



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Practice Management Application Suite

(BMW)

Scheduling Module User Manual

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Table of Contents

1.0	Introduction.....	1
2.0	System Navigation	2
3.0	Scheduling Module Operation.....	3
3.1	Scheduling Ribbon.....	3
3.1.1	Goto Group.....	3
3.1.2	Mode Group.....	4
3.1.3	Zoom Group	5
3.1.4	Search Group	6
3.1.5	Waiting List Group	8
3.1.6	Display Time Group.....	11
3.1.7	Tools Group.....	12
3.2	Selection and Filtering Pane.....	13
3.2.1	Calendar Panel.....	14
3.2.2	Clinics Panel.....	14
3.2.3	Status Panel	15
3.3	Resource Group Tabs	16
3.3.1	Removing a Resource Group from the Tabbed Listing.....	16
3.4	Appointment Grid Workspace.....	17
3.4.1	Appointment Slots	17
3.5	Using the Context Menus	18
3.5.1	Blank Appointment Slot Context Menu	19
3.5.2	Scheduled Appointment Slot Context Menu	20
3.6	Scheduling an Appointment.....	22
3.6.1	Mini Registration Option	22
3.7	Managing Scheduled Appointments	23
3.7.1	Change the Length of an Appointment.....	23
3.7.2	Move an Appointment.....	24
3.7.3	Copy and Paste Patient Information	25
3.7.4	Using the Filter	25
3.7.5	Add Comments to an Appointment.....	26
4.0	Scheduling Configuration.....	27
4.1	Configuring Clinics.....	28
4.1.1	Finding a Clinic.....	28
4.1.2	Adding a Clinic.....	29
4.1.3	Editing Clinic Parameters	30
4.1.4	Clinic Configuration - General Tab	31
4.1.5	Clinic Configuration - Scheduling Tab	33
4.1.6	Clinic Configuration – Users/Providers Tab	35
4.1.7	Clinic Configuration - Letters Tab	36
4.2	Configuring Clinic Availability.....	41

4.2.1	Using the Clinic Availability Configuration Page	42
4.2.2	Creating an Availability Schedule	46
4.2.3	Editing an Access Block	50
4.2.4	Copying Access Blocks	50
4.2.5	Deleting an Access Block	51
4.2.6	Copying an Availability Schedule.....	51
4.3	Table Maintenance Page	53
4.4	Access Types	54
4.4.1	Adding an Access Type	55
4.4.2	Editing an Access Type	57
4.5	Resource Groups.....	59
4.5.1	Adding a Resource Group	59
4.5.2	Editing a Resource Group	61
5.0	Scheduling Reports.....	63
5.1	Reports Module Overview	63
5.1.1	Reports Toolbar	63
5.2	Scheduling Report Types	65
5.3	Clinic Schedule Report	65
5.3.1	Clinic Schedule Report Parameters.....	66
5.3.2	Information in the Clinic Schedule Report	66
5.4	Appointments Report	67
5.4.1	Appointments Report Parameters	67
5.4.2	Information in the Appointments Report	68
5.5	Waiting List Report	69
5.5.1	Waiting List Report Parameters.....	69
5.5.2	Information in the Waiting List Report.....	70
5.6	Cancel/No-Show Appointments Report	71
5.6.1	Cancel/No-Show Appointments Report Parameters.....	71
5.6.2	Information in the Cancel/No-Show Appointments Report	72
5.7	Clinic Workload Report	73
5.7.1	Clinic Workload Report Parameters	73
5.7.2	Information in the Clinic Workload Report	73
5.8	Batch Print Appointment Letters	75
5.8.1	Batch Print Appointment Letters Parameters	75
5.8.2	Batch Printing Appointment Letters	76
	Glossary.....	87
	Acronym List	89
	Contact Information	90

Preface

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

BMW provides for the entry of new patients and editing the records of those already registered at a medical facility. The patient data managed with BMW 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

The Practice Management Application Suite (BMW) 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 not only simplifies record and patient management, but also allows for future expansion of the scope and capabilities of the system.

This User Manual describes the use of the BMW 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 BMW application suite, and individual User Manuals are available for other modules in the suite.

2.0 System Navigation

BMW provides access to a vast array of RPMS information. Entering and accessing that information is done through a consistent interface, primarily the Application ribbon, the Taskbar, and the Workspace. Refer to the *BMW Application Overview User Manual* for information about using the BMW interface.

Note: The GUI employed by this package shares most of its characteristics with those found in Microsoft® Windows 7 workstation applications including Microsoft Office 2007 and 2010. The terminology used to describe screen features and objects is significantly different from that used by earlier versions of Microsoft products. To minimize reader confusion over the long term, this manual uses the new terminology to describe these new GUI features.

3.0 Scheduling Module Operation

This section describes the features and functions of the BMW Scheduling module.

3.1 Scheduling Ribbon

The Scheduling ribbon (Figure 3-1) at the top of the Scheduling Module display controls how (and what) patient scheduling information is displayed.

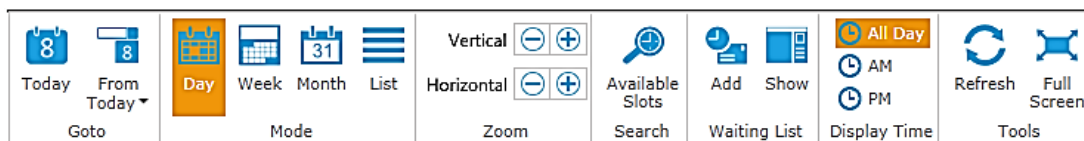


Figure 3-1: Scheduling ribbon

The Scheduling ribbon contains the following groups:

- **Goto** group
- **Mode** group
- **Zoom** group
- **Search** group
- **Waiting List** group
- **Display Time** group
- **Tools** group

3.1.1 Goto Group

Use the **Goto** group (Figure 3-2) of the Scheduling ribbon to quickly navigate to the current date as well as dates in the future.

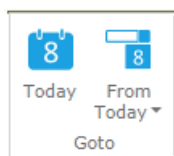


Figure 3-2: **Goto** group

Click the controls in the **Goto** group to navigate as follows:

- **Today.** Click **Today** to jump back to the current date.
- **From Today.** Click **From 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

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

3.1.2 Mode Group

Schedules can be viewed in four different modes: Day (one day), Week (seven days), Month, or a List view. Use the Mode group of the Scheduling ribbon (Figure 3-3) to switch between the modes.

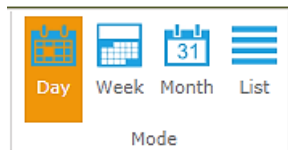


Figure 3-3: **Mode** group

The different modes are described in this list:

- **Day.** Click the **Day** control to see one day view of the Appointment Grid Workspace for the selected clinic(s). The Day mode provides maximum detail for a single day schedule.
- **Week.** Click the **Week** control to see a one week view of the Appointment Grid Workspace for the selected clinic(s).
- **Month.** Click the **Month** control to see a one month view of the Appointment Grid Workspace for the selected clinic(s).

Note: The month view will display only one clinic at a time.

- **List.** Click the **List** control to see a visual report of appointments for the selected clinic(s) displaying these columns:
 - Patient
 - Phone Number
 - Appointment Date
 - Scheduled Time

- Length
- Status
- Scheduled On
- Scheduled By
- Check In Time
- Checked In By
- Check Out Time
- Checked Out By
- No Show/Cancel Time
- No Show/Cancel By
- Appointment Type
- Comments
- Cancellation Reason
- Cancellation Remarks

Note: You may need 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, list boxes are provided for **Clinic** selection and **Appointments** timeframe (**Today**, **Future**, **Past**, and **All**). Also, the **Sort By** list provides a way to sort the listing by these criteria:

- Patient
- Date Ascending
- Date Descending
- Check In Time
- Check Out Time
- No Show/Cancel Time

The List option also includes a **Print** list, which allows you to print these letters:

- Pre-appointment Letter
- No-show Letter
- Cancelled by Clinic Letter
- Cancelled by Patient Letter

See Section 4.1.7 for more information about setting up patient letters.

3.1.3 Zoom Group

Use the **Zoom** group (Figure 3-4) to change the amount of information displayed in the Appointment Grid Workspace.

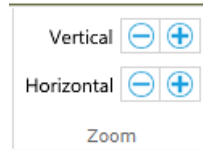


Figure 3-4: **Zoom** group

The **Zoom** group provides these controls:

- **Vertical.** Use the Vertical plus (+) and minus (-) buttons to zoom in and out of the vertical view of the Appointment Grid Workspace.
- **Horizontal.** Use the Horizontal plus (+) and minus (-) buttons to zoom in and out of the horizontal view of the Appointment Grid Workspace.

3.1.4 Search Group

The **Search** group (Figure 3-5) allows you to set up search criteria for available appointment slots.

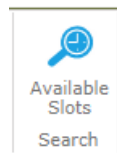


Figure 3-5: **Search** group

Click the **Available Slots** control to open the **Search Available Slots** dialog (Figure 3-6).

Search Available Slots

Clinics

- ☒ A CLINIC
- ☐ A CLINIC 2
- ☐ A CLINIC 3
- ☐ AAA MEDICAL CENTER
- ☐ B CLINIC
- ☐ BLUE ADULT CLINIC
- ☐ GREEN PEDIATRICS CLINIC
- ☐ RADIOLOGY DEPARTMENT
- ☐ SQUIRREL RIVER
- ☐ TURQUOIS OB- DEMO
- ☐ V PHN HOME

Search Criteria

When Next two weeks

On ☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

☒ All Day ☐ AM ☐ PM

Search Slots

Filter Access Type ▼

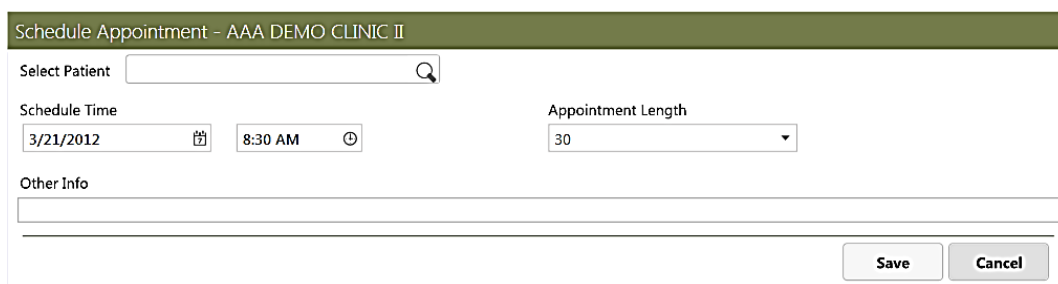
Start	Length (min)	Clinic	Slots Available	Access Type

Select
Cancel

Figure 3-6: **Search Available Slots** dialog

Follow these steps to set up a search for available appointment slots:

1. Choose one or more clinics from the list of available clinics on the left.
2. Use the **When** list box to choose the date range for the search.
3. Clear the check boxes in the **On** section for the particular days of the week for which you do not want to search, if any.
4. Select the **All Day**, **AM**, or **PM** check boxes to further limit the search.
5. Click **Search Slots** to start the search. When complete, a listing of available appointment times and dates will be displayed.
6. Select the appropriate access type from the **Filter Access Types** list box.
7. Click the desired available appointment to highlight it, and then click **Select**. (Alternatively, you can double-click the available appointment.) The **Schedule Appointment** dialog (Figure 3-7) displays.
8. Use the **Patient** search field to specify the patient to schedule for this slot.
9. Verify the date, time and appointment length and add any additional information as needed then click **Save**. The appointment has now been created.



Schedule Appointment - AAA DEMO CLINIC II

Select Patient

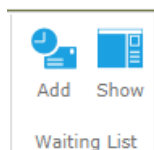
Schedule Time Appointment Length

Other Info

Figure 3-7: **Schedule Appointment** dialog

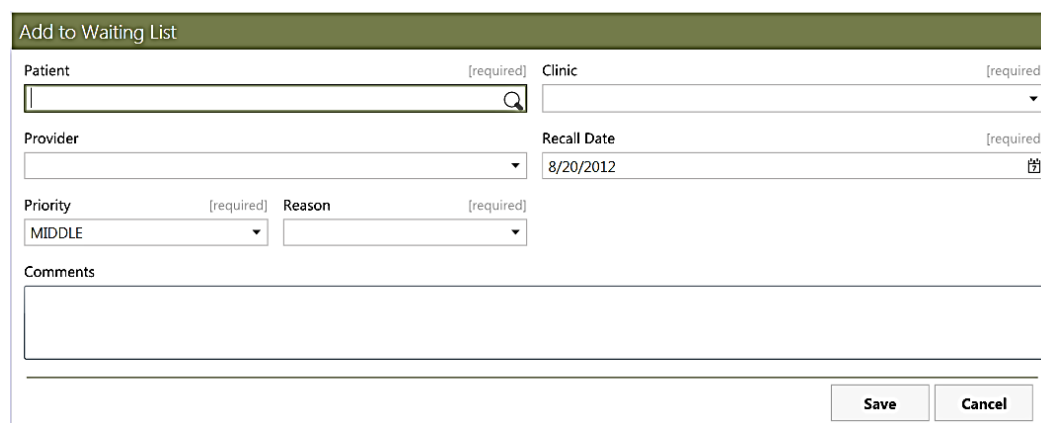
3.1.5 Waiting List Group

Use the **Waiting List** group of the Scheduling ribbon (Figure 3-8) to add a patient to a waiting list for appointments or to view/hide patients on the waiting list.

Figure 3-8: **Waiting List** group

The **Waiting List** group provides these controls:

- Add. Click the **Add** control to add a patient to a waiting list. This displays the **Add to Waiting List** dialog (Figure 3-9).



Add to Waiting List

Patient [required] Clinic [required]

Provider Recall Date [required]

Priority [required] Reason [required]

Comments

Figure 3-9: **Add to Waiting List** dialog

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

- Patient
- Clinic
- Provider (if available)
- Recall Date (date the patient needs to be scheduled on or by)

- Priority (the urgency of the appointment)
- Reason
- Comments (as needed)

Click **Save** to transfer the information to the Waiting list.

- **Show/Hide.** After choosing a clinic, click the **Show/Hide** control to alternately display or hide the **Waiting List** pane on the right side of the Appointment Grid Workspace. The **Waiting List** pane shows patients (if any) waiting for an appointment at the selected clinic. See Section 3.1.5.1 for more information about selecting clinics to display on the **Waiting List**.

When enabled, the **Waiting List** is displayed on the right side of the Appointment Grid Workspace (described in Section 3.4). An example of a typical **Waiting List** is shown in Figure 3-10.

The screenshot shows a 'Waiting List' window with a title bar containing 'Waiting List', 'June', and a calendar icon. Below the title bar is a dropdown menu currently set to 'AAA MEDICAL CENTER'. The list contains three patient entries, each separated by a horizontal line. Each entry includes the patient's name, HRN, phone number, priority, assigned clinic, and recall date. The first entry is for MISHRA, RASHMI with HRN (999999), phone 505-123-4567, priority LOW, clinic AAA MEDICAL CENTER, and recall date 6/21/2012, with a note 'CLOSED CLINIC'. The second entry is for JOHNSON, TANYA A with HRN (33697), phone 555-555-5768, priority HIGH, clinic AAA MEDICAL CENTER, and recall date 6/25/2012, with a note 'WARD FULL'. The third entry is for DOE, JOHN with HRN (357951), phone 555-121-2121, priority MIDDLE, clinic AAA MEDICAL CENTER, and recall date 6/25/2012, with a note 'Patient can be available on short notice.' At the bottom of the window is a pagination control showing 'Page 1' with left and right arrow buttons.

Patient Name	HRN	Phone No.	Priority	Assigned Clinic	Recall Date	Notes
MISHRA, RASHMI	(999999)	505-123-4567	LOW	AAA MEDICAL CENTER	6/21/2012	CLOSED CLINIC
JOHNSON, TANYA A	(33697)	555-555-5768	HIGH	AAA MEDICAL CENTER	6/25/2012	WARD FULL
DOE, JOHN	(357951)	555-121-2121	MIDDLE	AAA MEDICAL CENTER	6/25/2012	Patient can be available on short notice.

Figure 3-10: **Waiting List** example

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

- Patient name
- Patient HRN
- Patient home phone number
- Appointment priority
- Assigned clinic
- Recall date

- Reason
- Comments

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

Notes: If you move the patient appointment to a clinic other than the one it is originally intended for, it will remain on the **Waiting List**. If you move the appointment to the originally-intended clinic, a message is displayed asking you to verify that you want to remove the appointment from the **Waiting List**.

You cannot schedule the same patient for the same appointment slot at two separate clinics.

To remove a patient from the **Waiting List** without creating a scheduled appointment, right-click on the entry and click **Remove**. Once done, click **OK** to remove the patient from the **Waiting List**, or click **Cancel** to keep the patient on the list.

3.1.5.1 Using the Waiting List

When you right-click on an entry in the **Waiting List**, a context menu is displayed offering several options. Figure 3-11 shows an example of the Waiting List context menu.

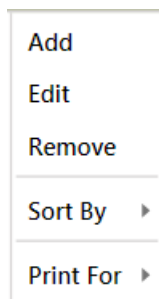


Figure 3-11: Waiting List context menu

The Waiting List context menu has the following options:

Option	Description
Add	Use this option to add a patient to the Waiting List .
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 .
Sort By	Use this option to sort the Waiting List by Recall Date, Patient, or Priority. The sort operation only affects the selected month and year.

Option	Description
Print For	Use this option to print a Waiting List report for a specific clinic. When you select this option, a list of available clinics is displayed. When you select the clinic for which you want to print the report, a Waiting List report is generated and displayed. See Section 5.5 for more information about displaying and printing the Waiting List report.

Important points about using the **Waiting List**:

- Use the field at the top of the **Waiting List** to select the clinic for which the **Waiting List** is shown.
- The **Waiting List** shows five appointments per page. If more than five patients are on the **Waiting List**, click the right and left arrows at the bottom of the list to view additional pages.
- By default, the **Waiting List** shows appointments for the current month. Click the calendar control in the upper right corner of the **Waiting List** to change the month and year displayed. The **Waiting List** is based on recall dates for the selected month.

3.1.6 Display Time Group

Use the **Display Time** group (Figure 3-12) to filter the range of time shown in the schedule listing.

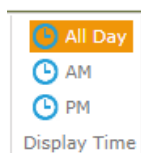


Figure 3-12: **Display Time** group

The **Display Time** group has these options:

- **All Day**. Click the **All Day** control to see scheduling information for the entire day for the selected clinic(s).
- **AM**. Click the **AM** control to see scheduling information from the opening time of the selected clinic(s) to 12:00 noon.
- **PM**. Click the **PM** control to see scheduling information from 12:00 noon to the closing time of the selected clinic(s).

3.1.7 Tools Group

Use the **Tools** group of the Scheduling ribbon (Figure 3-13) to refresh the schedule listing and to enlarge it.

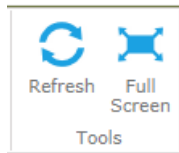


Figure 3-13: **Tools** group

The **Tools** group has these options:

- **Refresh.** Click the **Refresh** control to refresh the schedule listing. This is useful to ensure the latest scheduling changes are being displayed, including those made by others.
- **Full Screen.** Click the **Full Screen** control to view the clinic schedules without the Scheduling ribbon and the Selecting and Filtering pane. Click the control again (now displayed in the upper left corner of the screen) to return to a normal view.

3.2 Selection and Filtering Pane

The Selection and Filtering Pane (Figure 3-14) on the left side of the Scheduling module display provides a means to select dates and clinics, and filter the information displayed in the Appointment Grid Workspace.

The Selection and Filtering Pane consists of three main sections:

- Calendar:** A calendar for February 2012. The date '2' is selected. The days of the week are abbreviated as Su, Mo, Tu, We, Th, Fr, Sa.
- Clinics:** A section with a search bar and a list of clinics. Each clinic has a checkbox and a minus sign icon.

Clinic Name	Selected
AAA DEMO CLINIC II	☒
ANTICOAGULATION	☐
ATEST CLINIC I	☐
BIBERICA GP (B-60/15)	☐
BIBERICA HEADSTART	☐
BIBERICA MISC	☐
- Status:** A section with a list of appointment statuses. Each status has a checkbox and a color-coded square.

Status	Selected
Scheduled	☐
Checked In	☒
Checked Out	☐
No Show	☐
Cancelled By Patient	☐
Cancelled By Clinic	☐

Figure 3-14: Selection and Filtering pane

3.2.1 Calendar Panel

The Calendar panel (Figure 3-15) is at the top of the Selection and Filtering Pane.



Figure 3-15: Calendar panel

In most cases, the Calendar panel will show the current month. Use the left and right arrows at the top of the calendar to navigate to a particular month (and year), then click the date you want to view. You can also select more than one consecutive day on the calendar to view the schedule for those selected days. Do this by holding the Shift key while clicking the beginning and ending days of the time span you want to view.

3.2.2 Clinics Panel

Use the **Clinics** panel (Figure 3-16) to select the clinic(s) for which you want to view or set patient appointments. The list of clinics displayed in the **Clinics** panel is your "preferred resource list".

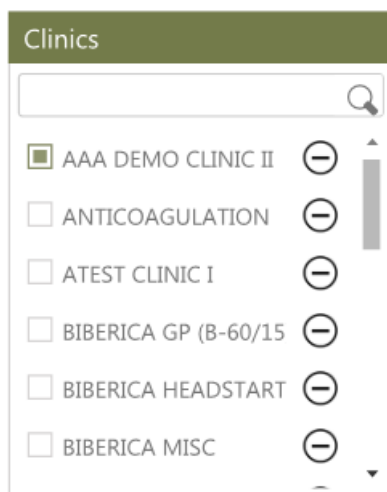


Figure 3-16: **Clinics** panel

Use the search list at the top of the **Clinics** panel to find a specific clinic and add it to your preferred resource list. The clinic must be active in order to be visible when searching for it.

Note: The search is based on the clinic's Resource name, not the Clinic name. Once a clinic is on the preferred resource list, it can be displayed in the Appointment Grid Workspace.

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

If you no longer wish 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, click the (-) button to the right of the clinic name.

3.2.3 Status Panel

Use the **Status** panel (Figure 3-17) to filter patient appointments by a variety of criteria.

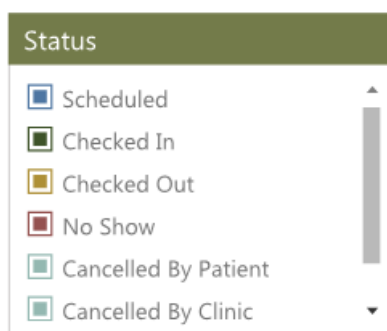


Figure 3-17: **Status** panel

Each of the filtering options in the Status panel has a check box to the left of the option label. Select or clear these checkboxes as needed to show only the appointment statuses you want:

- **Scheduled**
- **Checked In**
- **Checked Out**
- **No Show**
- **Cancelled By Patient**
- **Cancelled By Clinic**

By default all are selected; clear any status type you do not want to see when a clinic is viewed on the Appointment Grid Workspace.

3.3 Resource Group Tabs

The Resource Group tabs are displayed along the top of the Appointment Grid workspace (described in Section 3.4). Figure 3-18 shows an example of Resource Group tabs, although the names and number of the tabs will vary depending on the Resource Group you have defined. See Section 4.5 for more information about Resource Group.

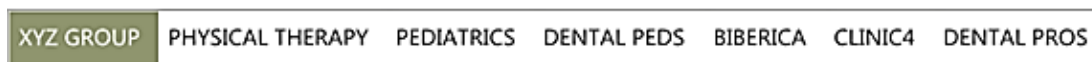


Figure 3-18: Resource Group tabs

Click a Resource Group tab to display the clinics (or other resources) assigned to that group in the Appointment Grid workspace.

Note: The Resource Group tabs are not visible in either the Month view or List view.

An indicator is also displayed on the far right side of the Resource Groups tabs to show the access type associated with a selected access block in the Appointment Grid workspace.

3.3.1 Removing a Resource Group from the Tabbed Listing

To remove a Resource Group tab from the listing, you must select the group and inactivate it from within the Settings module. See Section 4.5.2 for information about editing Resource Groups.

3.4 Appointment Grid Workspace

The Appointment Grid workspace (Figure 3-19) is the primary calendar and appointment display space of the Scheduling module.

XYZ GROUP	PHYSICAL THERAPY	PEDIATRICS	DENTAL PEDS	BIBERICA	CLINIC4	WCC	UNGROUPE
	AAA DEMO CLINIC			AAA MEDICAL CENTER			
	18 Monday			18 Monday			
:30	SMITH,ALANNAH DYAN (153758) ☎ 555-555-2646			DOE,BETTY (156911) ☎ 555-555-1714			
:45	DOE,JOHN (357951) ☎ 555-121-2121						
10:00 AM							
:15	DAVIDSON,BRUCE K (113845) ☎ 555-555-2036						
:30				DOE,JOHN (357951)		MISHRA,RASHMI (999999)	
:45	MISHRA,RASHMI (999999) ☎ 5051234567						
11:00 AM				HARRY,BRIAN MATTHEW (117629) ☎ 555-555-9018			
:15							
:30							
:45	WILLIAM,JENNIFER LEE (111155) ☎ 555-555-7692						

Figure 3-19: Appointment Grid workspace

3.4.1 Appointment Slots

Each Appointment slot within the Appointment Grid workspace shows the patient name and HRN, and when sufficient space permits (based on the Zoom settings), the patient's phone number, and any comments added when the appointment was created.

LIBRADO,CHARLES EUGENE (130477) ☎ 555-555-4431

Figure 3-20: 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, canceled, and no-show appointments. Also, walk-in appointments are shown with an orange bar on the left side of the appointment slot.

To see more detail about an individual appointment, hold your mouse cursor over the Appointment Panel. This displays a pop-up window showing additional details about the appointment. Figure 3-21 shows an example of a typical Appointment Details pop-up window.

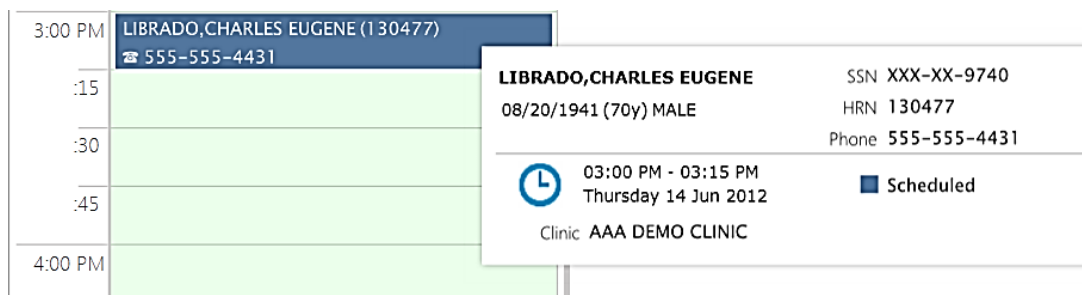


Figure 3-21: Appointment Details Pop-up example

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

- Patient Name
- DOB
- Age
- Sex
- Patient SSN
- Patient HRN
- Patient home phone number
- Beginning and ending times of the appointment
- Appointment date
- Clinic name
- Appointment status
- Other Info (such as any comments added to the appointment listing)

3.5 Using the Context Menus

Right-click within the Appointment Grid workspace to open a context menu (Figure 3-23) 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.

3.5.1 Blank Appointment Slot Context Menu

When you right-click a blank appointment slot, the options shown in Figure 3-22 are offered:

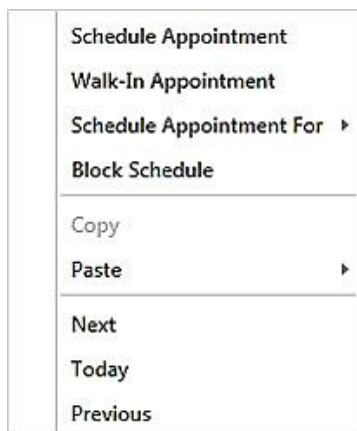


Figure 3-22: Blank appointment slot context menu example

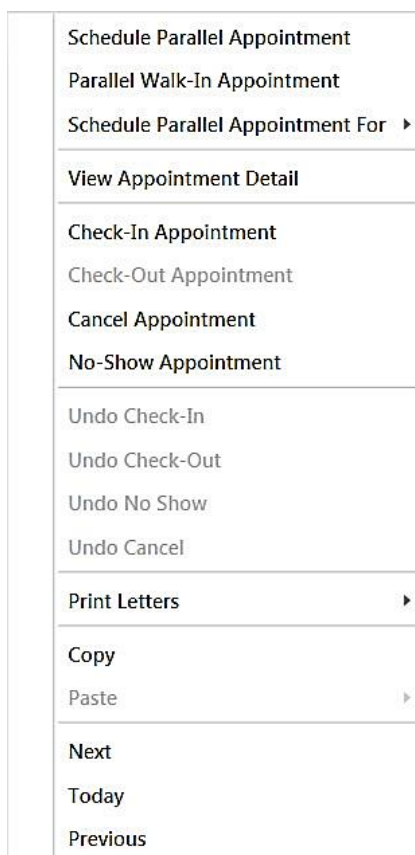
In this example, the context menu offers the options shown in Table 3-1:

Table 3-1: Blank appointment slot context menu options

Option	Description
Schedule Appointment	Select this option to schedule an appointment for a patient.
Walk-In Appointment	Select this option to schedule a walk-in appointment for a patient. Note that this option is only available for the current day.
Schedule Appointment For	Select this option to schedule an appointment for a patient whose record is currently open in the Patient Record pane. (See the <i>BMW Application Overview User Manual</i> for more information about the Patient Record pane.) If no patient records are open, this option is not available.
Schedule Block	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 in the Clinic Availability that is only in effect for that specific week.
Copy	This option is not available from the blank appointment context menu. It is, however, available from the scheduled appointment slot context menu described in Section 3.5.2.
Paste	Select this option to paste patient information from an existing appointment into the appointment slot on which you right-clicked.
Next	View the schedule for the next calendar day.
Today	View the schedule for today.
Previous	View the schedule for the previous calendar day.

3.5.2 Scheduled Appointment Slot Context Menu

When you right-click a previously-scheduled appointment slot, the options shown in Figure 3-23 are offered:



The image shows a context menu for a scheduled appointment slot. The menu items are as follows:

- Schedule Parallel Appointment
- Parallel Walk-In Appointment
- Schedule Parallel Appointment For ▶
- View Appointment Detail
- Check-In Appointment
- Check-Out Appointment
- Cancel Appointment
- No-Show Appointment
- Undo Check-In
- Undo Check-Out
- Undo No Show
- Undo Cancel
- Print Letters ▶
- Copy
- Paste ▶
- Next
- Today
- Previous

Figure 3-23: Scheduled appointment slot context menu example

In this example, the context menu offers the options shown in Table 3-2:

Table 3-2: Scheduled appointment slot context menu options

Option	Description
Schedule Parallel Appointment	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 4.2.2.1 for more information about Access Blocks.
Parallel Walk-In Appointment	Select this option to schedule a walk-in 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 4.2.2.1 for more information about Access Blocks.

Option	Description
Schedule Parallel Appointment For	Select this option to schedule a parallel appointment for a patient whose record is currently open in the Patient Record pane. (See the <i>BMW Application Overview User Manual</i> for more information about the Patient Record pane.)
View Appointment Detail	Select this option to see detailed information about the selected appointment.
Check-In Appointment	Select this option to mark an appointment as checked in. 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. Also note that you will not be able to add a Provider to the appointment unless the Provider has been added to the clinic via the Users/Provider tab in the Clinic Configuration. See Section 4.1 for more information about Clinic Configuration.
Check-Out Appointment	Select this option to mark an appointment as checked out.
Cancel Appointment	Select this option to mark an appointment as cancelled.
No-Show Appointment	Select this option to mark an appointment as a no-show.
Undo Check-In	Select this option to reverse a checked in appointment.
Undo Check-Out	Select this option to reverse a checked out appointment.
Undo No-Show	Select this option to reverse a no-show appointment.
Undo Cancel	Select this option to reverse a cancelled appointment.
Print Letters	Select this option to print patient letters based on the status of this appointment. Depending on the appointment status, you can print pre-appointment, no-show, clinic cancelled, and patient cancelled letters. These letters can serve as reminders about upcoming or missed appointments, and are configured in the Settings module described in Section 4.1.7.
Copy	Select this option to copy the selected patient's information in order to paste it into one or more other appointment slots.
Paste	Select this option to paste previously-copied patient information into each appointment slot on which you right-click.
Next	View the schedule for the next calendar day.

Option	Description
Today	View the schedule for today.
Previous	View the schedule for the previous calendar day.

3.6 Scheduling an Appointment

Follow these steps to create a patient appointment:

1. Select the clinic in which you want to create the appointment from the Clinics panel (see Section 3.2.2).
2. Right-click on the access block representing the time and day when the appointment will start and select **Schedule Appointment**. (Select **Schedule Parallel Appointment** if there are already one or more appointments scheduled during the desired time slot.) The Schedule Appointment dialog (Figure 3-24) is displayed.

Figure 3-24: **Schedule Appointment** dialog

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 described in Section 3.6.1.)
4. Specify the schedule date and time in the respective fields and specify the appointment length. Use the **Other Info** field to enter other information if necessary.
5. Click **Save** to save the scheduled appointment, or click **Cancel** to return to the Appointment Grid workspace without saving the appointment.

3.6.1 Mini Registration Option

In order 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 Mini Registration option (Figure 3-25) is displayed.

Schedule Appointment - AAA MEDICAL CENTER

Select Patient: DOE,JACK

Schedule Time: 1/8/2013

Other Info:

Save Cancel

Figure 3-25: Mini Registration option

Click the patient's name to open the **Register New Patient** form shown in Figure 3-26.

Register New Patient

Last Name [required]: DOE

First Name [required]: JACK

Middle Name

Suffix

Social Security Number

Reason for No SSN

Autogenerate HRN ☒

Date of Birth [required]: Enter date

Sex [required]

Facility/Division: 2010 DEMO HOSPITAL

Save Cancel

Figure 3-26: Register New Patient form

Enter the patient's registration information in the appropriate fields on the form. Required fields are noted on the form. If the **Autogenerate HRN** option is enabled, a temporary Health Record Number will be automatically generated for the patient. If the option is not enabled, a field is provided for you to enter the patient's HRN. This is useful for cases where an HRN has been issued to the patient at another facility.

Once the form is completed, click **Save** to save the new patient registration, or click **Cancel** to cancel the registration and return to the Appointment Grid workspace without saving the registration.

3.7 Managing Scheduled Appointments

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

3.7.1 Change the Length of an Appointment

Follow these steps 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.

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 4.1.7 for more information about Access Blocks.

3.7.2 Move an Appointment

Follow these steps to move (reschedule) an appointment from one appointment slot to another:

1. Position the mouse cursor anywhere on the appointment.
2. Click and hold the left mouse button and drag the appointment to the new appointment slot.
3. Release the mouse button.
4. Click **OK** to confirm the move in the dialog displayed.
5. Complete the **Appointment Cancelled By** and **Cancellation Reason** fields in the Re-Schedule Appointment dialog displayed, then click **Save**.

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.

Also, appointments can only be moved in the Day or Week display modes. See Section 3.7.3 for information about moving an appointment to a different week or month.

3.7.3 Copy and Paste Patient Information

As noted in Sections 3.5.1 and 3.5.2, you can right-click on an appointment and copy the patient information contained within it. Similar to other Windows-based copy and paste operations, the information is temporarily stored on a "clipboard", from which it can be pasted into a different location. This clipboard holds information for up to six patients. When you select the **Paste** option from the context (right-click) menu, a listing of any patient information on the clipboard is displayed. Select the desired information to paste it into the appointment slot on which you right-clicked. Figure 3-27: Scheduling Clipboard shows an example of the scheduling clipboard.

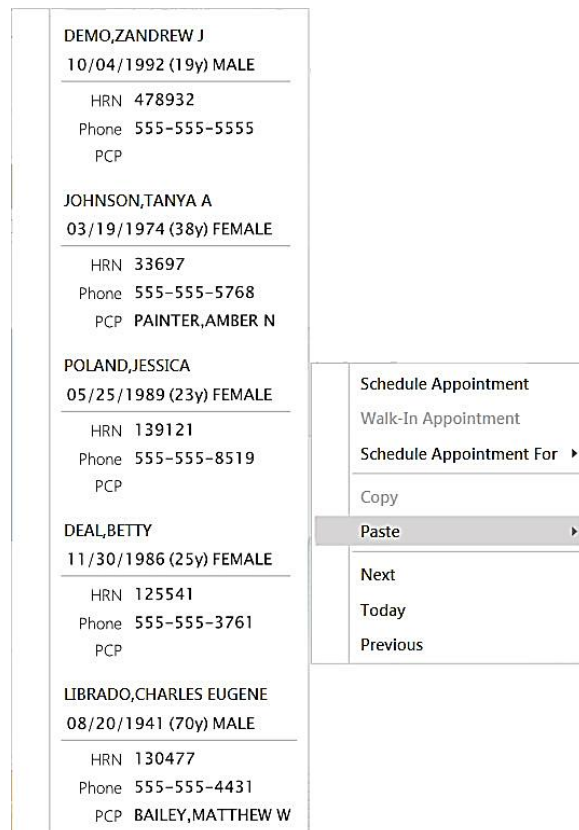


Figure 3-27: Scheduling Clipboard

Use this feature to copy patient information for an appointment from one day (or week) to another.

3.7.4 Using the Filter

As discussed in Section 3.2.3, you can use the filtering capabilities of the Status panel of the Scheduling module to filter the appointment types displayed. Using this feature, you can display only checked in appointments, only cancelled appointments, or a variety of other combinations that may be useful to you.

3.7.5 Add Comments to an Appointment

When you create an appointment, you can use the **Other Info** field to add comments about the appointment. In addition, you can add comments to an existing appointment in a similar manner. To do this, right-click on the appointment and select **View Appointment Detail**. Use the **Other Info** field to add comments about the appointment in the dialog displayed. Figure 3-28 shows an example of the **Appointment Detail** dialog.

Appointment Detail - AAA DEMO CLINIC (8/3/2012 9:30 AM-9:45 AM)		
PANTER,TANIN WILSON	SSN XXX-XX-5540	Eligibility Status CHS & DIRECT
06/13/1970 (42y) MALE	HRN 113655	Last Updated 01/05/2010
	PCP KEEK,VALERIA A	
Scheduled By ADMIN,SYSTEM	Status Checked Out	
Date Appointment Made 08/03/2012	Purpose Of Visit SCHEDULED VISIT	
Check-In Time 8/3/2012 12:59:15 PM	Checked-In By ADMIN,SYSTEM	
Check-Out Time 8/3/2012 1:30:58 PM	Checked-Out By ADMIN,SYSTEM	
Other Info		
		Save Cancel

Figure 3-28: **Appointment Detail** dialog

4.0 Scheduling Configuration

Unlike the other modules in BMW, the **Settings** module does not directly control or modify patient records. Instead, it controls a variety of application settings for other modules, allowing you to change or add such things as available appointment types, employer names, insurers, and clinics. Changes made within the Setting 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 BMW application for any scheduling configuration changes to take effect.

Open the Settings module by clicking **Settings** in the Taskbar, as shown in Figure 4-1.



Figure 4-1: Taskbar with **Settings** module highlighted

The selection pane on the left side of the Settings module displays a list of available options. The information displayed on the right side of the screen varies, depending on the option chosen.

4.1 Configuring Clinics

Click **Clinics** in the selection pane of the Settings module to see the Clinics page of the Settings module. Figure 4-2 shows an example of the Settings module with the Clinics page displayed.

Name	Resource Name	Abbreviation	Division	Institution	Active	Reactivation Date	Inactivate Date
A CLINIC	A CLINIC	AC	DEMO HOSPITAL	DEMO HOSPITAL	☐		
A CLINIC 1	A CLINIC 1	AC1	DEMO HOSPITAL	DEMO HOSPITAL	☐		
A CLINIC 2	A CLINIC 2	AC2	DEMO HOSPITAL	DEMO HOSPITAL	☐		
AAA MEDICAL CENTER	AAA MEDICAL CENTER	AAAMC	DEMO HOSPITAL	DEMO HOSPITAL	☐		
AMBULATORY CHRONIC PAIN CLINIC		ACPAC	IHS HOSPITAL	DEMO HOSPITAL	☐		
ANTICOAGULATION	Anticoag	ACC	IHS HOSPITAL	DEMO HOSPITAL	☐		
B CLINIC		BC	DEMO HOSPITAL	DEMO HOSPITAL	☐		
BIBERICA HEADSTART (R-60/15)		D HS	IHS HOSPITAL	DEMO HOSPITAL	☐		
BIBERICA, EXAM-PEDS (PP-60/15)		D EP	IHS HOSPITAL	DEMO HOSPITAL	☐		
BIBERICA, GP-PEDS (BP-60/15)		D GP	IHS HOSPITAL	DEMO HOSPITAL	☐		
BIBERICA, MISC DENTAL (30/15)		D MISC	IHS HOSPITAL	DEMO HOSPITAL	☐		
BLUE FP PRINCIPLE		PRINCIP	IHS HOSPITAL	DEMO HOSPITAL	☐		
BLUE SAME DAY PRINCIPLE		PRINCIP	IHS HOSPITAL	DEMO HOSPITAL	☐		
BROWN FP NEW-15		FP	IHS HOSPITAL	DEMO HOSPITAL	☐		
BROWN PRENATAL NEW-30		PRENATA	IHS HOSPITAL	DEMO HOSPITAL	☐		
BROWN SAME DAY NEW-15		SAMEDAY	IHS HOSPITAL	DEMO HOSPITAL	☐		
C CLINIC		CC	DEMO HOSPITAL	DEMO HOSPITAL	☐		
CANCER SCREENING		CS	DEMO HOSPITAL	DEMO HOSPITAL	☐		
CASE MANAGEMENT		CASEMGT	IHS HOSPITAL	DEMO HOSPITAL	☐		
CGPHNCLINIC		PPHN	DEMO HOSPITAL	DEMO HOSPITAL	☐		

Figure 4-2: Settings Module - Clinics page

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

4.1.1 Finding a Clinic

The Clinics page of the Settings module lists all of the clinics in the RPMS database. Each page of the display shows 20 clinics. Use the left and right arrows at the lower left corner of the page to navigate to other pages. The current page number is shown at the lower right corner of the page.

By default, the clinics are listed in alphabetical order based on the clinic name. Use the **Sort By** list at the top of the page to sort the listing by either the clinic name or by division.

Use the **Filter Clinic** field at the top of the page to narrow down your search for a specific clinic. Type any part of a clinic name into the field and press Enter. The filtered list of clinics will then be displayed.

4.1.2 Adding a Clinic

Click **Add** in the upper right corner of the Clinics page to set up a new clinic. The **Create New Clinic** form shown in Figure 4-3 is displayed.

Figure 4-3: **Create New Clinic** form

4.1.2.1 Fields on the Create New Clinic Form

The fields on the **Create New Clinic** form are shown in Table 4-1. Note that many of these fields affect the Scheduling module in regards to this clinic. Required fields are noted on the form:

Table 4-1: Fields on the **Create New Clinic** form

Field	Description
Name	Use this field to enter the name of the clinic. Note that BMW 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	Use this field to enter the abbreviated name of the clinic.
Division	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	This read-only field is automatically populated based on the Division you specify in the Division field.
Clinic Code	Use this field to specify the clinic 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	Use this field to specify the default length of appointment (in minutes) used by the clinic.

Field	Description
Display Increments / Hour	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 Section 4.5.
Future Booking Max Days	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 **Cancel** to close the form without saving your entries.

4.1.3 Editing Clinic Parameters

Select a clinic from the Clinics page as described in Section 4.1.1, and then click **Edit Parameters** in the upper right corner of the page to edit the parameters for that clinic. This causes a **Clinic Configuration** form similar to that shown in Figure 4-4 to be displayed.

Clinic Configuration - AAA MEDICAL CENTER

General | Scheduling | Users/Providers | Letters

Name [required]: AAA MEDICAL CENTER Abbreviation [required]: AAAMC Division [required]: CIHA HOSPITAL Institution: 2010 DEMO HOSPITAL

Treating Specialty: GENERAL MEDICINE Principal Clinic: AAA DEMO CLINIC Clinic Code: FAMILY PRACTICE Service: MEDICINE

Telephone: 555-888-6547 Reactivation Date: Enter date Inactivation Date: Enter date Multiple Clinic Codes Used: ☒

Prohibit access to clinic: ☐ Non Count Clinic: ☐ Include on file room list: ☒ Clinic meets at this facility: ☒

Physical Location: ALBUQUERQUE

Save **Cancel**

Figure 4-4: **Clinic Configuration** form

The **Clinic Configuration** form provides access to a variety of clinic parameters via these five separate tabbed pages:

- **General** tab

- **Scheduling** tab
- **Users/Providers** tab
- **Letters** tab

The parameters available from each tab are described in Sections 4.1.4 through 4.1.7 of this manual.

When editing the parameters of any of the tabbed pages, you are given these options at the bottom of the page:

- **Save.** Use this option to save your changes, close the **Clinic Configuration** form, and return to the Clinics page.
- **Cancel.** Use this option to close the **Clinic Configuration** form and return to the Clinics page without saving any of your changes.

4.1.4 Clinic Configuration - General Tab

When you first open the **Clinic Configuration** form, the **General** tab is displayed. Figure 4-5 shows an example of the **General** tab for a typical clinic.

Figure 4-5: **Clinic Configuration - General** tab

The fields on the **General** tab of the **Clinic Configuration** form are shown in Table 4-2. Some of these fields are populated when the clinic is first added to the RPMS system. Required fields are noted on the form:

Table 4-2: **Clinic Configuration - General** tab fields

Field	Description
Name	This field shows the name of the clinic, as entered when the clinic was added to the system.

Field	Description
Abbreviation	This field shows the abbreviated name of the clinic, as entered when the clinic was added to the system.
Division	This field shows the division with which the clinic is associated, as entered when the clinic was added to the system.
Institution	This read-only field shows the institution with which the clinic is associated, as determined when the clinic was added to the system.
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. Click on a clinic name to populate the field.
Clinic Code	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 is inactivated.
Multiple Clinic Codes Used	Enable 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	Enable this check box to allow only users with sufficient access rights to book appointments at this clinic. See Section 4.1.6 for more information about establishing user access rights.
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 new clinic or click **Cancel** to close the form without saving your entries.

4.1.5 Clinic Configuration - Scheduling Tab

Use the **Scheduling** tab on the **Clinic Configuration** form to configure various scheduling parameters for the selected clinic. Figure 4-6 shows an example of the **Scheduling** tab.

Clinic Configuration - AAA MEDICAL CENTER

General **Scheduling** Users/Providers Letters

Length of Appt [required] 30 Display Increments / Hour [required] 15-MIN Max Overbooks / Day [required] 2 Allowable No-Shows [required] 4

No-Show Waiting Period 15 Future Booking Max Days [required] 365 Hour Display Begins 6 Visit Service Category DAY SURGERY

Ask for Check In / Out Time ☒ Schedule Holidays ☐ Required X-ray Films ☒ Variable Appt Length ☒

Create Visit at Check In ☐

Save Cancel

Figure 4-6: **Clinic Configuration - Scheduling** tab

The **Scheduling** tab of the **Clinic Configuration** form includes the fields shown in Table 4-3, some of which are populated when the clinic is first added to the RPMS system. These settings affect the Scheduling module in regards to the selected clinic. Required fields are noted on the form:

Table 4-3: **Clinic Configuration - Scheduling** tab fields

Field	Description
Length of Appt	Use this field to specify a two-digit number indicating the default length of appointment (in minutes) used by the clinic.
Display Increments / Hour	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.
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.
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.

Field	Description
Future Booking Max Days	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 appointment 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 page. See Section 4.1.7 for more information about the Clinic Availability Configuration page.
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	Enable this check box to be prompted for check-in and check-out times when checking a patient in or out. When this option is enabled, the current date and time is the default. When this option is not enabled, you will not be prompted for check-in or check-out times, and the current date and time will be automatically entered. If an appointment is scheduled retroactively, then the date and time of the appointment will be used as the check-in or check-out time. This date and time will either be entered automatically or use as a default, depending on how this parameter is set.
Schedule Holidays	Enable this check box to allow appointments to be scheduled on holidays at this clinic.
Required X-ray Films	Enable this check box if x-ray films are required for patients at the selected clinic.
Variable Appt Length	Enable this check box to allow appointments of variable lengths to be set at the selected clinic.
Create Visit at Check in	Enable this check box to automatically create a PCC visit when a patient checks in at this clinic.

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

4.1.6 Clinic Configuration – Users/Providers Tab

Use the **Users/Providers** tab on the **Clinic Configuration** form to specify medical providers and scheduling users for the selected clinic. Figure 4-7 shows an example of the **Users/Providers** tab.

Clinic Configuration - AAA MEDICAL CENTER					
General Scheduling Users/Providers Letters					
Clinic User					
Name	Modify Appointment	Modify Schedule	Overbook	Master Overbook	
ADMIN,SYSTEM	☒	☒	☒	☒	Remove
SCHAEFER,TAMMY T	☐	☒	☐	☐	Remove
ADAMS,EVA	☒	☒	☐	☐	Remove
Provider					
Default	Name				
☐	JOHNSON,TERESA A				Remove
☐	SMITH,DEZARA M				Remove
☐	WILSON,JOE W				Remove
☐	THOMPSON,PEKAL MD				Remove
Save Cancel					

Figure 4-7: Clinic Configuration - Users/Providers tab

The **Users/Providers** tab of the **Clinic Configuration** form includes the **Clinic User** panel and the **Provider** panel.

4.1.6.1 Clinic User

Use the **Clinic User** panel to name the BMW users at the selected clinic, and to specify the access rights each user is granted. Click a user's name and select the appropriate check boxes for each user to grant these access rights:

- **Modify Appointment.** 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 on the **Availability** tab of the **Clinic Configuration** page.
- **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 on the **Scheduling** tab of the **Clinic Configuration** page.

- **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 on the **Scheduling** tab of the **Clinic Configuration** page.

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 *BMW Technical Manual* for more information about security keys.

To add a user to the Users listing, click within the search field at the upper right of the Users panel, then type some or all of the user's name, using a LAST,FIRST name format.

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

4.1.6.2 Provider

Use this panel to specify the medical providers associated with the clinic.

To add a provider, click within the search field at the upper right of the Provider panel and type one or more of the letters contained in the provider's name to display a list of search results. Click on a provider name to add it to the list within this panel.

To remove a provider from the list, click **Remove** to the right of the provider's name on the list.

Use the check boxes on the left side of the list to specify the default provider for the clinic.

4.1.7 Clinic Configuration - Letters Tab

As described in Section 5.8, the Scheduling module can generate and print a variety of appointment letters. Use the **Letters** tab of the Clinic Configuration page to configure these appointment letters for each specific clinic.

After selecting a clinic and opening the **Clinic Configuration** page as described in Section 4.1.3, click the **Letters** tab. A page similar to that shown in Figure 4-8 is displayed.

Clinic Configuration - AAA MEDICAL CENTER

General Scheduling Users/Providers **Letters**

NO-SHOW
CLINIC CANCELLED
PRE-APPOINTMENT
APPOINTMENT CANCELLED

Save Cancel

Figure 4-8: **Clinic Configuration - Letters** tab

The **Letters** tab allows you to configure these types of appointment letter templates:

- **NO-SHOW**
- **CLINIC CANCELLED**
- **PRE-APPOINTMENT**
- **APPOINTMENT CANCELLED**

These correspond to the letter types available from within appointments shown in the Scheduling and Patients modules.

4.1.7.1 Creating a New Letter Template

Each type of appointment letter template uses a similar format. The 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 needed 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.

Follow these steps to create a new letter template:

1. Click **Clinics** in the selection pane of the Settings Module to see the **Clinics** listing page (Figure 4-9).

Clinics								
Clinics Table Maintenance Add Edit Parameters Edit Availability								
Sort By Name Filter Clinic								
Name	Resource Name	Abbreviation	Division	Institution	Active	Reactivation Date	Inactivate Date	
A CLINIC	A CLINIC	AC	DEMO HOSPITAL	DEMO HOSPITAL	☐			
A CLINIC 1	A CLINIC 1	AC1	DEMO HOSPITAL	DEMO HOSPITAL	☐			
A CLINIC 2	A CLINIC 2	AC2	DEMO HOSPITAL	DEMO HOSPITAL	☐			
AAA MEDICAL CENTER	AAA MEDICAL CENTER	AAAMC	DEMO HOSPITAL	DEMO HOSPITAL	☐			
AMBULATORY CHRONIC PAIN CLINIC		ACPAC	IHS HOSPITAL	DEMO HOSPITAL	☐			
ANTICOAGULATION	Anticoag	ACC	IHS HOSPITAL	DEMO HOSPITAL	☐			
B CLINIC		BC	DEMO HOSPITAL	DEMO HOSPITAL	☐			
BIBERICA HEADSTART (R-60/15)		D HS	IHS HOSPITAL	DEMO HOSPITAL	☐			
BIBERICA, EXAM-PEDS (PP-60/15)		D EP	IHS HOSPITAL	DEMO HOSPITAL	☐			
BIBERICA, GP-PEDS (BP-60/15)		D GP	IHS HOSPITAL	DEMO HOSPITAL	☐			
BIBERICA, MISC DENTAL (30/15)		D MISC	IHS HOSPITAL	DEMO HOSPITAL	☐			
BLUE FP PRINCIPLE		PRNCIP	IHS HOSPITAL	DEMO HOSPITAL	☐			
BLUE SAME DAY PRINCIPLE		PRNCIP	IHS HOSPITAL	DEMO HOSPITAL	☐			
BROWN FP NEW-15		FP	IHS HOSPITAL	DEMO HOSPITAL	☐			
BROWN PRENATAL NEW-30		PRENATA	IHS HOSPITAL	DEMO HOSPITAL	☐			
BROWN SAME DAY NEW-15		SAMEDAY	IHS HOSPITAL	DEMO HOSPITAL	☐			
C CLINIC		CC	DEMO HOSPITAL	DEMO HOSPITAL	☐			
CANCER SCREENING		CS	DEMO HOSPITAL	DEMO HOSPITAL	☐			
CASE MANAGEMENT		CASEMGT	IHS HOSPITAL	DEMO HOSPITAL	☐			
CGPHNCLINIC		PPHN	DEMO HOSPITAL	DEMO HOSPITAL	☐			

Figure 4-9: Settings Module - Clinics page

- Select the clinic for which you want to create the letter template, and then click **Edit Parameters** in the upper right corner of the page. The **Clinic Configuration** page for the selected clinic is displayed (Figure 4-10).

Clinic Configuration - AAA MEDICAL CENTER			
General Scheduling Users/Providers Letters			
Name [required]	Abbreviation [required]	Division [required]	Institution
AAA MEDICAL CENTER	AAAMC	CIHA HOSPITAL	2010 DEMO HOSPITAL
Treating Specialty	Principal Clinic	Clinic Code [required]	Service
GENERAL MEDICINE	AAA DEMO CLINIC	FAMILY PRACTICE	MEDICINE
Telephone	Reactivation Date	Inactivation Date	
555-888-6547	Enter date	Enter date	
Prohibit access to clinic	Non Count Clinic	Include on file room list	Clinic meets at this facility
☐	☐	☒	☒
Physical Location	ALBUQUERQUE		
Save Cancel			

Figure 4-10: Clinic Configuration page example

- Click the **Letters** tab, and then select one of the letter types listed in the selection pane on the left of the page. For the example shown in Figure 4-11, **No-Show** has been selected.

Clinic Configuration - AAA MEDICAL CENTER

General Scheduling Users/Providers **Letters**

Modify

NO-SHOW

CLINIC CANCELLED

PRE-APPOINTMENT

APPOINTMENT CANCELLED

Dear JOHN,DOE

We missed you! You had an appointment on:

Wednesday, August 22, 2012 12:00 AM AAA MEDICAL CENTER

70 %

Save Cancel

Figure 4-11: **No-Show Letter** template selected

- Click **Modify** in the upper right corner of the page to open the letter configuration dialog (Figure 4-12).

NO-SHOW LETTER

Letter Template

Create New Template

Name [required] Greetings to parents? ☐

Initial Section

Final Section

Save Cancel

Figure 4-12: Blank Letter Configuration dialog

5. Select **Create New Template** in the **Letter Template** list, and type the name you want to give the new letter template in the **Name** field. For this example, the letter template is named *NO-SHOW EXAMPLE*.
6. 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 for pediatric patients.
7. 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** will be displayed after the salutation of the letter, but before the appointment date, time, and clinic. Text in the **Final Section** will be displayed after the appointment date, time, and clinic. Figure 4-13 shows an example of the letter configuration dialog after adding text to the appropriate fields.

Figure 4-13: Completed Letter Configuration dialog

8. After adding the desired text, click **Save** to close the dialog and save the new letter template.

Figure 4-14 shows an example of the No-Show letter template created using these steps.

Clinic Configuration - AAA MEDICAL CENTER

General Scheduling Users/Providers **Letters**

Modify

NO-SHOW
CLINIC CANCELLED
PRE-APPOINTMENT
APPOINTMENT CANCELLED

Dear JOHN,DOE

Did you forget about us? Our records show that you missed the appointment shown below:

Wednesday, August 22, 2012 12:00 AM AAA MEDICAL CENTER

Please contact us at your earliest convenience to re-schedule your appointment.

Thank you, The Staff at AAA Medical Center

70 %

Save Cancel

Figure 4-14: No-Show Letter template example

4.1.7.2 Modifying an Existing Letter Template

Existing letter templates are modified in a manner similar to creating a new one. Follow these steps:

1. Open the letter configuration dialog as described in Steps 1 through 4 in Section 4.1.7.1.
2. Select the letter template you want to modify from the **Letter** list.
3. Make any desired changes to the text of the letter template, and then click **Save** to save the template and close the letter configuration dialog.

4.2 Configuring Clinic Availability

Select a clinic and then click **Edit Availability** on the main **Clinics** page to establish the periods of time the selected clinic will be available for patient appointments and other scheduled events. Figure 4-15 shows an example of the **Clinic Availability Configuration** page.

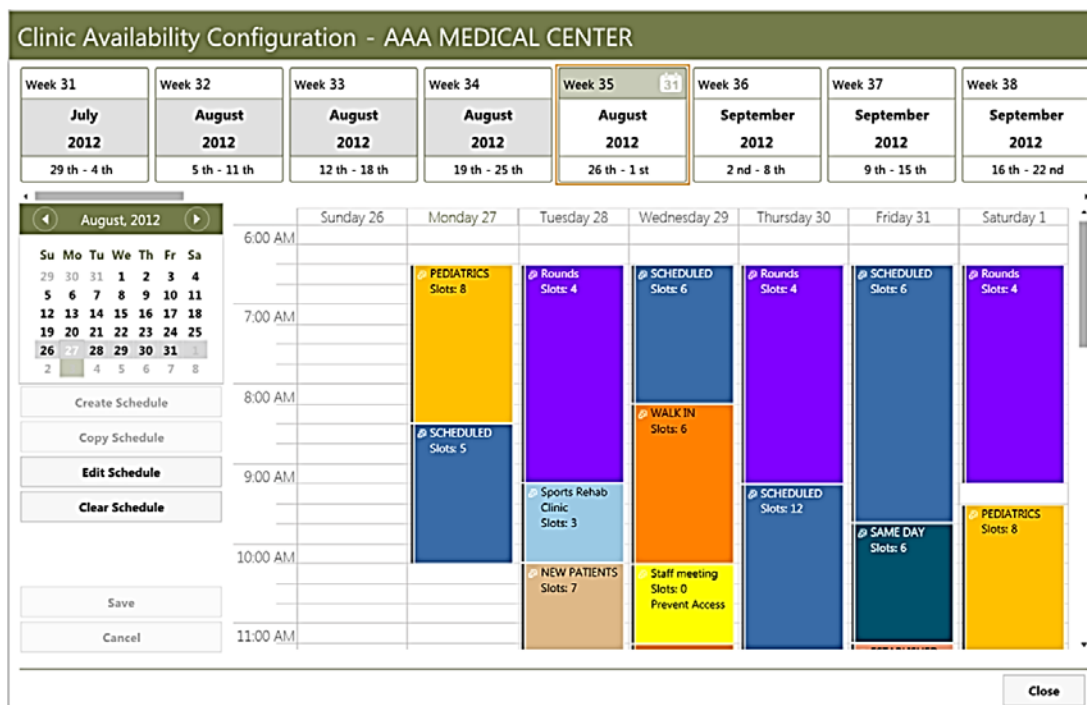


Figure 4-15: **Clinic Availability Configuration** page

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). 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 to suit your needs.

4.2.1 Using the Clinic Availability Configuration Page

The **Clinic Availability Configuration** page has four separate panels: The Timeline, the Calendar panel, the Availability Schedule menu, and the Schedule grid.

4.2.1.1 Timeline

The Timeline panel of the **Clinic Availability Configuration** page (Figure 4-16) shows 52 weeks, spanning from four weeks in the past to 48 weeks into the future.

Week 32	Week 33	Week 34	Week 35	Week 36	Week 37	Week 38	Week 39	Week 40	Week
August 2012	August 2012	August 2012	August 2012	September 2012	September 2012	September 2012	September 2012	September 2012	
5 th - 11 th	12 th - 18 th	19 th - 25 th	26 th - 1 st	2 nd - 8 th	9 th - 15 th	16 th - 22 nd	23 rd - 29 th	30 th - 6 th	

Figure 4-16: Timeline panel

Use the horizontal scroll bar (seen at the lower left corner of the example shown in Figure 4-16) to navigate to any of the weeks displayed on the Timeline. Click on any of the weeks shown to display that week's clinic availability in the schedule grid panel. A yellow border is displayed around the currently-selected week in the Timeline. In the example shown in Figure 4-16, Week 36 (September 2 through 8) is selected.

The Timeline also shows the weeks for which an availability schedule has been created (as opposed to a week that had 'inherited' its schedule from a previous week). This is indicated by shading in the upper part of each week block. In the example shown in Figure 4-16, Weeks 35, 37, and 40 each have an availability schedule. All of the other weeks displayed on the timeline also have a schedule, but it is inherited from a previous week. In the example shown in Figure 4-16, the schedule for Week 36 is inherited from Week 35. Similarly, Weeks 38 and 39 will have the same schedule as Week 37.

Past weeks are indicated on the Timeline with shading in the middle of the week block. In the example shown in Figure 4-16, Weeks 32 through 35 are in the past, while the other weeks displayed are either the current week or weeks in the future.

4.2.1.2 Calendar Panel

Use the Calendar panel of the **Clinic Availability Configuration** page (Figure 4-17) to quickly navigate to a specific year, month, or week.

July, 2013						
Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Figure 4-17: Calendar panel – week view

The calendar panel provides three different views, showing weeks, months, or years. The example in Figure 4-17 shows the "week" view for the month of July. Use the left and right arrows at the top of the calendar to navigate to other months.

When in the week view, click the month in the heading portion of the calendar to display all of the available months for the chosen year. Figure 4-18 shows an example of the "month" view.



Figure 4-18: Calendar panel - month view

Click any of the months displayed to navigate to the week view of that month.

When in the month view, click the year in the heading portion of the calendar to display all of the years available for clinic availability configuration. Figure 4-19 shows an example of the "year" view.



Figure 4-19: Calendar panel - year view

Click any of the years displayed to navigate to the month view of that year.

Using the combination of week, month, and year views, you can quickly navigate to a specific week, regardless of the year or month.

4.2.1.3 Availability Schedule Menu

Use the menu on the left side of the **Clinic Availability Configuration** page (Figure 4-20) to create, copy, edit, or clear an availability schedule.

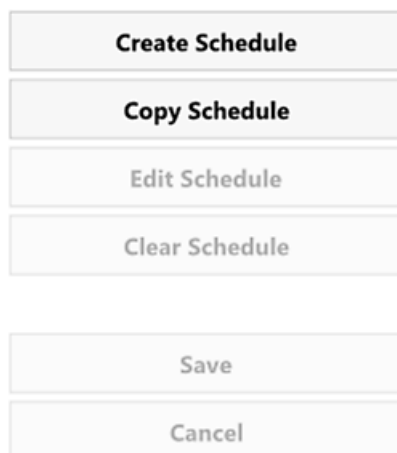


Figure 4-20: Availability Schedule menu

The options available on the menu will vary depending on the task you are performing. For example, if you have selected a week that has no availability schedule established, you have the options of creating a new schedule or copying an existing schedule to that week. Conversely, if you have selected a week for which an existing availability schedule has been established, you have the options of editing or clearing that schedule. In either case, after you have finished making changes, you are given the options to save the schedule or cancel the changes.

4.2.1.4 Availability Schedule Grid

The Availability Schedule grid panel of the **Clinic Availability Configuration** page (Figure 4-21) shows any clinic availability schedules that have been established. This panel is also used to configure new availability schedules or edit existing ones.



Figure 4-21: Availability Schedule grid

As described in Section 4.2, a clinic availability schedule is comprised of Access Blocks, which are color-coded representations of the amount of time allotted for a specific type of clinic access (such as appointments). The availability schedule grid displays the access blocks that have been established for a specific week.

4.2.2 Creating an Availability Schedule

Before creating individual Access Blocks, you must first create an availability schedule. An availability schedule covers one or more weeks at a time. If you have established multiple availability schedules, you can select which availability schedule is currently in effect for the selected clinic.

Note: If an availability schedule has been created, it will remain in effect for any week thereafter until you create a new availability schedule (or copy an existing one) in a different week.

Follow these steps to create an availability schedule:

1. In the **Clinics** page of the **Settings** module, highlight the name of the clinic for which you want to add an availability schedule, and then click **Edit Availability**.
2. On the **Clinic Configuration** page displayed, navigate to the week for which you want to establish an availability schedule.
3. Click **Create Schedule** on the menu on the left side of the page. This causes a blank availability schedule (Figure 4-22) to be displayed.

The screenshot displays the 'Clinic Availability Configuration - AAA MEDICAL CENTER' window. At the top, there is a header bar with the title. Below it, a navigation bar shows weeks from Week 19 to Week 27, with Week 27 selected. Each week entry includes the month and year (e.g., May 2013, June 2013) and the date range (e.g., 5 th - 11 th, 12 th - 18 th, etc.).

The main area is a grid for creating an availability schedule. On the left side of the grid, there is a sidebar with a calendar view showing months from Jan to Oct, with June selected. Below the calendar, there are buttons: 'Create Schedule', 'Copy Schedule', 'Edit Schedule', 'Clear Schedule', 'Save', and 'Cancel'. The grid itself has columns for days of the week (Sunday 9, Monday 10, Tuesday 11, Wednesday 12, Thursday 13, Friday 14, Saturday 15) and rows for time slots (6:00 AM, 7:00 AM, 8:00 AM, 9:00 AM, 10:00 AM). The grid is currently blank, indicating no access blocks have been created yet.

At the bottom right of the window, there is a 'Close' button.

Figure 4-22: Blank availability schedule

- After creating one or more Access Blocks as described in Section 4.2.2.1, click **Save** on the menu to save the new availability schedule, or click **Cancel** to cancel your changes and return to the previous availability schedule displayed.

4.2.2.1 Creating an Access Block

In order to establish an availability schedule, you 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.

Follow these steps to create a new Access Block:

- Open a blank availability schedule for the desired week as described in Section 4.2.2.
- In the blank grid displayed, select the grid cell(s) for which you want to create an Access Block. In the example shown in Figure 4-23, the cells representing Mondays from 8:00 AM to 10:15 AM have been selected.

Figure 4-23: Access block times selected

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

- Right-click within the selected cell(s) and select **Create Access Block** from the menu displayed to specify the access type. The **Configure Access Block** dialog shown in Figure 4-24 is displayed:

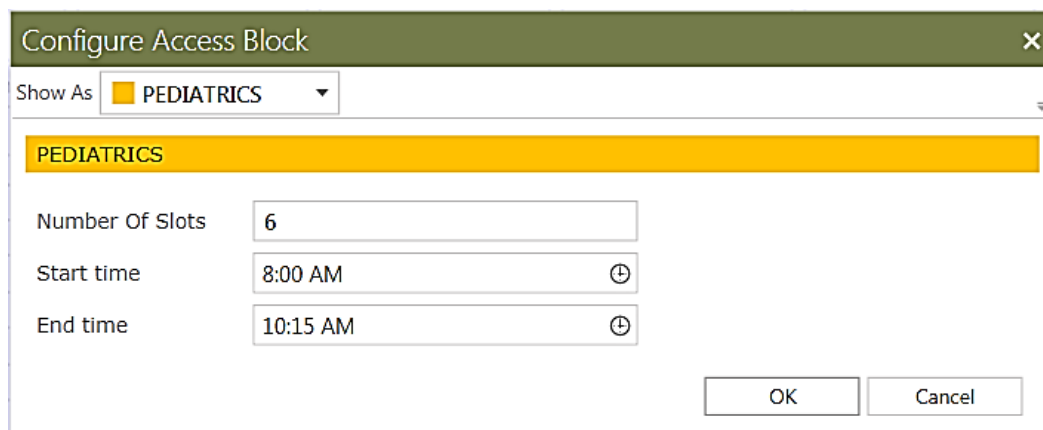
Figure 4-24: **Configure Access Block** dialog

- Use the **Show As** list to select the access type for the selected schedule cell(s). In the example shown in Figure 4-25, **Pediatrics** is being selected:

Figure 4-25: **Configure Access Block** dialog – Pediatrics selected

Note: The different Access Types available on the list are established on the Table Maintenance page of the Settings Module. See Section 4.4 for more information about setting up different Access Types.

- 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 as needed to the **Start time** and **End time** fields. Figure 4-26 shows a typical **Configure Access Block** dialog after selecting the access type (**PEDIATRICS**) and **Number Of Slots (6)**.

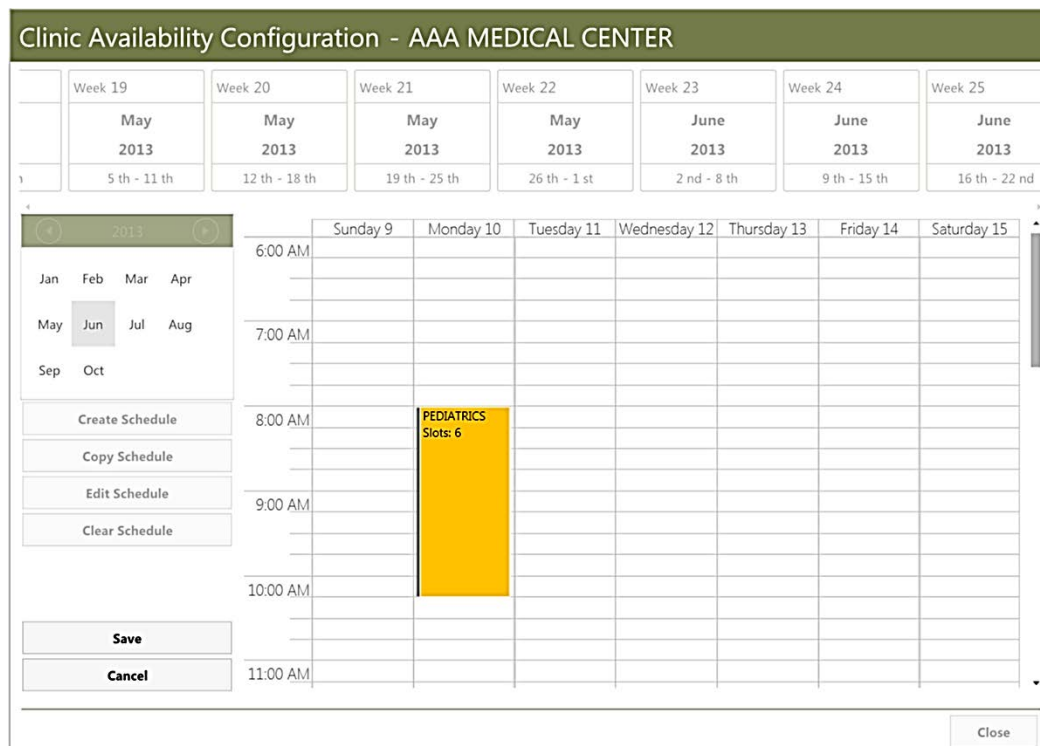


The 'Configure Access Block' dialog box is shown. It has a title bar with a close button. Below the title bar is a 'Show As' dropdown menu set to 'PEDIATRICS'. A yellow bar highlights the 'PEDIATRICS' category. Below this, there are three input fields: 'Number Of Slots' with the value '6', 'Start time' with '8:00 AM' and a clock icon, and 'End time' with '10:15 AM' and a clock icon. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 4-26: **Configure Access Block** dialog – completed

Note: If the **Number of Slots** field is set to zero, only user accounts with overbook capability can schedule appointments for that Access Block.

- When done, click **OK** to accept the settings for the new Access Block and return to the schedule grid. Figure 4-27 shows the results of adding the Access Block used in this example:



The 'Clinic Availability Configuration - AAA MEDICAL CENTER' window shows a weekly schedule grid. The top section displays weeks 19 through 25, with dates ranging from May 5th to June 22nd, 2013. The main grid shows time slots from 6:00 AM to 11:00 AM for each day of the week. A yellow block labeled 'PEDIATRICS Slots: 6' is added to the Monday 10th slot, spanning from 8:00 AM to 10:15 AM. On the left side, there is a sidebar with a calendar view for 2013, showing months from Jan to Oct. Below the calendar are buttons for 'Create Schedule', 'Copy Schedule', 'Edit Schedule', 'Clear Schedule', 'Save', and 'Cancel'. A 'Close' button is located at the bottom right of the window.

Figure 4-27: Availability schedule with new Access Block added

7. Create any other Access Blocks needed, and then click **Save** on the Action menu to save the availability grid or click **Cancel** to exit without saving your changes.
8. When you click **Save**, the confirmation dialog shown in Figure 4-28 is displayed.

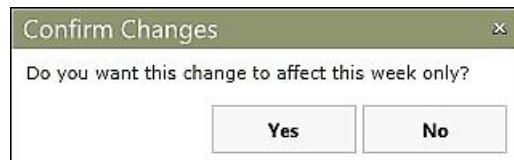


Figure 4-28: **Confirm Changes** Dialog

Click **Yes** to have the new availability schedule affect only the selected week. Click **No** to cause the availability schedule to affect the selected week as well as all other weeks afterward, until another availability schedule is established.

Note: This dialog is only displayed when you are creating a new availability schedule for a week for which an availability schedule has previously been established.

4.2.3 Editing an Access Block

To edit an Access Block after it has been created, double-click the block you want to edit. This causes an Appointment dialog similar to that shown in Figure 4-24 to be displayed. (Alternatively, you can right-click an Access Block and select **Change Access Block** from the context menu displayed.) Within that dialog, you can change the Access Type, Number of Slots, Start time, and End time fields. Click **OK** to close the dialog and save your changes, or click **Cancel** to close the dialog without saving any changes.

4.2.4 Copying Access Blocks

You can copy a day's worth of existing Access Blocks to a different day of the schedule availability grid. To do so, right-click on an empty grid cell for the day where you want the Access Block to be copied, select the Copy From option, and then select the day you want to copy. In the example shown in Figure 4-29, all of the Access Blocks from the Monday column of the grid will be copied to the selected day.

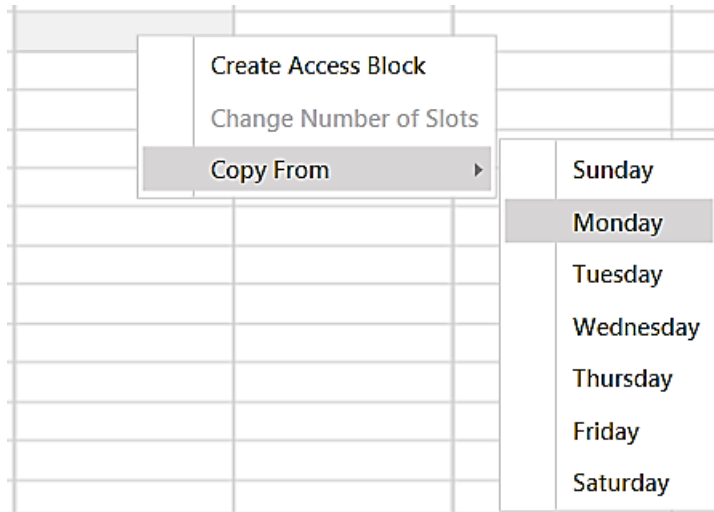


Figure 4-29: Copying Access Blocks

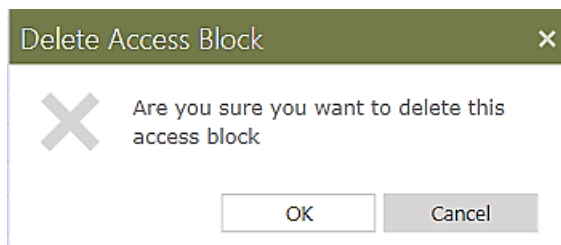
4.2.5 Deleting an Access Block

To delete an Access Block, hold your mouse cursor over the Access Block, then click the circled X in the upper right corner of the block as shown in Figure 4-30.



Figure 4-30: Deleting an Access Block

When you click the X, a confirmation dialog (Figure 4-31) is displayed. Click **OK** to accept the deletion or click **Cancel** to close the confirmation without deleting the Access Block.

Figure 4-31: **Delete Access Block** confirmation dialog

4.2.6 Copying an Availability Schedule

You can copy one or more days of a schedule to a different week in the schedule availability grid. Follow these steps to copy an availability schedule:

1. Use the Timeline at the top of the Clinic Availability Configuration screen to navigate to the week to which you want to copy an existing availability schedule.
2. Click **Copy Schedule** in the Availability Schedule menu on the left side of the screen. This causes the Copy Schedule dialog (Figure 4-32) to be displayed. The current availability schedule for the selected week is shown in the **Copy From** list box. In this example, the week of 7/14/2013 is displayed.

Copy Schedule

Copy From: 7/14/2013

Copy Days: ☒ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday

	Sunday 14	Monday 15	Tuesday 16	Wednesday 17	Thursday 18	Friday 19	Saturday 20
6:30 AM							
8:30 AM	SCHEDULED Slots: 12						
10:30 AM							
12:30 PM							

OK Cancel

Figure 4-32: **Copy Schedule** dialog - before

3. Use the **Copy From** list box at the top of the dialog to choose the week from which you want to copy the schedule to the selected week. The Copy Schedule dialog will display the schedule for the week you select from the list. In the example shown in Figure 4-33, the schedule from the week of 9/30/2012 will be copied to the selected week (7/14/2013).

Copy Schedule

Copy From: 9/30/2012

Copy Days: ☒ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday

	Sunday 30	Monday 1	Tuesday 2	Wednesday 3	Thursday 4	Friday 5	Saturday 6
6:30 AM		PEDIATRICS Slots: 8	Rounds Slots: 4	SCHEDULED Slots: 6	Rounds Slots: 4	SCHEDULED Slots: 6	Rounds Slots: 4
8:30 AM		SCHEDULED Slots: 5	Sports Rehab Clinic	WALK IN Slots: 6	SCHEDULED Slots: 12	SAME DAY Slots: 6	PEDIATRICS Slots: 8
10:30 AM			NEW PATIENTS Slots: 7	Staff meeting Slots: 0 WALK IN Slots: 4		ESTABLISHED	
12:30 PM							
		PRENATAL					

OK Cancel

Figure 4-33: **Copy Schedule** dialog - after

By default, the copy operation will copy all seven days of the schedule you are copying. As an option, you can copy only specific days of the week by clearing the appropriate check boxes in the **Copy Days** section of the dialog.

- After you have selected the week to copy from, click **OK** to copy the schedule to the selected week.
- As a final step, click **Save** in the Availability Schedule menu on the left side of the screen. The **Confirm Changes** dialog shown in Figure 4-34 is displayed.

Confirm Changes

Do you want this change to affect this week only?

Yes No

Figure 4-34: **Confirm Changes** dialog

Click **Yes** to have the new availability schedule affect only the selected week. Click **No** to cause the availability schedule to affect the selected week as well as all other weeks afterward, until another availability schedule is established.

4.3 Table Maintenance Page

Click **Table Maintenance** in the selection pane of the Settings Module to see the main Table Maintenance page. Figure 4-35 shows an example of the Settings module with the Table Maintenance page displayed.



Figure 4-35: Settings Module - Table Maintenance page

The individual options available from the Table Maintenance page are described in the User Manual for the module affected by that option, as shown in Table 4-4.

Table 4-4: Settings module – Table Maintenance options

Option	Described In
Eligibility Modifiers	<i>BMW Patient Registration User Manual</i>
Employer Group Insurance	<i>BMW Patient Registration User Manual</i>
Employers	<i>BMW Patient Registration User Manual</i>
Insurers	<i>BMW Patient Registration User Manual</i>
Patient Application Types	<i>BMW Patient Registration User Manual</i>
Access Types	<i>BMW Scheduling Module User Manual</i>
Resource Groups	<i>BMW Scheduling Module User Manual</i>

4.4 Access Types

As described in Section 4.2, 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). The **Access Types** option on the Table Maintenance page provides a way to define the types of Access Blocks available. You can add new Access Types and edit existing ones.

4.4.1 Adding an Access Type

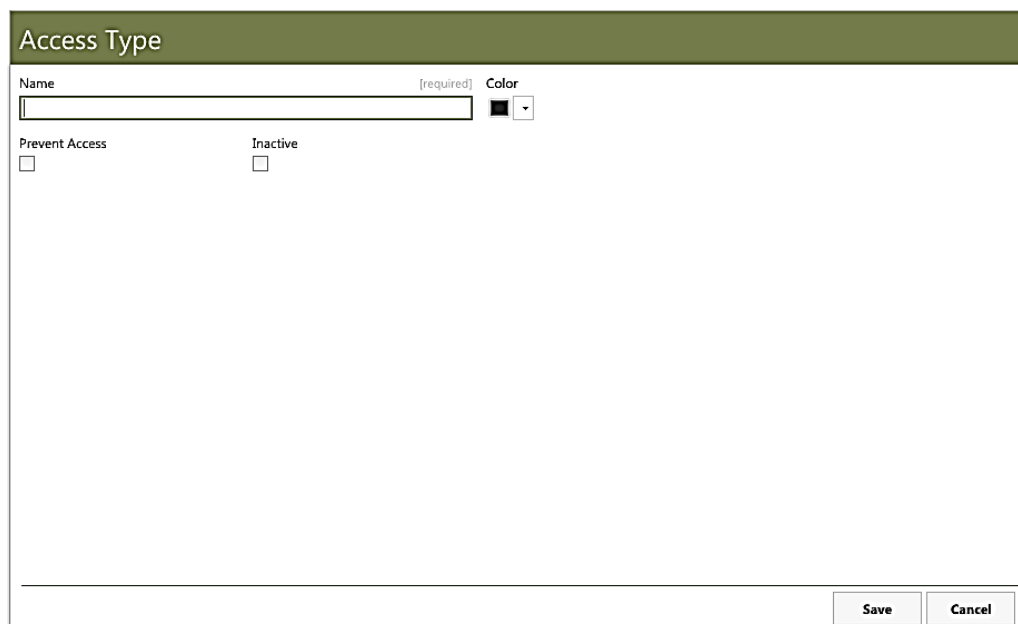
Follow these steps to add a new Access Type:

1. From the **Table Maintenance** page of the Settings Module, select **Access Types** and click **View** adjacent to the **Access Types** label. The **Access Types** listing page (Figure 4-36) is displayed.

Name	Inactive	Prevent Access	Color
HOLIDAY	☐	☒	
LUNCH	☐	☒	
SCHEDULED	☐	☐	
STUDY	☐	☐	
UNSCHEDULED	☐	☐	
WALK-IN	☐	☐	

Figure 4-36: **Access Types** listing page

2. Click **Add** in the upper right corner of the Access Types listing page to display the **Access Type** description page (Figure 4-37).



The image shows a web form titled "Access Type" with a dark green header. Below the header, there is a "Name" field with a "[required]" label and a "Color" dropdown menu. Underneath these, there are two checkboxes: "Prevent Access" and "Inactive". At the bottom right of the form, there are "Save" and "Cancel" buttons.

Figure 4-37: **Access Type** description page

3. Type a name for the new Access Type in the **Name** field and select a color from the **Color** list.

Optionally, select the **Prevent Access** check box to use this Access Block as a time period during which appointments cannot be scheduled. Also optionally, select the **Inactive** check box to create the new Access Type without making it active. Figure 4-38 shows an example of the **Access Type** description page after creating a new Access Type named **TEST ACCESS TYPE**.

Access Type

Name [required] Color

TEST ACCESS TYPE

Prevent Access ☐ Inactive ☐

Save Cancel

Figure 4-38: Creating a New Access Type

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

4.4.2 Editing an Access Type

Follow these steps to edit an existing Access Type:

1. From the **Table Maintenance** page of the Settings Module, select **Access Types** and click **View** (located to the left of the **Access Types** label). The Access Type listing page () will be displayed.
2. Use one of these methods to find the Access Type you want to edit:
 - Use the left and right arrows in the lower left corner of the page and the vertical scroll bar on the right of the page to navigate through each page of the Access Type listing.
 - Type the first few letters of the Access Type name in the **Filter Access Type** field in the upper right corner of the page, and then press Enter.
3. Select the Access Type you want to edit and click **Edit** in the upper right corner of the page. (Alternately, you can double-click the Access Type name.) A page similar to that shown in Figure 4-39 will be displayed.

Access Type

Name [required] Color ▾

Prevent Access ☐ Inactive ☐

Save Cancel

Figure 4-39: Editing an Access Type

4. Make any changes necessary to the Access Type name, color, and active/inactive status, and then click **Save** to save your changes or click **Cancel** to close the page without saving the changes. In the example shown in Figure 4-40, the **Name** has been changed from **DENTAL SPECIAL** to **DENTAL SPECIALTY**, the **Color** has been changed from pale blue to bright red, and the Access Type has been made active by clearing the **Inactive** check box.

Access Type

Name [required] Color ▾

Prevent Access ☐ Inactive ☐

Save Cancel

Figure 4-40: Access Type after editing

4.5 Resource Groups

Resource Groups are user-defined lists of clinic resources grouped together to streamline appointment scheduling for those resources. These resources can include providers (such as Dentists and Physicians), facilities, equipment, or other kinds of scheduled services. Note that 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 BMW Scheduling module.

4.5.1 Adding a Resource Group

Follow these steps to add a new Resource Group:

1. From the **Table Maintenance** page of the Settings Module, select **Resource Groups** and click **View** (located to the left of the **Resource Groups** label). A **Resource Groups** listing page similar to the one shown in Figure 4-41 will be displayed.

Name	Inactivate Date
ANTICOAG	
Anne's Clinic	
FAMILY MED	
PHYSICAL THERAPY	
URGENT CARE	

Page 1

Close

Figure 4-41: **Resource Groups** listing page

2. Click **Add** in the upper right corner of the Resource Groups listing page to display the **Resource Group** description page (Figure 4-42).

Resource Group

Name [required] Inactivation Date

Enter date

Group Resources

Name

Save Cancel

Figure 4-42: **Resource Group** description page

3. Type a name for the Resource Group in the **Name** field at the top of the page.
4. 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 4-43, a Resource Group named **XYZ GROUP** was created. The **AAA DEMO CLINIC** has been added to the group and **AAA MEDICAL CENTER** will be added once the mouse is clicked.

Resource Group

Name [required] Inactivation Date

XYZ GROUP Enter date

Group Resources

AAA

AAA DEMO CLINIC

AAA DEMO CLINIC II

AAA MEDICAL CENTER

Name

AAA DEMO CLINIC

Save Cancel

Figure 4-43: Adding a Group Resource

- When all the desired resources have been added to the group, click **Save** to save the group or click **Cancel** to close the page without saving your changes.

4.5.2 Editing a Resource Group

Follow these steps to edit an existing Resource Group:

- From the **Table Maintenance** page of the Settings Module, select **Resource Groups** and click **View** in the upper right corner of the page. (Alternately, you can double-click the **Resource Groups** label.) If you have a large number of Resource Groups, you can use the **Filter Resource Group** field in the upper right corner of the page to assist in finding the desired group.
- Select the Resource Group you want to edit, and then click **Edit** in the upper right corner of the page. (Alternatively, you can double-click the label for the selected Resource Group.) A Resource Group description page similar to that shown in Figure 4-44 is displayed.

Resource Group	
Name [required]	Inactivation Date
XYZ GROUP	Enter date
Group Resources	
Name	
AAA DEMO CLINIC	Remove
AAA MEDICAL CENTER	Remove
Save Cancel	

Figure 4-44: **Resource Group** description page ready to be edited

- From this page, you can edit the **Name** of the Resource Group, add resources to the group as described in Section 4.5.1, 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.
- When the desired changes are done, click **Save** to save your changes or click **Cancel** to close the page without saving your changes.

Note: You must log out and log back into BMW in order for any changes you make to take effect.

5.0 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.

5.1 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.

Click **Reports** in the Practice Management Application Suite Taskbar (Figure 5-1) to open the **Reports** module.



Figure 5-1: Taskbar with **Reports** module highlighted

5.1.1 Reports Toolbar

Regardless of the report type, the top of each report page includes the Reports Toolbar (Figure 5-2), which provides a variety of tools for handling and manipulating reports.



Figure 5-2: Reports Toolbar

5.1.1.1 Previous/Next Buttons

After you have generated more than one report of a specific type, use the Previous/Next buttons (Figure 5-3) to “page” through each of the previously-viewed reports.



Figure 5-3: Previous/Next buttons

5.1.1.2 Refresh Button

Use the Refresh button (Figure 5-4) to refresh a report.



Figure 5-4: Refresh button

The Refresh button is useful for ensuring a specific report contains the latest up-to-the-minute patient information.

5.1.1.3 Page Selection Buttons

Use the Page Selection buttons (Figure 5-5) to navigate through multi-page reports.



Figure 5-5: Page Selection buttons

You can also type a specific page number into the text field to jump quickly to that page.

5.1.1.4 Print Button

Use the Print button (Figure 5-6) to print the currently-displayed report.



Figure 5-6: Print button

Clicking this button displays a standard print dialog, which allows you to choose the printer to use, as well as the page range and the number of copies of the report to print.

5.1.1.5 Save Button

Click the Save button (Figure 5-7) to save the report in a variety of file formats.



Figure 5-7: Save button

The following file formats are supported:

- Acrobat (PDF)
- CSV (comma delimited)

- Excel 97-2003
- Rich Text Format
- TIFF

5.1.1.6 Show/Hide Parameters Button

Use the Show/Hide Parameters button (Figure 5-8) to alternately show or hide the report parameters panel at the top of the report page.

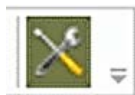


Figure 5-8: Show/Hide Parameters button

Hiding the parameters panel allows you to see more report entries per page.

5.2 Scheduling Report Types

When the Reports module is open, a listing of the available scheduling-related reports is displayed as shown in Figure 5-9.



Figure 5-9: **Scheduling Reports** listing

Click **View** on the left of any of the report type labels to open that type of report. After opening a report, you must provide additional parameters (such as start and end dates) in order to view it.

5.3 Clinic Schedule Report

The Clinic Schedule report shows the appointment schedule for one or more clinics, covering a time period you specify.

5.3.1 Clinic Schedule Report Parameters

When you first open the **Clinic Schedule Report** page, you must enter the **Clinics**, and the **Start** and **End** dates as shown in Figure 5-10.

The screenshot shows a web form titled "Clinic Schedule Report" with a green header bar. Below the header is a toolbar with various icons for navigation and actions. The form contains three input fields: "Clinics" (a dropdown menu), "Start" (a date input field), and "End" (a date input field). Each of these fields has a red circular icon with a white exclamation mark to its right, indicating a required field. A "Preview" button is located at the bottom right of the form.

Figure 5-10: **Clinic Schedule Report** parameters

Choose one or more clinics from the **Clinics** list, specify the start and end dates for the report, and click **Preview** to view the report. The clinics available in the **Clinics** list are limited to the clinics in your user preferred resource list.

5.3.2 Information in the Clinic Schedule Report

The Clinic Schedule report provides appointment information for each selected clinic found within the date parameters you specify. This information includes the following:

- Clinic name, day and date
- Appointment time
- Patient's name, HRN, date of birth, and age
- Person who scheduled the appointment and date it was scheduled
- Patient's home phone number
- Other information such as notes, if entered

Figure 5-11 shows an example of a typical Clinic Schedule report.

Clinic Schedule Report

Clinics: AAA MEDICAL CENTER Start: 1/12/2012 End: 7/30/2012

Page 1

Appointments For AAA MEDICAL CENTER on Monday, June 18, 2012

8:45 AM	MISHRA, KATHY	HRN: 999999	DOB: 1/1/1871	Age: (141)y	5051234567 CHECKED IN
9:00 AM	TSAVATEWA, JANNA MARIE	HRN: 176712	DOB: 8/23/1990	Age: (21)y	555-555-6731 SCHEDULED
9:15 AM	TSAVATEWA, JANNA MARIE	HRN: 176712	DOB: 8/23/1990	Age: (21)y	555-555-6731 CANCELLED BY CLINIC
9:30 AM	DOE, BETTY	HRN: 156911	DOB: 4/28/1988	Age: (24)y	

Figure 5-11: Clinic Schedule Report example

5.4 Appointments Report

The Appointments report shows detailed information about patient appointments at one or more clinics, filtered by appointment status and sorted by date.

5.4.1 Appointments Report Parameters

When you first open the **Appointments Report** page, you must specify **Clinics**, **Status**, and the **Start** and **End** dates for the report, as shown in Figure 5-12.

Appointments Report

Clinics: [Dropdown] Start: [Enter date] End: [Enter date] Status: [Dropdown]

Preview

Figure 5-12: Appointments Report parameters

Choose one or more clinics from the **Clinics** list, specify the **Start** and **End** dates for the report, and choose one or more options from the **Status** list.

The **Status** field offers the following options. You can select any combination of these statuses, or choose the **<select all>** option to quickly select all of the available types:

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

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

5.4.2 Information in the Appointments Report

The Appointments report provides detailed appointment information for each selected clinic found within the date parameters you specify. This information includes the following:

- Clinic name
- Appointment day and date
- Time
- Patient name
- Scheduled by
- Status
- Check-in time and by whom
- Check-out time and by whom

Figure 5-13 shows an example of an Appointments report.

Appointments Report Page 1

Appointments For AAA DEMO CLINIC II on Wednesday, January 18, 2012

Time	Patient	Scheduled By	Status	Check-In Time/By	Check-Out Time/By
10:00 AM	JOHNSON,ANDREW	ADMIN,SYSTEM	CHECKED IN	1/18/2012 10:00 AM ADMIN,SYSTEM	

Appointments For AAA DEMO CLINIC II on Tuesday, January 31, 2012

Time	Patient	Scheduled By	Status	Check-In Time/By	Check-Out Time/By
------	---------	--------------	--------	------------------	-------------------

100 %

Close

Figure 5-13: **Appointments Report** example

5.5 Waiting List Report

The **Waiting List** report shows information about appointment waiting lists at one or more clinics, filtered by appointment priority and sorted by date.

5.5.1 Waiting List Report Parameters

When you first open the **Waiting List Report** page, you must specify **Clinics**, **Priority**, and the **Start** and **End** dates for the report, as shown in Figure 5-14. In the case of the Waiting List report, the start and end dates refer to the recall dates.

Waiting List Report

0 of 0 pages

Clinics ⓘ

Priority ⓘ

Start ⓘ

End ⓘ

Show Resolved ☐

Preview

Figure 5-14: **Waiting List Report** parameters

Choose one or more clinics from the **Clinics** list, specify the **Start** and **End** dates for the report, and choose one or more options from the **Priority** list.

The **Priority** field offers the following options. You can select any combination of these waiting list priorities, or choose the <**select all**> option to quickly select all of them:

- **High**
- **Low**
- **Middle**

Select **Show Resolved** to show the waiting list entries that have been resolved, in addition to the outstanding waiting list entries.

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

5.5.2 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
- Patient name and HRN
- Patient home and work phone numbers
- Patient address
- Recall date
- Reason
- Priority
- Provider
- Comments (if any have been added)

Figure 5-15 shows an example of a **Waiting List Report**.

Waiting List Report

Clinics: DEMO CLINIC II, AAA Start: 3/30/2012

Priority: HIGH, LOW, MIDDLE End: 6/28/2012

Show Resolved ☐

Preview

Waiting List Report Page 1

Waiting List For AAA MEDICAL CENTER

Patient	Recall Date	Priority	Provider
SMITH, AARON CHRISTOPHER (143966) Home: 555-555-5582 POSTELL RD ANYCITY NORTH CAROLINA 28719	5/14/2012 Reason: WARD FULL	MIDDLE	JOHNSON, ANN MD
MISHRA, KATHY (999999) Home: 5051234567 Work: 5053216543 12345 ANY ST LOS ANGELES CALIFORNIA 91202	6/21/2012 Reason: CLOSED CLINIC	LOW	JOHNSON, ANN MD
DOE, JOHN (357951)	6/25/2012	MIDDLE	

100 %

Close

Figure 5-15: **Waiting List Report** example

5.6 Cancel/No-Show Appointments Report

The **Cancel/No-Show Appointments Report** shows information about appointments that were cancelled by the patient or the clinic, as well as those that are no-shows, over a specific date range. This report shows one or more clinics, filtered by appointment status and sorted by date.

5.6.1 Cancel/No-Show Appointments Report Parameters

When you first open the **Cancel/No-Show Appointments Report** page, you must specify **Clinics**, **Status**, and the **Start** and **End** dates for the report, as shown in Figure 5-16.

Cancel/No-Show Appointments Report

Clinics: [] Start: Enter date

Status: [] End: Enter date

Preview

Figure 5-16: **Cancel/No-Show Appointments Report** parameters

Choose one or more clinics from the **Clinics** list, specify the start and end dates for the report, and choose one or more options from the **Status** list.

The Status field offers the following options. You can select any combination of these waiting list statuses, or choose the <**select all**> option to quickly select all of the available choices:

- Cancelled by Clinic, which also includes appointments marked as "Cancelled by Both"
- Cancelled by Patient
- No-Show

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

5.6.2 Information in the Cancel/No-Show Appointments Report

The Cancel/No-Show Appointments Report provides detailed information about cancelled or no-show appointments for each selected clinic found within the date and status parameters you specify. This information includes the following:

- Clinic name
- Appointment day and date
- Time
- Patient name
- Scheduled by
- Status
- Cancel/No-Show time and who entered it into the patient record
- Notes (if present)
- Cancellation reason (if given)
- Other remarks (if entered)

Figure 5-17 shows an example of a **Cancel/No-Show Appointments Report**.

Cancel/No-Show Appointments Report

1 of 2 pages

Clinics: MEDICAL CENTER, ABQ Start: 2/6/2013
Status: CANCELLED BY PATIENT, End: 5/17/2013 Preview

Appointments For ABQ CLINIC on Monday, April 29, 2013

Time	Patient	Scheduled By	Status	Cancel/No-Show Time/By
1:40 PM	WEST, JALEE MONIQUE	ADMIN, SYSTEM	CANCELLED BY CLINIC	5/1/2013 11:24 AM ADMIN, SYSTEM
Other Info: test Reason Cancelled: WEATHER Remarks: test				

Appointments For BLUE ADULT CLINIC on Tuesday, March 19, 2013

Time	Patient	Scheduled By	Status	Cancel/No-Show Time/By
3:00 PM	DEMO, BLUE JOE	ADMIN, SYSTEM	CANCELLED BY CLINIC	3/19/2013 1:53 PM ADMIN, SYSTEM
Reason Cancelled: SCHEDULING CONFLICT/ERROR				

Appointments For BLUE ADULT CLINIC on Wednesday, March 20, 2013

Time	Patient	Scheduled By	Status	Cancel/No-Show Time/By
------	---------	--------------	--------	------------------------

100 % Close

Figure 5-17: **Cancel/No-Show Appointments Report** example

5.7 Clinic Workload Report

The Clinic Workload report shows statistical information about scheduled and unscheduled appointments at one or more clinics.

5.7.1 Clinic Workload Report Parameters

When you first open the **Clinic Workload Report** page, you must specify the **Clinics**, and the **Start** and **End** dates for the report, as shown in Figure 5-18.

Clinic Workload Report

0 of 0 pages

Clinics: Enter date Start Enter date End Preview

Figure 5-18: **Clinic Workload Report** parameters

5.7.2 Information in the Clinic Workload Report

The **Clinic Workload Report** provides statistics about the workload at one or more clinics. This information is shown in two sections: a summary view and a statistical view.

The summary view includes this information:

- Clinic name
- Date
- Number of scheduled appointments
- Number of unscheduled appointments
- Number of over-books
- Number of no-shows
- Number of canceled appointments
- Total number of patients seen

The statistical view includes this information:

- Clinic name
- Number of visits for the specified date range
- Number of visits for the same date range for the previous year(s)
- Net change in number of visits
- Percentage of change in number of visits

Figure 5-19 shows an example of a **Clinic Workload Report**.

Clinic Workload Report

1 of 1 pages

Clinics: AAA MEDICAL CENTER Start: 4/29/2012 End: 8/7/2012 Preview

Clinic Workload Report Page 1

Clinic Name	Date	Sched Appt	Unsched Appt	Over-Books	No-Shows	Cancel Appt	Total Seen
AAA MEDICAL CENTER	6/18/2012	7	0	0	1	2	7
	7/2/2012	2	0	0	0	0	2
	7/9/2012	4	0	0	0	0	4
	7/18/2012	1	0	0	0	0	1
	7/24/2012	1	0	0	0	0	1
	7/25/2012	1	0	0	0	0	1
Clinic Total:		16	0	0	1	2	16

Total Seen = Sched + Unsched + Overbooks
Cancelled and No-Shows are not included in the above totals and are given for statistical purposes only.

Clinic Name	Number of Visits 4/29/2012-8/7/2012	Number of Visits 4/29/2011-8/7/2011	Net Change	% Change
AAA MEDICAL CENTER	16	0	16	1,600.00 %

91 %

Close

Figure 5-19: Clinic Workload Report example

5.8 Batch Print Appointment Letters

The **Batch Print Appointment Letters** option in the Reports module provides a way 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, and are configured in the Settings module described in Section 4.1.7.

5.8.1 Batch Print Appointment Letters Parameters

When you first open the **Batch Print Appointment Letters** page, you must specify the **Clinics**, **Types**, and the **Start** and **End** dates for the appointments to be included in the batch of letters, as shown in Figure 5-20.

Batch Print Appointment Letters

0 of 0 pages

Clinics: [dropdown] Start: Enter date End: Enter date Types: [dropdown] Preview

Figure 5-20: Batch Print Letters parameters

The **Clinics**, **Start** and **End** fields are self-explanatory. The **Types** list offers these letter types:

- **Appointment Cancelled**
- **Clinic Cancelled**
- **No-Show**
- **Pre-Appointment**

5.8.2 Batch Printing Appointment Letters

Follow these steps to batch print one or more appointment letters:

1. Open the **Batch Print Appointment Letters** page as described in Section 5.8
2. In the **Clinics** list, select one or more clinics for which you want to print appointment letters.
3. In the **Start** and **End** date fields, enter the start and end dates for the time period the appointment letters should cover.
4. Use the **Type** list to select the type of letter you want to print.
5. Click **Preview** to generate the appointment letter(s) and display a preview of them. Use the left and right arrows in the toolbar to navigate from one letter to the next.

Note: Each particular letter type must be configured for your clinic. See Section 4.1.7 for more information about configuring patient letters.

6. Click the **Print Report** control in the toolbar to print the letters, or click the **Export Report** control to save the letters in Acrobat (PDF), CSV (comma delimited), Excel 97-2003, Rich Text Format, or TIFF formats for printing at a later time.
7. When done, click **Close** at the lower right of the page to close the page and return to the main Reports module page.

Appendix A: Keyboard Shortcuts

When running BMW in out of browser mode (as described in the *BMW Overview User Manual*), many of the BMW features and functions can be accessed with keyboard shortcuts. This Appendix describes the keyboard shortcuts that apply to the BMW Scheduling module. Keyboard shortcuts for the BMW Patient Registration module are described in the *BMW Patient Registration User Manual* and keyboard shortcuts for the Application ribbon are described in the *BMW Overview User Manual*.

The following table shows the keyboard shortcuts for the Scheduling module:

Keys	Available On	Action Performed
Ctrl-T	Schedule page	Go To Today
Ctrl-D	Schedule page	Change schedule to Day view
Ctrl-W	Schedule page	Change schedule to Week view
Ctrl-O	Schedule page	Change schedule to Month view
Ctrl-L	Schedule page	Change schedule to List view
Ctrl-Shift+S	Schedule page	Show Search Slot View
Ctrl- + [plus sign]	Schedule page	Zoom In (horizontal)
Ctrl- - [minus sign]	Schedule page	Zoom Out (horizontal)
Ctrl- * [multiply sign]	Schedule page	Zoom In (vertical)
Ctrl- / [divide sign]	Schedule page	Zoom Out (vertical)
Ctrl-Shift-W	Schedule page	Show Add To Waiting List dialog
Ctrl-H	Schedule page	Hide Waiting List
Ctrl-Shift-D	Schedule page	Display Time (All Day)
Ctrl-Shift-A	Schedule page	Display Time (AM)
Ctrl-Shift-P	Schedule page	Display Time (PM)
F5	Schedule page	Refresh schedule
F11	Schedule page	Toggle Full Screen mode on and off

Appendix B: 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.

B.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).

B.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.

B.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.

B.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.

B.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.

B.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.

B.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).

B.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 lower case 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.

B.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.

B.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.

B.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 screen after some period of inactivity.

B.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.

B.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.

B.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.

B.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.

B.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 needed 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 2 digits for Area, 2 digits for Service Unit, and 2 digits for Facility.

Health Record Number (HRN)

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 page.

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 needs to be created for the patient listed.

Acronym List

BMW	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: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

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