 shows an example of an **Appointments Requiring Action** report.




```
                    Appointments with No Action Taken
          Confidential Patient Data Covered by Privacy Act
                For dates: Dec 18, 2022 to Jan 18, 2023
--------------------------------------------------------------------------------
Appt Date            Type       Chart #   Sex  Age      Status
================================================================================
DEMO CLINIC 2
Dec 19, 2022@07:30   Scheduled   146576   BPRM,PATIENT A      F    26
Dec 19, 2022@08:45   Scheduled   892312   BPRM SEC,EN'DAYS    M    0
Dec 19, 2022@09:00   Scheduled   587412   BPRM,ENONEONEONE    F    57
Dec 19, 2022@09:15   Scheduled   104336   BPRM,PATIENT G      M    72
Dec 19, 2022@09:30   Scheduled   541254   BPRM,ENWOERU        M    22
Dec 19, 2022@09:45   Scheduled   458236   BPRM,ENDONUT        M    67
Dec 19, 2022@10:15   Scheduled   236874   BPRM,ENSALAMI       M    0
Dec 19, 2022@10:30   Scheduled   587416   BPRM,ENJASMINE      M    22
Dec 19, 2022@10:45   Scheduled   587125   BPRM,ENRICE         M    22
Dec 19, 2022@11:45   Scheduled   125066   BPRM,PATIENT S      F    68
Dec 19, 2022@13:15   Scheduled   139895   BPRM,PATIENT G      M    33
Dec 19, 2022@13:30   Scheduled   891245   BPRM,ENGONE         M    22
Dec 19, 2022@13:45   Scheduled   T76919   BPRM,ENFEMALE       F    77
Dec 19, 2022@14:00   Scheduled    39203   BPRM,ENAOB          M    92
Dec 19, 2022@14:15   Scheduled   568741   BPRM,ENNINETOO      F    22
Dec 19, 2022@14:30   Scheduled   874123   BPRM,ENANOTHERONE   M    77
Dec 19, 2022@14:45   Scheduled   264323   BPRM,ENLOAD         F    22
Dec 19, 2022@15:00   Scheduled   125825   BPRM,PATIENT G      M    27
```

Figure 4-7: Appointments Requiring Action Report example

4.2.2 Cancelled Appointment Report

The **Cancelled Appointment Report** shows information about appointments that were cancelled by the patient or the clinic over a specified time period.

4.2.2.1 Cancelled Appointment Report Parameters

The **Cancelled Appointment Report** has fields for these parameters:

- Clinics
- Start Date
- End Date
- Cancelled By

Figure 4-8 shows the parameters of the **Cancelled Appointment Report**.

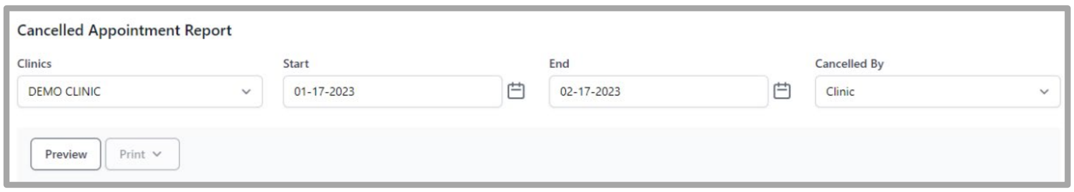


Figure 4-8: Cancelled Appointment Report parameters

1. Select a **clinic** from the **Clinics** list.
2. Specify the **Start** and **End** dates for the period of time you want reflected in the report. By default, the **Start** date is set to today's date and the **End** date is set to next month.
3. The **Cancelled By** field offers the following options:
    - Clinic – This includes appointments marked as **Cancelled by Clinic**.
    - Patient – This includes appointments marked as **Cancelled by Patient**.
4. After selecting the appropriate parameters, click **Preview** to view the report.

4.2.2.2 Information in the Cancelled Appointment Report

The **Cancelled Appointment Report** includes the following information for each appointment matching the specified report parameters:

- Cancelled by Type (Clinic/Patient)
- Date Range selected
- Clinic name
- Patient Name
- Phone
- HRCN
- Appointment Date and Time
- Cancellation Reason

- Notes (if present)

Figure 4-9 shows an example of a **Cancelled Appointment Report**.

Figure 4-9: Cancelled Appointment Report example

4.2.3 Clinic Schedule Report

The **Clinic Schedule Report** shows the appointments for a clinic or clinics for a specified time period.

4.2.3.1 Clinic Schedule Report Parameters

The **Clinic Schedule Report** has fields for these parameters:

- Clinics
- Start Date
- End Date

Figure 4-10 shows the parameters of the **Clinic Schedule Report**.

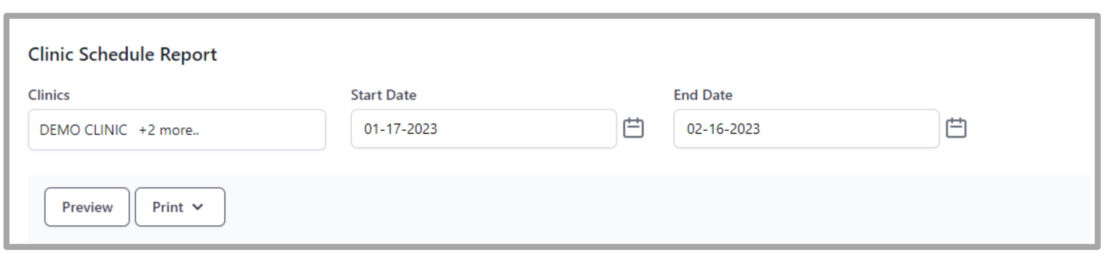


Figure 4-10: Clinic Schedule Report parameters

1. Select a **single clinic** or **multiple clinics** from the **Clinics** list or choose **<Select All>** to quickly select all of them.

2. Specify the **Start** and **End** dates for the period of time you want reflected in the report. By default, the **Start** date is set to **Today** and the **End** date is set to next month.
3. After selecting the appropriate **report parameters**, click **Preview** to view the report.

4.2.3.2 Information in the Clinic Schedule Report

The **Clinic Schedule Report** includes the following information for each appointment matching the specified report parameters:

- Date Range selected
- Clinic Name
- Appointment Date and Time
- Appointment Status and Updated By
- Chart #
- Patient's name, residence phone, DOB, and age
- Other Info

Figure 4-11 shows an example of a typical **Clinic Schedule** report.

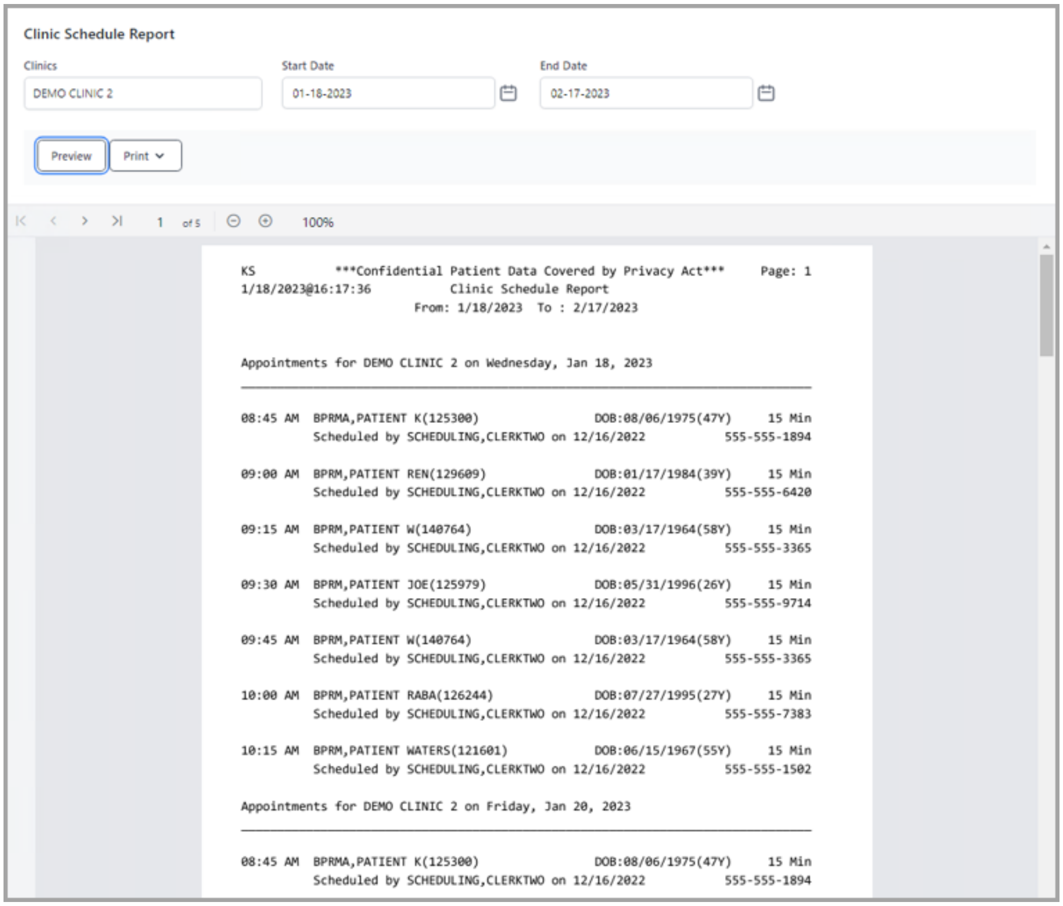


Figure 4-11: Clinic Schedule Report example

4.2.4 Clinic Workload Report

The **Clinic Workload Report** shows statistical information about scheduled and unscheduled appointments over a specified time period.

4.2.4.1 Clinic Workload Report Parameters

The **Clinic Workload Report** has fields for these parameters:

- Clinics
- Start Date
- End Date
- Report Format
- Compare to Previous Year

Figure 4-12 shows the parameters of the **Clinic Workload Report**.

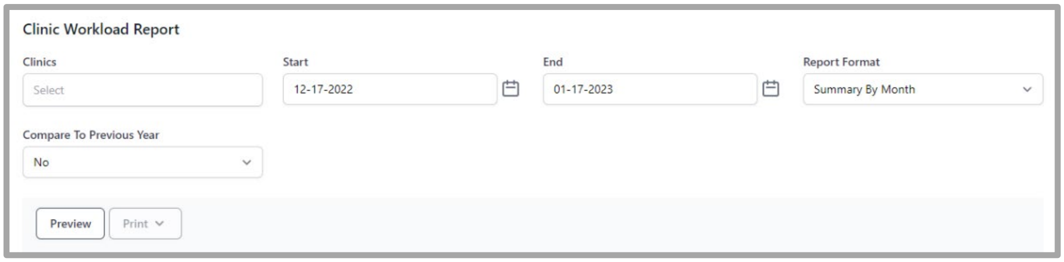


Figure 4-12: Clinic Workload Report parameters

1. Select a **single clinic** or **multiple clinics** from the **Clinics** list or choose **<Select All>** to quickly select all clinics.
2. Specify the **Start** and **End** dates for the period of time you want reflected in the report. By default, the **Start** date is set to last month and the **End** date is set to today's date.
3. The **Report Format** field offers the following options:
    - Summary by Month
    - Detail By Day

    The default for **Compare to Previous Year** is **No**.
4. After selecting the appropriate **report parameters**, click **Preview** to view the report.

4.2.4.2 Information in the Clinic Workload Report

The **Clinic Workload Report** includes the following information for the specified report parameters:

- Clinic Name
- Date
- Number of Scheduled Appointments
- Number of Unscheduled Appointments
- Number of Over-books
- Number of Add/Edits
- Number of No-shows
- Number of Canceled Appointments
- Total Number of Patients Seen

Figure 4-13 shows an example of a **Clinic Workload Report**.

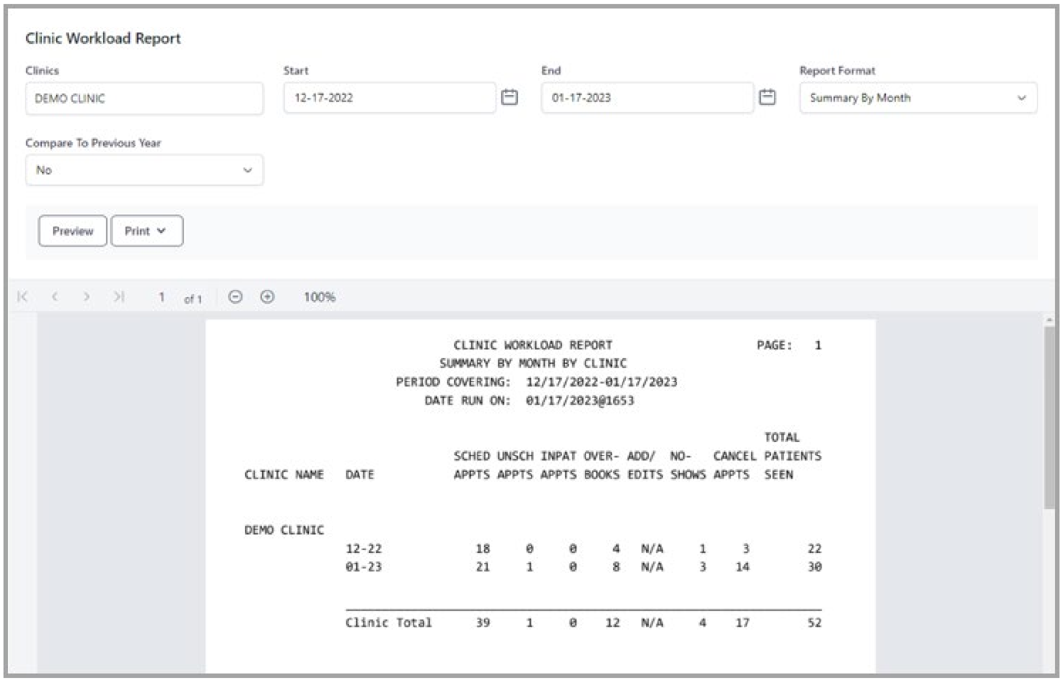


Figure 4-13: Clinic Workload Report example – Summary by Month

Figure 4-14 shows an example of a **Clinic Workload Report – Comparison Summary** page.

```
                      CLINIC WORKLOAD REPORT                 PAGE:   7
                 COMPARISON OF VISITS TO PREVIOUS YEAR
               FOR PERIOD COVERING:  09/26/2022-10/26/2022
                     REPORT RUN ON:  10/26/2022@1339

________________________________________________________________________________
|                        |                 |                 |        |        |
|                        |   # OF VISITS   |   # OF VISITS   |  NET   |   %    |
|       Clinic Name      |09/26/22-10/26/22|09/26/21-10/26/21| CHANGE | CHANGE |
|________________________|_________________|_________________|________|________|
|________________________|_________________|_________________|________|________|
|                        |                 |                 |        |        |
|BLUE CLINIC             |              24 |               0 |  24.00 |    N/A |
|CLINIC DEMO-2           |               8 |               0 |   8.00 |    N/A |
|DEMO CLINIC             |               2 |               5 |  -3.00 | -60.00 |
|TW-ALL NO CLINIC        |              30 |               0 |  30.00 |    N/A |
|TW-ALL YES CLINIC       |              11 |               0 |  11.00 |    N/A |
|TW-TEST                 |               1 |               0 |   1.00 |    N/A |
|________________________|_________________|_________________|________|________|
```

Figure 4-14: Clinic Workload Report – Comparison Summary page

4.2.5 No Show Report

The **No Show Report** shows information about appointments that the patient never showed up for and there was no cancellation by the patient over a specified date range.

4.2.5.1 No Show Report Parameters

The **No Show Report** has fields for these parameters:

- Clinics
- Start Date
- End Date
- Print Report Totals Only

Figure 4-15 shows the parameters of the **No Show Report**.

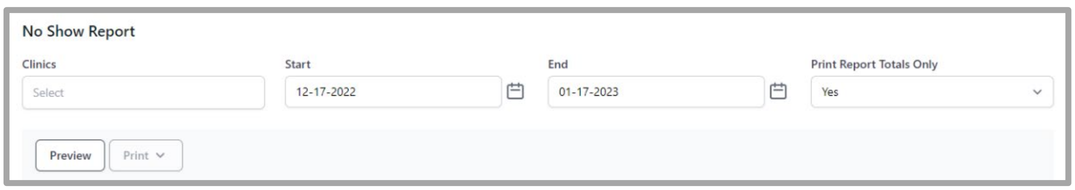


Figure 4-15: No Show Report parameters

1. Select a **single clinic** or **multiple clinics** from the **Clinics** list or choose **<Select All>** to quickly select all clinics.
2. Specify the **Start** and **End** dates for the period of time you want reflected in the report. By default, the **Start** date is set to last month and the **End** date is set to today's date.
3. The **Print Report Totals Only** field defaults to **Yes**.
4. After selecting the appropriate **parameters**, click **Preview** to view the report.

4.2.5.2 Information in the No Show Report

The **No Show Report** includes the following information for each appointment matching the specified report parameters:

- Date Range Selected
- Division
- Clinic Name
- Number of Without Rebooked Appointments
- Number of With Rebooked Appointments

- Total No-Show Appointments
- Percent No-Shows

Figure 4-16 shows an example of a **No Show Report**.

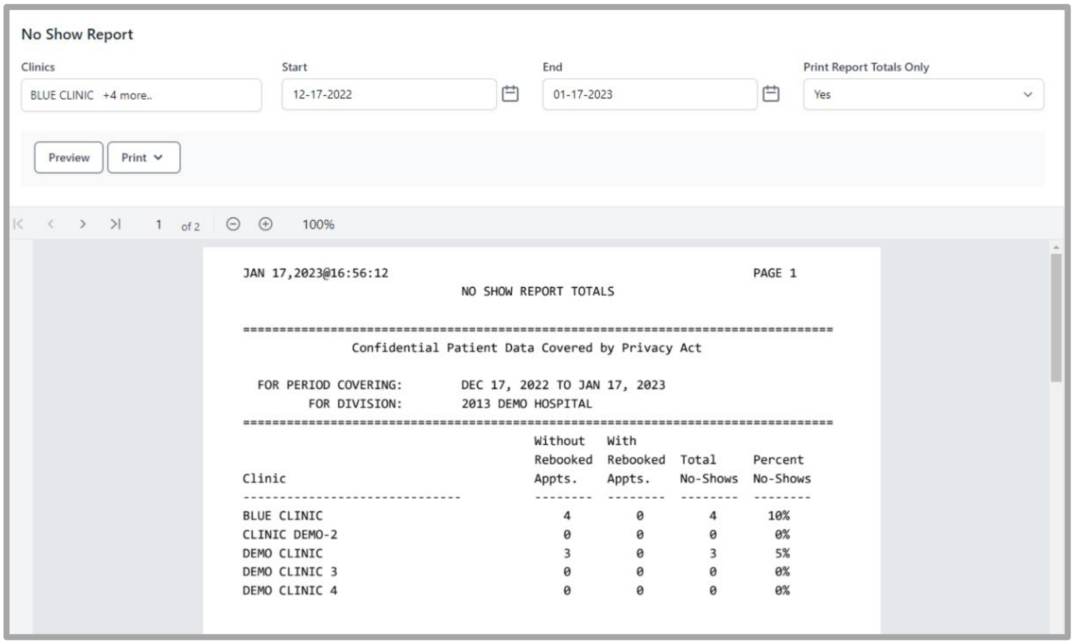


Figure 4-16: No Show Report example – Details

Figure 4-17 shows an example of a **No Show Report – Report Totals page**.

```
OCT 26,2022@13:46:22                                               PAGE 1
                              NO SHOW REPORT TOTALS

==================================================================================
               Confidential Patient Data Covered by Privacy Act

  FOR PERIOD COVERING:        SEP 26, 2022 TO OCT 26, 2022
         FOR DIVISION:        2020 DEMO HOSPITAL
==================================================================================
                                       Without   With
                                       Rebooked  Rebooked  Total     Percent
Clinic                                  Appts.    Appts.    No-Shows  No-Shows
------------------------------          --------  --------  --------  --------
BLUE CLINIC                                 7         0         7       23%
CLINIC DEMO-2                               1         0         1       11%
DEMO CLINIC                                 0         0         0        0%
```

Figure 4-17: No Show Report – Report Totals page

4.2.6 Print Letters

The **Print Letters** option in the **Reports** module provides the user with **Batch Letter Printing** ability for all **Letter Types** (**Pre-Appointment**, **Clinic Cancelled**, **Appointment Cancelled**, and **No-Show**). **Batch Letter Printing** provides the ability to print one or more pre-configured appointment letters to be sent to patients. These letters can serve as reminders about upcoming or missed appointments.

Note:	Each letter type must be configured before it can be used at the clinic. See Section 3.5 for more information about configuring **Letter Templates** in the **Settings** module.

4.2.6.1 Print Letters Parameters

The **Print Letters** report has fields for these parameters:

- Clinics
- Letter Type
- Start Date
- End Date

Figure 4-18 shows the parameters of the **Print Letters Report**.

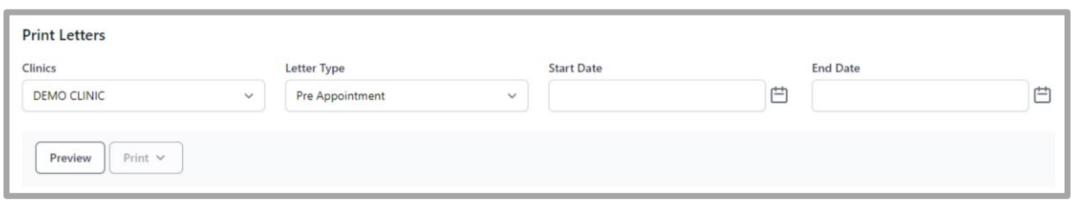


Figure 4-18: Print Letters parameters

1. Select a **clinic** from the **Clinics** list.
2. The **Letter Type** list offers these letter types:
    - Pre-Appointment (Default)
    - Clinic Cancelled
    - Appointment Cancelled
    - No-Show

    Table 4-1 provides additional information for each letter type.

Table 4-1: Letter Type descriptions

Field	Description
Pre-Appointment Letter	Use this letter type to print a letter for an appointment that was scheduled but the patient was not Checked-In. (Appointment status = SCHEDULED).
Clinic Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled by the clinic. (Appointment status = CANCELLED BY CLINIC).
Appointment Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled. (Appointment status = CANCELLED BY PATIENT).
No-Show Letter	Use this letter type to print a letter for an appointment that was marked a No Show due to the patient not showing up. (Appointment status = NO SHOW).

3. Specify the **Start Date** and **End Date** for the period of time for the appointments you want the letters generated.

4. After selecting the appropriate parameters, click **Preview** to generate the **appointment letters** and display a preview of them. Use the **Left** and **Right Arrows** in the toolbar to navigate from one letter to the next.

4.2.6.2 Batch Print Letters

To batch print one or more appointment letters:

1. In the **Clinics** list, select a **clinic** to print the **appointment letters** for.

2. Use the **Letter Type** list to select the **type of letter** to print.

3. In the **Start** and **End Date** fields, enter the **start** and **end dates** for the time period the appointment letters cover.

4. Click **Preview** to generate the **appointment letters** and display a preview of them. Use the **Left** and **Right Arrows** in the toolbar to navigate from one letter to the next.

   Figure 4-19 shows an example of a **Pre-Appointment Letter**.

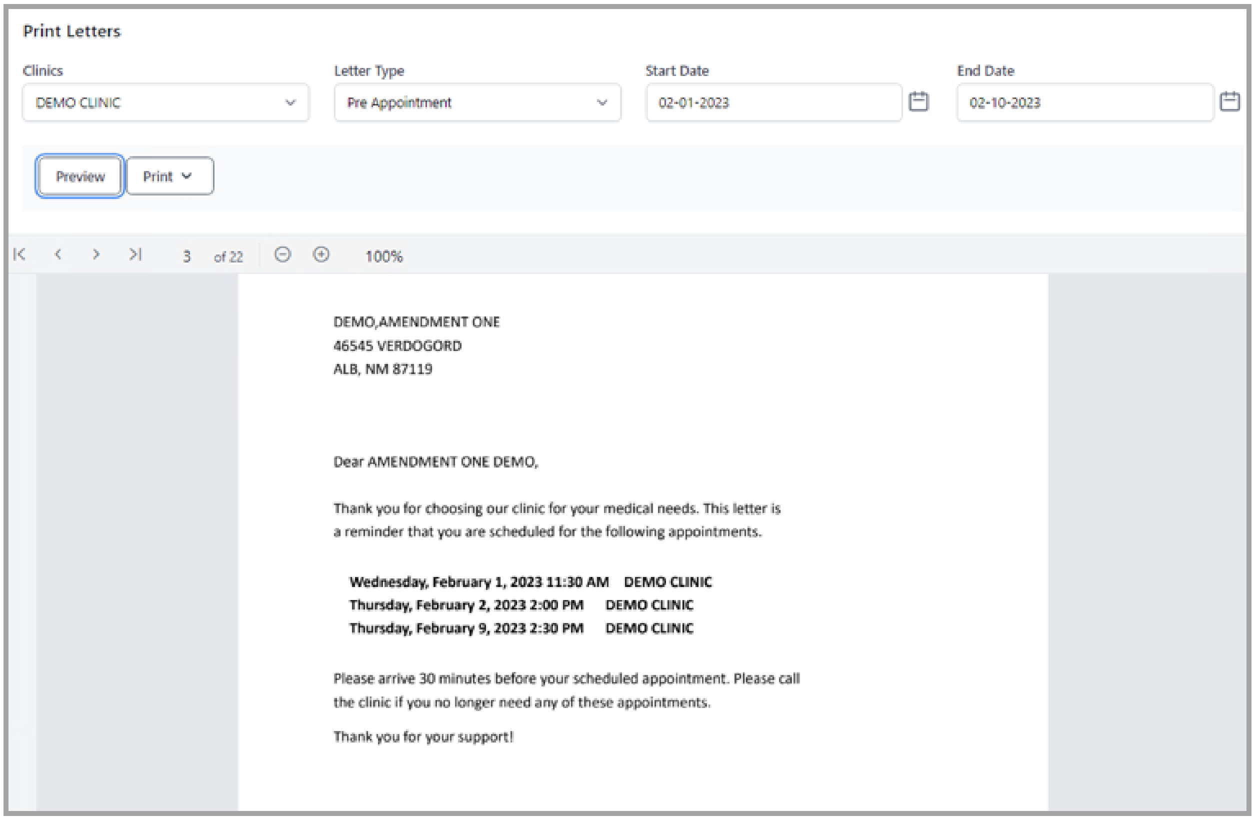


Figure 4-19: Print Pre-Appointment Letter example

4.2.7 Waiting List Report

The **Waiting List** report shows information about appointment waiting lists at a specific clinic covering a selected time period.

4.2.7.1 Waiting List Report Parameters

The **Waiting List Report** has fields for these parameters:

- Clinics
- Start Date
- End Date
- Date Range Type
- Include Removed Entries
- Sort By

Figure 4-20 shows the parameters of the **Waiting List Report**.

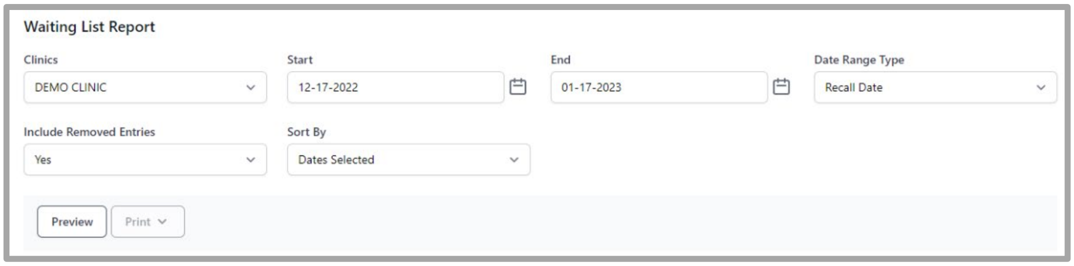


Figure 4-20: Waiting List Report parameters

1. Select a **clinic** from the **Clinics** list.
2. Specify the **Start** and **End Dates** for the period of time you want reflected in the report. By default, the **Start Date** is set to **Last Month** and the **End Date** is set to today's date.
   - The **Date Range Type** field offers the following options:
     – Recall Date (Default)
     – Date Added To List
     – Date Removed From List
   - **Include Removed Entries** field defaults to Yes.
   - The **Sort By** field offers the following options:
     – Dates Selected (Default)
     – Priority
     – Provider
     – Reason Added
     – Resolution
3. After selecting the appropriate **parameters**, click **Preview** to view the report.

4.2.7.2 Information in the Waiting List Report

The **Waiting List Report** provides detailed waiting list information for each selected clinic found within the date range and priority parameters you specify. This information includes the following:

- Clinic name
- Sort By Selected / Value
- Patient name
- Chart #
- Age
- Sex

- Home Phone
- Comments (if any have been added)
- Subtotals / Totals for groupings

Figure 4-21 shows an example of a **Waiting List Report**.

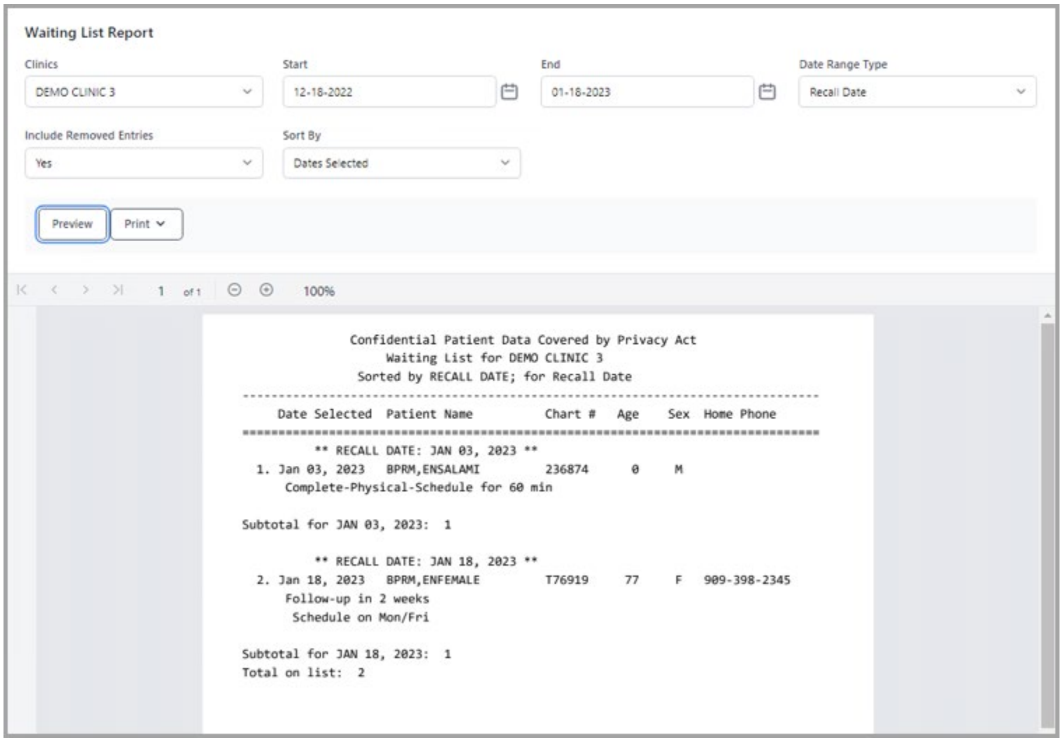


Figure 4-21: Waiting List Report example

5.0 Appointments Tab in Registration Module

The **Appointments** tab (Figure 5-1) shows a comprehensive listing of appointments for the **selected patient**.

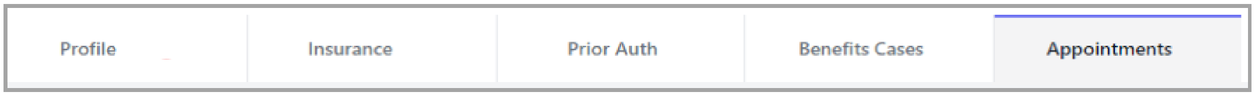


Figure 5-1: Appointments tab

An example of the **Appointments** tab window is shown in Figure 5-2.

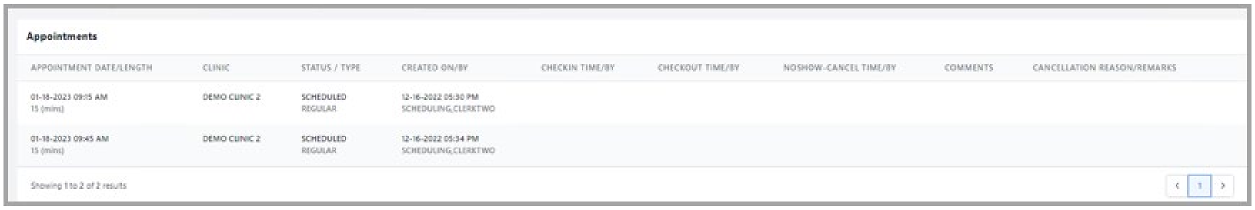


Figure 5-2: Appointments tab window example

5.1 Filter Appointments by Date

Use the **Date** panel to filter appointments (Figure 5-3). Users can select **All** appointments, **Today** appointments, **Past** appointments, or **Future** appointments.

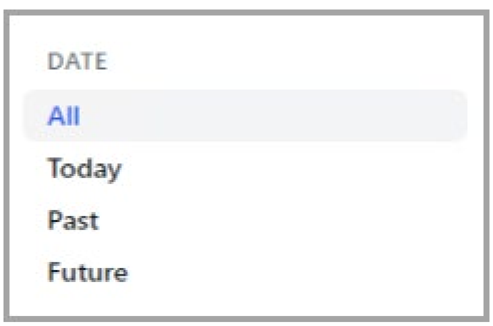


Figure 5-3: Date Panel Appointments Filter list

To filter, select one of the options on the **Date** panel and the **Appointments** window displays.

5.2 Appointment Information Listed

The following information is listed for each appointment (when applicable):

- Appointment Date/Length
- Clinic
- Status/Type

- Created On/By
- Check In Time/By
- Check Out Time/By
- No-Show – Cancel Time/By
- Comments
- Cancellation Reason/Remarks

5.3 Using the Context Menus

Context Menus offer a variety of options for working with **patient appointments**. These options are only available if the patient is in a **clinic** that the user has access to.

Right-click anywhere on an existing appointment line to open a context menu. Availability and options of **context menus** are dependent on the **appointment status**.

Refer to Section 2.5.2, Table 2-3 for additional information.

5.4 Print Options

The **Print** option (Figure 5-4) in the upper-right corner of the **Profile** window gives the user the option to print the **Face Sheet**, the patient's **Index Card**, **Wrist Band**, **Wellness Handout**, and **Future Appointments**.

Refer to the *BPRM Registration User Manual*, *Print Options*, for additional information.

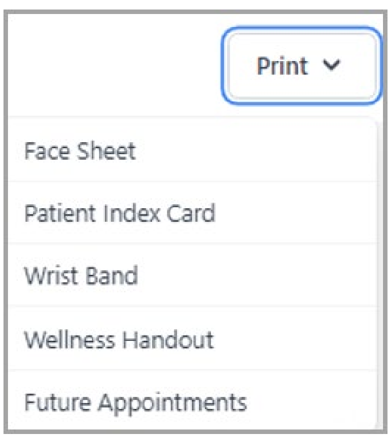


Figure 5-4: Print options drop-down list

Appendix A: Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is ***FOR OFFICIAL USE ONLY***. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (RoB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general ROB for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS Web site: http://security.ihs.gov/.

The ROB listed in the following sections are specific to RPMS.

A.1 All RPMS Users

In addition to these rules, each application may include additional RoBs that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

A.1.1 Access

RPMS users shall:

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.
- Be aware that personal use of information resources is authorized on a limited basis within the provisions *Indian Health Manual* Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not:

- Retrieve information for someone who does not have authority to access the information.

- Access, research, or change any user account, file, directory, table, or record not required to perform their *official* duties.
- Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their jobs or by divulging information to anyone not authorized to know that information.

A.1.2 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall:

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the functions they perform, such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

A.1.3 Accountability

RPMS users shall:

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Log out of the system whenever they leave the vicinity of their personal computers (PCs).
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)
- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.
- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4 Confidentiality

RPMS users shall:

- Be aware of the sensitivity of electronic and hard copy information, and protect it accordingly.
- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.
- Erase sensitive data on storage media prior to reusing or disposing of the media.
- Protect all RPMS terminals from public viewing at all times.
- Abide by all Health Insurance Portability and Accountability Act (HIPAA) regulations to ensure patient confidentiality.

RPMS users shall not:

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- Store sensitive files on a portable device or media without encrypting.

A.1.5 Integrity

RPMS users shall:

- Protect their systems against viruses and similar malicious programs.
- Observe all software license agreements.
- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not:

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.
- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6 System Logon

RPMS users shall:

- Have a unique User Identification/Account name and password.

- Be granted access based on authenticating the account name and password entered.
- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

A.1.7 Passwords

RPMS users shall:

- Change passwords a minimum of every 90 days.
- Create passwords with a minimum of eight characters.
- If the system allows, use a combination of alpha-numeric characters for passwords, with at least one uppercase letter, one lowercase letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- Change vendor-supplied passwords immediately.
- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).
- Change passwords immediately if password has been seen, guessed, or otherwise compromised, and report the compromise or suspected compromise to their ISSO.
- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not:

- Use common words found in any dictionary as a password.
- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user’s name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- Share passwords/IDs with anyone or accept the use of another’s password/ID, even if offered.
- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.
- Post passwords.
- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.
- Give a password out over the phone.

A.1.8 Backups

RPMS users shall:

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- Make backups of systems and files on a regular, defined basis.
- If possible, store backups away from the system in a secure environment.

A.1.9 Reporting

RPMS users shall:

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not:

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall:

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the window after some period of inactivity.

A.1.11 Hardware

RPMS users shall:

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- Keep an inventory of all system equipment.
- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not:

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall:

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that:

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall:

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not:

- Disable any encryption established for network, internet, and Web browser communications.

A.2 RPMS Developers

RPMS developers shall:

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.

- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access, and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Follow industry best standards for systems they are assigned to develop or maintain, and abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not:

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

A.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall:

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.

- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and backup files.
- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator’s database.
- Shall follow industry best standards for systems they are assigned to, and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not:

- Access any files, records, systems, etc., that are not explicitly necessary to perform their duties
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Glossary

Access Block

Access Blocks are color-coded representations of the amount of time allotted for a specific Access Type (or appointment).

Access Group

Access Groups are categories of Access Types. Assigning Access Types to Access Groups makes it easier to schedule and search for certain types of appointments.

Access Type

Access Types refer to the variety of different appointment types available in the RPMS. Each type of appointment, such as routine physical, dental, walk-in, or other specific appointment type is an Access Type.

Appointment Slots

Appointment slots are the number of appointments per defined appointment length. For example, if the number of slots is set to four and the clinic (resource) appointment length is 30 minutes, then there are four available appointments for every 30 minutes.

ASUFAC Number

ASUFAC Numbers are unique identifiers for each facility within IHS. A six-digit number comprised of two digits for Area, two digits for Service Unit, and two digits for Facility.

Health Record Number

Each facility assigns a unique number within that facility to each patient. Each HRN with its facility identification ASUFAC make a unique identifier within all of IHS.

Overbooking

Overbooking is a function that allows users to exceed the selected amount of appointment slots in a particular Access Block.

Preferred Resource List

The list of clinics displayed in the Clinics section on the left side of the Scheduling module main window.

Resource Group

Resource Groups are categories that help to organize the variety of resources available at each location.

Waiting List

A list created because a specific clinic or resource does not have an open appointment, or the user (clinic staff) chooses not to schedule an appointment. Patients on the waiting list serve as a reminder that an appointment must be created for the patient listed.

Acronym List

Acronym	Definition
BPRM	Practice Management Application Suite
GUI	Graphical User Interface
IHS	Indian Health Service
RPMS	Resource and Patient Management System

Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

Phone: (888) 830-7280 (toll free)

Web: http://www.ihs.gov/helpdesk/

Email: ITsupport@ihs.gov