RESOURCE AND PATIENT MANAGEMENT SYSTEM

Patient Information Management System
(PIMS)

Scheduling
(BSD)
User Manual

Version 5.3
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Albuquerque, New Mexico

PREFACE

The purpose of this manual is to provide user information about the Scheduling module that is part of Patient Information and Management System (PIMS) package version 5.3. Included in this manual is the information providing instructional guidance to a broad range of users within IHS medical facilities in daily use of the Scheduling Module of the PIMS software

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1.0 Introduction

The PIMS user manual is divided into three modules, ADT, Scheduling, and Sensitive Patient Tracking. This is the Scheduling module of PIMS. The Scheduling module of the PIMS Package is designed to assist in the setup of clinics, scheduling of patients for clinic appointments, and the collection of an assortment of related workload data for reporting purposes.

The information gathered through the Scheduling package is available online to a wide range of users throughout the medical center. Scheduling is fully integrated with FileMan, thus allowing the extraction of ad hoc reports by non-programming personnel. The Scheduling software provides for efficient and accurate collection, maintenance, and output of data, thus enhancing your medical center's ability to provide quality care to its patients.

Important features of the Scheduling module include clinic setup and enrollment/ discharge of patients from clinics. Some of the outputs that may be generated include workload analysis reports and letters of notification regarding cancellation of clinics/appointments.

The PIMS software package makes use of Current Procedural Terminology (CPT) codes, which is an AMA copyrighted product. Its use is governed by the terms of the agreement between the IHS and the American Medical Association.

Other related materials are the PIMS technical manual, the PIMS installation guide, and the PIMS release notes. The PIMS technical manual is provided to assist IRM personnel in the maintenance of the software. The installation guide provides assistance in installation of the package, and the release notes describe any modifications and enhancements to the software that are new to the version.

Note: MAS is an acronym for Medical Administration Service. This service, where it still exists, is now generally referred to as Health Administration Service. Several file names, option names, and reports in the PIMS software contain the initials MAS. These will be retained to avoid confusion and ensure continuity.

2.0 Orientation

2.1 How To Use This Manual

The Scheduling user manual is provided in Adobe Acrobat PDF (portable document format) files. The Acrobat Reader is used to view the documents. If you do not have the Acrobat Reader loaded, it is available from the Adobe home page (www.adobe.com).

Once you open the PDF file, you can click on the desired entry name in the table of contents on the left side of the screen to go to that entry in the document. You can print any or all pages of the file. Click on the Print icon and select the desired pages, then click OK.

Each menu file contains a listing of the menu, a brief description of the options contained therein, and the actual option documentation. The option documentation gives a detailed description of the option and what it is used for. It contains any special instructions related to the option.

2.2 Online Help

When the format of a response is specific, there usually is a help message provided for that prompt. Help messages provide lists of acceptable responses or format requirements that provide instruction on how to respond.

A help message can be requested by typing ? or ??. The help message will appear under the prompt, then the prompt will be repeated. For example:

```
Sort by TREATING SPECIALTY: ?
CHOOSE FROM:
01 SURGERY
1 CARDIOLOGY
12 PSYCHIATRY
Sort by TREATING SPECIALTY:
```

For some prompts, the system will list the possible answers from which you may choose. Any time choices appear with numbers, the system will usually accept the number or the name.

A help message may not be available for every prompt. If you type ? or ?? at a prompt that does not have a help message, the system will repeat the prompt.

2.3 Note to Users With "QUME" Terminals

It is very important that you set up your Qume terminal properly. After entering your access and verify codes, you will see:

```
Select TERMINAL TYPE NAME: {type}//
```

Please make sure that C-QUME is entered here. Once you type this, it will become the default and you can then press the Return key for all subsequent log-ins. If any other terminal type configuration is set, options using the List Manager utility (such as Appointment Management and Scheduling Parameters) will neither display nor function properly on your terminal.

3.0 Appointment List (AL)

Use this option to print a list of all set appointments categorized by time slot for each selected clinic for a specific date. The system prompts for setting options to allow for the number of copies, allowing walk-ins, identifying who made the initial appointment, as well as including the patient's primary contact number.

Running an Appointment List

1. Type AL at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: AL
```

Figure 3-1:Printing an appointment listing (step 1)

2. Type the division name or press the Return key for all divisions at the "Select division:" prompt. Type ?? at the "Select division:" prompt for a list of available options.

3. Type the name of the clinic or press the Return key for all clinics at the "Select clinic:" prompt. Type ?? at the "Select Clinic:" prompt for a list of available options. You can enter more than clinic by typing additional clinics at the "Select Another Clinic:" prompt. When you are done entering clinics, you can press the Return key at a blank "Select Another Clinic:" prompt.

4. Type the date at the "For Date:" prompt. Type ?? at the "For Date:" prompt for a description of valid dates.

```
Select Scheduling Menu Option: AL


     Use this option to print a list of scheduled appointments
     for one or more clinics for a specific date.  You can ask
     for all clinics or by principal clinic.  Optional items to
     include are walk-ins, who made the appointment, patient's
     phone number and primary care provider assignments.

Select division: ALL// [RET]
Select clinic: ALL// UNSPECIFIED
Select another clinic: Dulce
Select another clinic: [RET]
For Date: Today// [RET]
```

Figure 3-2: Printing an appointment listing (steps 2-4)

5. Type Y or N to the prompts that follow to customize your listing. You can press the Return key to accept the default entry.

6. Type B (browse onscreen) or P (print on paper) at the "Select One of the Following:" prompt. If you select P, type answers to the prompts that follow. If you select B, the list will appear on the screen (Figure 3-4).

```
Include Walk-Ins? YES// [RET]
Include Who Made Appt? NO// [RET]
Include Patient's Phone #? NO// [RET]
Include Primary Care Information? NO// [RET]
Include Chart Requests? NO// [RET]

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER


PRINT MODE: P
Number of Copies:  (1-10): 1
DEVICE: HOME
```

Figure 3-3: Printing an appointment listing (steps 5-6)

```
Appointment List            Oct 08, 2002 14:28:29          Page:    0 of    0
          Confidential Patient Data Covered by Privacy Act
 Time  Patient Name       HRCN      DOB (Age)    Lab@     X-Ray@     EKG@
         Insurance & Appointment Information









          Enter ?? for more actions

Select Action:Quit// ??



The following actions are also available:
+    Next Screen          FS   First Screen         SL   Search List
-    Previous Screen      LS   Last Screen          ADPL Auto Display(On/Off)
UP   Up a Line            GO   Go to Page           Q    Quit
DN   Down a Line          RD   Re Display Screen
>    Shift View to Right  PS   Print Screen
<    Shift View to Left   PL   Print List

Enter RETURN to continue or '^' to exit:
```

Figure 3-4: Sample appointment list

4.0 Appointment Management (AM)

Use this option to view appointments for a selected patient or clinic and to execute appropriate action(s) against these appointments, such as check in and check out.

If a patient is selected, all appointments for the selected patient within the designated time frame will be displayed. The beginning date of the report range is determined by the Appt Search Threshold parameter in the Scheduling Parameters (today's date minus the parameter entry), and the ending date will be 999 days in the future. If selecting a clinic, you will be prompted for the date range of the display. Only clinic appointments within the designated time frame and with a status of No Action Taken or Action Required are displayed. Following is a list of actions that may be accomplished through the Appointment Management Screen.

CI	Check In	OI	Add/Edit Other Info	HS	Health Summary
WI	Walk In	AT	Ancillary Tests	RX	Rx Profiles
PR	Patient Registration	CO	Check Out	PT	Change Patient
MA	Make Appointment	DE	Delete Check Out	CL	Change Clinic
NS	No Show	PC	Update PCP	CD	Change Date Range
CA	Cancel Appointment	EX	Expand Entry	AP	Appt Profiles

1. Type AM at the “Select Scheduling Menu Option:” prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: AM
```

Figure 4-1: Managing appointments (step 1)

2. Type a specific patient or clinic name at the “Select Patient name or Clinic name:” prompt. You can type a portion of a patient or clinic name and the system will give you the closest matches to your request. Select the number of matches you desire, then type Y or N at the “OK?” prompt to either confirm or reject your selection.

    a. If you are selecting a clinic, type the beginning date of the search at the “Select Beginning Date:” prompt. Then type the ending date of the search at the “Select Ending Date:” prompt. Type ?? at either prompt to see a list of available options. The Scheduling Management Module will be displayed (Figure 4-4).

> **Note:** If selecting a clinic, you will be prompted for the date range of the display. Only clinic appointments within the designated time frame and with a status of No Action Taken or Action Required are displayed.

```
                    APPOINTMENT MANAGEMENT

     Use this option to make appointments, check-in patients,
     request charts and otherwise manage your clinic.  You can
     select by patient to process that patient's appointments
     OR select a clinic to process all appointments in that
     clinic for a date range.


Select Patient name or Clinic name: C

     Searching for a Patient


     Searching for a Clinic

     1   CARDIOLOGY       DOCTOR,KATHRYN
     2   COLPO CLINIC
CHOOSE 1-2: 1

     CARDIOLOGY     DOCTOR,KATHRYN
  ...OK? Y

Select Beginning Date: T-30
Select    Ending Date: T
```

Figure 4-2: Managing appointments (steps 2 and 2a)

    b. If you select patient name, you will be directly taken to the Scheduling Management Module (Figure 4-4).

```
Select Patient name or Clinic name: PATIENT

     Searching for a Patient

   1    PATIENT,ALLISON                 M 02-02-1901 559785650    MH 4298
   2    PATIENT,ANDREA B.               F 07-05-1960 518775162    MH 7852
   3    PATIENT,ANNA MAE                F 06-07-2000 377571315    MH 9180
   4    PATIENT,ANNE MARIE              F 08-20-1960 697311756    MH 1745
   5  PATIENT,ANNETTE FLORENE  JAKE,NAOMI REBECCA
                                       F 08-29-1959 125287093    MH 4294
ENTER '^' TO STOP, OR
CHOOSE 1-5: 1
  PATIENT,ALLISON                      M 02-02-1901 559785650    MH 4298
        ...OK? Y
```

Figure 4-3: Managing appointments (steps 2 and 2b)

3. At the Appointment Management module, you will be presented with a list of options at the bottom of the screen. These options are explained in sections 4.1 through 4.18. Select the action that you want to use and then follow the prompts as they appear on your screen to carry out that action.

```
Appt Mgt Module            Oct 09, 2002 08:06:02          Page:    1 of   13
Clinic: PEDIATRIC
Total Appointment Profile                                 10/09/01 thru 10/24/01

     Patient                          Appt Date/Time    Status
 1   8068 PATIENT,Frank             10/10/2001@08:21  Checked In
 2   8097 PATIENT,Christopher       10/10/2001@08:30  No Action Taken
 3   7701 PATIENT,Carlos            10/10/2001@08:30  No Action Taken
 4   8239 PATIENT,Kylee Ruthia      10/10/2001@08:30  No Action Taken
 5   9073 PATIENT,Jamal Charles     10/10/2001@08:45  No Action Taken
 6   8667 PATIENT,Larry Anthony     10/10/2001@08:45  No Action Taken
 7   8190 PATIENT,Christlyn         10/10/2001@08:45  No Action Taken
 8   8617 PATIENT,Amanda Rae        10/10/2001@08:45  No Action Taken
 9   8219 PATIENT,Sandra Mae        10/10/2001@09:00  No Action Taken

+         Enter ?? for more actions

CI  Check In              OI  Add/Edit Other Info   HS  Health Summary
WI  Walk In               AT  Ancillary Tests       RX  Rx Profiles
PR  Patient Registration  CO  Check Out             PT  Change Patient
MA  Make Appointment      DE  Delete Check Out      CL  Change Clinic
NS  No Show               PC  Update PCP            CD  Change Date Range
CA  Cancel Appointment    EX  Expand Entry          AP  Appt Profiles
Select Action:
```

Figure 4-4: Appointment Management Module (excerpt)

4.1 Check In (CI)

The Appointment Check-in option is used to check in appointments for a selected clinic and date. It may also be used to edit the checked in date/time on file for an appointment or delete a checked in date/time when one has been entered in error.

1. Type CI at the “Select Action:” prompt.
2. Type the number of the patient or appointment you want to check in at the “Select Appointment:” or “Select Patient:” prompt. A brief summary of patient information will be displayed.
3. Type the date of check in or press the Return key to accept the current date and time at the “Checked-In:” prompt.
4. If the clinic uses PCC+, the PCC+ form will print at this time.

Under status, the patient will appear as being checked in and display the check-in time.

```
Select Action: CI
Select Appointment(s):  (10-18): 11
 11  8618 DEMO,Ventura      10/17/2001@09:00  No Action Taken
     Last Registration Update: JAN 17, 2001
CHECKED-IN: OCT 09, 2002@08:34// [RET]
```

Figure 4-5: Checking in a patient

```
Appt Mgt Module             Jan 09, 2004 09:50:45          Page:    1 of    1
Clinic: CARDIOLOGY
Total Appointment Profile                                 12/10/03 thru 01/09/04

     Patient                        Appt Date/Time    Status
 1   106290 DEMO,PATIENT            01/09/2004@14:00  Checked In          09:40
```

Patient is shown as being checked in.

```
          Enter ?? for more actions
CI  Check In              OI  Add/Edit Other Info   HS  (Health Summary)
WI  Unscheduled Visit     AT  Ancillary Tests       RX  (Rx Profiles)
PR  Patient Registration  CO  Check Out             PT  Change Patient
MA  Make Appointment      DE  Delete Check Out      CL  Change Clinic
NS  No Show               PC  Update PCP            CD  Change Date Range
CA  Cancel Appointment    EX  Expand Entry          AP  Appt Profiles
Select Action:Quit//
```

Figure 4-6: Displaying a checked-in patient

4.2 Walk In (WI)

Use this option to schedule a patient who has come into the clinic without an appointment and will be seen by a provider.

1. Type WI at the “Select Action:” prompt.

2. Type the name of the patient or clinic you want to check in at the “Select Patient:” or “Select Clinic:” prompt. A brief summary of patient information will be displayed.
3. Type the appointment time or press the Return key to accept the current time and date at the “Appointment Time:” prompt.
4. Type in any additional information at the “Other Info:” prompt. This entry can be free text. The system will then display the check-in time.
5. Type Y or N at the “Okay to Print a Routing Slip in Medical Records Now?” prompt.
    a. If you selected Y, you will be prompted to type the name of the printer where you want your report printed, and then type Y or N at the “Do You Want Your Output Queued” prompt. The walk-in is now logged into the system.
    b. If you selected N, the walk-in is now logged into the system.
6. If the clinic uses PCC+, the PCC+ form will print at this time.

```
Select Action: WI
     Last Registration Update: SEP 14, 2001
Select Clinic: CARDIOLOGY       DOCTOR,KATHRYN  (OCT 18, 2002@09:15)

APPOINTMENT TIME: NOW// [RET]
OTHER INFO: No comment at this time

CHECKED-IN: OCT 18, 2002@09:15//   (OCT 18, 2002@09:15)
        ...checked in OCT 18, 2002@09:15
OKAY TO PRINT A ROUTING SLIP IN MEDICAL RECORDS NOW? Y

FILE ROOM PRINTER: MIH108

Do you want your output QUEUED? N
```

Figure 4-7: Checking in a walk-in

Note: In the Scheduling Parameters option, if the Print Health Summaries with Routing Slips field is set to YES, and in the Clinic Profile, the Health Summary and Rx Profile fields are set to YES for printing with routing slips, these documents will be printed at this time.

4.3 Change Patient (PT)

Use this option to change the patient displayed on the screen without having to back out of the Appointment Management module.

1. Type PT at the “Select Action:” prompt.

2. Type the name of the patient you want, and the system will bring up the information on your patient.

4.4 Check Out (CO)

Use this option to check a patient out from their visit.

1. Type CO at the “Select Action:” prompt.

2. Type the appointment number needing check out at the “Select Appointment(s):” prompt.

3. Type Yes or No at the “Do you wish to make a follow-up appointment?” prompt. If you enter yes, you will be prompted to enter the date and time of the follow-up appointment. If you enter no, you will be prompted to enter the time and date of the check out.

```
Appt Mgt Module             Feb 02, 2004 14:57:37          Page:    1 of    1
Clinic: CARDIOLOGY
Total Appointment Profile                                 01/03/04 thru 02/02/04

     Patient                          Appt Date/Time    Status
 1   106290 PATIENT,ALAN RAY       01/09/2004@14:00  Checked In
 2   105441 DEMO,CISCO             01/09/2004@17:00  Checked In
 3   105191 PATIENT,ANISSA RAE     01/09/2004@17:00  Checked In
 4   102271 PATIENT,JESSICA        01/21/2004@11:27  Checked In       14:57





          Enter ?? for more actions
CI  Check In              OI  Add/Edit Other Info   HS  (Health Summary)
WI  Unscheduled Visit     AT  Ancillary Tests       RX  (Rx Profiles)
PR  Patient Registration  CO  Check Out             PT  Change Patient
MA  Make Appointment      DE  Delete Check Out      CL  Change Clinic
NS  No Show               PC  Update PCP            CD  Change Date Range
CA  Cancel Appointment    EX  Expand Entry          AP  Appt Profiles
Select Action:Quit// CO   Check Out
Select Appointment(s):  (1-4): 4

 4   102271 PATIENT,JESSICA     01/21/2004@11:27  Checked In       14:57
Do you wish to make a follow-up appointment? YES// [RET]


ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T+14  (FEB 16, 2004)

DATE/TIME: 022604@8  (FEB 26, 2004@08:00)


   ************************************************************
     15-MIN. APPOINTMENT MADE FOR WATERS,JESSICA NICOLE
     IN CARDIOLOGY CLINIC FOR Feb 26, 2004@08:00
   ************************************************************

WANT PATIENT NOTIFIED OF LAB,X-RAY, OR EKG STOPS? No//   (No)
  OTHER INFO:
Want to Print Appointment Letter for Patient? NO//
CHECKED OUT: NOW// [RET]  (FEB 02, 2004@15:00)
```

Figure 4-8: Checking out a patient

4. The Patient Status updates to indicate that the patient has been checked out and the time of check out.

```
Clinic: CARDIOLOGY
Total Appointment Profile                                    01/03/04 thru
02/02/04

     Patient                          Appt Date/Time    Status
 1   106290 PATIENT,Alan Ray         01/09/2004@14:00  Checked In
 2   105441 Demo,Cisco               01/09/2004@17:00  Checked In
 3   105191 PATIENT,Anissa Rae       01/09/2004@17:00  Checked In
 4   102271 PATIENT,Jessica          01/21/2004@11:27  Checked Out      15:00
 5   105441 Demo,Cisco               02/02/2004@15:00  Checked Out      15:01
```

Patient Status is now Checked Out

```
          Enter ?? for more actions
CI  Check In              OI  Add/Edit Other Info   HS  (Health Summary)
WI  Unscheduled Visit     AT  Ancillary Tests       RX  (Rx Profiles)
PR  Patient Registration  CO  Check Out             PT  Change Patient
MA  Make Appointment      DE  Delete Check Out      CL  Change Clinic
NS  No Show               PC  Update PCP            CD  Change Date Range
CA  Cancel Appointment    EX  Expand Entry          AP  Appt Profiles
Select Action:Quit//
```

4.5 Expand Entry (EP)

Use this option to get detailed information about a particular appointment.

1. Type EP at the “Select Action:” prompt.
2. Type the number of the appointment at the “Select Appointment:” prompt.
3. The Expanded Profile screen will be displayed. Use the options at the bottom of the screen to navigate through the screen. Type Q (quit) at the “Select Action:” prompt to return to the Appointment Management module.

```
Select Action: EP
Select Appointment(s):  (1-9): 1

Expanded Profile            Oct 18, 2002 11:05:18          Page:    2 of    2
                Confidential Patient Data Covered by Privacy Act
Patient: PATIENT,ALLISON (4298) Phone: 464-4775                        Ward:
PED
Appointment #: 1                                            Clinic: PEDIATRIC
+
                       *** Appointment Event Log ***
 Event                  Date                      User
 -----                  ----                      ----
 Appt Made              OCT 09, 2002@14:42:44     DOCTOR,JOHN
 Routing Slip Printed
 Check In               OCT 09, 2002@14:42        DOCTOR,JOHN
 Check Out
 Check Out Entered
 No-Show/Cancel

        Checked Out:
      Cancel Reason:
      Cancel Remark:
      Rebooked Date:
          Enter ?? for more actions

Select Action: Q
```

Figure 4-9: Displaying an extended entry

4.6 Change Clinic (CL)

Use this option to change the clinic currently displayed without having to leave the Appointment Management module.

1. Type CL at the “Select Action:” prompt.
2. Type the name of the new clinic at the “Select Clinic:” prompt and the system will change to new clinic. You can type ?? for a list of available clinics.

4.7 Cancel Appointment (CA)

Use this option to cancel an existing appointment for a patient or a clinic. Through this option, you can also print cancellation letters and rebook any canceled appointments.

1. Type CA at the “Select Action:” prompt
2. Type the number of the appointment which you want to cancel at the “Select Appointment(s):” prompt.

3. Type either P (patient) or C (clinic) depending on who canceled the appointment at the "Appointments Cancelled by (P)atient or (C)linic:" prompt.

4. Type the reason the appointment was cancelled at the "Select Cancellation Reasons Name:" prompt. Type ?? at the "Select Cancellation Reasons Name:" prompt for a list of available reasons. If you cannot find a reason close to one you need, contact your site manager to add the new reason to the system.

5. Type any other remarks you have about the cancellation at the "Cancellation Remarks:" prompt. This is a free-text field. If you do not have any remarks for this prompt, press the Return key.

6. Type Y or N at the "Do You Wish to Rebook Any Appointment(s) That You Have Cancelled?" prompt. If you select Y, you will be taken through a series of steps that will allow you to reschedule the appointment. Follow the prompts and screens as they are displayed.

```
Select Action: CA
Select Appointment(s):  (1-9): 8

Appointments cancelled by (P)atient or (C)linic: C

Select CANCELLATION REASONS NAME: Weather

CANCELLATION REMARKS: None

8   Pediatric                        10/16/2002@09:00  Inpatient Appointme
1 Appointment cancelled

DO YOU WISH TO REBOOK ANY APPOINTMENT(S) THAT YOU HAVE CANCELLED? N
```

Figure 4-10: Canceling an appointment

4.8 Make Appointment (MA)

Use this option to schedule one appointment for a patient.

1. Type MA at the "Select Action:" prompt.

2. Type the name of the clinic, primary care provider/team, or the name of the patient for which you want to book an appointment at the "Select Clinic:", "Select Provider/PCPR/PCTM:", or "Select Patient Name:" prompt.

3. Type the date, or the date and time of the desired appointment, F (first available), or ?? at the at the "Enter the Date Desired for this Appointment:" prompt. If you select F, you will be prompted to type a date range for the search. If you know the date and time of an available appointment, you may type it here without having to go through steps 4 and 5.

```
Select Action: MA

Clinic: CARDIOLOGY


Select PATIENT NAME: PATIENT, ALLISON
                              M 02-02-1901 559785650    MH 4298

  Select one of the following:

     'F'            for First available following a specified date
     Date           (or date computation such as 'T+2M') for a desired date
     Date/time      to schedule a specific appointment
     '?'            for detailed help

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: 10/30/02  (OCT 30, 2002)
```

Figure 4-11: Making an appointment (steps 1-3)

4. The Month-at-a-Glance screen will be displayed. Type either AL (appointment list) or SL (short list) at the "Select Action:" prompt to review the appointments available for the date range you entered.

5. When you are done browsing the appointments, type Q (quit) at the "Select Action:" prompt. If the particular clinic you chose has specific requirements for appointments, the system will display those requirements on the screen. All the requirements must be met in order to schedule an appointment.

6. Type the date and time of the desired appointment at the "Date/Time:" prompt.

7. Type Y or N at the "Want Patient Notified of Lab, X-Ray, or EKG Stops?" prompt. If you select Y, you will be prompted to type the date and time of the stops. When you are done typing stops, press the Return key at an empty "Enter Type and Time:" prompt.

8. Type Y or N at the "Want to Print Appointment Letter for Patient?" prompt. If you select Y, you will be prompted to type the printer where you want your letter printed.

```
Select Action: Q
15 MINUTE APPOINTMENTS
DATE/TIME: 10/30/02@9


   ************************************************************
     15-MIN. APPOINTMENT MADE FOR PATIENT,ALLISON
     IN CARDIOLOGY CLINIC FOR Oct 30, 2002@09:00
   ************************************************************

WANT PATIENT NOTIFIED OF LAB,X-RAY, OR EKG STOPS? No// Y  (Yes)
ENTER TYPE AND TIME (I.E. 'LAB@8:30'): lab@8  SCHEDULED
ENTER TYPE AND TIME (I.E. 'LAB@8:30'): [RET]
  OTHER INFO: none
Want to Print Appointment Letter for Patient? Y

DEVICE: HOME
```

Figure 4-12: Making appointments (steps 4-8)

4.9 Change Date Range (CD)

Use this option to change the date range originally entered without having to leave the Appointment Management module.

1. Type CD at the “Select Action:” prompt.
2. Type the new date range at the prompts.

```
Select Action: CD   Change Date Range

Select Beginning Date: SEP 24, 2002//T-60  (AUG 25, 2002)
Select    Ending Date: TODAY// T+30
```

Figure 4-13:Changing the date range

4.10 No Show (NS)

Use this option to change patient status to no-show. Check with your site manager as to what constitutes a no-show before marking a patient as a no-show. If you mistakenly change a patient’s status to no-show, you correct this by using this option as well.

1. Type NS at the “Select Action:” prompt.
2. Type the number of the appointment that you want to change to a no-show at the “Select Appointment (s):” prompt.

Note: If the patient status is already showing as a no-show, you can type Y at the “This Appointment Already a No-Show are You Sure You Want to Erase?” prompt and the system will change the status back to what it originally was.

3. Type Y or N at the “Want to Auto-Rebook No-Show Appointments Now?” prompt. If you select Y, the system will automatically book the patients in the next available slots. If you select N, you will have to reschedule the appointments using the MA option.

4. Type Y or N at the “Want Letters Printed Now?” prompt. If you type Y, you will be prompted to select a letter and a printer.

```
Select Action: NS
Select Appointment(s):  (1-3): 2
 2   Cardiology                      10/18/2002@10:30  No Action Taken/Tod
...OK   New Status: NO-SHOW
WANT TO AUTO-REBOOK NO-SHOW APPOINTMENTS NOW? N
WANT LETTERS PRINTED NOW? N
```

Figure 4-14: Entering a no-show

4.11 Delete Check Out (DE)

Use this option to delete a check out.

1. Type DE at the “Select Action:” prompt.

2. Type the number of the appointment you want to check out at the “Select Appointment(s):” prompt.

3. The system displays a warning.

4. Type Yes or No at the “Are you sure you want to delete the appointment check out?” prompt.

5. If you entered yes, the system will delete the record, press the Return key at the “Enter Return to continue or '^' to exit:” prompt.

```
Appt Mgt Module             Feb 02, 2004 15:01:18          Page:    1 of    1
Clinic: CARDIOLOGY
Total Appointment Profile                                 01/03/04 thru 02/02/04

     Patient                          Appt Date/Time    Status
 1   106290 PATIENT,Alan Ray        01/09/2004@14:00  Checked In
 2   105441 Demo,Cisco              01/09/2004@17:00  Checked In
 3   105191 PATIENT,Anissa Rae      01/09/2004@17:00  Checked In
 4   102271 PATIENT,Jessica         01/21/2004@11:27  Checked Out      15:00
 5   105441 Demo,Cisco              02/02/2004@15:00  Checked Out      15:01




          Enter ?? for more actions
CI  Check In              OI  Add/Edit Other Info   HS  (Health Summary)
WI  Unscheduled Visit     AT  Ancillary Tests       RX  (Rx Profiles)
PR  Patient Registration  CO  Check Out             PT  Change Patient
MA  Make Appointment      DE  Delete Check Out      CL  Change Clinic
NS  No Show               PC  Update PCP            CD  Change Date Range
CA  Cancel Appointment    EX  Expand Entry          AP  Appt Profiles
Select Action:Quit// DE   Delete Check Out
Select Appointment(s):  (1-5): 4

 4   102271 PATIENT,Jessica Nicole  01/21/2004@11:27  Checked Out      15:00

>>> Deleting the appointment check out will also delete any check out related
    information.  This information may include classifications, procedures,
    providers and diagnoses.

Are you sure you want to delete the appointment check out? NO// YES
>>> Deleting check out information...
   ...deleting check out date/time
>>> done.

Enter RETURN to continue or '^' to exit:
```

Figure 4-15: Deleting a check out

4.12 Appt Profiles (AP)

Use this option to see a list of transactions for a particular action.

1. Type AP at the “Select Action:” prompt.
2. Type the letters that corresponds to the action list you want to see at the “Select Profile:” prompt.
3. A list of transactions that have been executed under that action will be displayed.

```
Select Action: AP

CI        Checked In
NS        No Shows
TA        Total Appt Profile
NA        No Action Taken
CA        Cancelled
FU        Future Appointments
IP        Inpatient Appointments
NC        Non-Count Appointments
CO        Checked Out

Select Profile: CI
```

Figure 4-16: Listing appointment files

4.13 Patient Registration (PR)

Use this option to edit patient registration information.

1. Type PR at the "Select Action:" prompt.
2. If you are in a clinic screen, type the name of the patient at "Select Patient:" prompt. If you are already in a patient screen, go to step 3.
3. A listing of the patient's registration history will be displayed. Type Y or N at the "Want to Edit this Registration Record?" prompt.

```
elect Action: PR
Select PATIENT: PATIENT,ALLISON
                                        M 02-02-1901 559785650    MH 4298

   ********************************************************************
     Date of Last Registration Update: SEP 14, 2001

     Additional Registration Information:
       6-20-95 UPDATED FILE,CONSENT,CHS,PRI.ACT, ON FILE,NEED SSN,CIB.
       6-7-96 COMP UPDT,CONSENT,CHS,PRI.ACT,SSN ON FILE,NEED CIB,VT.
       7-10-96 CIB ON FILE,VT
       11-25-96 ABRV UPDT ON FILE,VT.
       09-25-97 UPDATED FILE.GB
       4-3-98 ABRV UPDT ON FILE,VT.
       1-8-99 COMP UPDT,CONSENT,CHS,PRI.ACT,ON FILE,SIGNED TODAY AND VALID
       THROUGH 1-8-00 OR OTHER CHGS,CONSENTED TO ALL SERVICES,VT.
       12-10-99 ABRV UPDT ON FILE,VT
       3-30-2000 ABRV UPDT ON FILE,VT
       9-14-2001 ABRV UPDT ON FILE,VT
   ********************************************************************

Want to Edit this Registration Record? Y
```

Figure 4-17: Editing patient registration (steps 1-3)

4. The Patient Registration screen will be displayed. This screen will also display a message informing you if there are any patient's registered with

temporary chart numbers. Press the Return key to continue with the editing process.

```
                              PATIENT REGISTRATION

                                  UNSPECIFIED HO

                             EDIT a patient's file


There are patients on file with TEMPORARY CHART NUMBERS.

Please print the list of these patients and supply the missing data.

Press the RETURN key to continue. [RET]
```

Figure 4-18: Editing patient registration (step 4)

5. The IHS Registration Editor screen will appear. Type the number of the field you want to edit at the "Change Which Item?" prompt. Type the new information and then press the Return key to record the changes. When you are done making changes or have no changes to make on this screen, press the Return key at the " Change Which Item?" prompt.

6. Press the Return key to scroll through each page of the patient's registration information. Make the appropriate changes where needed. To exit this option, you must repeatedly press the Return key, scrolling through the patient's registration information until you return to the Appointment Management module.

```
IHS REGISTRATION EDITOR  (page 1)UNSPECIFIED HO
==============================================================================
PATIENT,ALLISON   (updated: SEP 14, 2001)                      CHART #: 4298
------------------------------------------------------------------------------
                            Identifiers
==============================================================================
1.            DATE OF BIRTH :  02/02/1901
2.    PLACE OF BIRTH [CITY] :  UNSPECIFIED
3.   PLACE OF BIRTH [STATE] :  NEW MEXICO
4.                      SEX :  MALE
5.   SOCIAL SECURITY NUMBER :  000785650 (Verified by SSA)
6.        CURRENT COMMUNITY :  UNSPECIFIED RES
------------------------------------------------------------------------------
                                Mailing Address
7.  STREET ADDRESS [LINE 1] :  (505)623-8031
8.                     CITY :  UNSPECIFIED
9.                    STATE :  NEW MEXICO
10.                ZIP CODE :  88340
------------------------------------------------------------------------------
                                   Telephones
11.PHONE NUMBER [RESIDENCE] :  464-4775
12.     PHONE NUMBER [WORK] :  NONE
==============================================================================
                       CHANGE which item? (1-12) NONE// [RET]
```

Figure 4-19: Editing patient registration, excerpt of IHS registration editor (steps 5-6)

4.14 Add/Edit Other Info (OI)

Use this option to add or edit the Other Information field.

1. Type OI at the “Select Action:” prompt.
2. Type the number of the appointment which you need to make the change at the “Select Appointment(s):” prompt.
3. The “Other Info:” prompt will appear. If there is information in the field, it will appear next to the prompt. If there is no information, the prompt will be blank. Type the new or edited information at the “Other Info:” prompt and then press the Return key to record the changes.

```
Select Action: OI

Select Appointment(s):  (1-9): 1
OTHER INFO: this is the old info//  This is the new information [RET]
```

Figure 4-20: Changing the other info field

4.15 Ancillary Tests (AT)

Use this option to either add or delete an ancillary test appointment. With this option, you can also type or delete several entries for the same patient at various appointment times.

1. Type AT at the “Select Action:” prompt.

2. Type A (add test) (2a) or D (delete test) (2b) at the next “Select Action:” prompt.

   a. To add a test, type the number of the appointment to which you would like to add an appointment at the “Select Appointment(s)” prompt then enter the type of test and the time of the test at the “Enter Type and Time:” prompt. When you are finished adding tests, press the Return key at a blank “Enter Type and Time:” prompt.

```
     Select one of the following:

          A         ADD Ancillary Test
          D         DELETE Ancillary Test

Select Action: A
Select Appointment(s):  (1-9): 6
ENTER TYPE AND TIME (I.E. 'LAB@8:30'): ekg@9
ENTER TYPE AND TIME (I.E. 'LAB@8:30'): [RET]
```

Figure 4-21: Adding an ancillary test (step 2a)

   b. To delete a test, type the number of the appointment to which you would like to delete an appointment at the “Select Appointment(s)” prompt. A list of scheduled appointments will be displayed, then type the number of the appointment you want to delete at the “Select Test to Delete:” prompt.

```
     Select one of the following:

          A         ADD Ancillary Test
          D         DELETE Ancillary Test

Select Action: D
Select Appointment(s):  (1-9): 6
      1. LAB scheduled for Oct 10, 2002@21:00
      2. EKG scheduled for Oct 10, 2002@18:00
Select Test to Delete:  (2-999999999999): 1
```

Figure 4-22: Deleting an ancillary test (step 2b)

4.16 Update PCP (PC)

Use this option to update or change a patient’s Primary Care Provider (PCP).

1. Type PC at the “Select Action:” prompt.

2. The patient’s current PCP will be displayed. Type Y or N at the “Want to Change This Patient’s Providers?” prompt.

3. Type the name of the new PCP or press the Return key to accept the default PCP at the "Primary Care Provider:" prompt

4. Type the reason the change was made at the "Reason Prim Care Prov Changed:" prompt. Type ?? for a list of available reasons.

```
Select Action: PC

Primary Care Provider/Team: DOCTOR,JOHN / CARDIOLOGY
Want to CHANGE this patient's Providers? Y
PRIMARY CARE PROVIDER: DOCTOR,JOHN// DOCTOR,KATHRYN

REASON PRIM CARE PROV CHANGED: ??
```

Figure 4-23: Updating a patient's PCP

4.17 Health Summary (HS)

Use this option to display a patient's detailed health summary.

1. Type HS at the "Select Action:" prompt.

2. Type the name of the patient at the "Select Patient:" prompt.

3. Type the name of the specific type of health summary you need at the "Select Health Summary Type Name:" prompt. Type ?? at the "Select Health Summary Type Name:" prompt for a list of available summary types.

4. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select Action: HS
Select Patient: PATIENT,ALLISON
                                        M 02-02-1901 559785650    MH 4298
Select HEALTH SUMMARY TYPE NAME: PEDIATRIC

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER


PRINT MODE: B
```

Figure 4-24: Listing a health summary (steps 1-4)

5. If you selected B (browse onscreen), the Patient Health Summary screen will appear (Figure 4-25). Use the options at the bottom of the screen to navigate through the report.

```
Patient Health Summary     Oct 18, 2002 11:44:07          Page:    1 of    7

****** CONFIDENTIAL PATIENT INFORMATION -- 10/18/2002 11:44 AM  [JAC] *******
************** PATIENT,ALLISON #4298  (PEDIATRIC SUMMARY)  pg 1
**************

---------------------------- DEMOGRAPHIC DATA ----------------------------

PATIENT,ALLISON                 DOB: FEB 2,1901  41 YRS  MALE    no blood
type
APACHE, UNSPECIFIED TRIBE, NM       SSN: 559-78-5650
                                  MOTHER'S MAIDEN NAME: SHANTA,MARGARET
(H) 464-4775 (W) NONE
UNSPECIFIED RES ((505)623-8031,UNSPECIFIED,NM,88340)

LAST UPDATED: SEP 14,2001         ELIGIBILITY: CHS & DIRECT

HEALTH RECORD NUMBERS:  004298  UNSPECIFIED HO
DESIGNATED PROVIDER: DOCTOR,JOHN
REMARKS: 6-20-95 UPDATED FILE,CONSENT,CHS,PRI.ACT, ON FILE,NEED SSN,CIB.
         6-7-96 COMP UPDT,CONSENT,CHS,PRI.ACT,SSN ON FILE,NEED CIB,VT. [more]

+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 4-25: Listing a health summary (step 5)

4.18 Rx Profiles (RX)

Use this option to view or print a patient's medication or action profile.

1. Type RX at the "Select Action:" prompt.
2. If you are in a patient screen, type the clinic name at the "Select Clinic:" prompt, if you are in a clinic screen, type the name of the patient "Select Patient:" prompt.
3. Type the 1 for the patient's medication profile, or type 2 for the patient's action profile at the "Select Rx Profile to Print:" prompt.
4. Type a printer name at the "Device:" prompt. You can type HOME to display the report on the screen.

```
Select Action:Next Screen// RX   Rx Profiles
Select Patient: PATIENT,ALLISON
                                          F 02-02-1901 559785650    MH 4298

     Select one of the following:

          1         Medication Profile
          2         Action Profile

Select Rx Profile to Print: 1  Medication Profile
DEVICE: HOME// M1808
```

Figure 4-26: Listing RX profiles

5.0 Chart Requests (CR)

Use this option to request a patient's chart for review without actually scheduling the patient for an appointment. It could be used in a case where a physician has ordered lab tests for a particular patient and wishes to review those results in one week but not see the patient for another two weeks. You may type multiple patients for any selected date. The patient need not be enrolled in the clinic; however, he or she must be actively registered at the facility.

Routing slips for chart request that are requested for the same day will print immediately. No appointment is scheduled for the patient and no appointment letters are generated. The patient will appear on the clinic's file room list with no appointment time.

Future chart requests are processed the night before the requested delivery date. These will be sorted along with the nightly routing slip run. Please request charts as many days in advance as possible.

1. Type CR at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: CR
```

Figure 5-1: Requesting a chart (step 1)

2. Type the name of the clinic at the "Select Clinic Name:" prompt.

3. Type where the charts are to be delivered at the "Deliver Charts To (Provider/Location/Ext.):" prompt. This prompt allows for free text typing.

4. Type the date the chart is to be delivered at the “Select Chart Delivery Date:” prompt. Type ?? at the “Select Chart Delivery Date:” prompt for more information about typing a response at this prompt.

5. Type the patient’s name, social security number, or date of birth at the “Select Patient:” prompt. Type ? at the “Select Patient:” prompt for additional options on identifying a patient. If the patient is currently registered as an inpatient, you will see a message asking you to confirm your chart request.

6. To continue requesting charts for the date entered, type another patient name at the “Select Patient:” prompt. Press the Return key when you are done requesting charts for the date you entered.

7. Type the printer at which you want the chart request(s) to print at the “Chart Request Printer:” prompt.

```
SELECT CLINIC NAME: PEDIATRIC
DELIVER CHARTS TO (PROVIDER/LOCATION/EXT.): Dr Adams


Select Chart Delivery Date: T  (OCT 10, 2002)

Select PATIENT: PATIENT,ANDREA B.
                        M 02-02-1901 559785650    MH 4298

     chart request recorded...


Select PATIENT: [RET]

Chart Request Printer: fdesk
```

Figure 5-2 Requesting a chart (steps 2-7)

6.0 Display a Patient's Appointments (DA)

Use this option to produce a listing of a patient's appointments. The output will show the patient's name, social security number, appointment date and time, length of appointment, clinic, and date/time report printed.

You may choose to print only pending appointments, or pending and past appointments within a specified date range. Past appointments with a no-show or cancelled status will be so displayed if previously entered. Past appointments with a status of no action taken will also be displayed.

1. Type DA at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: DA
```

Figure 6-1: Displaying appointments (step 1)

2. Type the patient name, social security number, or other identifying number at the "Select Patient:" prompt.

3. Type the date where you want to start your appointment search at the "Select Beginning Date:" prompt.

4. Type the date where you want to end your appointment search at the "Select Ending Date:" prompt.

```
Select Patient: PATIENT,ALLISON
                    M 02-02-1901 559785650    MH 4298


Select Beginning Date:  TODAY// T-365  (OCT 10, 2001)
Select Ending Date:  T+90// [RET]
```

Figure 6-2: Displaying appointments (steps 2-4)

5. A list of the patient's appointments during the chosen date range will be displayed (Figure 6-3). If there are no appointments available, the system will display a message indicating that there are no appointments.

6. A list of your options will be displayed at the bottom of the screen. Select either VA (view appointment), VV (view visit), or ?? (display more options). Follow the promptsfor each selection.

```
Display Patient's AppointmentsOct 10, 2002 08:28:01          Page:    1 of
1
               Confidential Patient Data Covered by Privacy Act
PATIENT,ALLISON           #4298           DOB: 02/02/1901     Sex: MALE
Pcp/Team: None/None
    Appt Date/Time      Clinic Name              Type  -  Status
 1. Oct 09, 2002@14:42  PEDIATRIC               WALK-IN - CHECKED IN









          Enter ?? for more actions
VA  View Appointment                     VV  View Visit
Select Action:
```

Figure 6-3: Displaying appointments (steps 5-6)

7.0 Multiple Appointment Booking (MB)

Use this option to make multiple appointments for a patient on a consecutive day/week basis. This capability eliminates the time consuming scheduling of individual appointments to clinics such as Dialysis or Physical Therapy where the patient may report daily or weekly for a long period of time.

You may choose to book the appointments daily or weekly for as many days/weeks in advance as permissible through the clinic set-up. If you choose to book by day, the appointments will be booked for consecutive days. Saturdays and Sundays are optional. Advance booking by week allows you to book appointments on the same day of the week for consecutive weeks.

You may display any pending appointments the patient has for the selected clinic and/or other clinics. If the patient is not enrolled in the selected clinic, you will have the opportunity to either enroll or schedule the patient for a consultation.

The system may display numerous messages when utilizing this option depending on whether or not every slot requested is available. These include such information as patient already has an appointment on that date/time, clinic does not meet on that date, or appointment cannot be made while clinic is inactivated. If an appointment will be an overbook, you will be notified and allowed to overbook if so specified in the clinic set-up and if you hold the SDOB security key. At the end of the option, the system lists each individual appointment scheduled and the total number of appointments made.

If you schedule an appointment in the past, depending on how parameters are set at your site, you may be prompted for a checkout date/time, and a checkout interview may be displayed. The checkout interview may prompt for classification, provider, diagnosis, and procedure codes for the selected appointment. The default provider and diagnosis assigned to the clinic through the Set up a Clinic option (if any) appear as defaults.

The system then automatically checks out that appointment. It is important to note that when determining whether an appointment is past or future, the system looks at the present date and time.

You may issue a request for the patient’s records if today's date and the appointment date are the same and the Record Tracking package is running at your site.

1. To access the Multiple Booking option, type MB at the “Select Scheduling Menu Option:” prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: MB
```

Figure 7-1: Booking multiple appointments (step 1)

2. Type the name of the clinic for which you want to book an appointment at the "Select Clinic:" prompt.

3. Type the patient name at the "Select Patient Name:" prompt.

4. Type the date, or the date and time of the desired appointment, F (first available), or ?? at the at the "Enter the Date Desired for this Appointment:" prompt. If you select F, you will be prompted to type a date range for the search.

```
Select CLINIC: CARDIOLOGY
Select PATIENT NAME: PATIENT,ALLISON
                                        M 02-02-1901 559785650    MH 4298

  Select one of the following:

     'F'            for First available following a specified date
     Date           (or date computation such as 'T+2M') for a desired date
     Date/time      to schedule a specific appointment
     '?'            for detailed help

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: F

  START SEARCH FOR NEXT AVAILABLE FROM WHAT DATE: T
  ENTER LATEST DATE TO CHECK FOR 1ST AVAILABLE SLOT: T+2M
```

Figure 7-2: Booking multiple appointments (steps 2-4)

5. Type either AL (appointment list) or SL (short list) at the "Select Action:" prompt to review the appointments available for the date range you entered.

```
MONTH-AT-A-GLANCE           Oct 10, 2002 09:53:14          Page:    1 of    2
NO SHOW REAPPOINTMENTS TO WCC AS FOLLOWS:
1. BIRTH TO 8 MONTHS - REAPPOINTMENT AT NEXT WCC.
2.  8 MONTHS TO 20 MONTHS - REAPPOINT AT NEXT WCC.

                                     PEDIATRIC
                                     Oct 2002

 TIME  |8     |9     |10    |11     |12     |1      |2      |3      |4      |
 DATE  |      |      |      |       |       |       |       |       |       |
WE 16  |   [5 5|5 5 5 5|5 5 5 5]
WE 23  |   [5 5|5 5 5 5|5 5 5 5]
WE 30  |   [5 5|5 5 5 5|5 5 5 5]
                                     Nov 2002

 TIME  |8     |9     |10    |11     |12     |1      |2      |3      |4      |
 DATE  |      |      |      |       |       |       |       |       |       |
WE 06  |   [5 5|5 5 5 5|5 5 5 5]
WE 13  |   [5 5|5 5 5 5|5 5 5 5]
WE 20  |   [5 5|5 5 5 5|5 5 5 5]
+         Enter ?? for more actions
>>>
AL  Appointment List      SL  Short Appt List

Select Action:
```

Figure 7-3: Booking multiple appointments (step 5)

6. When you are done browsing the appointments, type Q (quit) at the "Select Action:" prompt.

7. Type D (daily), W (weekly), B (biweekly), or M (monthly) at the "Select Type of Appointments:" prompt. Select the option that best fits how you want to schedule the patient's appointments.

8. Type the date and time of the first appointment at the "Date/Time:" prompt.

9. Type the number of consecutive appointments you want to schedule for the patient at the "For How Many Consecutive XXX's Do You Want Appointments Scheduled at (Time)?:" prompt.

10. Type any information you want noted for the appointment at the "Other Info:" prompt or press the Return key skip this step.

11. Type Y or N at the "Want Chart Requested?" prompt. If you select Y, you will be prompted to type which printer you want to print the request.

12. Type Y or N at the "Want to Print Appointment Letter for Patient:" prompt. If you select Y, you will be prompted to select a printer for the letter.

13. The computer will display the number of appointments made. Press the Return key to confirm the check in time for the patient at the “Checked-In:” prompt.

```
Select Action:Quit// [RET]   QUIT

     Select one of the following:

          D         DAILY
          W         WEEKLY
          B         BIWEEKLY
          M         MONTHLY

elect TYPE OF APPOINTMENTS: W
DATE/TIME: T@9
FOR HOW MANY CONSECUTIVE THURSDAY'S DO YOU WANT APPOINTMENTS SCHEDULED
   AT 9:00 AM?: 5
  OTHER INFO: [RET]
APPOINTMENT MADE ON OCT 10, 2002@09:00
Want Chart Requested? N
APPOINTMENT MADE ON OCT 17, 2002@15:00
Want to Print Appointment Letter for Patient? N
APPOINTMENT MADE ON OCT 24, 2002@15:00
Want to Print Appointment Letter for Patient? N
APPOINTMENT MADE ON OCT 31, 2002@15:00
Want to Print Appointment Letter for Patient? Y
DEVICE: HOME
Want to Print Appointment Letter for Patient? N
5 APPOINTMENTS MADE
CHECKED-IN: OCT 10, 2002@10:00//   [RET]
        ...checked in OCT 10, 2002@10:00
 APPOINTMENTS MADE
```

Figure 7-4:Booking multiple appointments (steps 6-13)

8.0 Multiple Clinic Display/Book (MC)

Use this option to schedule a patient between 2 to 4 different clinics for one particular date. All chosen clinics must have an available slot on at least one identical day, starting from the date the search begins to the earliest maximum date for future booking (the default date to end the search) or another selected end date. The earliest maximum date for future booking is defined in the clinic set-up.

You can enroll the patient in a selected clinic or schedule a consultation. Capability is also provided to include notification of scheduled ancillary tests, such as lab, x-ray, or EKG, in the patient appointment letters. Depending on individual clinic setup, you may be able to request previous x-rays be sent to the clinic.

The availability patterns for all of the selected clinics are displayed showing the first date (within the date range selected) an appointment may be scheduled. Each clinic pattern is then individually listed when booking into that clinic.

If overbooking is allowed in the selected clinic and you hold the SDOB security key, a prompt appears whenever you attempt to schedule an appointment that is outside of the normal clinic hours, or all available time slots are filled.

If overbooking is not allowed in the selected clinic and/or you do not hold the SDOB security key, whenever you attempt to schedule an appointment that is outside of the normal clinic hours, or if all available time slots are filled, a message will be displayed letting you know you do not have that capability.

For past appointments, you may also check the appointment in or out. If the Ask For Check In/Out Time (Supervisor menu - Set Up a Clinic option) parameter is set to yes for the selected clinic, you are prompted for a check in/out date. When checkout is selected, a checkout interview may be displayed. Depending on how parameters are set at your site and classification criteria, the checkout interview may prompt you for provider, diagnosis, classification, and procedure code information for the visit. The default provider and diagnosis assigned to the clinic through the Set up a Clinic option (if any) appear as defaults.

It is important to note that when determining whether an appointment is past or future, the system looks at the present date AND time. For example, if it is presently October 1, 2002@0800, an appointment for October 1, 2002@07:30 would be considered past while one for October 1, 2002@0815 would be future.

If the Record Tracking package is running at your site and you make an appointment for the current date, you may issue a request for the patient's records. If you answer yes at the prompt, a record request will be generated to the file room.

1. To use the Multiple Clinic option. type MC at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: MC
```

Figure 8-1: Booking multiple clinic appointments (step 1).

2. Type the patient name at the “Select Patient Name:” prompt.

3. Type the name of the first clinic you want to search at the “Select Clinic:” prompt.

4. Type the name of the second clinic you want to search at the “Select Clinic:” prompt.

5. When you are done selecting clinics, press the Return key at the “Select Clinic:” prompt. A list of the selected clinics you selected will be displayed (Figure 8-2).

6. Type Y or N at the “OK to proceed?” prompt.

7. Type the date that you want to being your search at the “Look for Clinic Availability Starting When:” prompt.

```
Select PATIENT NAME: PATIENT,Allison
                                        M 02-02-1901 559785650    MH 4298

YOU MAY SELECT FROM 2-4 CLINICS

Select CLINIC: Pediatric
  APPOINTMENT LENGTH DESIRED: 15// [RET]
Select CLINIC: Cardiology
Select CLINIC: [RET]
The following clinics have been selected:

PEDIATRIC                                    15 MINUTE APPOINTMENT
CARDIOLOGY                                   15 MINUTE APPOINTMENT

OK to proceed? Yes// [RET]

LOOK FOR CLINIC AVAILABILITY STARTING WHEN: T
```

Figure 8-2: Booking multiple clinic appointments (steps 2-7)

8. Review the appointments the system displays. Type B (book), C (continue looking for appointment), or R (redisplay) at the “Enter: '^' - Exit 'B' - Book 'C' - Continue Search or 'R' - Redisplay:” prompt.

```
                         DATE: (WEDNESDAY) OCT 16, 2002

CLINIC: PEDIATRIC                                (15 MINUTES)
-------
 TIME  |8      |9      |10     |11     |12     |1      |2      |3      |4
WE 16  |   [5 5|5 5 5 5|5 5 5 5]

CLINIC: CARDIOLOGY                               (15 MINUTES)
-------
 TIME  |8      |9      |10     |11     |12     |1      |2      |3      |4
WE 16  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1
1]


ENTER:
   '^' - EXIT  'B' - BOOK  'C' - CONTINUE SEARCH or  'R' - REDISPLAY: B
```

Figure 8-3: Booking multiple clinic appointments (step 8)

9. Type the time of the appointment you want to book at the “Schedule Time:” prompt.

10. Type the minutes the appointment will last at the “Length of Appointment (In Minutes):” prompt. The system will display a confirmation of the appointment.

11. Type Y or N at the “Want Patient Notified of Lab, X-Ray, or EKG Stops?” prompt. If you select Y, you will be required to type the schedule time of the stop at the “Enter Type and Time (i.e. 'Lab@8:30'):” prompt. When you are

done entering individual stops, press the Return key at the “Enter Type and Time (i.e. 'Lab@8:30'):” prompt.

12. Type any comments or information at the “Other Info:” prompt.

13. Type Y or N at the “Want Previous X-Ray Results Sent to Clinic?” prompt.

14. Type Y or N at the “Want to Print Appointment Letter for Patient?” prompt. If you select Y, you will required to type the name the printer you want the letter to print.

15. The system will display a message indicating that the time of the appointment made and in which clinic it was made (Figure 8-4). Repeat steps 9-14 for each clinic you selected to make an appointment. The “Select Patient Name:” prompt will appear when all appointments are entered.

```
******************************************************************************
Make appt in : PEDIATRIC

 TIME  |8      |9      |10     |11     |12     |1      |2      |3      |4
WE 16  |   [5 5|5 5 5 5|5 5 5 5]

SCHEDULE TIME: 9

LENGTH OF APPOINTMENT (IN MINUTES): 15

   ************************************************************
     15-MIN. APPOINTMENT MADE FOR PATIENT,ALLISON
     IN PEDIATRIC CLINIC FOR Oct 16, 2002@09:00
   ************************************************************

WANT PATIENT NOTIFIED OF LAB,X-RAY, OR EKG STOPS? N
  OTHER INFO: [RET]
WANT PREVIOUS X-RAY RESULTS SENT TO CLINIC? N
Want to Print Appointment Letter for Patient? N

15 minute appointment made in PEDIATRIC

Select PATIENT NAME:
```

Figure 8-4: Booking multiple clinic appointments (steps 9-15)

9.0 Month-at-a-glance Display (MD)

Use this option to display clinic availability without making an appointment for a patient. Use this option to view a clinic's available appointments or to view the first available date for each clinic under a principal clinic.

This option allows the user to view the appointment schedule for its availability, beginning at as specified date and searching through to fifteen (15) days in the future.

1. Type MD at the “Select Scheduling Menu Option:” prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: MD
```

Figure 9-1: Displaying month-at -a -glance (step 1)

2. Type the clinic name for which you interested at the “Select Clinic:” prompt.

3. Type the date, or the date and time of the desired appointment, F (first available), or ?? at the at the “Enter the Date Desired for this Appointment:” prompt. If you select F, you will be prompted to type a date range for the search.

```
Select CLINIC: PEDIATRIC

  Select one of the following:

     'F'            for First available following a specified date
     Date           (or date computation such as 'T+2M') for a desired date
     '?'            for detailed help

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T
```

Figure 9-2: Displaying month-at -a -glance (steps 2-3)

4. The Month-at-a-Glance screen will be displayed. A selection of options is displayed at the bottom of the screen. Type AL (appointment list) or SL (short appointment list) at the " Select Action:" prompt. Type ?? at the "Select Action:" prompt for more options.

```
MONTH-AT-A-GLANCE           Oct 10, 2002 13:12:05          Page:    1 of    4


                                      CARDIOLOGY
                                      Oct 2002

 TIME  |8       |9       |10      |11      |12      |1       |2       |3       |4    |
 DATE  |        |        |        |        |        |        |        |        |     |
TH 10  [1 1 1 1|0 1 1 1|0 1 1 1|1 1 1 1|1 1 1 1|0 1 1 1|0 1 1 1|0 1 1 1|0 1 ]
FR 11  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SA 12  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SU 13  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
MO 14  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
WE 16  [1 1 1 1|1 1 1 1|0 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
TH 17  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|0 1 1 1|0 1 1 1|0 1 ]
FR 18  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SA 19  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SU 20  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
MO 21  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
WE 23  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]

+         Enter ?? for more actions
>>>
AL  Appointment List      SL  Short Appt List

Select Action:
```

Figure 9-3: Displaying Month-at-a-Glance (step 4)

10.0 Print Scheduling Letters (PL)

This option allows you to print any one of the following types of scheduling letters for a selected date range.

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

You may choose to print the letter assigned to the clinic (through Set Up a Clinic option) or another letter of the same type. If you choose to print an assigned letter and the selected clinics do not have letters of the corresponding type assigned to them, no letters will print for those clinics. If you choose to print a letter other than the letter assigned to the clinic(s), the letter you select will print for all selected patients and clinics.

1. Type MD at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO

   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: PL
```

Figure 10-1:Printing Scheduling Letters (step 1)

2. Type A (appointment cancelled), C (clinic cancelled), N (no-show), or P (pre-appointment) at the "Select the Type of Letter to Print:" prompt.

3. Type the name of the letter at the "Select Letter Name:" prompt. Type ? at the "Select Letter Name:" prompt to see a list of available letters.

4. Type the name of the division for which you want to print the letters at the "(Type of Letter) for Which Division:" prompt. Type ? at the "(Type of Letter) for Which Division:" prompt to see a list of available divisions.

5. Follow the prompts at each letter selection and answer them appropriately.

6. Type P (letter for individual patient) or C (letters for entire clinic) at the "Enter 'P' for Individual Patient Letters or 'C' for Letters by Clinic:" prompt. If you select P, you will be prompted to type the individual patient's name. If you select C, type the clinic name. If you wish to print letters for the majority of clinics, type ALL at the "Select clinic" prompt. You will then be prompted to exclude any clinics and, if so, to name those clinics. This action prevents having to type numerous individual clinic names

> **Note**: For pre-Appointment type letters - if ALL is entered at the "Select clinic" prompt, letters will not print for any clinics designated as non-count clinics.

7. Type answers to all prompts in order to customize your letters. Type the name of the printer where you want the letters to print at the "Device:" prompt.

```
SELECT THE TYPE OF LETTER TO PRINT: ??

   Choose from:
   A        APPOINTMENT CANCELLED
   C        CLINIC CANCELLED
   N        NO-SHOW
   P        PRE-APPOINTMENT

SELECT THE TYPE OF LETTER TO PRINT: C
Select LETTER NAME: ?

   Choose from:
   APPOINTMENT CXL     CLINIC CANCELLED

Select LETTER NAME: APPOINTMENT CXL
CANCELLATION LETTERS FOR WHICH DIVISION: 1
DID CLINIC CANCEL AVAILABILITY? N
Enter 'P' for individual PATIENT letters or 'C' for letters by CLINIC: P// C
Count, Non Count, or Both: C// [RET]
Select clinic: ALL// [RET]
Do you want to exclude any Clinic(s)? No// [RET]  (No)
DEVICE: HOME// M8108
```

Figure 10-2: Printing Scheduling letters (steps 2-7)

11.0 View Provider's Schedule (PS)

Use this option to view a particular provider's schedule across all clinics where that provider is listed as the default provider.

1. Type PS at the “Select Scheduling Menu Option:” prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO

   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: PS
```

Figure 11-1: Viewing providers schedule (step 1)

2. Type the name of the provider at the “ Select Provider:” prompt.

3. Type D (to view a daily schedule) or W (to view a weekly schedule) at the “Select Display Timeframe:” prompt.

```
Select PROVIDER: DOCTOR,Kathryn
                  CARDIOLOGY


     Select one of the following:

          D         DAILY
          W         WEEKLY

Select DISPLAY TIMEFRAME: W
```

Figure 11-2: Viewing providers schedule (steps 2-3)

The provider’s schedule will be displayed (Figure 11-3).

4. Type VA (view appointment), Q (quit), or ?? (for more options) at the “Select Action:” prompt. If you select VA, you will be prompted to type the number of the appointment for which you would like to see more detail.

```
Provider's Weekly Schedule    Oct 10, 2002 14:38:25          Page:    1 of
2
          Appointments for DOCTOR,KATHRYN for week of Oct 10, 2002

    Times        Clinic       Patient             Appointment Info
                         Appointments for Oct 10, 2002
 1. 09:00-09:15  CARDIOLOGY   ALLISON PATIENT
 2. 10:00-10:15  CARDIOLOGY   ALLISON PATIENT      no



 3. 13:00-13:15  CARDIOLOGY   ALLISON PATIENT

 4. 14:00-14:15  CARDIOLOGY   ALLISON PATIENT

 5. 15:00-15:15  CARDIOLOGY   ALLISON PATIENT

 6. 16:00-16:15  CARDIOLOGY   ALLISON PATIENT

+         Enter ?? for more actions

VA  View Appointment                    Q   Quit

Select Action:
```

Figure 11-3: Viewing providers schedule (step 4)

12.0 Waiting List Enter/Edit (WL)

Use this option to place a patient on the waiting list for admission to the medical center or nursing home care unit or to edit patient data already on file.

The Delete Waiting List Entry option must be used to remove a patient from the waiting list. A list of patients who are currently on the waiting list may be obtained through the Waiting List Output option.

At multidivisional facilities, each division is set up with a separate waiting list. New waiting list divisions may be added. Waiting list divisions must be chosen from those divisions already established at your medical center and defined in the Medical Center Division file.

During the execution of this option, the Consistency Checker is run to determine if any inconsistent data is present. If there are any inconsistencies, a message will appear listing the fields not specified, and you will be prompted to correct these inconsistencies before continuing.

1. Type WL at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO

   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: WL
```

Figure 12-1:Using the waiting list option (step 1)

2. Type the waiting list by name or ward at the "Select Waiting List Clinic or Ward:" prompt.

```
Select WAITING LIST CLINIC OR WARD:
```

Figure 12-2: Using the waiting list option (step 2)

13.0 Primary Care Provider Menu (PCP)

This option allows you to access options that allow you to enter/edit Primary Care Providers information.

- To access the Primary Care Provider menu, type PCP at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO

   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: PCP

                           Primary Care Provider Menu

                                  (UNSPECIFIED HO)


   PCL    Primary Care Providers List
   STM    Set Up Primary Care Teams
   UPC    Update Primary Care Provider

Select Primary Care Provider Menu Option:
```

Figure 13-1: Selecting Primary Care Provider menu

13.1 Primary Care Providers List (PCL)

Use this option to generate a report identifying the size and constituents of a practitioner's patient panel. Through this option, you can select change the Primary Care Provider (PCP) by patient, by community, or for all.

1. To access the Primary Care Providers list, type PCL at the "Select Primary Care Provider Menu Option:" prompt.

2. Type the name of the provider at the "Select a Primary Care Provider:" prompt. Type ?? for a list of available providers. A patient list for the provider selected will be displayed (Figure 13-3).

```
                          Primary Care Provider Menu

                                 (UNSPECIFIED HO)


   PCL    Primary Care Providers List
   STM    Set Up Primary Care Teams
   UPC    Update Primary Care Provider

Select Primary Care Provider Menu Option: PCL
Select a PRIMARY CARE PROVIDER: DOCTOR,KATHRYN
```

Figure 13-2: Accessing the Primary Care Providers list

```
PRIMARY CARE PROVIDER       Oct 11, 2002 11:30:46          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
                  Patient List for DOCTOR,KATHRYN

     Patient                Chart  Community      Last Visit
   1 PATIENT,FRANK        T00004  ??
   2 PATIENT,KYLE         T00006  ??
   3 PATIENT,ALLISON       4298  UNSPECIFIED RES   10/7/02  HOS









          - Previous Screen  Q Quit  ?? for More Actions
1  Change PCP by Patient                3  Change PCP for ALL
2  Change PCP by Community              4  Print List
Select Action:
```

Figure 13-3: Primary Care Providers list

13.1.1 Change PCP by Patient

Use this option to change the PCP by individual patient.

1. Type 1 at the "Select Action:" prompt.
2. Type the patient's number at the "Select Patient (s):" prompt.
3. Type the name of the new provider at the "Primary Care Provider:" prompt.
4. Type the reason for the change at the "Reason Prim Care Prov Changed:" prompt. Type ?? to see a list of available reasons.

```
PRIMARY CARE PROVIDER       Feb 03, 2004 09:28:49          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
                  Patient List for ADAM,FLOYD

     Patient                Chart  Community      Last Visit
   1 PATIEN T,NADIYA A      100001  ??
   2 PATIENT,ALLISON ST     100009  ??
   3 PATIENT,NIJONI         100000  DEMO CO









          - Previous Screen  Q Quit  ?? for More Actions
1  Change PCP by Patient                3  Change PCP for ALL
2  Change PCP by Community              4  Print List
Select Action: Quit// 1   Change PCP by Patient
Select Patient(s):  (1-2): 1


   1  DEMO,NADIYA D.:
PRIMARY CARE PROVIDER: ADAM,FLOYD G// ADAM,DANIELLE       DA

REASON PRIM CARE PROV CHANGED: testING
Building Patient List. . .Please wait.
```

Figure 13-4: Changing PCP by patient

13.1.2 Change PCP by Community

Use this option to change a PCP for an entire community.

1. Type 2 at the “Select Action:” prompt.
2. Type the name of the desired community at the “Select Community:” prompt.
3. Type the name of the new PCP at the “Enter New Primary Care Provider:” prompt.
4. Type the reason for the change at the “Select Reason for Change:” prompt.
5. Type YES at the “Ready to continue?” prompt.

```
Select Action: Quit// 2   Change PCP by Community

Select COMMUNITY: LINCOLN     PLACER     CALIFORNIA     801     0631801
Enter new PRIMARY CARE PROVIDER: DEMO,DANIELLE       DD
Select REASON for CHANGE: TESTING

I will now convert the Primary Care Provider for patients of
               ADAM,FLOYD G in LINCOLN
to             TAGGART,DANIELLE
Ready to continue? NO// YES
```

Figure 13-5: Changing PCP by community

13.1.3 Change PCP for All

Use this option to change PCP for all patients in the provider's patient list.

1. Type 3 at the "Select Action:" prompt.
2. Type the name of the new provider at the "Enter New Primary Care Provider:" prompt.
3. Follow the remaining prompts as they appear on your screen.

```
          - Previous Screen  Q Quit  ?? for More Actions
1  Change PCP by Patient                3  Change PCP for ALL
2  Change PCP by Community              4  Print List
Select Action: 3



                     CONVERT PRIMARY CARE PROVIDER


Enter new PRIMARY CARE PROVIDER:
```

Figure 13-6: Changing PCP for All

13.1.4 Print List

Use this option to print a list of the provider's patients listed.

1. Type 4 at the "Select Action:" prompt.
2. Type the name of the printer at which you want the list to print at the "Device:" prompt. Type ?? at the "Device:" prompt for a list of available printers.

```
1  Change PCP by Patient                3  Change PCP for ALL
2  Change PCP by Community              4  Print List
Select Action: Quit// 4   Print List
DEVICE: HOME//
```

Figure 13-7: Printing PCP list

13.2 Set Up Primary Care Teams (STM)

Use this option to edit primary care teams or to create new primary care teams. STM uses ScreenMan. When using ScreenMan for entering data, use the tab or arrow keys for moving between fields.

1. Type STM at the "Select Primary Care Provider Menu Option:" prompt.

```
                          Primary Care Provider Menu

                                 (UNSPECIFIED HO)


   PCL    Primary Care Providers List
   STM    Set Up Primary Care Teams
   UPC    Update Primary Care Provider

Select Primary Care Provider Menu Option: STM
```

Figure 13-8: Selecting the Set up Primary Care Team option

2. Type the name of the primary care team you want to add or edit at the "Select Primary Care Teams Name:" prompt. Type ?? at the "Select Primary Care Teams name:" prompt to display a list of available teams. If you are adding a new team, you will be prompted to confirm your selection.

```
Select PRIMARY CARE TEAMS NAME:CARDIOLOGY
```

Figure 13-9: Editing a primary care team (step 2)

3. The system will display the Primary Care Team Updates screen. Press the Tab key, the up arrow (↑), or the down arrow (↓) to move the cursor to the prompt where you would like to make a change. You can change or add the name of the team, type of service they perform, inactivation date, and the members of the team.

```
                          PRIMARY CARE TEAM UPDATES

          TEAM NAME: CARDIOLOGY
            SERVICE: CLINIC
 INACTIVATION DATE:

PRIMARY CARE PROVIDERS

COMMAND:                                   Press <PF1>H for help     Insert
```

Figure 13-10: Editing a primary care team (step 3)

To make a change or a new entry on the form, press the Return key to record the change. If necessary, a pop-up window may appear at the bottom of the screen for further entry of information.

4. For example, if you are deleting a provider's name for the primary care list, the system will display the warning seen in Figure 13-11. Type Y or N to either confirm or stop deletion. If you type Y, the provider's name will be deleted from the provider team. If you type N, the provider's name will reappear on the provider team list.

```
  WARNING: DELETIONS ARE DONE IMMEDIATELY!
           (EXITING WITHOUT SAVING WILL NOT RESTORE DELETED RECORDS.)
Are you sure you want to delete this entire Subrecord (Y/N)?
```

Figure 13-11: Editing a primary care team (step 4)

5. If you are adding a provider to the provider team, use the Tab key, up arrow (↑), or down arrow (↓) to move to the line below the last provider on the list (Figure 13-12), type the new providers name, and then press the Return key. You can only add providers that are already in the system. Follow the prompts as they appear at the bottom of the screen to select and then confirm the addition of the new provider.

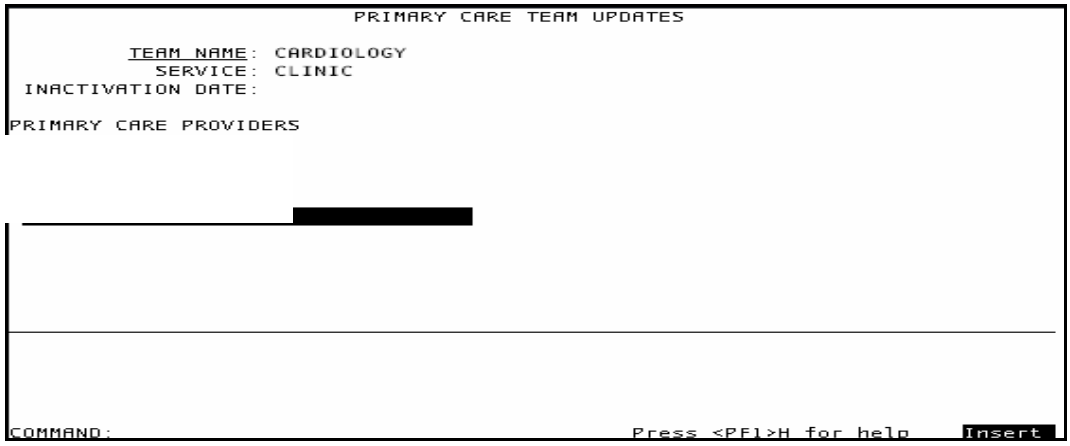

Figure 13-12: Adding primary care provider

13.3 Update Primary Care Provider (UPC)

This option is used to assign patients to and discharge patients from PCMM teams and associated positions for primary care assignments. At any given time, a patient may only be assigned to one primary care team and one primary care practitioner. Only active teams and practitioners are available for selection. Once the patient name is entered, the software checks to see if the patient already has primary care assignments. Based on that status, the option displays the applicable prompts to accomplish the following actions.

1. Type UPC at the "Select Primary Care Provider Menu Option:" prompt.

2. Type the name of the patient at the “Select Patient Name:” prompt.

3. The system will display the current PCP and PCT. If no PCP or PCT is currently assigned, the “Primary Care Provider/Team:” prompt will be empty. Type Y or N at the “Want to Change this Patient's Providers?” prompt. If you select N, you will be returned to the “Select Patient Name:” prompt.

4. Type the name of the new PCP at the “Primary Care Provider: (current PCP)//” prompt. Type ?? at the “Primary Care Provider: (current PCP)//” prompt to display a list of available PCP.

5. Type the reason for the PCP change at the “Reason Prim Care Prov Changed:” prompt.

6. You may continue to change patient’s PCPs. When you are done changing PCPs, press the Return key at a blank “Select Patient Name:” prompt.

```
                          Primary Care Provider Menu

                                 (UNSPECIFIED HO)


   PCL    Primary Care Providers List
   STM    Set Up Primary Care Teams
   UPC    Update Primary Care Provider

Select Primary Care Provider Menu Option: UPC
Select PATIENT NAME: PATIENT,ALLISON
                                        M 02-02-1901 559785650    MH 4298

Primary Care Provider/Team: ADAM,KATHRYN / CARDIOLOGY
Want to CHANGE this patient's Providers? Y
PRIMARY CARE PROVIDER: ADAM,KATHRYN// ADAM,ADAM
REASON PRIM CARE PROV CHANGED: Testing
Select PATIENT NAME: [RET]
```

Figure 13-13: Updating primary care providers

14.0 Patient Mini Registration (PMR)

Use this option to temporarily register a new patient requiring an appointment at the clinic. The patient will be assigned a temporary chart number until he has come to the appointment; thereafter, he will be assigned a permanent (or official) chart number. This allows patient information to be put into the system so that pertinent records on each patient are not lost.

- Type PMR at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO

   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: PMR
```

Figure 14-1: Using patient mini-registration (step 1)

It is not unusual to have several of the same surnames in the database, so the system allows the user to scan for all possible occurrences, and allows for verification that this new patient is not already in the system.

- Select Y (1) or N (2) at the "Do You Wish to Scan for Similar Names or Chart Numbers?" prompt.

1. If you want to search the current database for the patient you are registering, type Y at the "Do You Wish to Scan for Similar Names or Chart Numbers?" prompt.

    a. Type the patient's name, Social Security Number, or Date of Birth at the "Select Patient Name:" prompt.

    b. If the patient is already registered at the clinic, the following screen will display when the patient's scan number is selected (Figure 14-2),

and you cannot use PMR. If you cannot find the patient in the system, press the Return key at the “Select Patient Name:” prompt and you will be returned to the Do You Wish to Scan for Similar Names or Chart Numbers?” prompt.

```
Do you wish to SCAN FOR SIMILAR NAMES or CHART NUMBERS? (Y/N)  YES//
Select PATIENT NAME: PATIENT,ALLISON
                                          M 02-02-1901 559785650   MH 4298

This patient is already registered at this facility!
```

Figure 14-2: Using patient mini registration (step 1)

2. If you want to immediately begin entering the patient’s information, type N at the “Do You Wish to Scan for Similar Names or Chart Numbers?” prompt.

    a. Type the patient’s full name at the “Enter the Patient's Name:” prompt.

    b. Type Y (to continue with the registration process) or N (to return to the “Enter Patient’s Name:” prompt) at the “Are You Adding 'Smith, Jeff ' as a New Patient?” prompt.

    c. If you did not type the patient’s middle name, you will be prompted to either type the patient’s middle name or press the Return key, otherwise you will be directly sent to step 3d.

    d. Type the patient’s sex (Male or Female) at the “Type the Patient Sex:” prompt.

    e. Type the patient’s date of birth at the “Patient Date of Birth:” prompt.

    f. Type the patient’s social security number at the “Patient Social Security Number:” prompt. If you do not know the patient’s social security number, you can type P at the “Patient Social Security Number:” prompt to create a pseudo- social security number.

```
Do you wish to SCAN FOR SIMILAR NAMES or CHART NUMBERS? N
Enter the NEW PATIENT'S FULL NAME.....
   (EXAMPLE:   MORGAN,JAMES PAUL,JR  (no space after commas))

Entering NEW Patient for UNSPECIFIED HO




Enter the PATIENT'S NAME: SMITH,JEFF
Enter complete middle name if known,
        or press <return> to add as entered: [RET]
   ARE YOU ADDING 'SMITH, JEFF ' AS A NEW PATIENT (THE 8326TH)? Y
   PATIENT SEX: M
   PATIENT DATE OF BIRTH: 12/12/12
   PATIENT SOCIAL SECURITY NUMBER: 123456789
```

Figure 14-3: Using patient mini registration (steps 2a-2-f)

g. The system will search for possible duplicate patients in the database.

   i. If there are no duplicates, the patient will be added (Figure 14-4).

```
   ...searching for potential duplicates.

   No potential duplicates have been identified.

   ...adding new patient
```

Figure 14-4: Using patient mini-registration (step 3g i)

   ii. If the system finds a patient with similar information, you will prompted to confirm whether or not you want to continue with the registration process. Type Y or N at the “Do you still want to add 'Patient Name' as a new patient?” prompt (Figure 14-5).

```
...searching for potential duplicates..

   The following patients have been identified as potential duplicates:

     JONES,FRED                          M 12-12-1901 000121212P   MH T00002

   Do you still want to add 'DEMO,JEFF' as a new patient? Y
```

Figure 14-5:Using patient mini-registration (step 3g ii)

h. Type Y (to continue with registration) or N (to delete the patient and leave PMR) at the “Do you need a temporary chart number for this new patient? (Y/N)” prompt.

i. The system will assign the patient a temporary chart number, press the Return key at the “Press Return” prompt to continue with PMR.

j. The system will then give you prompts confirming the patient's date of birth and sex. Press the Return key to confirm the information, or type the corrected information at the appropriate prompts.

```
Do you need a temporary chart number for this new patient? (Y/N) Y

The new patient's TEMPORARY chart number is T00003

Press RETURN...[RET]

DATE OF BIRTH: 12/12/1912// [RET]

SEX: MALE// [RET]
```

Figure 14-6: Using patient mini- registration (steps 3h-3j)

k. If you do not type the patient's social security number, the system will prompt you for an explanation. Select the appropriate explanation at the "Reason for No SSN:" prompt.

```
Press RETURN...


     *************************** SSN MISSING ***************************
     The SSN is Required, Please indicate the Reason for Non-collection.
                (If the SSN is known, hit RETURN to enter it)

     Select one of the following:

          1         Not Available
          2         Patient Refused
          3         Patient will Submit

REASON for No SSN: 1  Not Available
```

Figure 14-7: Using patient mini-registration (step 3k)

15.0 Reports Menu (Scheduling) (SCR)

This is the main menu for accessing Scheduling reports including workload, availability, and usage reports. It also contains options to print routing slips, letters, and clinic profiles.

This section of the Scheduling system allows the user to selectively build certain reports depending upon the information relative to the clinic, patient, inpatient, files, radiology requests, and appointments.

- To access the Reports menu, type SCR at the "Select Scheduling Menu Option:" prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: MD
```

15.1 Address/Insurance Update (AIU)

Use this report print patient addresses and insurance update information for a composite of those changes that have recently occurred. This option also allows for setting up clinics to automatically print this information, along with the patient health summaries. Sorting is done by patient or by clinic.

1. Type AIU at the "Select Reports Menu (Scheduling) Option:" prompt.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: AIU
```

Figure 15-1: Updating insurance and address information (step 1)

2. Type the name of the patient for which you need the update at the “Select Patient:” prompt.

3. Type the name of the printer where you would like the update to print at the “Device” prompt.

```
Select PATIENT: DEMO,PATIENT
                                          M 01-01-1901 000785650    MH 4321
DEVICE:
```

Figure 15-2: Updating insurance and address information (steps 2-3)

```
                      UNSPECIFIED INDIAN HOSPITAL
                Confidential Patient Data Covered by Privacy Act
                 *** PATIENT ADDRESS AND INSURANCE UPDATE ***
         *** PLEASE MAKE CORRECTIONS TO ANY INCORRECT INFORMATION ***

DEMO,CISCO                    HRCN: 105441  DOB: 01/01/1901   AGE: 103 YRS
SSN: 000314012

524-2860                                          Home: 555-555-4586
UNSPECIFIED, NM 88340                               Birth Place: OK

   Employer: BANK                                 Work Phone: 555-555-1559
   Spouse's Employer: UNEMPLOYED                  Work Phone:

   Father's Name: DEMO,JONAS DAVIN                Birthplace: UNKNOWN, OK
   Mother's Name: DEMO,LANCE WILLIAM              Birthplace: UNKNOWN, OK

   Emergency Contact: DEMO,MARISSA RENEE
   Relationship: MOTHER                           Phone No.:
   Mailing Address:
   City:                     State:               Zip:

ELIGIBILITY: CHS & DIRECT

TRIBE OF MEMBERSHIP/CORP.   BLOOD QUANTUM   TRIBE QUANTUM   TRIBE
-------------------------   -------------   -------------   -----
DEMO INDIAN TRIBE OF OKL    FULL            1/2

   INSURANCE COMPANY               POLICY #        ELIGIBILITY DATES
   ----------------------------    ------------    --------------------------
   *** NO PRIVATE INSURANCE INFORMATION ON RECORD ***

   MEDICARE NUMBER   RELEASE DATE  MEDICARE ELIGIBILITY DATES/COVERAGE
   ----------------  ------------  -----------------------------------
   *** NO MEDICARE INFORMATION ON RECORD ***

   MEDICAID NUMBER                 MEDICAID ELIGIBILITY DATES/COVERAGE
   ----------------                -----------------------------------
   111222333  NM                   AUG 6,2003 to

   Does this include Dental coverage?  Yes___  No___

   Is this a work related Injury?      Yes___ No___
   Date of Injury: _______________________

        We appreciate your cooperation and assistance in filling out this
form.
   It is important that we keep our patient registration files accurate so
   that we can provide a better service to you.

   The Business Office, UNSPECIFIED HO              Printed 10:07 AM  Jan 09,
2
```

Figure 15-3: Sample of insurance/address update form

15.2 Chart Locator (CHL)

Use this report to review all appointments (scheduled and walk-ins) as well as chart requests for a patient within a date range. This option is designed to assist you in finding the paper chart if not in its proper place in the file room.

1. Type CHL at the "Select Reports Menu (Scheduling) Option:" prompt in the Reports menu.

2. Type the patient's name whose chart you are looking for at the "Select Patient:" prompt.

3. Type the beginning date for the search at the "Select Beginning Date for Search:" prompt.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: CHL

Select Patient: PATIENT,ALLISON
Select Beginning Date for Search: T-365
```

Figure 15-4: Using chart locator (steps 1-3)

4. The Chart Locator screen will be displayed (Figure 15-4). Follow the instructions at the bottom of the screen.

```
CHART FINDER                Oct 15, 2002 10:35:39          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
PATIENT,ALLISON           #4298           DOB: 02/02/1901     Sex: MALE
Pcp/Team: DOCTOR,JOHN/CARDIOLOGY
               Includes actions for Oct 15, 2001 to Oct 15, 2002

Current Status: Patient currently an Inpatient on PED

Oct 07, 2002@15:02  GENERAL           Chart Request  (54874)
Oct 09, 2002@14:42  PEDIATRIC         WALK-IN Appt   (INPATIENT/CHECKED IN)
Oct 10, 2002@07:42  PEDIATRIC         Chart Request  (DR SMITHS HOUSE)
Oct 10, 2002@09:00  CARDIOLOGY        SCHED Appt     (INPATIENT APPOINTMENT)
Oct 10, 2002@10:00  CARDIOLOGY        SCHED Appt     (INPATIENT/CHECKED IN)
Oct 10, 2002@13:00  CARDIOLOGY        SCHED Appt     (INPATIENT APPOINTMENT)
Oct 10, 2002@14:00  CARDIOLOGY        SCHED Appt     (INPATIENT APPOINTMENT)

          Enter ?? for more actions
>>>

Select Action:Quit//
```

Figure 15-5: Using chart locator (step 4)

15.3 List Charts Requested (LCR)

Use this report to print a list of all chart requests for a particular date. This report lists only chart requests and does not include scheduled appointments or walk-ins. This report may be sorted by date/time the request was made, by clinic, by principal clinic or by terminal digit.

1. Type LCR at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: LCR
```

Figure 15-6: Listing charts requested (step 1)

2. Type the date that you would like to print the chart request listing at the "Select Date:" prompt.

3. Type the name of the division from where you would like the information at the "Select Division" prompt. Type ?? for a listing of available divisions or type ALL for all divisions.

4. Type the name of the clinic you are interested in at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics.

5. Type the number from the option list that corresponds to the way you would like your report sorted at the "Charts Requested by Date Sort Order:" prompt.

6. Type the name of the printer where you would like the report to print at the "Device" prompt. A screen similar to Figure 15-8 displays or prints.

```
Select Date:  T  (OCT 15, 2002)
Select division: UNSPECIFIED INDIAN HOSPITAL
Select clinic: ALL

     Select one of the following:

          D         BY DATE/TIME REQUESTED
          C         BY CLINIC CODE
          P         BY PRINCIPAL CLINIC
          T         BY TERMINAL DIGIT

CHARTS REQUESTED BY DATE SORT ORDER: D

Use wide paper or condensed print if printing to paper


DEVICE:
```

Figure 15-7: Listing charts requested (steps 2-6)

```
CHARTS REQUESTED BY DATE    Jan 09, 2004 10:26:14          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
                         CHART REQUESTS for Jan 09, 2004
  HRCN  Patient Name        Clinic   Requested On        By   Printed On

12345   Demo, Patient       CARDIOLOGY  12/25/03         dp
65432   Demo, Person        PEDS        01/05/04         ab     01/05/04










          Enter ?? for more actions                                     >>>

Select Action:Quit//
```

Figure 15-8: Sample screen for the LCR option

15.4 List Routing Slips Printed (LRS)

Use this option to list all routing slips printed for a date, sorted by date appointment was made, by clinic, or by terminal digit.

1. Type LRS at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: LRS
```

Figure 15-9: Listing routing slips printed (step 1)

2. Type the date that you need the information at the “Select Date:” prompt.

3. Type the name of the division from where you would like the information at the “Select Division” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.

4. Type the name of the clinic you are interested in at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.

5. Type the number from the option list that corresponds to the way you would like your report sorted at the “Charts Requested by Date Sort Order:” prompt.

6. Type the name of the printer where you would like the report to print at the “Device” prompt. A screen similar to Figure 15-11 displays or prints.

```
Select Date:  T
Select division: UNSPECIFIED
Select clinic: ALL

     Select one of the following:

          D         BY DATE/TIME REQUESTED
          C         BY CLINIC CODE
          P         BY PRINCIPAL CLINIC
          T         BY TERMINAL DIGIT

CHARTS REQUESTED BY DATE SORT ORDER: D

Use wide paper or condensed print if printing to paper


DEVICE:
```

Figure 15-10: Listing routing slips printed (steps 2-7)

```
APPT ROUTING SLIPS PRINTED  Jan 09, 2004 10:31:13          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
                         APPT ROUTING SLIPS for Jan 09, 2004
  HRCN  Patient Name       Clinic   Appt Made On        By   Printed On
106290  PATIENT,ALAN RAY    CARDIO   Jan 09, 2004@09:29  JT    **don't
print**
105441  DEMO,CISCO         CARDIO   Jan 09, 2004@10:25  JT    **don't print**
Total Appts: 2; Total Not Printed: 0









          Enter ?? for more actions
>>>

Select Action:Quit//
```

Figure 15-11: Sample screen of the LRS option

15.5 File Room List (FRL)

The File Room List option is used to generate a listing of appointments for a specified day. This listing may be by terminal digit order where all patients with appointments on that day will be consecutively listed, or the listing may be by clinic where a separate page will print out for each clinic.

Information provided includes the clinic name and date, date report printed, patient name and social security number, time of visit, and appointment type. When a chart has been requested but no appointment is scheduled (such as may be done through the Chart Request option of the Appointment Menu), the appointment time and type will not appear on the file room list. When printed, each clinic will print on a separate page.

1. Type FRL at the "Select Reports Menu (Scheduling) Option:" prompt in the Reports menu.

2. Type the date that interests you at the "List Appointments for What Date:" prompt.

3. Type the name of the division from where you would like the information at the "Select Division" prompt. Type ?? for a listing of available divisions or type ALL for all divisions.

4. Type the name of the clinic you are interested in at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics.

5. Type the number from the option list that corresponds to the way you would like your report sorted at the "File Room List Sort Order:" prompt.

6. Type the name of the printer where you would like the report to print at the "Device" prompt.

```
                            Reports Menu (Scheduling)
                                   (UNSPECIFIED HO)

   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: FRL

List Appointments for What Date:  T-5
Select division: UNSPECIFIED
Select clinic: ALL

     Select one of the following:

          C         BY CLINIC CODE
          P         BY PRINCIPAL CLINIC
          T         BY TERMINAL DIGIT

FILE ROOM LIST SORT ORDER: C
DEVICE:
```

Figure 15-12: Running a file room list (steps 1-7)

7. The File Room List screen will be displayed (Figure 15-13). Follow the instructions at the bottom of the screen.

```
FILE ROOM LIST              Oct 15, 2002 13:07:05          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
          FILE ROOM LIST FOR APPOINTMENTS & CHART REQUESTS for Oct 10, 2002
   HRCN  Patient Name            Date of Birth    Clinic            Appt Time

   **02 - CARDIAC**
   4298  PATIENT,ALLISON          DOB: 02/02/1901  CARDIOLOGY        at 09:00
   4298  PATIENT,ALLISON          DOB: 02/02/1901  CARDIOLOGY        at 10:00
   4298  PATIENT,ALLISON          DOB: 02/02/1901  CARDIOLOGY        at 13:00
   4298  PATIENT,ALLISON          DOB: 02/02/1901  CARDIOLOGY        at 14:00
   4298  PATIENT,ALLISON          DOB: 02/02/1901  CARDIOLOGY        at 15:00
   4298  PATIENT,ALLISON          DOB: 02/02/1901  CARDIOLOGY        at 16:00

   **20 - PEDIATRIC**
   4298  PATIENT,ALLISON          DOB: 02/02/1901  PEDIATRIC         Cht Req
   6172  DEMO,NATALIA             DOB: 05/05/1901  PEDIATRIC         Cht Req
   7852  PATIENT,ANDREA B.        DOB: 07/05/1900  PEDIATRIC         Cht Req
          ** Patient Died on OCT 08, 2002@09:27:56 **


          Enter ?? for more actions

Select Action:Quit//
```

Figure 15-13: Running a file room list (step 8)

15.6 Health Summaries by Clinic (HSC)

Use this option to print a report of outpatient encounters for a selected date range. The Provider/Diagnosis report sorts by division and outpatient encounter date. You also may choose two of the following additional sorts: clinical code and principal clinic.

Data contained in the report includes patient name and last four digits of SSN, encounter date and time, clinic name and stop code, provider, and diagnostic code. The report is formatted to print at 132 columns. Depending on your sort selections, you may wish to queue to print during non-peak hours.

1. Type HSC at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.

2. Type the date at the “Print Health Summaries for Which Date:” prompt.

3. Type the name of the division from where you would like the information at the “Select Division” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.

4. Type the name of the clinic you are interested in at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.

5. Type the letter from the option list that corresponds to the way you would like your report sorted at the “Health Summaries Sort Order:” prompt.

6. Type Y or N at the “Do you want to also print other forms?” prompt.

7. Type the name of the printer where you would like the report to print at the “Device:” prompt. A screen similar to Figure 15-15 displays or prints.

```
                          Reports Menu (Scheduling)

                                 (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: HSC



Print Health Summaries for Which Date:  T
Select division: UNSPECIFIED
Select clinic: ALL

     Select one of the following:

          C         BY CLINIC CODE
          P         BY PRINCIPAL CLINIC

HEALTH SUMMARIES SORT ORDER: P
Do you want to also print other forms? Y
DEVICE:
```

Figure 15-14: Listing health summaries by clinic (steps 1-8)

```
******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
************* DEMO,CISCO #105441  (ADULT REGULAR SUMMARY)  pg 1 *************

----------------------------- DEMOGRAPHIC DATA -----------------------------

DEMO,CISCO                        DOB: JUL 3,1952  51 YRS  MALE    no blood type
INDIAN TRIBE OF OKLAHOMA          SSN: 000-31-4012
                                  MOTHER'S MAIDEN NAME: DEMO,LANCE
(H) 555-555-4586 (W) 555-999-1559 FATHER'S NAME: DEMO,JONAS DAVIN
UNSPECIFIED RES (524-2860,UNSPECIFIED,NM,88340)

LAST UPDATED: AUG 6,2003          ELIGIBILITY: CHS & DIRECT
SERVICE-CONNECTED VETERAN  MC (05/28/1969-01/27/1972)  CLAIM# 2650671

HEALTH RECORD NUMBERS:  105441  UNSPECIFIED HO
DESIGNATED PROVIDER: ADAM,SISTER JUANITA

--------------------------- INSURANCE INFORMATION ---------------------------

INSURANCE                NUMBER    SUFF COV       EL DATE   SIG DATE  END DATE
NM MEDICAID              111222333                08/06/03



******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
************* DEMO,CISCO #105441  (ADULT REGULAR SUMMARY)  pg 2 *************

----------------------- ALLERGIES (FROM PROBLEM LIST) -----------------------


                           ***** NONE RECORDED *****

--------------- MEASUREMENT PANELS (max 5 visits or 2 years) ---------------


           HT   WT      BP      BMI       %RW          VU             VC
02/24/96              132/78
02/05/96   69  196             28.9      130%                      20/20-20/20


------------------------------ ACTIVE PROBLEMS ------------------------------

             ENT.    MODIFIED
  MH1       11/05/93 11/05/93 HX OF ALCOHOLISM



******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
************* DEMO,CISCO #105441  (ADULT REGULAR SUMMARY)  pg 3 *************

------------------------------ ACTIVE PROBLEMS ------------------------------

             ENT.    MODIFIED
  MH2       03/12/94 03/12/94 SEIZURE DISORDER

---------------------------- HISTORY OF SURGERY ----------------------------

Minor procedures are on file but have not been displayed.


--------------------- CURRENT MEDICATIONS (max 1 year) ---------------------
```

```
-------------- SCHEDULED ENCOUNTERS (max 10 visits or 90 days) --------------

PAST:
  11/03/03 10:00  CJ-TEST (45 min.,LAB)



******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
************* DEMO,CISCO #105441  (ADULT REGULAR SUMMARY)  pg 4 *************

-------------- SCHEDULED ENCOUNTERS (max 10 visits or 90 days) --------------

  11/03/03 10:00  CJ-TEST (45 min.,LAB)
                  test
  11/03/03  9:00  CJ-TEST (30 min.)
                  this is a test
PENDING:
  01/09/04  5:00  CARDIOLOGY (15 min.,LAB)

-------------- HOSPITALIZATION STAYS (max 5 visits or 5 years) --------------


--------------- IN HOSPITAL VISITS (max 10 visits or 2 years) ---------------


------------ OUTPATIENT/FIELD VISITS (max 10 visits or 2 years) ------------


******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
************* DEMO,CISCO #105441  (ADULT REGULAR SUMMARY)  pg 5 *************

----------------- REFERRED CARE (max 10 visits or 2 years) -----------------

                            <<<  RCIS REFERRALS  >>>

No Referred Care Referral records on file.

----------------- MOST RECENT LABORATORY DATA (max 2 years) -----------------

                                                          UNITS    REF RANGE

------------------------------- IMMUNIZATIONS -------------------------------

   IMMUNIZATION FORECAST:

     * Immunization Forecasting disabled (see Site Parameters). #314

   IMMUNIZATION HISTORY:



******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
************* DEMO,CISCO #105441  (ADULT REGULAR SUMMARY)  pg 6 *************

------------------------------ ALL SKIN TESTS -----------------------------


PPD             01/25/96  0 mm UNSPECIFIED HO
                08/05/94  0 mm UNSPECIFIED HO

----------------------- HEALTH MAINTENANCE REMINDERS -----------------------
```

```
                          LAST        NEXT

BLOOD PRESSURE            02/24/96  MAY BE DUE NOW (WAS DUE 02/24/98)
WEIGHT                    02/05/96  MAY BE DUE NOW (WAS DUE 02/05/97)

IMMUNIZATIONS DUE * Immunization Forecasting disabled (see Site Parameters). #31
4

INFLUENZA                           MAY BE DUE NOW



******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
************* DEMO,CISCO #105441  (ADULT REGULAR SUMMARY)  pg 7 *************

----------------------- HEALTH MAINTENANCE REMINDERS -----------------------


SCREEN FOR TOBACCO USE              MAY BE DUE NOW
*** END * CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********



******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
*********** PATIENT,ALAN RAY #106290  (ADULT REGULAR SUMMARY)  pg 1 ***********

----------------------------- DEMOGRAPHIC DATA -----------------------------

PATIENT,ALAN RAY                   DOB: DEC 9,1901  103 YRS  MALE    no blood type
TRIBE RES                          SSN: 000-25-2607
                                  MOTHER'S MAIDEN NAME: DEMO,MICHAEL IVAN
(H) 555-555-9978                  FATHER'S NAME: PATIENT,ELVIS
ROOSEVELT (PO BOX 725,ROOSEVELT,UT,84066)

LAST UPDATED: JAN 3,1996          ELIGIBILITY: DIRECT ONLY

HEALTH RECORD NUMBERS:  106290  UNSPECIFIED HO
DESIGNATED PROVIDER: <none identified>


----------------------- ALLERGIES (FROM PROBLEM LIST) -----------------------


                           ***** NONE RECORDED *****





******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
*********** PATIENT,ALAN RAY #106290  (ADULT REGULAR SUMMARY)  pg 2 ***********

--------------- MEASUREMENT PANELS (max 5 visits or 2 years) ---------------


           HT   WT      BP      BMI       %RW          VU             VC
01/02/96        25                 ***       ***

*** NO HEIGHT FOR PATIENT.


-------------------- CURRENT MEDICATIONS (max 1 year) ---------------------
```

```
-------------- SCHEDULED ENCOUNTERS (max 10 visits or 90 days) --------------

PENDING:
  01/09/04  2:00  CARDIOLOGY (15 min.)




******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
*********** PATIENT,ALAN RAY #106290  (ADULT REGULAR SUMMARY)  pg 3 ***********

--------------- IN HOSPITAL VISITS (max 10 visits or 2 years) ---------------


------------ OUTPATIENT/FIELD VISITS (max 10 visits or 2 years) ------------


----------------- REFERRED CARE (max 10 visits or 2 years) -----------------

                            <<<  RCIS REFERRALS  >>>

No Referred Care Referral records on file.

------------------------------- IMMUNIZATIONS -------------------------------

   IMMUNIZATION FORECAST:

     * Immunization Forecasting disabled (see Site Parameters). #314

   IMMUNIZATION HISTORY:


******** CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
*********** PATIENT,ALAN RAY #106290  (ADULT REGULAR SUMMARY)  pg 4 ***********

----------------------- HEALTH MAINTENANCE REMINDERS -----------------------

                           LAST        NEXT

BLOOD PRESSURE                        MAY BE DUE NOW
HEIGHT                                MAY BE DUE NOW

WEIGHT                     01/02/96   MAY BE DUE NOW (WAS DUE 01/02/97)
HCT/HGB                               APCH HCT/HGB TESTS Taxonomy Missing

IMMUNIZATIONS DUE * Immunization Forecasting disabled (see Site Parameters). #31
4

*** END * CONFIDENTIAL PATIENT INFORMATION -- 1/9/2004 10:36 AM  [JT] ********
```

Figure 15-15: Sample screen of the HSC option

15.7 Radiology Pull List (RPL)

The Radiology Pull List option is used to generate a listing of all patients whose radiology reports/films are required for their scheduled appointments. The report is run by date and sorted by terminal digit (SSN). The listing includes patient name,

SSN, clinic name, and appointment date/time. Any appointments the patient has scheduled for later that same day will also be displayed.

1. Type RPL at the "Select Reports Menu (Scheduling) Option:" prompt in the Reports menu.

2. Type the name of the division from where you would like the information at the "Select Division:" prompt. Type ?? for a listing of available divisions or type ALL for all divisions.

3. Type the name of the clinic you are interested in at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics.

4. Type the date that interests you at the "Print for Which Date:" prompt.

5. Type the name of the printer where you would like the report to print at the "Device" prompt.

```
                          Reports Menu (Scheduling)

                                 (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: RPL



Select division: ALL
Select clinic: ALL
Print For Which Date:  T
DEVICE:
```

Figure 15-16: Listing the radiology pull list (steps 1-6)

6. The Radiology Pull List screen will be displayed (Figure 15-17). Follow the instructions at the bottom of the screen.

```
RADIOLOGY PULL LIST         Jan 09, 2004 10:39:50          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
          The following patients have appointments on Jan 09, 2004
               and need their previous radiology films pulled
 Chart #  Patient Name            Clinic                    Appt Time
 105441   DEMO,CISCO              CARDIOLOGY                1/9/2004@17:00
 106290   PATIENT,ALAN RAY        CARDIOLOGY                1/9/2004@14:00









          Enter ?? for more actions

Select Action:Quit//
```

Figure 15-17: Listing the radiology pull list (step 7)

15.8 Routing Slips (RS)

Use this option to print routing slips for one individual patient, all patients, or add-ons (patients scheduled for appointments since routing slips were last printed).

If the Print Health Summaries with Routing Slips field is set to YES in the Scheduling Parameters, and the Health Summary and Rx Profile fields are set to YES in the Clinic Profile, these documents will be printed with the routing slips (during Check-in, Walk-in, nightly routing slip runs).

The routing slips may be sorted to print by terminal digit, patient name, or clinic name. When sorted by clinic, one, many (limit 20), or all clinics may be included. If the slip is a reprint of a previous run, the original run date is also shown. The routing slip shows the patient's rated disabilities and health insurance data, when applicable. Any future appointments are also listed (limited to the number that will fit on one page).

An area is provided to list the diagnoses and procedures performed during the clinic visits on that day and any of the following questions regarding service connection and exposure related conditions are included, when applicable.

A routing slip may be printed for a single patient even if there are no clinic visits scheduled for that patient on that day. When all routing slips are printed, a total page will be provided showing the facility name, date and time the slips were printed, and the total number of slips printed.

1. Type RS at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports Menu.

2. Type the name of the division from where you would like the information at the “Routing Slips for Which Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.

3. Type the name of the clinic you are interested in at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.

4. Type Y or N at the “Do You Want Routing Sheet for a Single Patient?” prompt. If you type Y, you will be prompted to type the name of the patient then taken to step 9.

5. Type A or O at the “Select All Routing Slips (A) or Only Add-ons (O):” prompt to choose between running the report by all routing slips or only by add-ons.

6. Type the number from the option list that corresponds to the way you would like your report sorted at the “Choose Sort Order:” prompt.

7. Type Y or N at the “Is This a Reprint of a Previous Run?” prompt.

8. Type appropriate answers to the remaining prompts as they appear on the screen. The prompts will change depending on what sort order you chose in step 6.

9. Type the name of the printer where you would like the report to print at the “Device” prompt.

10. Type Y or N at the “Do you want your output Queued?” prompt.

```
                            Reports Menu (Scheduling)
                                   (UNSPECIFIED HO)

   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: RS
ROUTING SLIPS FOR WHICH DIVISION:  UNSPECIFIED INDIAN HOSPITAL
DO YOU WANT ROUTING SHEET FOR A SINGLE PATIENT? N
Select All Routing Slips (A) or Only Add-ons (O): O

     Select one of the following:

          1         TERMINAL DIGIT
          2         CLINIC NAME
          3         PRINCIPAL CLINIC
          4         PATIENT NAME

Choose Sort Order: 1
PRINT ROUTING SLIPS FOR WHAT DATE:  T
IS THIS A REPRINT OF A PREVIOUS RUN? N
ENTER TERMINAL DIGIT TO BEGIN PRINT FROM: FIRST

DEVICE: MIH108
Do you want your output QUEUED? N
```

Figure 15-18: Running routing slips

15.9 Appointment Management Reports (AMR)

Use this option to access reports designed to assist you in managing your appointment statuses. This option will help your site implement and manage the appointment check in requirement. There are three reports available: Appointment Management Statistics, Appointments Requiring Action, and Uncoded Checked-in Appointments. There is also a Online Help (Report Descriptions) option that will give you a detailed description of each of these reports.

- To access the AMR option, type AMR at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports Menu.

```
                          Reports Menu (Scheduling)

                                 (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: AMR
```

Figure 15-19: Accessing appointment management report

- Sections 15.9.1 through 0 explain how to use each of the options in the AMR menu.

15.9.1 Appointment Management Statistics

Use this report to print statistics for appointments with their corresponding statuses of checked-in, checked-out, no action taken, cancelled, no-shows, and inpatient. Use the report to track whether all your appointments have been processed. This will insure that workload reports run properly.

1. Type 1 at the "Select Report:" prompt in the Appointment Management Reports submenu.

```
          1. Appointment Management Statistics
          2. Appointments Requiring Action
          3. Uncoded Checked-in Appointments
          4. Online Help (Report Descriptions)

         Select REPORT:  (1-4): 1
```

Figure 15-20: Using the Appointment Management Statistics option (step 1)

2. Type the date range you want the report to cover.

```
____________________________ Date Range Selection ____________________________

Select Beginning Date: T-365
Select    Ending Date: T
```

Figure 15-21: Using the Appointment Management Statistics option (step 2)

3. Type 1 (Statistics) or 2 (Division(s) Only Statistics) at the "Which Visits:" prompt.

```
____________________________ Statisitcs Criteria ____________________________

     Select one of the following:

          1         Statistics
          2         Division(s) Only Statistics

Which Visits: 1
```

Figure 15-22: Using the Appointment Management Statistics option (step 3)

4. Type 1 (Appointment Clinic) or 2 (Stop Code) at the "Select Report Format:" prompt.

```
_______________________________ Report Format _______________________________

     Select one of the following:

          1         Appointment Clinic
          2         Stop Code

Select Report Format: 1
```

Figure 15-23: Using the Appointment Management Statistics option (step 4)

5. Type the name of the division (one/many/all) at the "Select Division:" prompt.

```
_____________________________ Division Selection _____________________________
Select division: UNSPECIFIED INDIAN HOSPITAL
```

Figure 15-24: Using the Appointment Management Statistics option (step 5)

6. If in step 3 you selected 1 (Statistics), retype the name of the division (one/many/all) at the "Select Division:" prompt now under the Clinic Selection header, type the name of the clinic (one/many/all) at the "Select Clinic:" prompt, and then type the stop code (one/many all) at the "Stop Codes:" prompt. If you selected 2 (Division(s) Only Statistics), you can print data for one/many/all divisions, but individual clinics/stop codes cannot be chosen, and you will go directly to step 7.

```
_____________________________ Division Selection _____________________________
Select division: UNSPECIFIED INDIAN HOSPITAL

_____________________________ Clinic Selection _____________________________
Select division: UNSPECIFIED INDIAN HOSPITAL
Select clinic: ALL
```

Figure 15-25: Using the Appointment Management Statistics option (step 6)

7. The Report Specifications screen will appear (Figure 15-26). You can now see the options for your report. Type Y or N at the "Continue?" prompt. If you type N, you will be returned to step 2.

8. Type the name of the printer where you would like this printed at the "Device:" prompt. All reports should be queued to a printer at 132 columns.

```
__________________________ Report Specifications __________________________

   Encounter Dates: 10/16/02 to 10/16/02
     Report Format: Appointment Clinics

               Divisions                                Clinics
               ---------                                ----------
               UNSPECIFIED INDIAN HOSPITAL                All
_____________________________________________________________________________
Continue? Y
_____________________________ Device Selection _____________________________

If printing to paper, this report requires 132 columns.


DEVICE: HOME
```

Figure 15-26: Using the Appointment Management Statistics option (steps 7-8)

9. If you select to display the report on the screen, the Appointment Management Report screen will appear. Use the options at the bottom of the screen to navigate through the report.

```
APPOINTMENT MANAGEMENT REPORT Oct 16, 2002 15:54:44        Page:    1 of    1

  Division: UNSPECIFIED INDIAN HOSPITAL      Date Range: 10/16/02 to 10/16/02
 Clinic                           Checked-In    Checked-Out    No Action
Taken

-------------------------------------------------------------------------------
CARDIOLOGY                                 0              0                  0
PEDIATRIC                                  0              0                  1
===============================================================================
TOTAL                                      0              0                  1


     * CI=Checked-In ; RB=Rebooked
     * Cancelled appointments only reflect appointments cancelled using
       the "Cancel Clinic Availability" option, not Cancel Appointment.
     * Checked-In does not include no-shows or cancelled appointments
       that have been checked in.  They are listed under those categories.
  MEDICAL CENTER                            Date Range: 10/16/02 to 10/16/02
 Division                         Checked-In    Checked-Out    No Action
Taken

+      Enter ?? for more actions                                          >>>

Select Action:Next Screen//
```

Figure 15-27: Sample Appointment Management Report (excerpt)

15.9.2 Appointments Requiring Action

Use this report to list all appointments with the specific status of no status or no action taken. In order for this report to be accurate, appointments must have an appropriate status added.

1. Type 2 at the “Select Report:” prompt in the Appointment Management Reports submenu.

```
           1. Appointment Management Statistics
           2. Appointments Requiring Action
           3. Uncoded Checked-in Appointments
           4. Online Help (Report Descriptions)

          Select REPORT:  (1-4): 2
```

Figure 15-28: Running an Appointments Requiring Action report (step 1)

2. Type the letter that corresponds to the option for how you would like your report sorted at the “Subtotal Report by:” prompt.

3. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division.

4. Type the name of the clinic you are interested in at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.

5. Type the date that you would like to begin your search and the date you would like to end your search at the “Select First Date to Search:” and “Select Last Date to Search:” prompts.

6. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print. A screen similar to Figure 15-30 displays or prints.

```
     Select one of the following:

          C         Clinic
          P         Principal Clinic
          V         Provider
          T         Team

Subtotal Report by: C
Select division: ALL
Select clinic: ALL
Select First Date to Search:  T-365
Select Last Date to Search:  T

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: P
DEVICE:
```

Figure 15-29: Running an Appointments Requiring Action report (steps 2-6)

```
APPOINTMENTS REQUIRING ACTION Jan 09, 2004 11:03:30        Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
                    For dates: Jan 09, 2003 to Jan 09, 2004
 Appt Date/Time       Type         HRCN   Patient Name        Sex  Age
AUDIOLOGY
May 07, 2003@14:00    Scheduled   104076   DEMO,ELSIE          F    66
May 08, 2003@14:00    Scheduled   104076   DEMO,ELSIE          F    66
Jul 22, 2003@09:00    Scheduled   105968   DEMO,CHRISTINA BEN  F    8
Jul 22, 2003@10:00    Scheduled   106924   DEMO,AARON R.       M    6

CARDIOLOGY
Jan 09, 2004@17:00    Overbook    105191   PATIENT,ANISSA RAE   F    11

DENTAL
Sep 19, 2003@09:00    Scheduled   105367   DEMO,ADORA BETH    F    19

ENT CLINIC
May 01, 2003@12:00    Same Day    105193   DEMO,TRINA ANN    F    38

MANNING
+         Enter ?? for more actions

Select Action:Next Screen// [RET]

APPOINTMENTS REQUIRING ACTION Jan 09, 2004 11:03:45        Page:    2 of    2
               Confidential Patient Data Covered by Privacy Act
                    For dates: Jan 09, 2003 to Jan 09, 2004
+Appt Date/Time       Type         HRCN   Patient Name        Sex  Age
Feb 25, 2003@17:30    Same Day    103682   BLAKE,MIHLENE DESH  F    15

PEDS GENERAL
Jul 07, 2003@13:00    Scheduled   101393   SERAWAP,BENNIE R.   F    27









          Enter ?? for more actions

Select Action:Quit//
```

Figure 15-30: Sample appointments requiring action screen

15.9.3 Uncoded Checked-in Appointments

Use this report to list all PCC visits that were created by the Scheduling Check-In process that do not yet have a purpose of visit. This report will be used to determine if PCC forms have been submitted for these visits or if an additional visit has been created for this scheduled visit.

1. Type 3 at the “Select Report:” prompt in the Appointment Management Reports submenu.

```
          1. Appointment Management Statistics
          2. Appointments Requiring Action
          3. Uncoded Checked-in Appointments
          4. Online Help (Report Descriptions)

         Select REPORT:  (1-4): 3
```

Figure 15-31: Running an Uncoded Checked-in Appointments report (step 1)

2. Type the date that you would like to begin your search and the date you would like to end your search at the “Enter beginning Visit Date:” and “Enter ending Visit Date:” prompts.

3. Type the letter that corresponds to the option for how you would like your report sorted at the “Sort the report by:” prompt.

4. Type the name of the printer where you would like your report to print at the “Device:” prompt. A screen similar to Figure 15-33 displays or prints.

```
Enter beginning Visit Date:  T-365
Enter ending Visit Date:  T

***NOTE:If you pick Visit date order the report will be sorted by Visit date
and sub-sorted by clinic code.  All others will be sub-sorted by visit date.

     Select one of the following:

          T         Terminal Digit Order
          H         Health Record Number Order
          D         Visit Date Order
          C         Clinic Code Order

Sort the report by: T
DEVICE:
```

Figure 15-32: Running an Uncoded Checked-in Appointments report (steps 2-4)

```
JT                                  Jan 09, 2004                        Page 1
                                  UNSPECIFIED HO
                  CHECKED IN VISITS WITH NO POV (NOT YET CODED)
                    Visit dates: Jan 09, 2003 to Jan 09, 2004
** Last column is the number of other visits on the same day and the
 # of those visits that are complete

PATIENT NAME   HRN  VISIT DATE&TIME    SC CL HOSPITAL LOC    PROV    # visits
-----------------------------------------------------------------------------
DEMO, PATIENT 1234   12/15/03  12:00         UNSPECIFIED      DOCTOR      2



End of report.  HIT RETURN:
```

Figure 15-33: Sample uncoded check-in visits report

15.9.4 Online Help (Report Descriptions)

This option gives you a detailed description on the three reports available under the Appointment Management Reports (AMR) option.

1. Type 4 at the “Select Report:” prompt in the Appointment Management Reports submenu.

```
          1. Appointment Management Statistics
          2. Appointments Requiring Action
          3. Uncoded Checked-in Appointments
          4. Online Help (Report Descriptions)

         Select REPORT:  (1-4): 4
```

Figure 15-34: Using the online help option (step 1)

2. Type the number that corresponds with the report you need information about or press the Return key to go back to the Appointment Management submenu at the “Select Help System Action or <Return>:” prompt.

```
                         APPOINTMENT MANAGEMENT REPORTS

These reports assist you in managing your appointment statuses.  Workload
Reports require knowing whether an appointment took place, so each must be
checked-in or marked as a no-show or cancellation.


 1    Appointment Management Statistics


 2    Appointments Requiring Action


 3    Uncoded Checked-in Appointments

Select HELP SYSTEM action or <return>:
```

Figure 15-35: Using the online help option (step 2)

3. Depending on the option you selected, a report description displays similar to Figure 15-36.

```
           APPOINTMENT MANAGEMENT STATISTICS

Use this report lists statistics on all appointments in select clinics for
a date range.  It reports number of check-ins, check-outs, no-shows,
cancellations, inpatients and number of appointments where no action was
taken.

Besides running the report for specific clinics, you can also select
specific clinic codes.  Be warned: this method takes much longer to run as
it must look through all your clinics to find those with the selected
clinic codes.

If you are printing the report to paper, it requires wide paper or
condensed print.  If you send it to the screen, it will be presented in
browse mode.

Select HELP SYSTEM action or <return>:
```

Figure 15-36: Sample online help

15.10 Clinic Availability Reports (CAR)

Use this option to run a variety of reports that provide a display of the clinic patterns for the clinics and date range selected. You may run these reports for all clinics and divisions within your facility, or you may specify individual divisions and clinics. The reports available in the Clinic Availability Reports submenu are:

1. Clinic List (Day of Week)
2. Month-at-a-glance Display
3. Clinic Availability Report
4. Clinic Capacity Report
5. Next Available Appointment Report
6. Number of Available Appointments

7. Number of Appts Made & Wait Times
8. Clinic Abbreviations
9. On-line Help (Report Descriptions)

For each selected clinic, the option will print its clinic appointment pattern as well as a listing by appointment date/time of those patients who are scheduled. The SSN and the appointment length will be displayed for each patient. The clinic appointment pattern shows the number of available slots, scheduled slots, and overbooks. A legend is included in the report that explains the symbols used.

Individual appointments cancelled through the Cancel Appointment option are re-incremented accordingly on the appropriate clinic availability pattern and do not appear on the listing of appointments. The clinic availability pattern does not take into account unscheduled visits or no-shows. In order to get a true picture of the actual number of slots for a clinic, you should refer to the listing of patients beneath the clinic availability pattern. Unscheduled patient visits will always be listed. To include no-shows and those patients who were scheduled in time slots for which the clinic availability was cancelled, the user must specify inclusion of no-shows and cancellations. Patients who were cancelled due to cancellation of the entire clinic will be designated by a "*".

1. Type CAR at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports Menu

```
                          Reports Menu (Scheduling)

                                 (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
          ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: CAR
```

Figure 15-37: Accessing the Clinic Availability Report submenu

15.10.1 Clinic List (Day of Week)

Use this report to view and print a list of selected clinics that specify those days of the week in which each clinic meets (or sees patients). Sort and print can be done for all clinics, selected ones, or for all clinics grouped under the principal clinic. All reports can be viewed in browse mode when Home is the print device selected.

1. Type 1 at the "Select Report: (1-9):" prompt in the Clinic Availability Report submenu.

```
          1. Clinic List (Day of Week)
          2. Month-at-a-glance Display
          3. Clinic Availability Report
          4. Clinic Capacity Report
          5. Next Available Appointment Report
          6. Number of Available Appointments
          7. Number of Appts Made & Wait Times
          8. Clinic Abbreviations
          9. On-line Help (Report Descriptions)

         Select REPORT:  (1-9): 1
```

Figure 15-38: Running a clinic list (day of week) (step 1)

2. Type the name of the division from where you would like the information at the "Select Division:" prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division.

3. Type the name of the clinic you are interested in at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.

4. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select division: ALL
Select clinic: ALL

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-39: Running a clinic list (day of week) (steps 2-4)

5. If you selected B (Browse onscreen), the report will be displayed on your screen (Figure 15-40). Use the options at the bottom of the screen to navigate the report.

```
CLINIC LIST - DAY OF WEEK    Oct 17, 2002 08:33:16         Page:    1 of    3

  FACILITY: UNSPECIFIED INDIAN HOSPITAL
  CLINIC LIST BY DAY OF WEEK AS OF OCT 17, 2002

   *C* = CLINIC CURRENTLY MEETS ON THIS DAY
   *F* = CLINIC WILL MEET IN THE FUTURE ON THIS DAY


CLINIC:                            | SUN | MON | TUE | WED | THU | FRI | SAT |
=================================================================================
|11-17                             |     | *C* | *C* | *C* | *C* | *C* |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|AUDIOLOGY                         |     |     | *C* | *C* | *C* | *C* |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|CARDIOLOGY                        | *C* | *C* |     | *C* | *C* | *C* | *C* |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|DENTAL                            |     | *C* | *C* | *C* | *C* | *C* |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|DIABETIC DOC #1                   |     | *C* |     |     |     | *C* |     |
+         Enter ?? for more actions

Select Action:


+CLINIC LIST - DAY OF WEEK    Jan 23, 2004 10:52:58        Page:    2 of    3
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|ENT CLINIC                        |     |     |     |     | *C* |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|GENERAL                           | *C* |     | *C* |     |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|MANNING                           |     | *C* | *C* | *C* | *C* | *C* |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|Multiple Dental Chairs            |     | *C* | *C* | *C* | *C* |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|OPTOMETRY CLINIC                  |     | *C* | *C* | *C* | *C* | *C* |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PED WBC                           |     | *C* | *C* | *C* |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PEDIATRIC                         |     | *C* |     | *C* |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PEDS GENERAL                      |     | *C* |     |     |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PRENATAL                          |     |     |     |     | *C* |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|

+CLINIC LIST - DAY OF WEEK    Jan 23, 2004 10:52:58        Page:    2 of    3
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|ENT CLINIC                        |     |     |     |     | *C* |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|GENERAL                           | *C* |     | *C* |     |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|MANNING                           |     | *C* | *C* | *C* | *C* | *C* |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|Multiple Dental Chairs            |     | *C* | *C* | *C* | *C* |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
```

```
|OPTOMETRY CLINIC                  |     | *C* | *C* | *C* | *C* | *C* |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PED WBC                           |     | *C* | *C* | *C* |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PEDIATRIC                         |     | *C* |     | *C* |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PEDS GENERAL                      |     | *C* |     |     |     |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
|PRENATAL                          |     |     |     |     | *C* |     |     |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|
+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 15-40: Running a clinic list (day of week) (step 5)

15.10.2 Month-at-a-glance Display

Use this option to display clinic availability without making an appointment for a patient. Use this option to view a clinic's available appointments or to view the first available date for each clinic under a principal clinic.

1. Type 2 at the “Select Report: (1-9):” prompt in the Clinic Availability Report submenu.

```
           1. Clinic List (Day of Week)
           2. Month-at-a-glance Display
           3. Clinic Availability Report
           4. Clinic Capacity Report
           5. Next Available Appointment Report
           6. Number of Available Appointments
           7. Number of Appts Made & Wait Times
           8. Clinic Abbreviations
           9. On-line Help (Report Descriptions)

          Select REPORT:  (1-9): 2
```

Figure 15-41: Displaying month-at -a -glance (step 1)

2. Type the clinic name for which you interested at the “Select Clinic:” prompt.

3. Type the date, or the date and time, of the desired appointment, F (first available), or ?? at the at the “Enter the Date Desired for this Appointment:” prompt. If you select F, you will be prompted to type a date range for the search.

```
Select CLINIC: PEDIATRIC

  Select one of the following:

     'F'            for First available following a specified date
     Date           (or date computation such as 'T+2M') for a desired date
     '?'            for detailed help

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T
```

Figure 15-42: Displaying month-at -a -glance (steps 2-3)

4. Month-at-a-Glance will be displayed. A selection of options is displayed at the bottom of the screen. Type AL (appointment list) or SL (short appointment list) at the " Select Action:" prompt. Type ?? at the " Select Action:" prompt for more options.

```
MONTH-AT-A-GLANCE           Oct 10, 2002 13:12:05          Page:    1 of    4


                                      CARDIOLOGY
                                      Oct 2002

 TIME  |8       |9       |10      |11      |12      |1       |2       |3       |4    |
 DATE  |        |        |        |        |        |        |        |        |     |
TH 10  [1 1 1 1|0 1 1 1|0 1 1 1|1 1 1 1|1 1 1 1|0 1 1 1|0 1 1 1|0 1 1 1|0 1 1 1|0 1 ]
FR 11  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SA 12  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SU 13  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
MO 14  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
WE 16  [1 1 1 1|1 1 1 1|0 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
TH 17  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|0 1 1 1|0 1 1 1|0 1 1 1|0 1 ]
FR 18  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SA 19  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SU 20  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
MO 21  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
WE 23  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]

+         Enter ?? for more actions
>>>
AL  Appointment List      SL  Short Appt List

Select Action:
```

Figure 15-43: Displaying month-at -a –glance (step 4)

15.10.3 Clinic Availability Report

Use this report when you need to have a pattern of clinics that see patients. Printouts for the specific clinic (or all clinics), according to date ranges are available. Note that the user can get details of cancellations and no-shows as well. The system will then list those patients who have appointments in those timeslots.

1. Type 3 at the “Select Report: (1-9):” prompt in the Clinic Availability Report submenu.

```
          1. Clinic List (Day of Week)
          2. Month-at-a-glance Display
          3. Clinic Availability Report
          4. Clinic Capacity Report
          5. Next Available Appointment Report
          6. Number of Available Appointments
          7. Number of Appts Made & Wait Times
          8. Clinic Abbreviations
          9. On-line Help (Report Descriptions)

         Select REPORT:  (1-9): 3
```

Figure 15-44: Using the Clinic Availability report (step 1)

2. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division.

3. Type the name of the clinic you are interested in at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.

4. Type the date that you would like to begin your search and the date you would like to end your search at the “Beginning Visit Date:” and “Ending Visit Date:” prompts.

5. Type Y or N at the “Include Cancellations and/or No-Shows?” prompt.

6. Type the name of the printer where you would like your report to print or type HOME to display the report on the screen at the “Device:” prompt.

```
Select division: ALL
Select clinic: ALL

**** Date Range Selection ****

   Beginning DATE : T

   Ending    DATE : T+7

INCLUDE CANCELLATIONS AND/OR NO-SHOWS? N

DEVICE: HOME
```

Figure 15-45: Using the Clinic Availability report (steps 2-6)

7. If you selected to display the report on screen, the Clinic Availability report will be displayed. Use the selection of options that are displayed at the bottom of the screen to help you navigate the report.

```
CLINIC AVAILABILITY REPORT   Oct 17, 2002 09:21:20         Page:    1 of   14

                                                   OCT 17,2002@09:21   PAGE 1
                               UNSPECIFIED INDIAN HOSPITAL
                               11-17
                               OCTOBER  2002

 TIME  |8      |9      |10     |11     |12     |1      |2      |3      |4
 DATE  |       |       |       |       |       |       |       |       |
TH 17  |       |       |       |       |       [5 5 5 5|5 5 5 5|5 5 5 5]


FOR CLINIC AVAILABILITY PATTERNS:

    0-9 and j-z --denote available slots where j=10,k=11...z=26
            A-W --denote overbooks with A being the first slot to be
overbooked
                  and B being the second for that same time, etc.
      *,$,!,@,# --denote overbooks or appts. that fall outside of a clinic's
                  regular hours

+         Enter ?? for more actions

Select Action:
```

Figure 15-46: Using the Clinic Availability report (step 7)

15.10.4 Clinic Capacity Report

Use this report to see a clinic's capacity. You will able to compare the clinic available slots with the appointments made. If you need to run this report for past dates, this report will show you the number of actual patient encounters that day, the number of new appointments made that day along with the average number of days between making the appointment and the appointment date itself.

1. Type 4 at the "Select Report: (1-9):" prompt in the Clinic Availability Report submenu.

2. Press the Return key at the "Press Enter to Continue:" prompt.

```
           1. Clinic List (Day of Week)
           2. Month-at-a-glance Display
           3. Clinic Availability Report
           4. Clinic Capacity Report
           5. Next Available Appointment Report
           6. Number of Available Appointments
           7. Number of Appts Made & Wait Times
           8. Clinic Abbreviations
           9. On-line Help (Report Descriptions)

          Select REPORT:  (1-9): 4


     Use this report to compare appointment slots assigned vs.
     open slots left.  For past dates this report will also
     display the number of actual patient encounters that day,
     the number of new appointments made that day along with
     the average number of days between making the appointment
     and the appointment date itself.


Press ENTER to continue: [RET]
```

Figure 15-47: Running a clinic capacity report (steps 1-2)

3. Type S (summary for date range) or D (detail by day) at the “Select Report Format:” prompt to select how you would like your report to be formatted.

4. Type CL (clinic name) or CC (clinic code) at the “Specify Limiting Category for Detail:” prompt to select how would like to type the clinic information. If you select CL, you will be prompted to type the clinic name. If you select CC, you will be prompted to type the clinic code. When you are done entering all the clinics you want included, press the Return key.

5. Type the name of the printer where you would like your report to print or type HOME to display the report on your screen at the “Device:” prompt.

```
                        Clinic Appointment Capacity Report
     Select one of the following:

          S         SUMMARY FOR DATE RANGE
          D         DETAIL BY DAY

Select report format: S


     Select one of the following:

          CL        CLINIC NAME
          CC        CLINIC CODE

Specify limiting category for detail: C

Select CLINIC: CARDIOLOGY
Select CLINIC: [RET]

DEVICE: HOME
```

Figure 15-48: Running a clinic capacity report (steps 3-5)

6. If you selected to display the report onscreen, the Clinic Capacity Report screen will be displayed (Figure 15-49). Use the options at the bottom of the screen to navigate the report.

```
 CLINIC CAPACITY REPORT      Oct 17, 2002 09:37:08         Page:    1 of    1
-------------------------------------------------------------------------------
                  <*>  Clinic Appointment Capacity Report  <*>
                  Summary for division: UNSPECIFIED HO (202301)
-------------------------------------------------------------------------------
For clinic availability dates OCT 17,2002 through OCT 24,2002
Date printed: OCT 17,2002@09:37
Page: 1
-------------------------------------------------------------------------------
                                    Avail.    Pct.  Actual  ---Future Appts---
Clinic Code                  Clinic   Appt.   Slots  Clinic    Total    Ave
  Clinic Name              Capacity   Slots  Avail.    Enc.    Made    Wait
-------------------------------------------------------------------------------

02-CARDIAC                      252     247     98%       0       0     0.0
  CARDIOLOGY                    252     247     98%       0       0     0.0

Division total:                 252     247     98%       0       0     0.0
-------------------------------------------------------------------------------
NOTE:  Clinic Capacity    = total # of appointments slots
       Avail. Appt. Slots = # of slots still open
+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 15-49: Running a clinic capacity report (step 6)

15.10.5 Next Available Appointment Report

Use this report to find the next available appointment slot for a patient for a particular clinic, within a specific date range and with an appointment duration time as specified.

1. Type 5 at the "Select Report: (1-9):" prompt in the Clinic Availability Report submenu.

```
          1. Clinic List (Day of Week)
          2. Month-at-a-glance Display
          3. Clinic Availability Report
          4. Clinic Capacity Report
          5. Next Available Appointment Report
          6. Number of Available Appointments
          7. Number of Appts Made & Wait Times
          8. Clinic Abbreviations
          9. On-line Help (Report Descriptions)

         Select REPORT:  (1-9): 5
```

Figure 15-50: Running the Next Available Appointment report (step 1)

2. Type Y or N at the "Search for Next 3rd Available Appt.?" prompt. Answer Yes to use the 3rd next available appointment in your calculations, using the 3rd next available appointment instead of the very next one, gives a clearer picture of the clinic schedule. Answer No to use next available appointment.

3. Type the name of the division from where you would like the information at the "Select Division:" prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division.

4. Type the name of the clinic you are interested in at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.

5. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Search for Next 3rd Available Appt.? N
Select division: ALL
Select clinic: ALL

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-51: Running the Next Available Appointment report (steps 2-5)

6. If you selected B (browse onscreen), the Next Available Appointment screen will be displayed (Figure 15-52). Use the options at the bottom of the screen to navigate through the report.

```
NEXT AVAILABLE APPOINTMENT   Oct 17, 2002 11:18:35         Page:    1  of  1
UNAFFILIATED CLINICS
                           AUDIOLOGY                   Oct 17, 2002   0 days
                           CARDIOLOGY                  Oct 17, 2002   0 days
                           DENTAL                      Oct 17, 2002   0 days
                           PEDIATRIC                   Oct 23, 2002   6 days





          Enter ?? for more actions

Select Action:Quit//
```

Figure 15-52: Running the Next Available Appointment report (step 6)

15.10.6 Number of Available Appointments

Use this report to view and print the total number of available appointments within each respective clinic for each day of the next two weeks. This makes short work of the scheduling process and for figuring out which clinics have openings.

1. Type 6 at the “Select Report: (1-9):” prompt in the Clinic Availability Report submenu.

```
           1. Clinic List (Day of Week)
           2. Month-at-a-glance Display
           3. Clinic Availability Report
           4. Clinic Capacity Report
           5. Next Available Appointment Report
           6. Number of Available Appointments
           7. Number of Appts Made & Wait Times
           8. Clinic Abbreviations
           9. On-line Help (Report Descriptions)

          Select REPORT:  (1-9): 6
```

Figure 15-53: Running the number of available appointments (step 1)

2. Type the start date of the report at the “Starting Date:” prompt.

3. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division.

4. Type the clinic name at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Return key.

5. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```
Starting Date:  T  TODAY (OCT 17, 2002)
Select division: A (ALL)
Select clinic: A  (ALL)

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

Print Mode: B
```

Figure 15-54: Running the number of available appointments (steps 2-5)

6. If you selected B (browse onscreen), the Number of Available Appointments will be displayed (Figure 15-55). Use the options at the bottom of the screen to navigate through the report.

```
Number of Available Appts.    Oct 17, 2002 12:44:32        Page:    1 of    1
                    NUMBER OF APPTS AVAILABLE BY CLINIC AND DATE
                         Oct 17, 2002 to Oct 30, 2002

      | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 |
Principal Clinic:  UNAFFILIATED CLINICS
??33  |  7 |  7 |  0 |  0 |  7 |  7 |  7 |  7 |  7 |  0 |  0 |  7 |  7 |  7 |
AUD   | 24 | 28 |  0 |  0 |  0 | 28 |  8 | 24 | 28 |  0 |  0 |  0 | 28 |  8 |
CARDIO  29 | 32 | 32 | 32 | 32 |  0 | 32 | 30 | 32 | 32 | 32 | 32 |  0 | 32 |
PEDS  |  0 |  0 |  0 |  0 |  0 |  0 | 50 |  0 |  0 |  0 |  0 |  0 |  0 | 50 |









          Enter ?? for more actions

Select Action:
```

Figure 15-55: Running the number of available appointments (step 6)

15.10.7 Number of Appts Made & Wait Times

Use this report to review the number of appointments made each day by principal clinic and individual clinic. The number made by day of week is also included as well as the wait time between making the appointment and the actual appointment date. The wait times are listed as low, high, and average number of days.

1. Type 7 at the “Select Report: (1-9):” prompt in the Accessing the Clinic Availability Report submenu

```
          1. Clinic List (Day of Week)
          2. Month-at-a-glance Display
          3. Clinic Availability Report
          4. Clinic Capacity Report
          5. Next Available Appointment Report
          6. Number of Available Appointments
          7. Number of Appts Made & Wait Times
          8. Clinic Abbreviations
          9. On-line Help (Report Descriptions)

         Select REPORT:  (1-9): 7
```

Figure 15-56: Listing the Number of Appointments Made & Wait Times (step 1)

2. Type the division name at the "Select Division:" prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division. When you are done entering division names, press the Return key.

3. Type the clinic name at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Return key.

4. Type the beginning date of the report at the "Select First Date to Search:" prompt.

5. Type the ending date of the report at the "Select Last Date to Search:" prompt.

6. Type Y or N at the "Include Daily Totals?" prompt.

7. Type Y or N at the "Display Individual Clinic Totals?" prompt.

8. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select division: ALL
Select clinic: CARDIOLOGY
Select another clinic: [RET]
Select First Date to Search:  T-365
Select Last Date to Search:  T
Include Daily Totals? N
Display Individual Clinic Totals? N

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-57: Listing the Number of Appointments Made & Wait Times (steps 2-8)

9. If you selected B (browse onscreen), the Count # of Appointments Made screen will be displayed (Figure 15-58). Use the options at the bottom of the screen to navigate through the report.

```
COUNT # OF APPTS MADE         Oct 17, 2002 13:13:14        Page:    1 of    1
         Appointments Made from Oct 17, 2001 to Oct 17, 2002

  Date Appt Made     Day of Week     # Appts Made          Ave # Appts Made
UNAFFILIATED CLINICS
 Total for this principal clinic:          16                   16
  Oct 10, 2002       Thursday              16

          Average for Sundays:              0                    0
          Average for Mondays:              0                    0
          Average for Tuesdays:             0                    0
          Average for Wednesdays:           0                    0
          Average for Thursdays:           16                   16
          Average for Fridays:              0                    0
          Average for Saturdays:            0                    0
     Wait Times:  Low - High - Average
                    0 -  28  -    9
CARDIOLOGY
    Total for this clinic:                 16                   16
  Oct 10, 2002       Thursday              16
+         Enter ?? for more actions

SELECT ACTION:
```

Figure 15-58: Listing the Number of Appointments Made & Wait Times (step 9)

15.10.8 Clinic Abbreviations

Use this report to list all of the clinic abbreviations. This report is useful for printing out the list of active clinics, sorted by their appropriate abbreviations. Since space on many reports is limited, clinic names are abbreviated and sorted thereby.

1. Type 8 at the “Select Report: (1-9):” prompt in the Clinic Availability Report submenu.

```
           1. Clinic List (Day of Week)
           2. Month-at-a-glance Display
           3. Clinic Availability Report
           4. Clinic Capacity Report
           5. Next Available Appointment Report
           6. Number of Available Appointments
           7. Number of Appts Made & Wait Times
           8. Clinic Abbreviations
           9. On-line Help (Report Descriptions)

          Select REPORT:  (1-9): 8
```

Figure 15-59: Listing Clinic Abbreviations (step 1)

2. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-60: Listing Clinic Abbreviations (step 2)

3. If you selected B (browse onscreen), the Clinic Abbreviations screen will be displayed (Figure 15-61). Use the options at the bottom of the screen to navigate through the report.

```
CLINIC ABBREVIATIONS         Oct 17, 2002 13:28:11         Page:    1 of    1
AUD       AUDIOLOGY
CARDIO    CARDIOLOGY
CC        COLPO CLINIC
DM        DIABETIC PRINCIPAL
DM        DIABETIC CLINIC
DM #1     DIABETIC DOC #1
DM #2     DIABETIC DOC #2
DM #3     DIABETIC DOC #3
ENT       ENT CLINIC
GC        11-17
GEN       GENERAL
GW        gw
MAMM      MAMMOGRAM CLINIC
MDC       Multiple Dental Chairs
MH        Mental Health
MH/SS     MENTAL HEALTH
MS        MEDICAL STUDENT
NA        NURSES APPT
NC        NEPHROLOGY
+         Enter ?? for more actions

Select Action:
```

Figure 15-61: Listing Clinic Abbreviations (step 3)

15.10.9 Online Help (Report Descriptions)

Use this option to help you select a report from the CAR submenu that suits you best. This option will give you detail help as to each report in the CAR submenu. Select from a list of reports dealing with clinic schedules and appointment availabilities. All these report descriptions will be displayed onscreen.

1. Type 9 at the "Select Report: (1-9):" prompt in the Accessing the Clinic Availability Report submenu.

```
           1. Clinic List (Day of Week)
           2. Month-at-a-glance Display
           3. Clinic Availability Report
           4. Clinic Capacity Report
           5. Next Available Appointment Report
           6. Number of Available Appointments
           7. Number of Appts Made & Wait Times
           8. Clinic Abbreviations
           9. On-line Help (Report Descriptions)

          Select REPORT:  (1-9): 9
```

Figure 15-62: Using on-line help (step 1)

2. Type the number that corresponds to the report with which you need help at the “Select Help System action or <return>:” prompt.

```
                          CLINIC AVAILABILITY REPORTS

Use this option to select from a list of reports dealing with clinic
schedules and appointment availabilities.  All reports can be viewed in
browse mode when HOME is the print device selected.

 1    Clinic List (Day of Week)

 2    Month-at-a-glance Display

 3    Clinic Availability Report

 4    Clinic Capacity Report

 5    Next Available Appointment Report

 6    Number of Available Appointments

 7    Number of Appts Made & Wait Times

 8    Clinic Abbreviations

Select HELP SYSTEM action or <return>: 1
```

Figure 15-63: Using on-line help (step 2)

15.11 Clinic Profile (CPF)

Use this report to produce a profile of one, many or all clinics. At multidivisional facilities, you may choose to generate the profile of clinics associated with one, many, or all divisions. The clinics will be profiled as of the date the report is requested, providing the most current information available.

Some of the data elements included in each profile may be: clinic name, abbreviation (if any), telephone number and location of clinic, days clinic meets, start date, increments, hour display begins, appointment length, variable length, max overbooks/day, stop code, credit stop code, non-count clinic, access to clinic

prohibited, and max number days for future booking. Look at parameters including default provider and diagnosis for each clinic are also displayed.

The following is a brief explanation of some of the data elements listed on the report:

- Non-Count Clinic: If answered Yes, clinic will not impact on AMIS statistics.
- Credit Stop Code: Stop code that will be credited in addition to normal stop code if clinic is so specified.
- Start Date: Date clinic was initially set up.
- Increments: Number of slots per hour.
- Variable: Variable length appointments.
- Prohibit Access To Clinic: Indicates if the clinic is restricted to privileged users. If the clinic is temporarily or permanently inactivated, or is scheduled to be inactivated, this information will be displayed in the profile.

1. Type CPF at the "Select Reports Menu (Scheduling) Option:" prompt in the Reports menu.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)

   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: CPF
```

Figure 15-64: Running a clinic report (step 1)

2. Type the name of the division from where you would like the information at the "Select Division:" prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division.

3. Type the name of the clinic you are interested in at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinics, press the Return key at a blank "Select Clinic:" prompt.

4. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select division: ALL
Select clinic: CARDIOLOGY
Select another Clinic: [RET]

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-65: Running a clinic report (steps 2-4)

5. If you selected B (browse onscreen), the Clinic Profile screen will be displayed (Figure 15-66). Use the options at the bottom of the screen to navigate through the report

```
CLINIC PROFILE             Oct 17, 2002 11:34:25          Page:    1 of    2

       Clinic: CARDIOLOGY                          Abbrv: CARDIO
     Facility: UNSPECIFIED HO                      Service: CLINIC
     Location: 1st floor, N Wing             Clinic Code: 02 - CARDIAC
    Telephone: 247-0011               Principal Clinic: UNAFFILIATED CLINICS

 Clinic Meets: SU,MO,WE,TH,FR,SA          Sched Holidays: YES
Appt. Display: Begins at 8 AM               Appt. Length: 15 min.
   Increments: 15-MIN                     Variable Length: NO
Overbooks/Day: 0                           Future Booking: 45 days max.
  Auto-Rebook: Start at 9 AM            Max. Auto-Rebook: 45 days
     No-Shows: 2 allowed                     Wait Period: 14
                                         Pull Prev X-rays: YES

Appointment List Statement:
Special Instructions: None
Clinic's Letters –
+         Enter ?? for more actions
Select Action:Next Screen//
```

Figure 15-66: Running a clinic report (step 5)

15.12 No-Show Reports (NSR)

Use this option to access reports of all no-shows entered into the system for specified clinics. The reports can be run for one, many or all clinics. A range of clinics may also be selected, such as all clinics whose names begin with the same letters. This will limit the number of keystrokes needed to choose those clinics. The output can be generated for a date range or a single date. At multidivisional facilities, you may print the report for a single division or all divisions. The No-Show reports submenu gives you three options:

- No-Show Report
- Frequent No-Shows
- On-line Help (Report Descriptions)

To access the No-Show reports, type NSR at the "Select Reports Menu (Scheduling) Option:" prompt in the Report menu.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: NSR
```

Figure 15-67: Selecting No-Show reports

15.12.1 No-Show Report

Use this report to track and list the number of no-shows by date subtotaled by clinic and division.

1. Type 1 at the "Select Report:" prompt in the No-Show Report submenu.

```
           1. No-Show Report
           2. Frequent No-Shows
           3. On-line Help (Report Descriptions)

          Select REPORT:  (1-3): 1
```

Figure 15-68: Running a no-show report (step 1)

2. Type the name of the division from where you would like the information at the "Select Division:" prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division. When you are done entering divisions, press the Return key.

3. Type the name of the clinic you are interested in at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinics, press the Return key at a blank “Select Clinic:” prompt.

4. Type the date range you wish the report to cover.

5. Type Y or N at the “Print report totals only?” prompt.

6. Type the name of the printer where you would like your report to print or type HOME to display the report on your screen at the “Device:” prompt

```
Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [RET]
Select clinic: CARDIOLOGY
Select another clinic: [RET]

You may enter only a beginning date if you would like
to see a report of No-Shows for only one date.

**** Date Range Selection ****

   Beginning DATE : T-365

   Ending    DATE : T


Print report totals only? Y


DEVICE: HOME
```

Figure 15-69: Running a no-show report (steps 2-6)

7. If you typed HOME, the No-Show report will be displayed (Figure 15-70). Use the options at the bottom of the screen to navigate through the report.

```
 No-Show Report               Oct 17, 2002 13:58:13        Page:    1 of    3

               Confidential Patient Data Covered by Privacy Act

  FOR PERIOD COVERING:        OCT 17, 2002 TO OCT 17, 2002
         FOR DIVISION:        UNSPECIFIED INDIAN HOSPITAL
           FOR CLINIC:        CARDIOLOGY
==========================================================================

DATE                    TIME     PATIENT                        HRCN
----                    ----     -------                        ----


*** NO NO-SHOWS OCCURRED IN THIS CLINIC DURING THIS TIME FRAME ***

                        TOTAL NO-SHOWS W/NO   TOTAL NO-SHOWS W/   TOTAL NO-
SHOWS
DATE                    REBOOKED APPTS.       REBOOKED APPTS.
==========================================================================
___                    ___                            ___

+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 15-70: Running a no show report (step 7)

15.12.2 Frequent No-Shows

Use this report to track patients with a specified number of recorded no-shows by clinic, by principal clinic or for your whole facility. Each time you run the report, you can select the # of no-shows that will determine who to include in the listing.

1. Type 2 at the “Select Report:” prompt in the No-Show Report submenu.

```
           1. No-Show Report
           2. Frequent No-Shows
           3. On-line Help (Report Descriptions)

          Select REPORT:  (1-3): 2
```

Figure 15-71: Listing frequent no-shows (step 1)

2. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division. When you are done entering divisions, press the Return key.

3. Type the name of the clinic you are interested in at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinics, press the Return key at a blank “Select Clinic:” prompt.

4. Type the starting and ending date range you wish the report to cover.

5. Type the number of no-shows that you want to define as frequent at the "Number of No-Shows that defines Frequent: (1-99):" prompt.

6. Type F (Facility), P (Principal Clinic), or C (Clinic) at the "No-Show Limit Based on Which Category:" prompt to determine how you want your no-show category based.

7. Type Y or N at the "Display Appt. Other Info?" prompt. Answer yes to include appointment length and other info (used for appt reason). Answer no to list patient name, chart #, last no-show, and counts only.

8. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select division: UNSPECIFIED Indian Hospital
Select division: [RET]
Select clinic: CARDIOLOGY
Select clinic: [RET]
Select First Date to Search:  T  (OCT 17, 2002)
Select Last Date to Search:  T  (OCT 17, 2002)
Number of No-Shows that defines Frequent:  (1-99): 2

     Select one of the following:

          F         Facility
          P         Principal Clinic
          C         Clinic

No-Show Limit based on which category: F
Display Appt. Other Info? N

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-72: Listing frequent no-shows (step 2-8)

9. If you select B (browse onscreen), the Frequent No-Shows screen will be displayed (Figure 15-73). Use the options at the bottom of the screen to navigate through the screen.

```
Frequent No-Shows             Oct 17, 2002 14:11:02          Page:    1 of
1
               Confidential Patient Data Covered by Privacy Act
           For appointments between Oct 17, 2001 and Oct 17, 2002
             Patients with at least 1 no-shows for the facility
  Patient            HRCN    Last No-show   #No-shows: Clinic  Princ Cln
Facil
Principal Clinic: UNAFFILIATED CLINICS        (Count back 30 days)

 PEDIATRIC (Count back 30 days)
  ATENCIO,MARILEE    8210     11/28/01@09:30                1       0       1
               15MIN  WELL CHILD CLINIC
  CARRILLO,SEQUANA   8453     11/28/01@10:30                1       0       1
               15MIN  WELL CHILD CLINIC









          Enter ?? for more actions

Select Action:Quit//
```

Figure 15-73: Listing frequent no-shows (step 9)

15.12.3 Online Help (Report Descriptions)

Use this option to give you help with the no-show reports. This option gives you detailed report descriptions for the No-Show, and Frequent No-Show reports. All the report descriptions will be displayed onscreen.

1. Type 3 at the “Select Report:” prompt in the No-Show Report submenu.

```
           1. No-Show Report
           2. Frequent No-Shows
           3. On-line Help (Report Descriptions)

          Select REPORT:  (1-3): 3
```

Figure 15-74: Using on-line help (step 1)

2. Type the number of the report with which you need help at the “Select Help System Action or <Return>:” prompt.

```
                                NO-SHOW REPORTS

Use this option to access various reports on no-shows for scheduled clinic
appointments.  Reports include statistics and patient listings.  These
reports assume you are marking your no-shows at the end of every clinic
day.  Various reports under the Appoitnment Management Reports option can
assit you in finding appointments that need to be marked as checked in,
no-show or cancelled.


 1    No-Show Report




 2    Frequent No-Shows

Select HELP SYSTEM action or <return>:
```

Figure 15-75: Using on-line help (step 2)

15.13 Waiting List Report (WLR)

Use this report when the respective clinic is completely booked, and the demand still exists for medical attention at the clinic. This report lists those patients who have been put on a waiting list for the specific clinic. It can be sorted by Provider to be Seen, Date Added to List or Recall Date, or by the date entered into the system.

1. Type WLR at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)


   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: WLR
```

Figure 15-76: Running a waiting list report (step 1)

2. Type the name of the clinic or ward that you would like to see at the “Select Clinic or Ward:” prompt.

3. You can select three ways to list the report. Type the number of your selection at the “Select Date Range Type:” prompt:

   - 1- Date Added to List
   - 2- Recall Date
   - 3- Date Removed from List

4. Type the beginning date at the “Select Beginning Date:” prompt.

5. Type the ending date at the “Select Ending Date:” prompt.

6. Type Yes or No at the “Include Entries Already Removed from List?” prompt.

7. You can further sort the report by the following options. Type the number of your selection at the “Select Sort:” prompt.

   - 1-By Dates Selected
   - 2-By Priority
   - 3-By Provider
   - 4-By Reason Added

- 5-By Resolution

8. Type P (print) or B (browse) at the “Print Mode:” prompt.

```
     Use this option to list patients on your waiting list by
     date added, recall date or date removed.  You can sort the
     report by date, priority, provider, reason for adding or
     resolution.  For a list displayed on your screen, you can
     select any entry to review all information including the
     comments added.



Select Clinic or Ward: DEMO MENTAL HEALTH


   1)  Date Added to List
   2)  Recall Date
   3)  Date Removed from List
Select Date Range Type:  (1-3): 1

Select Beginning Date:  T-365  (FEB 02, 2003)
Select Ending Date:  T  (FEB 02, 2004)

Include Entries Already Removed from List? NO// YES


   1)  By Dates Selected
   2)  By Priority
   3)  By Provider
   4)  By Reason Added
   5)  By Resolution
Select Sort:  (1-5): 1

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: BROWSE// B
```

Figure 15-77: Running a waiting list report (step 2-5)

9. The Waiting List Report displays (Figure 15-78).

```
Waiting List Report         Feb 02, 2004 15:24:35          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
               Waiting List for UNSPECIFIED MENTAL HEALTH
         Sorted by DATE ADDED TO LIST; for Date Added to List

     Date Selected  Patient Name       Chart #    Age    Sex  Home Phone
          ** DATE ADDED TO LIST: May 21, 2003 **
  1. May 21, 2003   DEMO,TROY HANSON FR  102478     29     M   555-555-4560

          ** DATE ADDED TO LIST: Aug 01, 2003 **
  2. Aug 01, 2003   DEMO,BEATRIC  104616            12     F   555-555-5287

          ** DATE ADDED TO LIST: Aug 30, 2003 **
  3. Aug 30, 2003   DEMO,ANDRE BENSON     105098     11     M   555-555-5010




          Enter ?? for more actions
V   View Entry                          Q   Quit
Select Action:Quit//
```

Figure 15-78: Running a waiting list report (step 9)

10. Type V at the “Select Action:” prompt, to view the patient’s information or Q to exit.

```
elect Action:Quit// v   View Entry

Waiting List View Entry     Feb 02, 2004 15:26:33          Page:    1 of    1
               Confidential Patient Data Covered by Privacy Act
DEMO,TROY HANSON FRANCIS#102478         DOB: 03/31/1901     Sex: MALE
Pcp/Team: None/None

           DATE ADDED TO LIST:     MAY 21, 2003
         REASON ADDED TO LIST:     BACK UP
                     PRIORITY:     MIDDLE
                     PROVIDER:     DEMO,DANIELLE
                  RECALL DATE:     OCT 21, 2003
     PHONE NUMBER [RESIDENCE]:     555-555-2446
          PHONE NUMBER [WORK]:     555-999-9609

Comments:
JUST NEEDED

       DATE REMOVED FROM LIST:
                   RESOLUTION:
          Enter ?? for more actions

Select Action:Quit//
```

Figure 15-79: Running a waiting list report (step 10)

15.14 Workload/Statistical Reports (WSR)

Use this option to generate a variety of reports showing clinic workload, facilitating the determination of the kinds of activity within clinics during a specified date range. It allows for comparison of clinic or stop code activity for a specified time frame between the selected year and the previous year.

After you specify a date range for the report, the system will verify that the outpatient encounter status update process has been performed for each date in the range. If any of the dates have not been processed by this update logic, you will be warned and generation of the workload report will be allowed to continue.

Some of the data elements displayed include the number of scheduled appointments, unscheduled appointments, inpatient appointments, and overbooks. You may choose to display the report for individual clinic meetings or a summary of the month. The patient names may or may not be displayed.

If the report is run by stop code, the add/edits may be included. Cancelled appointments will appear on this report if they were entered through either the Cancel Clinic Availability option or the Cancel Appointment option.

All appointments with a status of no action taken will be included in the no shows column of the report.

The total patients seen is calculated as follows: Scheduled + Unscheduled + Inpatients + Overbooks + Add/Edits = Total Patients Seen

Note: Depending on selected specifications, this report may be quite lengthy. You may choose to run the report during off hours.

- To access the Workload/Statistical Reports menu, type WSR at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.

```
                            Reports Menu (Scheduling)

                                   (UNSPECIFIED HO)

   AIU    Address/Insurance Update
   CHL    Chart Locator
   LCR    List Charts Requested
   LRS    List Routing Slips Printed
   FRL    File Room List
   HSC    Health Summaries by Clinic
   RPL    Radiology Pull List
   RS     Routing Slips
           ---------------
   AMR    Appointment Management Reports
   CAR    Clinic Availability Reports
   CPF    Clinic Profile
   NSR    No-Show Reports
   WLR    Waiting List Report
   WSR    Workload/Statistical Reports

Select Reports Menu (Scheduling) Option: WSR  Workload/Statistical Reports
```

Figure 15-80: Accessing the workload/statistical reports menu

15.14.1 Statistics by Type of Appointment

Use this report to view counts of completed appointments broken down by type of appointment (scheduled, same day, walk-in, overbook or inpatient). Sorts include clinic, principal clinic, provider, or team. Optional sub-sorts include morning vs. afternoon appointments, pediatric vs. adult patients, and male vs. female patients.

1. Type 1 at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```
          1. Statistics by Type of Appointment
          2. Scheduled vs. Patients Seen
          3. Detailed Appointment Listing
          4. Monthly Workload Comparisons
          5. On-line Help (Report Descriptions)

         Select REPORT:  (1-5): 1
```

Figure 15-81: Listing statistics by type of appointment (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.

```
     Select one of the following:

          C         Clinic
          P         Principal Clinic
          V         Provider
          T         Team

Subtotal Report by: C
```

Figure 15-82: Listing statistics by type of appointment (step 2)

a. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Return key at a blank "Select Another Division:" or "Select Another Clinic:" prompt.

```
Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [RET]
Select clinic: PEDIATRIC
Select another clinic: [RET]
```

Figure 15-83: Listing statistics by type of appointment (step 2a)

b. If you type V, you will prompted to type the name of the provider(s) you would like included. When you are done typing in the providers you want included, press the Return key at a blank "Select Another Provider:" prompt.

```
Subtotal Report by: V
Select provider: DOCTOR,KATHRYN
Select another provider: DOCTOR,JOHN
Select another provider: [RET]
```

Figure 15-84: Listing statistics by type of appointment (step 2b)

c. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are don typing in the providers you want included, press the Return key at a blank "Select Another Team:" prompt.

```
Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [RET]
```

Figure 15-85: Listing statistics by type of appointment (step 2c)

3. Type the first date of the search at the "Select First Date to Search:" prompt.

4. Type the ending date of the search at the "Select Last Date to Search:" prompt.

5. Type Y or N at the "List Individual Dates?" prompt.

```
Select First Date to Search:  T-365
Select Last Date to Search:  T
List Individual Dates? N
```

Figure 15-86: Listing statistics by type of appointment (steps 3-5)

6. Type the number of the additional sort option you would like to use at the "Select Addition Sort (optional):" prompt. If you do not want any additional sorts, press the Return key at the "Select Addition Sort (optional):" prompt.

7. Type Y or N at the "Assume Patient Seen if Appt Not Checked In?" prompt. Type ?? at the "Assume Patient Seen if Appt Not Checked In?" prompt, if you need further details on this selection.

8. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
     Select one of the following:

          1         Morning vs. Afternoon
          2         Pediatric vs. Adult Patients
          3         Male vs. Female Patients

Select addition sort (optional): 1
Assume Patient Seen if Appt NOT Checked In? Y
     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-87: Listing statistics by type of appointments (steps 6-8)

9. If you selected B (browse onscreen), the Workload Statistics screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```
WORKLOAD STATISTICS           Oct 17, 2002 15:21:38        Page:    1 of   1
                        Completed Appointments by Type
                    For dates: Oct 17, 2001 to Oct 17, 2002
 Category Names             SCHED SAMEDAY  WALKIN  OVERBK    INPT    TOTAL
SEEN
11-17                         0       0       5       0       0             5
 TOTAL MALE                   0       0       2       0       0             2
 TOTAL FEMALE                 0       0       3       0       0             3

  Oct 31, 2001 - FEMALE       0       0       1       0       0       0     1
  Nov 08, 2001 - FEMALE       0       0       1       0       0       0     1
  Nov 12, 2001 - FEMALE       0       0       1       0       0       0     1
  Nov 09, 2001 - MALE         0       0       1       0       0       0     1
  Dec 14, 2001 - MALE         0       0       1       0       0       0     1

AUDIOLOGY                    30       0       0       0       0            30
 TOTAL MALE                  25       0       0       0       0            25
 TOTAL FEMALE                 5       0       0       0       0             5

  Nov 01, 2001 - FEMALE       1       0       0       0       0       0     1
  Dec 06, 2001 - FEMALE       3       0       0       0       0       0     3
+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 15-88: Listing statistics by type of appointments (step 9)

15.14.2 Scheduled vs. Patients Seen

Use this report to compare the difference between in expected and actual workload in a clinic. The number of patients expected will be calculated by adding the scheduled appointments to the overbooks while subtracting cancellations. The number of actual patients seen is calculated by subtracting no-shows are subtracted and adding walk-ins to the expected amount.

1. Type 2 at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```
          1. Statistics by Type of Appointment
          2. Scheduled vs. Patients Seen
          3. Detailed Appointment Listing
          4. Monthly Workload Comparisons
          5. On-line Help (Report Descriptions)

         Select REPORT:  (1-5): 2
```

Figure 15-89: Listing scheduled vs. patients seen (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.

```
     Select one of the following:

          C         Clinic
          P         Principal Clinic
          V         Provider
          T         Team

Subtotal Report by: P
```

Figure 15-90: Listing scheduled vs. patients seen (step 2)

a. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Return key at a blank "Select Another Division:" or "Select Another Clinic:" prompt.

```
Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [RET]
Select clinic: PEDIATRIC
Select another clinic: [RET]
```

Figure 15-91: Listing scheduled vs. patients seen (step 2a)

b. If you type V, you will prompted to type the name of the provider(s) you would like included. When you are done typing in the providers you want included, press the Return key at a blank "Select Another Provider:" prompt.

```
Subtotal Report by: V
Select provider: DOCTOR,KATHRYN
Select another provider: DOCTOR,JOHN
Select another provider: [RET]
```

Figure 15-92: Listing scheduled vs. patients seen (step 2b)

c. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are don typing in the providers you want included, press the Return key at a blank "Select Another Team:" prompt.

```
Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [RET]
```

Figure 15-93: Listing scheduled vs. patients seen (step 2c)

3. Type the first date of the search at the "Select First Date to Search:" prompt.

4. Type the ending date of the search at the "Select Last Date to Search:" prompt.

5. Type Y or N at the “List Individual Dates?” prompt.

```
Select First Date to Search:  T-365
Select Last Date to Search:  T
List Individual Dates? N
```

Figure 15-94: Listing scheduled vs. patients seen (steps 3-5)

6. Type the number of the additional sort option you would like to use at the “Select Addition Sort (optional):” prompt. If you do not want any additional sorts, press the Return key at the “Select Addition Sort (optional):” prompt.

7. Type Y or N at the “Assume Patient Seen if Appt Not Checked In?” prompt. Type ?? at the “Assume Patient Seen if Appt Not Checked In?” prompt if you need further details on this selection.

8. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```
     Select one of the following:

          1         Morning vs. Afternoon
          2         Pediatric vs. Adult Patients
          3         Male vs. Female Patients

Select addition sort (optional): 1
Assume Patient Seen if Appt NOT Checked In? Y
     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-95: Listing scheduled vs. patients seen (steps 6-8)

9. If you selected B (browse onscreen), the Scheduled Versus Seen screen will be displayed (Figure 15-96). Use the options at the bottom of the screen to navigate through the report.

```
SCHEDULED VS. SEEN          Oct 17, 2002 15:35:54          Page:    1 of   1
                    For dates: Oct 17, 2001 to Oct 17, 2002
                  (Assumes patients seen if not flagged as no-shows)
 Category Names        SCHED +OVERBK -CANCEL=EXPECTED -NOSHOW +WALKIN =  SEEN
11-17                      2       0       0       2       0       3        5
 TOTAL MALE                2       0       0       2       0       0        2
 TOTAL FEMALE              0       0       0       0       0       3        3

  Oct 31, 2001 - FEM       0       0       0       0       0       1        1
  Nov 08, 2001 - FEM       0       0       0       0       0       1        1
  Nov 12, 2001 - FEM       0       0       0       0       0       1        1
  Nov 09, 2001 - MAL       1       0       0       1       0       0        1
  Dec 14, 2001 - MAL       1       0       0       1       0       0        1

AUDIOLOGY                 30       0       0      30       0       0       30
 TOTAL MALE               25       0       0      25       0       0       25
 TOTAL FEMALE              5       0       0       5       0       0        5

  Nov 01, 2001 - FEM       1       0       0       1       0       0        1
  Dec 06, 2001 - FEM       3       0       0       3       0       0        3
+         Enter ?? for more actions

Select Action:
```

Figure 15-96: Listing scheduled vs. patients seen (step 9)

15.14.3 Detailed Appointment Listing

Use this report to view a listing of completed appointments sorted by clinic and date. For each appointment, the type (scheduled, walk-in, inpatient, etc.), chart number, sex, age and appointment status (checked-in, no action taken) are listed Can be sorted by principal clinic, provider or team.

1. Type 3 at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```
           1. Statistics by Type of Appointment
           2. Scheduled vs. Patients Seen
           3. Detailed Appointment Listing
           4. Monthly Workload Comparisons
           5. On-line Help (Report Descriptions)

          Select REPORT:  (1-5): 3
```

Figure 15-97: Running a detailed appointment listing (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.

```
     Select one of the following:

          C         Clinic
          P         Principal Clinic
          V         Provider
          T         Team

Subtotal Report by: C
```

Figure 15-98: Running a detailed appointment listing (step 2)

a. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Return key at a blank "Select Another Division:" or "Select Another Clinic:" prompt.

```
Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [RET]
Select clinic: PEDIATRIC
Select another clinic: [RET]
```

Figure 15-99: Running a detailed appointment listing (step 2a)

b. If you type V, you will prompted to type the name of the provider(s) you would like included. When you are done typing in the providers you want included, press the Return key at a blank "Select Another Provider:" prompt.

```
Subtotal Report by: V
Select provider: DOCTOR,KATHRYN
Select another provider: DOCTOR,JOHN
Select another provider: [RET]
```

Figure 15-100: Running a detailed appointment listing (step 2b)

c. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are don typing in the providers you want included, press the Return key at a blank "Select Another Team:" prompt.

```
Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [RET]
```

Figure 15-101: Running a detailed appointment listing (step 2c)

3. Type the first date of the search at the "Select First Date to Search:" prompt.

4. Type the ending date of the search at the "Select Last Date to Search:" prompt.

5. Type Y or N at the "List Individual Dates?" prompt.

```
Select First Date to Search:  T-365
Select Last Date to Search:  T
List Individual Dates? N
```

Figure 15-102: Running a detailed appointment listing (steps 3-5)

6. Type the number of the additional sort option you would like to use at the "Select Addition Sort (optional):" prompt. If you do not want any additional sorts, press the Return key at the "Select Addition Sort (optional):" prompt.

7. Type Y or N at the "Assume Patient Seen if Appt Not Checked In?" prompt. Type ?? at the "Assume Patient Seen if Appt Not Checked In?" prompt, if you need further details on this selection.

8. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
     Select one of the following:

          1         Morning vs. Afternoon
          2         Pediatric vs. Adult Patients
          3         Male vs. Female Patients

Select addition sort (optional): 1
Assume Patient Seen if Appt NOT Checked In? Y
     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-103: Running a detailed appointment listing (steps 6-8)

9. If you selected B (browse onscreen), the Workload Appointment Listing screen will be displayed (Figure 15-104). Use the options at the bottom of the screen to navigate through the report.

```
WORKLOAD APPT LISTING       Oct 18, 2002 07:45:12          Page:    1 of    1
                  Confidential Patient Data Covered by Privacy Act
                         Appointments by Clinic and Date
                    (does not include no-shows or cancellations)
                      For dates: Sep 18, 2002 to Oct 18, 2002
 Appt Date/Time      Type         HRCN   Sex  Age      Status
CARDIOLOGY
Oct 10, 2002@09:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 10, 2002@10:00   Inpatient     4298   M    41       INPATIENT/CHECKED IN
Oct 10, 2002@13:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 10, 2002@14:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 10, 2002@15:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 10, 2002@16:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 16, 2002@10:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 17, 2002@14:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 17, 2002@15:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT
Oct 17, 2002@16:00   Inpatient     4298   M    41       INPATIENT APPOINTMENT

PEDIATRIC
Oct 09, 2002@14:41    Walkin           2   M    7        CHECKED IN
+         Enter ?? for more actions

Select Action:
```

Figure 15-104: Running a detailed appointment listing (step 9)

15.14.4 Monthly Workload Comparisons

Use this report to see a statistical comparison between the current month and the same month a year prior. You will see that each month shows the net change and percent change. You have the option to sort the report by clinic, principal clinic, provider, or team. No sub-sorts are available.

1. Type 4 at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```
           1. Statistics by Type of Appointment
           2. Scheduled vs. Patients Seen
           3. Detailed Appointment Listing
           4. Monthly Workload Comparisons
           5. On-line Help (Report Descriptions)

          Select REPORT:  (1-5): 4
```

Figure 15-105: Listing monthly workload comparisons (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.

```
     Select one of the following:

          C         Clinic
          P         Principal Clinic
          V         Provider
          T         Team

Subtotal Report by: C
```

Figure 15-106: Listing monthly workload comparisons (step 2)

a. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Return key at a blank "Select Another Division:" or "Select Another Clinic:" prompt.

```
Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [RET]
Select clinic: PEDIATRIC
Select another clinic: [RET]
```

Figure 15-107: Listing monthly workload comparisons (step 2a)

b. If you type V, you will prompted to type the name of the provider(s) you would like included. When you are done typing in the providers you want included, press the Return key at a blank "Select Another Provider:" prompt.

```
Subtotal Report by: V
Select provider: DOCTOR,KATHRYN
Select another provider: DOCTOR,JOHN
Select another provider: [RET]
```

Figure 15-108: Listing monthly workload comparisons (step 2b)

c. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are don typing in the providers you want included, press the Return key at a blank "Select Another Team:" prompt.

```
Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [RET]
```

Figure 15-109: Listing monthly workload comparisons (step 2c)

3. Type the first date of the search at the "Select First Date to Search:" prompt.

4. Type the ending date of the search at the "Select Last Date to Search:" prompt.

5. Type Y or N at the "Assume Patient Seen if Appt Not Checked In?" prompt. Answer yes if you want the report to assume patients were seen even when their appointments were not checked-in or flagged as no-shows. Answer no if only appointments with a check-in date/time are to be counted.

6. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select First Date to Search:  T-365
Select Last Date to Search:  T
Assume Patient Seen if Appt NOT Checked In? N

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 15-110: Listing monthly workload comparisons (steps 3-6)

7. If you selected B (browse onscreen), the Workload Comparison screen will be displayed (Figure 15-111). Use the options at the bottom of the screen to navigate through the report.

```
WORKLOAD COMPARISONS        Oct 18, 2002 08:24:20          Page:    1 of    1
               Monthly Comparisons on Completed Appointments by Type
                      For dates: Oct 18, 2002 to Oct 18, 2002
                  and corresponding dates from the previous year

 Category Name            SCHED SAMEDAY  WALKIN  OVERBK    INPT    TOTAL SEEN
11-17
   Oct 2001                   0       0       0       0       0            0
   Oct 2002                   0       0       0       0       0            0
             Net Change       0       0       0       0       0            0
             % Change         0       0       0       0       0            0%

AUDIOLOGY
 Oct 2001                     0       0       0       0       0            0
 Oct 2002                     0       0       0       0       0            0
             Net Change       0       0       0       0       0            0
             % Change         0       0       0       0       0            0%

DENTAL
 Oct 2001                     0       0       6       0       0            6
+         Enter ?? for more actions

Select Action:
```

Figure 15-111: Listing monthly workload comparisons (step 7)

15.14.5 On-line Help (Report Descriptions)

Use this option to give you help with the workload reports. This option gives you detailed report descriptions for the all workload reports under the WSR option. All report descriptions will be displayed onscreen.

1. Type 5 at the "Select Report:" prompt in the Workload/Statistical Reports submenu.

```
          1. Statistics by Type of Appointment
          2. Scheduled vs. Patients Seen
          3. Detailed Appointment Listing
          4. Monthly Workload Comparisons
          5. On-line Help (Report Descriptions)

         Select REPORT:  (1-5): 5
```

Figure 15-112: Using on-line help (step 1)

2. Type the number of the report with which you need help at the "Select Help System Action or <Return>:" prompt.

```
                          WORLOAD/STATISTICAL REPORTS

Use this option to access various workload reports.   Some are statistical
and some are appointment listings.  This series assumes that Appointment
Management Reports have been run and deemed clean.  These reports count
past appointments.


 1    Statistics by Type of Appointment


 2    Scheduled vs. Patients Seen


 3    Detailed Appointment Listing


 4    Monthly Workload Comparisons

Select HELP SYSTEM action or <return>:
```

Figure 15-113: Using on-line help (step 2)

16.0 Supervisor Menu (Scheduling) (SCS)

The Supervisor Menu, available as the last option on the main Scheduling menu, should be used by the clinic's scheduling supervisor or other personnel familiar with setting up a clinic, the appointment schedule matrix, and other inherent options available in this Scheduling system as applicable to the specific clinic(s), since all relevant functions of the clinic are configured here.

> **Note**: Caution should be taken when configuring a clinic. The individual setting up (or maintaining) this information into the clinic should have a thorough understanding of how the clinic is run and how it should be configured.

Sections 16.1-16.8 detail how to use each option within the Supervisor Scheduling menu.

To access the Supervisor menu, type SCS at the "Select Scheduling Menu Option:" prompt located in the Scheduling main menu.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO

   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: SCS
```

Figure 16-1: Accessing the Supervisor menu

16.1 Application Coordinator Menu (ACM)

This menu is used to access options that will allow you to customize your site. This menu contains sensitive options that are restricted to the Scheduling Application Coordinator. These options are only to be used when necessary and when the person

using them has received specialized training. Sections 16.1.1-16.1.13 explain how to use each option in the ACM.

To access the Application Coordinator menu, type ACM at the "Select Supervisor Menu (Scheduling) option:" prompt.

```
                          Supervisor Menu (Scheduling)

                                  (UNSPECIFIED HO)

   ACM    Application Coordinator Menu ...
   CPF    Clinic Profile
   CRA    Cancel/Restore Clinic Availability
   DSU    Display Scheduling User
   EEL    Enter/Edit Letters
   LAM    List Appts Made By Clinic
   MON    Month-at-a-glance Display
   SET    Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: ACM
```

Figure 16-2: Accessing the Application Coordinator menu

16.1.1 Add Cancellation Reasons (ACR)

Use this option to add a cancellation reason to the Cancellation Reason file. This can be used anytime you need to add a reason that had not been previously needed. You cannot delete reasons, but you can inactivate them, letting users know that this reason is no longer used.

To access ACR, type ACR at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: ACR
```

Figure 16-3: Adding a cancellation reason

Edit or Inactivating Cancellation Reason:
Use this option to edit or inactivate a reason that is already in you system.

1. Type the name of an existing reason at the "Select Cancellation Reason Name:" prompt. Type ?? for a listing of existing reasons.

2. Go through each prompt as it appears on the screen and edit where appropriate. The current setting will appear at each prompt. Type ?? at any prompt to see a list of available options. Type 1 at the "Inactive:" prompt to inactivate the reason or press the Return key to bypass this prompt.

```
Select CANCELLATION REASONS NAME: COULDN"T MAKE IT
NAME: COULDN'T MAKE IT//   (No Editing)
TYPE: BOTH// C
SYNONYM: COULDN'T// [RET]
INACTIVE: 1
```

Figure 16-4: Adding a cancellation reason code

Add a New Cancellation Reason:
Use this option to add a new cancellation reason into your system.

1. Type the name of the new reason at the "Select Cancellation Reason Name:" prompt.

2. Type Y at the "Are you adding 'new reason' as a New Cancellation Reason:" prompt.

3. To select who is associated with the reason, type P (patient), C (clinic), or B (both) at the "Type:" prompt.

4. Type an abbreviation for the reason code that can be used by users to choose this new code at the "Synonym:" prompt.

5. Press the Return key at the "Inactive:" prompt to bypass this option.

```
Select CANCELLATION REASONS NAME: ??


Select CANCELLATION REASONS NAME: Patient Didn't feel like coming in
  Are you adding 'Patient didn't feel like coming in' as
    a new CANCELLATION REASONS (the 16TH)? Y
NAME: Didn't feel like coming in//   (No Editing)
TYPE: P

SYNONYM: Didn't
INACTIVE: [RET]
```

Figure 16-5: Adding a new cancellation reason code

16.1.2 Add/Edit a Holiday (AEH)

Use this option to add, edit, or delete a holiday. Any clinic that is affected by the change of holidays dates must be remapped, which updates the clinic pattern to insure inclusion or exclusion of the holiday.

- To access AEH, type AEH at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: AEH
```

Figure 16-6: Adding/Editing a holiday

Add a New Holiday:
Use this option to add an entirely new holiday into the system.

1. Type the date of the new holiday at the "Add/Edit Holiday:" prompt.
2. Type Y or N at the "Are You Adding 'Date' as a New Holiday?" prompt.
3. Type the name of the new holiday at the "Holiday Name:" prompt
4. If you need to make any corrections after typing the holiday name, make them at the "Name:" prompt or press the Return key to keep the current name.

```
ADD/EDIT HOLIDAY: NOV 02, 2002
  Are you adding 'NOV 02, 2002' as a new HOLIDAY (the 20TH)? Y
   HOLIDAY NAME: My Birthday
NAME: My Birthday// [RET]
```

Figure 16-7: Adding a holiday

Edit an Existing Holiday:
Use this option to edit a holiday that already exists in the system.

1. Type the date of the existing holiday at the “Add/Edit Holiday:” prompt. Type ?? for a list of available holidays.

2. Type the date to which you want to change the holiday or press the Return key to keep the current date at the “Date: ‘Current Date’//” prompt.

3. Type the new name of the holiday or press the Return key to keep the current name at the “Name: ‘Current Name’//” prompt.

```
ADD/EDIT HOLIDAY: May 29, 1995   MAY 29, 1995       M DAY
DATE: MAY 29,1995// [RET]
NAME: M DAY// MEMORIAL DAY
```

Figure 16-8: Editing a holiday

> **Note**: If the holiday name is longer then 19 characters, you will be prompted to replace sections of the name with a new section. You will not be allowed to change the entire name only sections at a time.

```
ADD/EDIT HOLIDAY: Jan 15, 1996   JAN 15, 1996       DR. MARTIN LUTHER KING,
JR.DAY
DATE: JAN 15,1996// [RET]
NAME: DR. MARTIN LUTHER KING, JR. DAY  Replace DAY With Birhtday
  Replace [RET]
   DR. MARTIN LUTHER KING, JR. Birhtday
```

Figure 16-9: Editing a holiday name longer than 19 characters

16.1.3 Add Waiting List Reasons (AWR)

Use this option to add or edit local reasons to the Waiting List Reason file. You cannot delete a reason, but you can inactivate it.

1. To access AWR, type AWR at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

2. To add a new waiting list reason, type the name of the new reason at the “Select Waiting List Reason Name:” prompt and then type Y to confirm your selection at the “Are you adding 'New Reason' as a new Waiting List Reason (# of reason)?” prompt. If you are editing or inactivating a reason, type the name of the existing reason at the “Select Waiting List Reasons Name:” prompt. Type ?? for a list of existing reasons.

3. Either edit the name of the name of the reason or press the Return key at the “Name:” prompt.

4. Type the classification of waiting list reason at the “Type:” prompt. Type ?? at this prompt to see a detailed list of available options.

5. Type I (inactive) or A (active) at the “Inactive:” prompt. If you type I, the code will become inactive and you will no longer be allowed to use this reason.

```
                          Application Coordinator Menu

                                  (UNSPECIFIED HO)


   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: AWR

        You may enter a new WAITING LIST REASON, if you wish

Select WAITING LIST REASON NAME: BACK UP
  Are you adding 'BACK UP' as a new WAITING LIST REASON (the 7TH)? No// Y
NAME: BACK UP// [RET]
TYPE: ??

     Choose from:
       A        ADD TO LIST
       R        REMOVE FROM LIST
TYPE: A  ADD TO LIST
INACTIVE: [RET]
```

Figure 16-10: Adding waiting list reasons

16.1.4 Change Patterns to 30-60 (CHG)

Use this option to change patterns that were created with 15-minute increments to the 30-60 minute increment pattern.

You may be asked if you wish to delete clinic availability for a particular day of the week. The system will not permit deletion of existing appointments through this option.

Utilizing the Change Patterns to 30-60 option may adversely affect existing appointments. The system will check to see if any availability dates for the selected clinic have previously been cancelled. If so, a message will appear prompting you to see the days that have been affected.

> **Note:** If you initially set up a clinic with 20-minute increments, using this option to change the pattern could cause the clinic availability pattern to display incorrectly. This option is **not** recommended for use with 20-minute increment appointment slots.

1. To access CHG, type CHG at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu

                                  (UNSPECIFIED HO)


   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: CHG
```

Figure 16-11: Changing patterns to 30 –60 (step 1)

2. Type the name of the clinic that you want to change at the "Select Clinic Name:" prompt.

3. Type the number of minutes of the new appointment length at the "Length of App't:" prompt.

4. Press the Return key at the "Display Increments per Hour:" prompt. This prompt should not be edited when patterns have been established using another increment per hour. Editing this field will cause existing patterns to be erroneous and scheduling conflicts may also occur if the increments are changed

5. Type the date that the change will occur at the "Availability Date:" prompt.

6. Type the time range for the new appointment times at the "Time:" prompt. When you are done entering time ranges, press the Return key.

7. Type the number of slots you want for the given time range at the "No. Slots:" prompt.

8. The system will display the new pattern. Type Y or N at the "Pattern OK for Mondays indefinitely?" prompt.

9. If you are done entering availability dates for the new appointment time change, press the Return key at the "Availability Date:" prompt.

```
Select CLINIC NAME: Pediatric
LENGTH OF APP'T: 15// 30
DISPLAY INCREMENTS PER HOUR: 15-MIN // [RET]

AVAILABILITY DATE: 11/25/02  (NOV 25, 2002)

                                      MONDAY

TIME: 0800-1200   NO. SLOTS: 1//  25
TIME: [RET]
[y y y y|y y y y|y y y y|y y y y]
...PATTERN OK FOR MONDAYS INDEFINITELY? y  (Yes)
...SORRY, LET ME THINK ABOUT THAT A MOMENT...
PATTERN FILED!
AVAILABILITY DATE: [RET]
```

Figure 16-12: Changing patterns to 30 –60 (steps 2-9)

16.1.5 Create Visit Status Report (CVS)

Use this option to review the status of whether clinics have Create Visit at Check-in turned on or not. This report will list those clinics with the parameter turned off first sorted by principal clinic. All clinics on the list are active.

1. To access CVS, type CVS at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu

                                  (UNSPECIFIED HO)


   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: CVS
```

Figure 16-13: Creating visit status report (step 1)

2. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division. When you are done entering division names, press the Return key.

3. Type the clinic name at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Return key.

4. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print

```
     Use this report to review whether clinics have 'Create
     Visit at Check-in' turned on or not.  It lists those
     clinics with the parameter turned OFF first sorted by
     principal clinic.  All clinics on the list are active.


Select division: ALL
Select clinic: ALL

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER


PRINT MODE: B
```

Figure 16-14: Creating visit status report (steps 2-4)

5. If you selected to browse the report onscreen, the Create Visit Status Report screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```
Create Visit Status Report    Oct 23, 2002 14:31:21        Page:    1 of    4
                       Sorted by Status & Principal Clinic

   Clinic Name                    Code   Mult Vst Cat  Clinic Provider
Req?

               CLINICS WITH 'CREATE VISIT AT CHECKIN' TURNED OFF

UNAFFILIATED CLINICS
   gw                              01
   RHEUMATOLOGY                    38
   zm                              16
   zt                              16
   DIABETIC CLINIC                 06
   DIABETIC PRINCIPAL              06
   DIABETIC DOC #1                 06
   DIABETIC DOC #2                 06
   DIABETIC DOC #3                 06
   PEDIATRIC                       20
   MAMMOGRAM CLINIC                25
   NEPHROLOGY                      49
+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 16-15: Creating visit status report (step 5)

16.1.6 Edit Scheduling Parameters (ESP)

Use this option to set up and maintain facility and system parameters dealing with the Scheduling functions in PIMS. There are three files involved. The MAS Parameter file has only one entry and is used for system-wide items such as multi-division

yes/no and appointment search threshold. All other parameters are based on facility and stored in either the Medical Center Division or the IHS Scheduling Parameter file.

To access ESP, type ESP at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu

                                  (UNSPECIFIED HO)


   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: ESP
```

Figure 16-16: Accessing Edit Scheduling Parameters

Editing System Wide Parameters

This option allows you to edit the Primary Facility Name, whether or not the facility is a Multidivisional Medical Center, and the appointment search threshold.

1. Type the name of the Primary Facility at the "Primary Facility Name:" prompt, or press the Return key to keep the current default name.

2. Type Y or N depending if your facility is a multidivisional Medical Center at the "Multidivision Med Center?:" prompt.

3. Type the time in days for the appointment search threshold at the "Appt Search Threshold:" prompt. Enter the number of days in the past that the 'Appointment Management' option should initially search for appointments. When the user selects a patient, this parameter will automatically be used to search that many days in the past for appointments. When a clinic is selected, this number will be used to calculate the default beginning date. If this field is not entered, then the system will use 2 days.

```
Editing system-wide parameters:

PRIMARY FACILITY NAME: UNSPECIFIED INDIAN HOSPITAL// [RET]
MULTIDIVISION MED CENTER?: YES// [RET]
APPT SEARCH THRESHOLD: 15// [RET]
```

Figure 16-17: Editing system wide parameters

Editing facility-wide parameters:
This option allows you to edit the parameters within your facility. You will be able to edit several scheduling parameters ranging from ancillary test start times, letter parameter, printer setups, and slip configurations.

1. Type the division name or number where you will be making changes at the "Select IHS Scheduling Parameters Division:" prompt.

2. Type Y to confirm your selection at the "OK?" prompt.

3. Type the number or name of the facility where you want to set the file pointer at the "Institution File Pointer:" prompt. Type ?? for more detail on this option.

4. Type the number of your facility at the "Facility Number:" prompt.

```
Editing facility-wide parameters:

Select IHS SCHEDULING PARAMETERS DIVISION: 1  UNSPECIFIED INDIAN HOSPITAL
1569
         ...OK? Y

INSTITUTION FILE POINTER: 1 UNSPECIFIED HO

FACILITY NUMBER: 1569
```

Figure 16-18: Editing facility-wide parameters (steps 1-4)

5. The system will display the Scheduling Parameters screen. This screen uses ScreenMan. When using ScreenMan for entering data, use the tab or arrow keys for moving between fields. You can type ?? at any prompt to display your options at the bottom of the screen

6. Type answers to each of the fields to customize your site.

7. When you are done typing answers for page one, move the cursor to the command line located at the bottom of the screen and type NEXT PAGE.

8. Again, type answer to each of the fields to customize your site.

9. When you are done typing answers for page two, move the cursor to the command line and type EXIT.

```
                  SCHEDULING PARAMETERS for UNSPECIFIED INDIAN HOSPage 1 of 2

OUTPATIENT ONLY (answer only if YES):

      APPT LAB TEST START TIME: 0800
           APPT EKG START TIME: 0800
         APPT X-RAY START TIME: 0800

   ADDRESS LOCATION ON LETTERS: TOP
REMOVE SALUTATION FROM LETTERS:
  ASK LETTER DURING MAKE APPT?: YES

RESTRICT VIEW OF WHO MADE APPT: YES
   WAITING PERIOD FOR NO-SHOWS: 30

    PATIENT REGISTRATION EDIT?: YES, FULL EDIT OR ADDRESS


COMMAND:                                        Press <PF1>H for help   Insert

                  SCHEDULING PARAMETERS for UNSPECIFIED INDIAN HOSPage 2 of 2

            FILE ROOM USES TERMINAL DIGIT?: NO
               DEFAULT FILE ROOM LIST SORT: BY CLINIC CODE

                       ROUTING SLIP FORMAT: LONG
       PRINT EXTRA ROUTING SLIP FOR CHART?: NO
PRINT HEALTH SUMMARIES WITH ROUTING SLIPS?: YES

            DEFAULT HEALTH SUMMARY PRINTER: MIH108
                    DEFAULT WALKIN PRINTER: MIH108
             DEFAULT CHART REQUEST PRINTER: MIH108
              ACTION PROFILE TERMINAL TYPE: C-MINIOUT-VXD

                    WAITING PERIOD FOR AIU: 30




COMMAND:                                       Press <PF1>H for help    Insert
```

Figure 16-19: Editing facility-wide parameters (steps 5-9)

16.1.7 Inactivate/Reactivate Clinic (IRC)

Use this option to inactivate or reactivate a clinic.

To access IRC, type IRC at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: IRC
```

Figure 16-20: Accessing IRC

Inactivate a Clinic

The Inactivate a Clinic option is used to make a clinic inactive (no activity allowed) as of a selected date. Once the clinic is inactivated, it will remain so until it is reactivated through the Reactivate a Clinic option. You may not inactivate a clinic which has appointments scheduled on and/or after the selected inactivation date.

If the clinic was previously scheduled to be inactivated, you will be able to choose one of the following courses of action: to delete the inactivate date and either restore or reconstruct the previous clinic availability patterns; to allow the present inactivation date to remain in effect; to change the present inactivation date to another date.

1. To inactivate a clinic, type I at the "Select Action:" prompt.
2. Type the name of the clinic you would like to inactivate at the "Select Clinic:" prompt.
3. Type the date you want the clinic inactivated at the "Enter Date Clinic is to be Inactivated:" prompt.
4. The system will then display a message stating the clinic will be inactivated on the entered date.

```
     Select one of the following:

          I         INACTIVATE CLINIC
          R         REACTIVATE CLINIC

Select Action: I

Select CLINIC NAME: GENERAL
Enter Date Clinic is to be Inactivated: 11/01/02

Clinic will be inactivated effective 11/01/2002
```

Figure 16-21: Inactivating a clinic

Reactivate a Clinic

If you decide to restore or reconstruct clinic availability patterns, you will be prompted to either examine existing patterns and verify them and/or type each new availability date, time, and number of slots. See the Set Up a Clinic option for help in establishing clinic availability patterns.

This option enables the user to reactivate clinic availability for any clinic, which has been inactivated through the Inactivate a Clinic option. A valid reactivate date is any date that is later than the inactivate date.

When the clinic is initially reactivated, you will be prompted to establish clinic availability patterns for the reactivate date. It is imperative that a pattern be established for this date. Without re-establishing the pattern, users will be unable to book appointments into the reactivated clinic. Patterns for other dates may be established at this time, if desired. For assistance in establishing clinic availability patterns, please refer to the Set Up a Clinic option.

If the selected clinic was previously assigned a reactivate date, you may either change the old date to a new date or delete the old date entirely. It is important to note that if you choose to delete, the clinic will remain inactivated until a new reactivate date is entered.

1. To reactivate a clinic, type R at the “Select Action:” prompt.
2. Type the name of the clinic that you wish to reactivate at the “Select Clinic:” prompt.
3. Type the date that you want the clinic reactivated at the “Enter date clinic is to be reactivated:” prompt.
4. Type the time range for which the clinic will be available at the “Time:” prompt.
5. Type Y or N at the “Pattern OK for Sundays Indefinitely?” prompt.

6. Type Y or N at the "Do you want to set up additional availabilities for this clinic now?" prompt. If you type Y, repeat steps 3-6.

```
Select Action: R
Select CLINIC NAME: GENERAL
Enter date clinic is to be reactivated: 11/03/02

AVAILABILITY DATE: 11/03/2002  (NOV 03, 2002)

                                        SUNDAY

TIME: 0800-1700   NO. SLOTS: 1//  20
TIME: [RET]
[t t t t|t t t t|t t t t|t t t t|t t t t|t t t t|t t t t|t t t t]
...PATTERN OK FOR SUNDAYS INDEFINITELY? Y
...EXCUSE ME, THIS MAY TAKE A FEW MOMENTS...
PATTERN FILED!

Clinic will be reactivated effective 11/03/2002
Do you want to set up additional availabilities for this clinic now? Y

AVAILABILITY DATE: 11/05/02

                                        TUESDAY

TIME: 0800-1700   NO. SLOTS: 1//  25
TIME:
[y y y y|y y y y|y y y y|y y y y|y y y y|y y y y|y y y y|y y y y]
...PATTERN OK FOR TUESDAYS INDEFINITELY? Y
...HMMM, HOLD ON...
PATTERN FILED!
```

Figure 16-22: Reactivating a clinic

16.1.8 View Scheduling Keys (KEY)

Use this option to view the current security keys in effect. The display will explain to whom each key is to be assigned.

1. To access KEY, type KEY at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: KEY
```

Figure 16-23: Viewing scheduling keys (step 1)

2. The Scheduling Security Keys screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```
Scheduling Security Keys      Oct 23, 2002 13:36:15        Page:    1 of    4
          Listing of security keys used by this module

SDMOB                     (Unlocks Master Overbook)
     Allows user to exceed the maximum overbook parameter in ALL CLINICS!!
Be very careful assigning this key.  For most users who need master overbook
access, assign by clinic or by principal clinic.  This can be done under Set
Up A Clinic.

SDOB                      (Unlocks Overbook Access)
     Allows user to overbook a time slot up to the maximum per day for ALL
CLINICS!!  Be very careful assigning this key.  For most users who need
overbook access, assign by clinic or by principal clinic under Set Up A
Clinic.

SDZAC                     (Unlocks App Coordinator Menu)
     Assign this key ONLY to those users needing access to the restricted
supervisor options that now live under the Application Coordinator Menu.

SDZCVDSTATUS              (CVD STATUS)
+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 16-24: Viewing scheduling keys (step 2)

16.1.9 Users with Overbook to All Clinics (OVB)

This option allows you to print a list of all users with SDOB or SDMOB security keys. These keys give the user overbook access to all clinics. It is recommended that you keep this list short. Overbook access by individual clinic or by principal clinic is available under Set Up A Clinic.

1. To access OVD, type OVD at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

2. A description of the report will be displayed. Press the Return key at the "Press Enter to continue:" prompt to continue.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: OVB

     Use this option to print a listing of all users holding the
     SDOB or SDMOB keys.  These keys give users overbook access
     to ALL clinics.  It is recommended that you keep this list
     short.  Assigning overbook access by individual clinic or
     by principal clinic is available under the Set Up a Clinic
     option.


Press ENTER to continue: [RET]
```

Figure 16-25: Listing user with overbook to all clinics (steps 1-2)

3. The Overbook Access Listing screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```
OVERBOOK ACCESS LISTING       Oct 23, 2002 13:28:48        Page:    1 of    2
          USERS WITH KEYS THAT GIVE THEM OVERBOOK IN ALL CLINICS

SDOB:  OVERBOOK ACCESS
   USER,CHARLES
   USER,MD DEBORAH
   USER,KAREN ANN
   USER,MD
   USER,WALTER A
   USER,P
   USER,EDGAR
   USER,DEMO
   USER,EDWARD
   USER,JOHN

SDMOB:  MASTER OVERBOOK ACCESS
   ISLAS,CHARLES
   USER,MD DEBORAH
   USER,KAREN ANN
+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 16-26: Listing user with overbook to all clinics (step 3)

16.1.10 Purge Scheduling Data (PSD)

Use this option to retrieve disk space and delete various non-essential nodes created by the Scheduling module in the hospital location and patient files.

Note: You are required to keep one full fiscal year of data online.

You may select which files to purge and may choose to print the nodes as they are deleted. This option should be run during off-hours.

1. To access PSD, type PSD at the "Select Application Coordinator Menu Option:" prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: RMC
```

Figure 16-27: Purging scheduling data (step 1)

2. The system will display a list of all the files that you can purge. To continue, type Y at the “OK to continue?” prompt.

3. To purge files in the Hospital Location file, type Y at the “Do you want to purge the Hospital Location file nodes?” prompt. If you do not wish to purge any of these files, type N.

4. To purge files in the Patient file, type Y at the “Do you want to purge the Patient file nodes?” prompt. If you do not wish to purge any of these files, type N.

5. If you selected Y in either step 3 or 4, you will be prompted to type a date through which you want these files purged. Type the date at the “Select date through which you want these files purged:” prompt.

6. Type Y or N at the “Do you want to print nodes (in Global format - %G) as they are deleted?” prompt.

7. The system will give you one last opportunity to confirm your selections. Type Y or N at the “Is everything OK to proceed?” prompt.

8. Type the name of the device where you would like a report of files purged at the “Device:” prompt.

9. The system will then begin the purge and a listing of purged files will be displayed.

```
The date you select to delete through may not exceed SEP 30, 2001.
The files you may choose to delete from and the nodes that will be deleted
are:

 from the HOSPITAL LOCATION File
  -  the 'S' nodes, APPOINTMENT multiple
  -  the 'ST' nodes, clinic PATTERN multiple
  -  the 'OST' nodes, clinic SPECIAL PATTERN multiple
  -  the 'C' nodes, CHART CHECK multiple
  -  the 'AAS' nodes, 10/10 visits cross-reference
 from the PATIENT File
  -  the 'ASDPSD' nodes, Special Survey cross-reference

OK to continue? No// Y

Do you want to purge the Hospital Location file nodes? No// Y

Do you want to purge the Patient file nodes? No// Y

Select date through which you want these files purged: SEP 30, 2001

Do you want to print nodes (in GLOBAL format - %G) as they are deleted? N

Is everything OK to proceed? No// Y

DEVICE: HOME


*** SCHEDULING PURGE IN PROCESS ***

Begin purge of Hospital Location File nodes OCT 23, 2002@12:44:28
0 APPTS AND MISCELLANEOUS HOSPITAL LOCATION NODES DELETED
0 10/10 AND UNSCHEDULED XREFS PURGED

End of Hospital Location purge

*** SCHEDULING PURGE COMPLETED *** OCT 23, 2002@12:44:28
Hospital Location file nodes have been purged through: SEP 29, 2000@90:00
```

Figure 16-28: Purging scheduling data (steps 2-9)

16.1.11 Remap Clinic (RMC)

Use this option to reset the clinic availability patterns of established clinics. It updates the pattern to insure knowledge of the holiday or deletion of the holiday. The Holiday file is usually updated annually. This option must be run for each clinic that meets on the date of the holiday. The Remap Clinic option would also be utilized if the clinic set-up is edited from no scheduling on holidays to scheduling on holidays or vice/versa. Before the clinic is remapped for any date on which existing appointments may be deleted, the appointments must be cancelled.

You may choose to remap for one/many/all clinics and, at multidivisional facilities, for one/many/all divisions. The system will insert the holiday name into clinic availability patterns even if the clinic does not meet on the day of the holiday.

The following messages may appear under the Remark section of the output generated by this option or on your screen while utilizing the option.

Message	**Occurs When**
Bogus clinic day- Appts!	The date and day of the week do not correspond.
[HOLIDAY NAME]- Appts!	Appointments exist on a holiday and the clinic does not schedule on holidays. This allows you to cancel and reschedule appointments if necessary.
No master pattern found for this day	No day of the week template exists for this day of the week.

The following message may appear on the output:

Cancelled	Availability was cancelled. If appointments were originally scheduled on a holiday and later cancelled, you must restore availability for the selected date and remap that date to insert the holiday; otherwise, it will remain cancelled.

The following message may appear on the screen:

Cancelled - Appts!	Appointments were originally scheduled on a holiday and later cancelled. You must first restore clinic availability for the selected date in order to remap and to show the holiday in the pattern.

1. To access RMC, type RMC at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: RMC
```

Figure 16-29: Remapping a clinic (step 1)

2. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division. When you are done entering division names, press the Return key.

3. Type the clinic name at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Return key.

4. Type the beginning date of the report at the “Select Beginning Date:” prompt.

5. Type the ending date of the report at the “Select Ending Date:” prompt.

6. Type a printer where you want this report printed at the “Device:” prompt or type HOME to display the listing on the screen.

```
Select division: UNSPECIFIED INDIAN HOSPITAL
Select division: [RET]
Select clinic: CARDIOLOGY
Select clinic: [RET]

**** Date Range Selection ****

   Beginning DATE : T-365

   Ending    DATE : t+365


DEVICE: HOME//
```

Figure 16-30: Remapping a clinic (steps 2-6)

7. If you select to display the remapping on the screen, the Clinic Remap Function screen will appear. Press the Return key to changes pages or to exit from this display.

```
OCT 23,2002                  Clinic Remap Function                 pg 1 of 2

     Clinic Name           Clinic Date            Remark
     -----------           -----------            ------

11-17                      SAT NOV  2,2002   My Birthday- Inserted
AUDIOLOGY                  SAT NOV  2,2002   My Birthday- Inserted
Bariatric                  SAT NOV  2,2002   My Birthday- Inserted
CARDIOLOGY                 MON NOV 25,2002   Cancelled
COLPO CLINIC               SAT NOV  2,2002   My Birthday- Inserted
DENTAL                     SAT NOV  2,2002   My Birthday- Inserted
DIABETIC CLINIC            SAT NOV  2,2002   My Birthday- Inserted
DIABETIC DOC #1            SAT NOV  2,2002   My Birthday- Inserted
DIABETIC DOC #2            SAT NOV  2,2002   My Birthday- Inserted
DIABETIC DOC #3            SAT NOV  2,2002   My Birthday- Inserted
DIABETIC PRINCIPAL         SAT NOV  2,2002   My Birthday- Inserted
ENT CLINIC                 SAT NOV  2,2002   My Birthday- Inserted
GENERAL                    SAT NOV  2,2002   My Birthday- Inserted
MAMMOGRAM CLINIC           SAT NOV  2,2002   My Birthday- Inserted
MEDICAL STUDENT            SAT NOV  2,2002   My Birthday- Inserted
MENTAL HEALTH              SAT NOV  2,2002   My Birthday- Inserted
```

Figure 16-31: Remapping a clinic (step 7)

16.1.12 Scheduling Templates (SCT)

Use this option to add and edit scheduling appointment availability templates as well as listing those already defined.

1. To access SCT, type SCT at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: sct
```

Figure 16-32: Adding/editing scheduling templates (step 1)

2. Type 1 (add/edit templates) or type 2 (list defined templates) at the "Select Action:" prompt. If you select 2, you will be taken directly to the Scheduling Template screen. You can use the options at the bottom of the screen to navigate through the report. If you select 1, continue with steps 3-6.

3. Type an existing or new template name at the "Select Scheduling Templates Name:" prompt. If you are adding a new template, you will prompted to confirm your selection. For a list of available templates, you can type ?? at the "Select Scheduling Templates Name:" prompt.

4. Type the time range for which you want the template to run at the "Select Time:" prompt. If you are adding a new time range, you will be prompted to confirm your selection. If you are editing a template, type the new time range you desire, or press the Return key to accept the default range.

5. Type the number of slots that you want for the time range entered at the "Slots:" prompt.

6. If no more time ranges need to be entered, press the Return key at the next "Select Time:" prompt to complete the template entry. If you want to add other time slots, type them here.

```
     Select one of the following:

          1         Add/Edit Templates
          2         List Defined Templates


Select SCHEDULING TEMPLATES NAME: New Template
  Are you adding 'new temp' as a new SCHEDULING TEMPLATES (the 1ST)? No// Y

Select TIME: 0900-1700
  Are you adding '0900-1700' as a new TIME (the 1ST for this SCHEDULING
TEMPLATES)? No// Y
  SLOTS: 5
Select TIME: [RET]
```

Figure 16-33: Adding/editing scheduling template (steps 2-6)

16.1.13 View Event Driver (VED)

Use this option to view the items linked to the Scheduling Event Driver. These are items fired whenever an appointment event is executed.

1. To access VED, type VED at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```
                          Application Coordinator Menu
                                  (UNSPECIFIED HO)

   ACR    Add Cancellation Reasons
   AEH    Add/Edit a Holiday
   AWR    Add Waiting List Reasons
   CHG    Change Patterns to 30-60
   CVS    Create Visit Status Report
   ESP    Edit Scheduling Parameters
   IRC    Inactivate/Reactivate Clinic
   KEY    View Scheduling Keys
   OVB    Users with Overbook to All Clinics
   PSD    Purge Scheduling Data
   RMC    Remap Clinic
   SCT    Scheduling Templates
   VED    View Event Driver

Select Application Coordinator Menu Option: VED
```

Figure 16-34: Viewing event driver (screen 1)

2. The Scheduling Event Driver screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```
SCHEDULING EVENT DRIVER     Oct 23, 2002 10:02:02          Page:    1 of    3

    Seq   Protocol                       Description
       BSDAM APPOINTMENT EVENTS Protocol - Scheduling Event Driver Menu

      5   BSDAM CREATE VISIT - INTERACTICreate Visit at Check-in
    5.1   BSDAM CREATE VISIT - SILENT   Create Visit at Check-in
      6   BSDAM ADD ENCOUNTER           Add Outpatient Encounter
      8   BSDAM APPT SLIP               Appointment Slip Print

Documentation:
This extended action contains all the actions that need to be performed
when an action is taken upon an appointment such as check-in or check-out.
This is a copy of SDAM APPOINTMENT EVENTS with only IHS items attached.

The protocol item BSDAM CREATE VISIT must have a lower sequence number
than any other item where the visit ien is required. The protocol returns
the variables BSDVSTN (visit ien) and BSDVCN (visit control number or null
and error codes) IF CREATE VISIT is turned ON for clinic. They are killed
in the exit action of this event driver.
+         Enter ?? for more actions

Select Action:Next Screen//
```

16.2 Clinic Profile (CPF)

Use this option to produce a profile of one, many, or all clinics. At multidivisional facilities, you may choose to generate the profile of clinics associated with one, many, or all divisions. The clinics will be profiled as of the date the report is requested, providing the most current information available.

Some of the data elements included in each profile may be: clinic name, abbreviation (if any), telephone number and location of clinic, days clinic meets, start date, increments, hour display begins, appointment length, variable length, max overbooks/day, stop code, credit stop code, non-count clinic, access to clinic prohibited, and max number of days for future booking. Checkout parameters including default provider and diagnosis for each clinic are also displayed.

1. To access CPF, type CPF at the “Select Supervisor Menu (Scheduling) Option:” prompt.

```
                          Supervisor Menu (Scheduling)

                                  (UNSPECIFIED HO)

   ACM    Application Coordinator Menu ...
   CPF    Clinic Profile
   CRA    Cancel/Restore Clinic Availability
   DSU    Display Scheduling User
   EEL    Enter/Edit Letters
   LAM    List Appts Made By Clinic
   MON    Month-at-a-glance Display
   SET    Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: CPF
```

Figure 16-35: Listing a clinic profile (step 1)

2. Type the name of the division from where you would like the information at the "Select Division:" prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division. When you are done entering division names, press the Return key.

3. Type the clinic name at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Return key.

4. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select division: ALL
Select clinic: CARDIOLOGY
Select another clinic: [RET]

     Select one of the following:

          B         BROWSE ON SCREEN
          P         PRINT ON PAPER

PRINT MODE: B
```

Figure 16-36: Listing a clinic profile (steps 2-4)

5. If you selected B (browse onscreen), the clinic profile screen will be displayed (Figure 16-37). Use the option s at the bottom of the screen to navigate through the report.

```
CLINIC PROFILE              Oct 21, 2002 10:28:48          Page:    1 of    2
       Clinic: CARDIOLOGY                           Abbrv: CARDIO
     Facility: UNSPECIFIED HO                       Service: CLINIC
     Location: 1st floor, N Wing             Clinic Code: 02 - CARDIAC
    Telephone: 247-0011               Principal Clinic: UNAFFILIATED CLINICS

 Clinic Meets: SU,MO,WE,TH,FR,SA          Sched Holidays: YES
Appt. Display: Begins at 8 AM               Appt. Length: 15 min.
   Increments: 15-MIN                     Variable Length: NO
Overbooks/Day: 0                           Future Booking: 45 days max.
  Auto-Rebook: Start at 9 AM            Max. Auto-Rebook: 45 days
     No-Shows: 2 allowed                     Wait Period: 14
                                         Pull Prev X-rays: YES
Appointment List Statement:

Special Instructions: None

Clinic's Letters -
+         Enter ?? for more actions
Select Action:Next Screen//
```

Figure 16-37: Listing a clinic profile (step 5)

The following is a brief explanation of some of the data elements listed on the report:

Non-Count Clinic
If answered YES, clinic will not impact AMIS statistics

Credit Stop Code
Stop code that will be credited in addition to normal stop code if clinic is so specified

Start Date
Date clinic was initially set up.

Increments
Number of slots per hour

Variable
Variable length appointments

16.3 Cancel/Restore Clinic Availability (CRA)

Use this option to cancel a clinic's availability for either a whole day or portions of a day. Only one portion of a day may be cancelled at a time. If several portions of a day are to be cancelled, the option must be re-entered to cancel each portion. If part of the same day has been cancelled previously, the cancellation(s) will be listed. You may cancel another portion(s) as long as the new cancellation does not overlap any previous cancellation(s).

1. To access CRA, type CRA at the “Select Supervisor Menu (Scheduling) Option:” prompt.

```
                          Supervisor Menu (Scheduling)

                                   (UNSPECIFIED HO)

   ACM    Application Coordinator Menu ...
   CPF    Clinic Profile
   CRA    Cancel/Restore Clinic Availability
   DSU    Display Scheduling User
   EEL    Enter/Edit Letters
   LAM    List Appts Made By Clinic
   MON    Month-at-a-glance Display
   SET    Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: CRA
```

Figure 16-38: Canceling/Restoring clinic availability (step 1)

2. Type C (cancel clinic) or R (restore clinic) at the “Select Action:” prompt.

3. Type the name of the clinic that you want to either cancel or restore availability.

4. Type the date that you want availability changed at the “Restore/Cancel ‘Clinic’ for What Date:” prompt. If you are restoring clinic availability, confirm the date and time you are restoring and clinic availability will be restored. If you are canceling availability, continue with steps 5-9.

5. After you have entered the desired clinic name and date, the system will list any scheduled appointments that exist during that time in a report entitled Pre-cancellation List. If you want to browse this report on your screen, type HOME at the “Device:” prompt.

```
     Select one of the following:

          C         CANCEL CLINIC AVAILABILITY
          R         RESTORE CLINIC AVAILABILITY

Select Action: C
Select CLINIC NAME: CARDIOLOGY
CANCEL 'CARDIOLOGY' FOR WHAT DATE: 11/25/02  (NOV 25, 2002)
FIRST, I'LL LIST THE EXISTING APPOINTMENTS


DEVICE: HOME
```

Figure 16-39: Canceling/Restoring clinic availability (steps 2-5)

6. The Pre-Cancellation report lists the patient name, SSN, appointment time, appointment length, and the patient's telephone number. Type Y or N at the “Want to Cancel Whole Day?” prompt. If you type N, meaning you only want to cancel part of the day, follow the prompts as they appear on your screen to cancel the specific part of the day.

7. Type in an optional message as to why the clinic availability was changes at the "(Optional) Message:" prompt. To bypass this prompt, press the Return key.

8. Type Y or N at the "Want to Auto-Rebook Appointments Now?" prompt.

    a. If you type N, the appointments will need to be rescheduled through the Make Appointment option in the Appointment menu. The information requested to accomplish this could be taken from the Pre-Cancellation List report. The report could also be an aid in notifying patients of cancellations by telephone in the event there was not enough time to reach them by mail.

    b. If you type Y, the Cancelled Clinic Auto-Rebook Report will be generated. This report provides the clinic name, date cancelled, patient name and social security number, old appointment time, and new date and time. Auto-rebooking of appointments has occurred while utilizing this option, the Cancelled Clinic Auto-Rebook Report will be generated. This report shows the new date/time of the rebooked appointments including the ancillary test time. There are three parameters that affect the auto-rebooking of appointments with associated ancillary tests. They are: OP lab test start time, OP EKG start time, and OP x-ray start time. If a time is entered at these parameters, the ancillary test time will not rebook before the start time specified in the parameter

9. Type Y or N at the "Want Letters Printed Now?" prompt. This prompt provides you the capability to print cancellation letters. A cancellation letter must have been previously entered through the Enter/Edit Letters option and assigned to the clinic being cancelled through the Set up a Clinic option. This letter will notify patients of the appointment cancellation and the new date/time scheduled. You will have to designate a printer to print the letters.

A status of Cancelled by Clinic will appear on the Patient Profile of each patient whose appointments are cancelled through this option. The user who entered the cancellation will also be noted.

```
CARDIOLOGY Clinic Pre-cancellation list for Nov 25, 2002
PATIENT NAME                        ID       APPT TIME    LENGTH  TELEPHONE
-------------------------------------------------------------------------------
PATIENT,ALLISON                   4298          8:00 AM       15    555-4775
PATIENT,KYLE                    T00006          8:15 AM       15
PATIENT,AHL                     T00005          8:30 AM       15
PATIENT,ALICIA                     129          9:00 AM       15    555-4432
PATIENT,NAOMI REBECCA             4294          9:15 AM       15    NONE
PATIENT,ARICELI HONEY             6593          1:15 PM       15    555-4703
PATIENT,DANIEL NEIL               2886          5:00 PM       15


WANT TO CANCEL THE WHOLE DAY? N
WANT TO CANCEL PART OF THE DAY? Y
STARTING TIME: 9
ENDING TIME: 10

(OPTIONAL) MESSAGE: Snow Day

CANCELLED!
WANT TO AUTO-REBOOK APPOINTMENTS NOW? Y
WANT LETTERS PRINTED NOW? N

DEVICE: HOME
```

Figure 16-40: Canceling/Restoring clinic availability (steps 6-9)

16.4 Display Scheduling User (DSU)

Use this option to view the user's access level in the Scheduling system. This feature displays the current keys and allows for upgrading to advanced privilege-based keys.

1. To access DSU, type DSU at the "Select Supervisor Menu (Scheduling) Option:" prompt.

```
                          Supervisor Menu (Scheduling)

                                   (UNSPECIFIED HO)

   ACM    Application Coordinator Menu ...
   CPF    Clinic Profile
   CRA    Cancel/Restore Clinic Availability
   DSU    Display Scheduling User
   EEL    Enter/Edit Letters
   LAM    List Appts Made By Clinic
   MON    Month-at-a-glance Display
   SET    Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: DSU
```

Figure 16-41: Displaying scheduling user (step 1)

2. Type the name of the user for whom you want to see information at the "Select Scheduling User:" prompt.

3. Type the name of the printer where you want this report printed at the "Device:" prompt or type HOME to display the report onscreen.

```
     Use this option to view a user's access level in the IHS
     Scheduling software.  It will list all major functions a
     user can perform based on security keys.  It will also list
     which restricted clinics the user can access and the user's
     overbook level.


Select SCHEDULING USER:  DOCTOR,JOHN
DEVICE: HOME
```

Figure 16-42: Displaying scheduling user (steps 2-3)

4. If you selected to display the report onscreen, the User's Access in Scheduling screen will be displayed (Figure 16-43). Use the options at the bottom of the screen to navigate through the report.

```
USER'S ACCESS IN SCHEDULING   Oct 22, 2002 11:06:07        Page:    1 of    2

Name:  DOCTOR,JOHN       Service: CLINIC

User's Access based on Security Keys:
     Unlocks App Coordinator Menu
     CVD STATUS
     (OBSOLETE - No Longer Used)
     Unlocks Scheduling Menu
     OBSOLETE - No longer used
     Allows updating MH PCP
     Unlocks Clinic Visit Setup
     Unlocks PCP Menu
     Unlocks Scheduling Purge
     Unlocks Full Registration
     Unlocks Pat Mini Reg
     Unlocks Supervisor Menu
     OBSOLETE - No longer used
     OBSOLETE - No longer used
     Unlocks Waiting List

+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 16-43: Displaying scheduling user (step 4)

16.5 Enter/Edit Letters (EEL)

Use this option to type individual letters under the following four letter types: Pre-appointment, Appointment Cancelled, No-Show, and Clinic Cancelled. At the time a clinic is set up, the user may choose which specific letter for each letter type he/she wants associated with that clinic. These letters will then be generated through selected Scheduling options.

The purposes of the four letter types are:

Pre-Appointment: to remind the patient of pending appointment(s).

Clinic Cancelled: to notify patient(s) that a clinic appointment has been cancelled by the clinic; due to either cancellation of the entire clinic or cancellation of an individual appointment, and to inform them if a new appointment was made through auto-rebook.

No-Show: to alert the patient to the fact that a scheduled appointment was missed.

Appointment Cancelled: to inform the patient that a new appointment was made through auto-rebook when the patient cancelled the appointment.

Whether the patient's address appears at the top or bottom of the page when these letters are generated depends on how the site parameter, address location on letter, is set at your facility. If parameter, use temporary address, is set to no, the patient's permanent address will be used when printing the letters even if the temporary address date range is in effect.

1. To access EEL type EEL at the "Select Supervisor Menu (Scheduling) Option:" prompt.

```
                          Supervisor Menu (Scheduling)

                                   (UNSPECIFIED HO)

   ACM    Application Coordinator Menu ...
   CPF    Clinic Profile
   CRA    Cancel/Restore Clinic Availability
   DSU    Display Scheduling User
   EEL    Enter/Edit Letters
   LAM    List Appts Made By Clinic
   MON    Month-at-a-glance Display
   SET    Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: EEL
```

Figure 16-44: Editing a letter (step 1)

2. Select the type of letter you want to create or edit and type the corresponding letter at the "Select Type of Letter:" prompt.

3. Type the name of the letter you want to edit or type the name of the new letter at the "Select Letter:" prompt. You may type ?? to display a list of letters available for editing. If you are creating a new letter, you will be prompted to confirm that you are adding a new letter.

4. If you are editing an existing letter, go through the prompts that are displayed and make edits where appropriate. At a prompt, if you do not want to make any changes, press the Return key to advance to the next prompt. If you are

entering a new letter, type answers at the prompts, each field is required. You can type ?? at any prompt to see a listing of available options.

5. The system will then display the initial section of the letter. To edit the initial section of a letter or to type a new letter, type Y at the "Edit?" prompt or type N to bypass the editing option.

```
     Use this option to enter a new or edit an existing letter.
     The letter types available are:
       (A)ppointment Cancelled - appointment cancelled by Cancel
                                 Appointment action under Appt Mgt.
       (C)linic Cancelled - appointment cancelled by Cancel
                                 Clinic Availability option.
       (N)o-Show - reminder to patient who did not show, to make
                                 another appointment.
       (P)re-Appointment - reminder to patient of upcoming appt.
SELECT TYPE OF LETTER: C
SELECT LETTER: APPOINTMENT CXL
NAME: APPOINTMENT CXL// [RET]
GREETINGS TO PARENTS?: NO//[RET]
TYPE: C//[RET]
INITIAL SECTION OF LETTER:
The following clinic appointment(s) were cancelled:


Edit? Y
```

Figure 16-45: Editing a letter (steps 2-5)

6. You will be taken to the RPMS Full Screen Text Editor. In many ways, the Full Screen Text Editor works just like a traditional word processor. The lines wrap automatically, the up, down, right, and left arrows move the cursor around the screen, and a combination of upper and lower case letters can be used. On the other hand, some of the conventions of a traditional word processing program do not apply to the RPMS full screen editor. For example, the Delete key does not work. Delete text by moving one space to the right of the error and backspacing to remove the erroneous entry.

   When entering or editing the letter, you can type the text in a traditional word processing application like Word or Word Perfect and then paste the text into the open RPMS window, or simply type the letter in the display.

   Listed below are the most commonly used RPMS text editor commands:

Delete a line (extra blank or text)	PF1(F1) followed by **D**
Join two lines (broken or too short)	PF1(F1) followed by **J**
Save without exiting	PF1(F1) followed by **S**
Exit and save	PF1(F1) followed by **E**
Quit without saving	PF1(F1) followed by **Q**

Top of text	PF1(F1) followed by **T**

```
==[ WRAP ]==[ INSERT ]=< INITIAL SECTION OF LETTER >====[ <PF1>H=Help ]======
Type the text of the letter here, or simply edit the existing text.


<===T=====T=====T=====T=====T=====T=====T=====T=====T>=====T
Bottom of text                              PF1(F1) followed by B
```

Figure 16-46: Editing a letter (step 6)

> Note: You can display all of the commands available for the RPMS Full Screen Editor by pressing the PF1 (F1) key, then typing H. Type a caret (^) to exit the help screens.

7. When you are done typing the initial text of the letter, press the F1 key and then type E.

8. The final section of the letter will be displayed. To finish editing or entering a letter type Y at the "Edit?" prompt or type N to bypass the editing option.

```
FINAL SECTION OF LETTER:. . .
       . . .
     _____________ __, 19__ AT _______ IN ____________ CLINIC, WITH

     DR ___________________. HAS BEEN CANCELLED DUE TO CIRCUMSTANCES

     BEYOND OUR CONTROL.

     FOR RE-APPOINTMENT PLEASE CALL THE FRONT DESK OR THE MEDICAL RECORDS

     DEPARTMENT.

  Edit? NO// Y
```

Figure 16-47: Editing a letter (steps 7-8)

9. When you are done typing the final section of the letter, press the F1 key and then type E. The letter is now edited/entered.

```
==[ WRAP ]==[ INSERT ]=======< FINAL SECTION OF LETTER >=====[ <PF1>H=Help ]=
UNSPECIFIED INDIAN HOSPITAL
P.O BOX 210
UNSPECIFIED, NEW MEXICO  88340
(505) 671-4441


DATE:____________________

FROM:  MEDICAL RECORDS DEPARTMENT

TO:  ____________________

RE:  APPOINTMENT CANCELLATION


     WE ARE SORRY TO INFORM YOU THAT YOUR APPOINTMENT ON ________________

     _____________ __, 19__ AT _______ IN ____________ CLINIC, WITH

<======T======T======T=======T=======T=======T=======T=======T=======T>======
```

Figure 16-48: Editing a letter (step 9)

16.6 List Appts Made by Clinic (LAM)

This option allows the user to list all appointments made for a particular clinic or all clinics within a date range. Note that the user initiating the appointment is identified.

1. To access LAM type LAM at the “Select Supervisor Menu (Scheduling) Option:” prompt.

```
                                    (UNSPECIFIED HO)


   ACM    Application Coordinator Menu ...
   CPF    Clinic Profile
   CRA    Cancel/Restore Clinic Availability
   DSU    Display Scheduling User
   EEL    Enter/Edit Letters
   LAM    List Appts Made By Clinic
   MON    Month-at-a-glance Display
   SET    Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: LAM
```

Figure 16-49: Listing appointments made by clinic (step 1)

2. Type 1 at the “Select Type of Report: “ prompt to list all appointments scheduled for a date range, who made the appointment and when, or type 2 at the “Select Type of Report: “ prompt to list who made appointments scheduled for a given date range, how many they made and their percentage of the total.

3. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You many type more than one division. When you are done entering division names, press the Return key.

4. Type the clinic name at the ”Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Return key.

5. Type the beginning date of the report at the “Select Beginning Date:” prompt.

6. Type the ending date of the report at the “Select Ending Date:” prompt.

7. Type a printer where you want this report printed at the “Device:” prompt or type HOME to display the listing on the screen.

```
     Select one of the following:

          1         LIST APPOINTMENTS
          2         LIST USERS WITH COUNTS

Select Type of Report: 1  LIST APPOINTMENTS
Select division: ALL//
Select clinic: ALL//
Select beginning date:  T-365
Select ending date:  T
DEVICE: HOME
```

Figure 16-50: Listing appointments made by clinic (steps 2-7)

8. If you selected to display the listing on the screen, use the options at the bottom of the screen to navigate through the report.

```
APPTS MADE BY USERS           Oct 23, 2002 08:34:05          Page:    1 of
289
                         Oct 23, 2001 to Oct 23, 2002
 Appt Date           Chart #   Age     Who Made Appt       Date Appt Made
DIABETIC DOC #1
Oct 26, 2001@09:00    6756    65 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@09:00    4748    69 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@09:30    6572    51 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@09:30    4238    59 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@09:30    4409    76 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@10:00    6432    73 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@10:00    5090    63 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@10:00    5696    56 YRS    OTHERPROVIDER,MD.   Oct 09, 2001
Oct 26, 2001@10:11    5636    46 YRS    OTHERPROVIDER,MD      Oct 26, 2001

+         Enter ?? for more actions

Select Action:Next Screen//
```

Figure 16-51 Listing appointments made by clinic (step 8)

16.7 Month-at-a-glance Display (MON)

Use this option to display clinic availability without making an appointment for a patient. Use this option to view a clinic's available appointments or to view the first available date for each clinic under a principal clinic.

This option allows the user to view the appointment schedule for its availability, beginning at as specified date and searching through to fifteen (15) days in the future.

1. Type MD at the “Select Scheduling Menu Option:” prompt.

```
                    ****************************************
                    *        INDIAN HEALTH SERVICE         *
                    *       CLINIC SCHEDULING SYSTEM       *
                    *            VERSION 5.3               *
                    ****************************************
                                   UNSPECIFIED HO


   AL     Appointment List
   AM     Appointment Management
   CR     Chart Requests
   DA     Display Patient's Appointments
   MB     Multiple Appointment Booking
   MC     Multiple Clinic Display/Book
   MD     Month-at-a-glance Display
   PL     Print Scheduling Letters
   PS     View Provider's Schedule
   WL     Waiting List Enter/Edit
   PCP    Primary Care Provider Menu ...
   PMR    Patient Mini Registration
   SCR    Reports Menu (Scheduling) ...
   SCS    Supervisor Menu (Scheduling) ...

Select Scheduling Menu Option: MD
```

Figure 16-52: Displaying month-at -a -glance (step 1)

2. Type the clinic name for which you interested at the “Select Clinic:” prompt.

3. Type the date, or the date and time of the desired appointment, F (first available), or ?? at the at the “Enter the Date Desired for this Appointment:” prompt. If you select F, you will be prompted to type a date range for the search.

```
Select CLINIC: PEDIATRIC

  Select one of the following:

     'F'            for First available following a specified date
     Date           (or date computation such as 'T+2M') for a desired date
     '?'            for detailed help

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T
```

Figure 16-53: Displaying month-at -a -glance (steps 2-3)

4. The Month-at-a-Glance screen will be displayed. A selection of options is displayed at the bottom of the screen. Type AL (appointment list) or SL (short appointment list) at the " Select Action:" prompt. Type ?? at the " Select Action:" prompt for more options.

```
MONTH-AT-A-GLANCE           Oct 10, 2002 13:12:05          Page:    1 of    4


                                      CARDIOLOGY
                                      Oct 2002

 TIME  |8       |9       |10      |11      |12      |1       |2       |3       |4    |
 DATE  |        |        |        |        |        |        |        |        |     |
TH 10  [1 1 1 1|0 1 1 1|0 1 1 1|1 1 1 1|1 1 1 1|0 1 1 1|0 1 1 1|0 1 1 1|0 1 ]
FR 11  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SA 12  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SU 13  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
MO 14  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
WE 16  [1 1 1 1|1 1 1 1|0 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
TH 17  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|0 1 1 1|0 1 1 1|0 1 ]
FR 18  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SA 19  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
SU 20  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
MO 21  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]
WE 23  [1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 1 1|1 1 ]

+         Enter ?? for more actions
>>>
AL  Appointment List      SL  Short Appt List

Select Action:
```

Figure 16-54: Displaying Month-at-a-Glance (step 4)

16.8 Set Up a Clinic (SET)

The Set up a Clinic option is used to define/edit clinic parameters and establish appointment availability patterns for the clinics at your facility. Appointments may not be made through the Scheduling package to clinics not defined through this option.

Following is some of the basic clinic information established through this option.

- service associated with the clinic
- is/is not a non-count clinic
- ask for check in/out time
- number of allowable consecutive no-shows
- appropriate stop code number
- is/is not a variable length clinic
- can/cannot schedule to this clinic on holidays
- include/don't include on file room lists
- whether or not each visit to the clinic requires x-ray films and/or action profiles

Prior to using this option, the four letter types which the Scheduling package uses (no-show, pre-appointment, clinic cancelled, and Appointment cancelled) must have letters defined through the Enter/Edit Letters option of this menu. Each letter type may have several differently worded letters associated with it. This option will allow you to associate these letters with the clinic you are entering. Letters are automatically generated when the appropriate action is taken through one of the Scheduling menu options.

16.8.1 Setting up a clinic options

1. To access SET, type SET at the "Select Supervisor Menu (Scheduling) Option:" prompt.

```
                          Supervisor Menu (Scheduling)

                                  (UNSPECIFIED HO)


   ACM    Application Coordinator Menu ...
   CPF    Clinic Profile
   CRA    Cancel/Restore Clinic Availability
   DSU    Display Scheduling User
   EEL    Enter/Edit Letters
   LAM    List Appts Made By Clinic
   MON    Month-at-a-glance Display
   SET    Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: SET
```

Figure 16-55: Setting up a clinic (step 1)

2. Type either an existing clinic name or the name of a new clinic at the "Select Clinic Name:" prompt. If you are adding a new clinic, you will prompted to confirm that you are adding a new clinic. If you are editing an existing clinic, you will taken directly to the Set Up Clinic screen (step 3).

3. Type the length the appointments at the "Length of App't:" prompt. This entry must be in minutes ranging from 10 to 240 minutes.

```
Select CLINIC NAME: UNSPECIFIED MENTAL HEALTH
  Are you adding 'UNSPECIFIED MENTAL HEALTH' as a new HOSPITAL LOCATION? No//
Y  (Yes)
LENGTH OF APP'T: 30
```

Figure 16-56: Setting up a clinic (steps 2-3)

The Set Up Clinic screen will be displayed. When editing the parameters of an existing clinic, previous entries will appear as defaults. When setting up a new clinic, certain prompts will appear with defaults.

- To navigate through this screen you can use the up (↑), or down (↓) arrows, the Tab key, or the Return key. When you have a question about filling out a particular prompt, type ?? and the available options will be displayed at the bottom of the screen. To display the available commands, type a caret (^) at any prompt or move the cursor to the bottom of the screen and the "Command:" prompt will be displayed at the bottom of the screen. You must fill in all fields on all four pages to properly type a new clinic.

```
                           SET UP A CLINIC                      Page 1 of 4

 CLINIC NAME: CARDIOLOGY                        ABBREVIATION: CARDIO
    DIVISION: INDIAN HOSPITAL                   FACILITY: UNSPECIFIED HO

     MEETS AT THIS FACILITY?: YES
  NON-COUNT CLINIC? (Y OR N): NO
 INCLUDE ON FILE ROOM LISTS?: NO
  PRINCIPAL CLINIC:
 PHYSICAL LOCATION: 1st floor, N Wing                 TELEPHONE: 247-0011
       CLINIC CODE: CARDIAC
  HOSPITAL SERVICE: CLINIC

CLINIC OWNERS (responsible for setup)
DEMO,WALTER



Exit     Save     Next Page     Refresh

Enter a command or '^' followed by a caption to jump to a specific field.


COMMAND:                                     Press <PF1>H for help    Insert
```

Figure 16-57: Setting up a new clinic (page 1)

```
                            SET UP A CLINIC                       Page 2 of 4

SPECIAL INSTRUCTIONS for make appt. (3 lines max.)




   PROHIBIT ACCESS TO CLINIC?:                    OVERBOOK USERS & LEVEL
        SCHEDULE ON HOLIDAYS?:
   HOUR CLINIC DISPLAY BEGINS: 8
        LENGTH OF APPOINTMENT: 30
  VARIABLE APPOINTMENT LENGTH: YES,
  DISPLAY INCREMENTS PER HOUR: 30-MIN
        OVERBOOKS/DAY MAXIMUM: 0
MAX # DAYS FOR FUTURE BOOKING: 999
   START TIME FOR AUTO REBOOK:
   MAX # DAYS FOR AUTO-REBOOK: 14
_______________________________________________________________________________




COMMAND:                                        Press <PF1>H for help    Insert
```

Figure 16-58: Setting up a new clinic (page 2)

```
                            SET UP A CLINIC                       Page 3 of 4

         PRE-APPOINTMENT LETTER:
     CLINIC CANCELLATION LETTER:
      APPT. CANCELLATION LETTER:
                 NO SHOW LETTER:
 ALLOWABLE CONSECUTIVE NO-SHOWS: 999
    WAITING PERIOD FOR NO-SHOWS: 30




          PRINT HEALTH SUMMARY?: YES   HEALTH SUMMARY TYPE: DENTAL
PRINT ADDRESS/INSURANCE UPDATE?: YES
             PRINT RX PROFILES?: YES, ACTION PROFILE
           REQUIRE X-RAY FILMS?:

_______________________________________________________________________________




COMMAND:                                        Press <PF1>H for help    Insert
```

Figure 16-59: Setting up a clinic (page 3)

```
                          SET UP A CLINIC                        Page 4 of 4

  ASK FOR CHECK IN/OUT TIME: YES
  CREATE VISIT AT CHECK-IN?:
     VISIT SERVICE CATEGORY:
MULTIPLE CLINIC CODES USED?:
    VISIT PROVIDER REQUIRED:
             PYXIS LOCATION:

CLINIC PROVIDERS            DEFAULT









COMMAND:                                      Press <PF1>H for help    Insert
```

Figure 16-60: Setting up a clinic (page 4)

16.8.1.1 Page One Data Elements

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, type @ to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

CLINIC NAME

Name given by user to any ward, clinic, file room, operating room or other location within an IHS facility.

ABBREVIATION

An abbreviation for the clinic name 1-7 characters in length.

DIVISION

Division name assigned to each entry in this file to identify where the specific location is. There can be multiple divisions assigned to an Institution, but only one division per location.

FACILITY

Institution name assigned to each entry in this file to identify where the specific location is.

CLINIC MEETS AT THIS FACILITY?: YES

Press the Return key to accept the default of YES. NO if the clinic meets elsewhere.

NON-COUNT CLINIC? (Y OR N)
YES if visits should **not** affect AMIS statistics. NO if visits **should** affect AMIS statistics

INCLUDE ON FILE ROOM LISTS
This field will only appear for non-count clinics. YES to include this clinic on file room lists; NO to not include.

PRINCIPAL CLINIC
If enrollment in this clinic is equivalent to enrollment in a larger one, enter the larger clinic here. If your entry is not in the HOSPITAL LOCATION file, you will be prompted for Hospital Location Type and Hospital Location Type Extension.

PHYSICAL LOCATION
Enter the location of the clinic (0-25 characters). Press the Return key to not enter a location.

TELEPHONE
Telephone number for the specific location.

CLINIC CODE
Three digit stop code number assigned to this clinic. Type ?? for a list of stop codes.

SERVICE
The hospital service associated with this clinic. Press the Return key for a list of services.

CLINIC OWNERS
Enter the people that are responsible for the setup of the clinic.

16.8.1.2 Page two data elements

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, type @ to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

SELECT SPECIAL INSTRUCTIONS
Any special instructions concerning this clinic, 0-25 characters.

PROHIBIT ACCESS TO CLINIC
Should only privileged users have access to book to this clinic? YES or press the Return key for NO.

SCHEDULE ON HOLIDAYS
Should the user be able to schedule appointments to this clinic on holidays? YES or press the Return key for NO.

OVERBOOK USERS & LEVEL

Enter the users who have overbook capability.

HOUR CLINIC DISPLAY BEGINS

Appears for new clinics only. Press the Return key if 8AM. Otherwise, the time should be entered as follows.

9AM = 9	1PM = 13
10AM = 10	2PM = 14
11AM = 11	3PM = 15
NOON = 12	4PM = 16

LENGTH OF APP'T

Enter the time, in minutes, of an average appointment for this clinic (must be a multiple of 10 or 15). The length of time entered here directly affects the INCREMENTS PER HOUR display set up later. Be sure to calculate the desired time/increment relationship before entering them as you are not able to edit INCREMENTS PER HOUR after an availability date has been entered.

VARIABLE APPOINTMENT LENGTH

Does this clinic have variable appointment lengths? Enter V to allow for a varied appointment length or press the Return key to not allow variable appointment length.

DISPLAY INCREMENTS PER HOUR: 4

The number of increments that will be displayed per hour for this clinic. Accept the default or type a ? for a list of choices.

OVERBOOKS/DAY MAXIMUM

Enter the number of allowable overbooks per day to this clinic. If overbooks are not allowed, enter zero

MAX # DAYS FOR FUTURE BOOKING

Maximum number of days available when searching for open clinic slots for this clinic in the future. A number between 11 and 999.

START TIME FOR AUTO REBOOK

Start time (hour of day) that should be searched for when auto rebooking an appointment to this clinic. Enter the time or press the Return key to begin at the clinic start time.

MAX # DAYS FOR AUTO REBOOK

Maximum number of days the system can be set to search up to when auto rebooking appointments. A number between 1 and 365.

16.8.1.3 Page three data elements

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, type @ to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

PRE-APPOINTMENT LETTER

This letter will be generated through the Print Scheduling Letters option of the Output menu advising patients of upcoming appointments to this clinic. Enter the name of the pre-appointment letter. Type ? for a list of pre-appointment letters. Press the Return key to leave blank.

CLINIC CANCELLATION LETTER

This letter will be generated for this clinic whenever either the clinic availability is cancelled through the Cancel Clinic Availability option of this menu, or when an appointment is cancelled through the Cancel Appointment option of the Appointment menu and the cancellation is at the request of the clinic. Enter the name of the clinic cancellation letter. Type ? for a list of clinic cancellation letters. Press the Return key to leave blank.

APPT. CANCELLATION LETTER

This letter will be generated for this clinic whenever an appointment is cancelled at the patient's request through the Cancel Appointment option of the Appointment menu. Enter the name of the appt. cancellation letter. Type ? for a list of appt. cancellation letters. Press the Return key to leave blank.

NO-SHOW LETTER

This letter will be generated in conjunction with no-shows entered for this clinic through the No-Show option of the Appointment menu. Enter the name of the no-show letter. <?> for a list of no-show letters. <RET> to leave blank.

ALLOWABLE CONSECUTIVE NO-SHOWS

This is the number of times in a row that a patient can be a no-show in this clinic before being flagged for possible discharge from the clinic.

WAITING PERIOD FOR NO-SHOWS

Enter the number of days you want the computer to use in searching of previous no-shows in this clinic.

PRINT HEALTH SUMMARY

Answer YES if you want Health Summaries printed with Routing Slips.

PRINT HEALTH SUMMARY TYPE

Enter the type of Health Summary you would like printed.

PRINT ADDRESS/INSURANCE UPDATE

Answer YES if you want Address/Insurance Updates printed with Routing Slips.

PRINT RX PROFILES
Enter No, Yes (Medication profile), Yes (Action profile), or Both.

REQUIRE X-RAY FILMS
YES to have x-ray films pulled for visits to this clinic. Press the Return key for no films.

16.8.1.4 Page four data elements

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, type @ to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

ASK FOR CHECK IN/OUT TIME
YES to ask the date/time each time a patient is checked in or out of this clinic. Press the Return key for NO to have the system automatically enter the current date/time.

It is recommended you set this parameter to NO for most clinics; however, if you wish to track the actual check in or out time for a particular clinic, set this parameter to YES.

Your entry here will override how this field is set in the Scheduling Parameters. A Return key entered here will act the same as a NO response and will also override the Scheduling Parameters.

When retroactively scheduling an appointment, the system will use the date/time of the appointment as the check in time. This date/time will either be automatically entered or used as the default, depending on how this parameter is set.

CREATE A VISIT AT CHECK-IN
Answer YES to create a PCC visit when checking in a patient to this clinic.

VISIT SERVICE CATEGORY
Choose from Ambulatory, Chart Review, or Telecommunications.

MULTIPLE CLINIC CODES USED
Answer YES if more than one clinic code is used for this clinic.

VISIT PROVIDER REQUIRED
Enter YES or NO.

PYXIS Location
Used to link with PYXIS unit.

CLINIC PROVIDERS

Enter the providers associated with this clinic. These providers will then be displayed when updating the provider through Appointment Management or Check Out.

DEFAULT PROVIDER

Enter 1 or YES if you wish to make the selected provider appear as the default provider for this clinic; otherwise, enter 0 or NO.

16.8.2 Setting up clinic availability

To access clinic availability when editing an existing or new clinic, type a caret (^) at the "Command:" prompt.

Availability Date

At the "Availability Date:" prompt, enter the first date appointments can be made to this clinic. For each day of the week that this clinic meets, enter the FIRST date available. You will then be asked for the range of appointment times and the number of slots per appointment. If you enter a date that has already been set up, you will be changing its appointment schedule.

Time

At the "TIME:" prompt, enter the time range the clinic will be available. Decide upon times/slots prior to entering them into the system as each day the clinic will meet in the future will need to be changed individually if the data is entered erroneously. Times should be entered in this format: 0800-1200. You cannot establish a pattern for the clinic that is too wide to fit the 80 character screen.

You may also enter a scheduling template name(s): [FMS C1 or [PEDS B3AM;PEDS D1PM. A template name must be preceded by a bracket [. If you need to enter more than one template per day (am and pm), separate them by a semicolon. To see a list of current templates, type [? at TIME prompt. Section 16.1.12 explains how to enter a scheduling template for use in this prompt.

No of Slots

At the "NO. OF SLOTS:" prompt, enter the number of patients which will be seen in each increment per hour. Press the Return key to accept the default or enter another number up to 9. If you enter 10 to 26, the display will be in letters of the alphabet starting with j and ending with z. Block scheduling should only be used for group clinics such as group therapy. The Time and No. of Slots prompts will repeat until you press the Return key instead of a time.

Once you have established the pattern for the clinic, you will be asked if that pattern is correct for that day of the week indefinitely. If you answer yes, the Availability Date prompt will appear again. You may type a date for a new day of the week and then establish the pattern, or press the Return key to exit. If you answer No, you must

then verify the pattern for each consecutive matching day of the week as far into the future as is necessary.

When editing an existing clinic set up through this option, the software will check to see if any availability dates for that clinic have previously been cancelled. If so, the following message will appear and you will be given the opportunity to print a listing of the affected days.

```
AVAILABILITY DATE: T

TIME: 0800-1700   NO. SLOTS: 1//  20
TIME:    [ MUST BEGIN AFTER LAST ENDING TIME ]
[   |   |   |   |   |   |   |   |   ]
...PATTERN OK FOR WEDNESDAYS INDEFINITELY? Y  (Yes)
...HMMM, JUST A MOMENT PLEASE...
PATTERN FILED!

Availability has been cancelled previously.  The day(s) has been overwritten
with the new availability.  Would you like to see the day(s) that has been
affected? Yes// [RET]  (Yes)
DEVICE: HOME// [RET]
```

Figure 16-61: Setting up clinic availability

17.0 Appendix A: Printing PCC+ Forms

If your site uses PCC+ in all or some of your clinics and you want to print the PCC+ forms during the check-in process using the Scheduling Package, you will need to check the following:

Security Keys
All users printing PCC+ forms during check-in must have 2 security keys, **VENZPRT** and **VENZSCH**

Clinic Setup
All clinics that you will be printing PCC+ forms for during check-in must be setup in the Scheduling Package to require a provider at check-in. Check your clinic profile for the clinics that use PCC+ and make sure the field "Require Provider" is set to yes. During the check-in process, a provider must be entered.

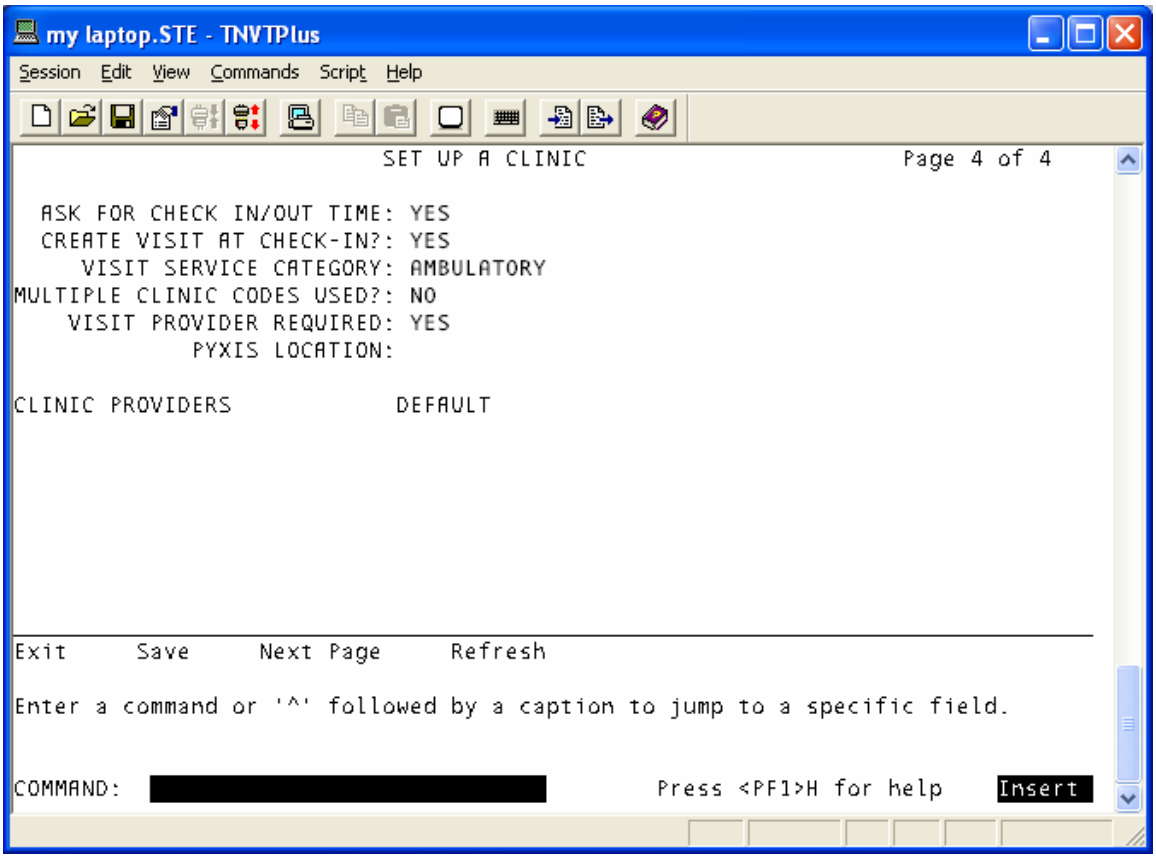

Figure 17-1: Setting up a clinic

PCC+ setup
In the setup of the clinic in PCC+ the field "DEPARTMENT (CLINIC STOP)" must match the field "CLINIC CODE" in the setup of the clinic in the Scheduling Package.

Printing the PCC+ form during check-in

When checking in a patient, the user will be prompted for the **provider**, if they want a **PCC+ form or not**, and the name of the **PCC+ clinic.** In most cases, the PCC+ clinic name will appear as the default

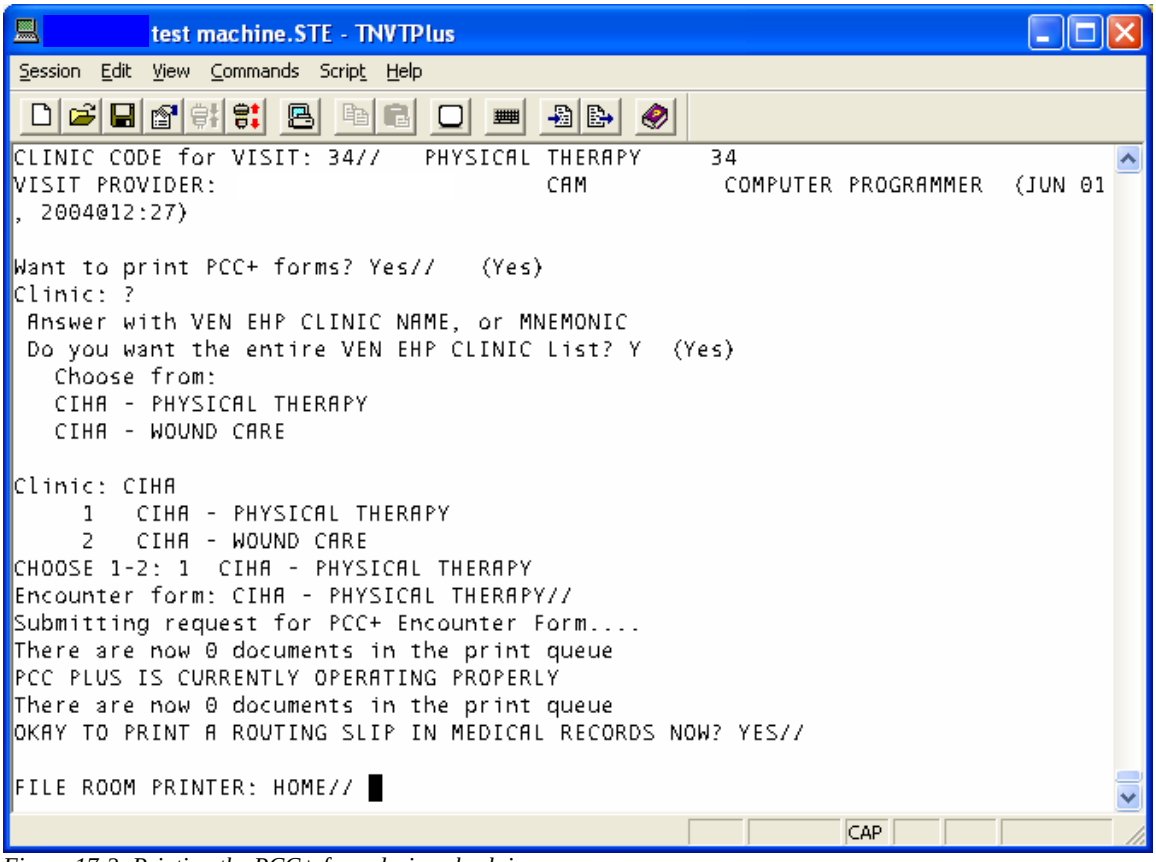

Figure 17-2: Printing the PCC+ form during check-in

18.0 Glossary

TERM	DEFINITION
AMIS	Automated Management Information System
Ancillary test	A test added to an existing appointment (i.e. lab, x-ray, EKG).
Add-ons	Patients who have been scheduled for a visit after routing slips for a particular date have been printed.
CPT	Current Procedural Terminology
Collateral visit	A visit by a non-veteran patient whose appointment is related to or associated with a service-connected patient's treatment.
Database	All of the information contained in all of the files within the computer system.
Fields	A collection of related information that comprise a record.
FileMan	A database management system used by Indian Health Service.
No show	A person who did not report for a scheduled clinic visit without prior notification to the medical center.
Non-count clinic	A clinic whose visits do not affect AMIS statistics.
Prompt	Informs that the computer is waiting for the user to type a command. In the MUMPS system, the prompt is the > character. In FileMan, the prompt can be any word followed by a : character
Mainframe	A large computer that runs the Headquarters supply program (STORES).
MUMPS	(**M**assachusetts general hospital **U**tility **M**ulti **P**rogramming **S**ystem) - The computer language used to create FileMan and SAMS. It also is known as the "M" language
Pull list	A list of patients whose radiology/MAS records should be pulled from the file room for use in conjunction with scheduled clinic visits.
RAM	Resource Allocation Methodology

TERM	DEFINITION
Resource and Patient Management System (RPMS)	The RPMS is a decentralized automated information system that operates on computers at approximately 300 IHS and tribal hospitals and clinics throughout the continental U.S. and Alaska.
Routing slip	When printed for a specified date, it shows the current appointment time, clinic, location, and stop code. It also shows future appointments.
Security key	Used in conjunction with locked options or functions. Only holders of this key may perform these options/functions. Used for options which perform a sensitive task.
Sharing	Agreement or contract under which patients from other government agreement agencies or private facilities are treated.
Stop code	A three-digit number corresponding to an additional stop/service a patient received in conjunction with a clinic visit. Stop code entries are used so that medical facilities may receive credit for the services rendered during a patient visit.

19.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the ITSC Help Desk by:

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