RESOURCE AND PATIENT MANAGEMENT SYSTEM

Practice Management Application Suite

(BPRM)

Scheduling Module User Manual

Version 3.0 Patch 7
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Preface

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

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

1.0 Introduction

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

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

2.0 System Navigation

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

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

3.0 Scheduling Module Operation

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

3.1 Scheduling Ribbon

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

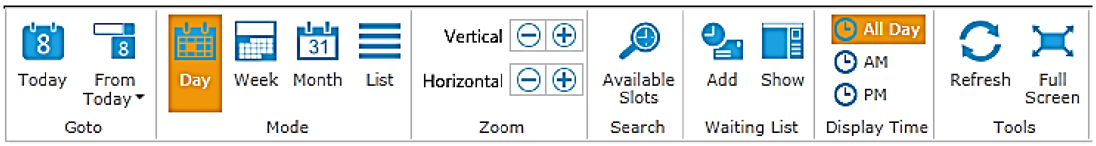

Figure 3-1: Scheduling ribbon

The Scheduling ribbon contains the following groups:

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

3.1.1 Goto Group

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

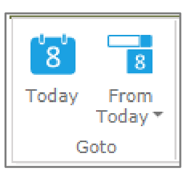

Figure 3-2: **Goto** group

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

- **Today**. Click **Today** to jump back to the current date.
- **From Today**. Click **From Today** to jump from the current date to another date in the future. This opens a list of the following points in the future:
  - 1 Day
  - 2 Day

- 1 Week
- 2 Week
- 3 Week
- 1 Month
- 3 Month
- 4 Month
- 6 Month
- 1 Year

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

3.1.2 Mode Group

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

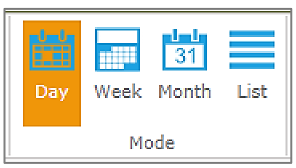

Figure 3-3: **Mode** group

The different modes are described in this list:

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

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

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

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

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

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

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

The List option also includes a **Print** list, which allows letters to be printed:

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

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

3.1.3 Zoom Group

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

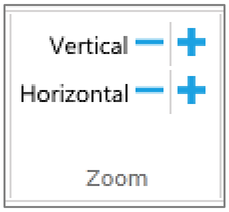

Figure 3-4: **Zoom** group

The **Zoom** group provides these controls:

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

3.1.4 Search Group

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

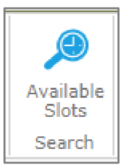

Figure 3-5: **Search** group

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

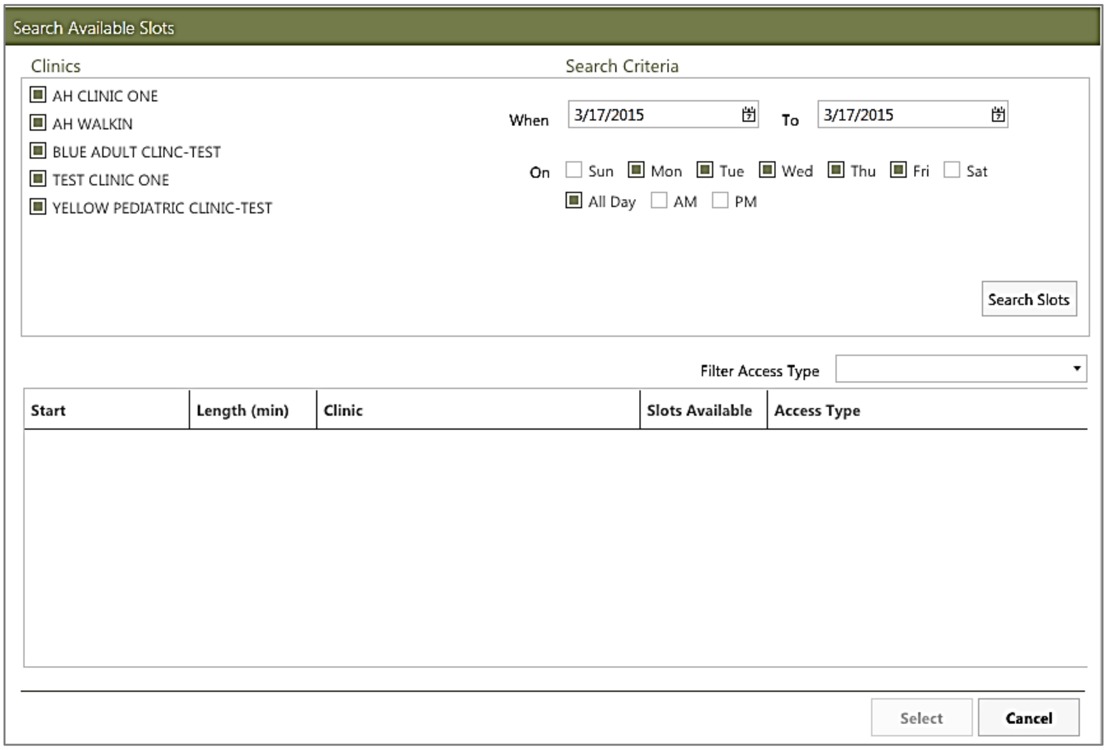

Figure 3-6: **Search Available Slots** dialog

To set up a search for available appointment slots:

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

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

3.1.5 Waiting List Group

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

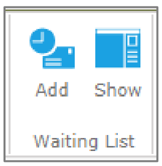

Figure 3-8: **Waiting List** group

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

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

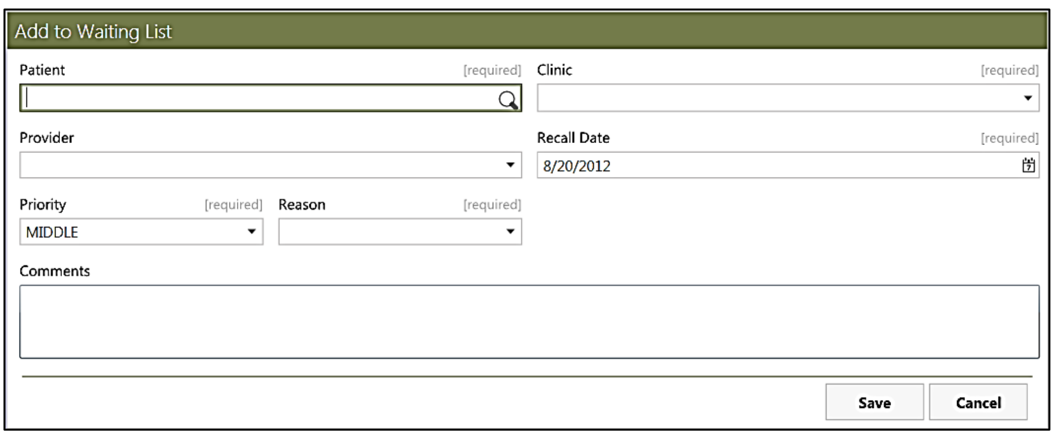

Figure 3-9: **Add to Waiting List** dialog

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

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

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

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

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

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

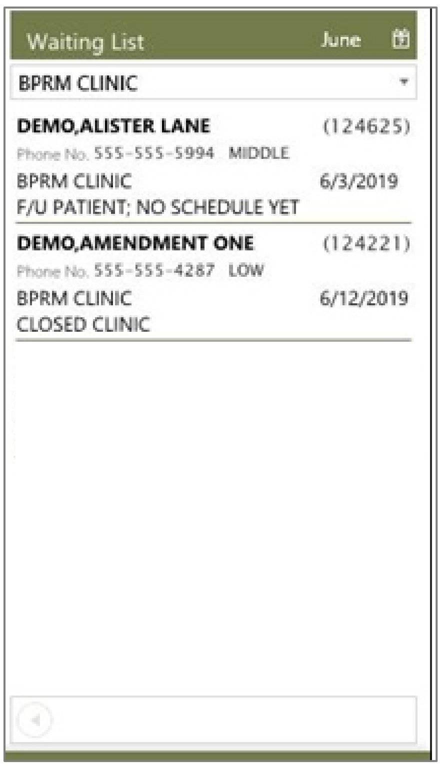

Figure 3-10: **Waiting List** example

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

- Patient name
- Patient HRN
- Patient home phone number
- Appointment priority

- Assigned clinic
- Recall date
- Reason
- Comments

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

> **Notes:** If the patient appointment is moved to a clinic other than the one for which it is originally intended, it will remain on the Waiting List. If the appointment is moved to the originally intended clinic, a confirmation message displays The same patient cannot be scheduled for the same appointment slot at two separate clinics.

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

3.1.5.1 Using the Waiting List

Right-click an entry in the **Waiting List** to display a context menu offering several options. Figure 3-11 shows an example of the Waiting List context menu.

Figure 3-11: Waiting List context menu

The Waiting List context menu contains the following options:

Table 3-1: Waiting List Context Menu

Option	Description
Add	Use this option to add a patient to the **Waiting List**.
Edit	Use this option to edit the details for an existing **Waiting List** entry.
Remove	Use this option to remove a patient from the **Waiting List**.
Sort By	Use this option to sort the **Waiting List** by Recall Date, Patient, or Priority. The sort operation only affects the selected month and year.

Option	Description
Print For	Use this option to print a **Waiting List** report for a specific clinic. When you select this option, a list of available clinics displays. When you select the clinic for which you want to print the report, a **Waiting List** report is generated and displayed. See Section 5.6 for more information about displaying and printing the **Waiting List** report.

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

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

3.1.6 Display Time Group

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

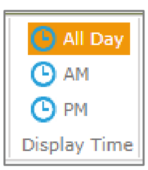

Figure 3-12: **Display Time** group

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

- **All Day**. Click the **All Day** control to view scheduling information for the entire day for the selected clinics.
- **AM**. Click the **AM** control to view scheduling information from the opening time of the selected clinics to 12:00 noon.
- **PM**. Click the **PM** control to view scheduling information from 12:00 noon to the closing time of the selected clinics.

3.1.7 Tools Group

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

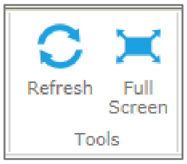

Figure 3-13: **Tools** group

The **Tools** group has these options:

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

3.2 Selection and Filtering Pane

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

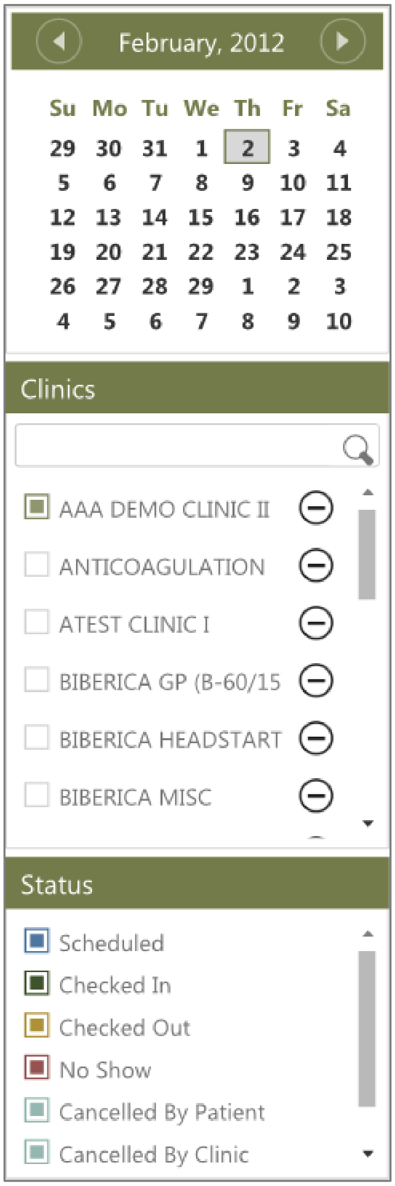

Figure 3-14: Selection and Filtering pane

3.2.1 Calendar Panel

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

Figure 3-15: Calendar panel

In most cases, the Calendar panel will show the current month.

- Use the left and right arrows at the top of the calendar to navigate to a particular month (and year), then click the date to view.
- Select more than one consecutive day on the calendar to view the schedule for those selected days by holding the Shift key while clicking the beginning and ending days of the time span to view.

3.2.2 Clinics Panel

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

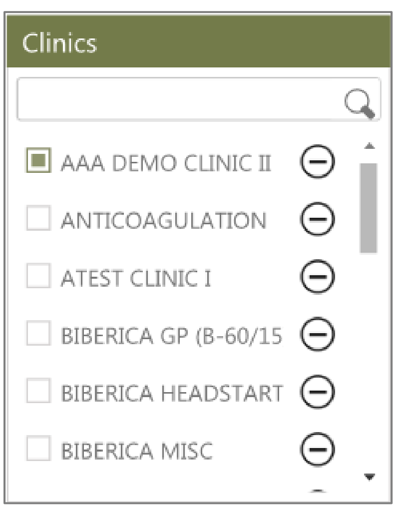

Figure 3-16: **Clinics** panel

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

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

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

If you no longer wish to view appointments for a particular clinic, clear the selection box to the left of the clinic name. To remove the clinic permanently from the preferred resource list, click the minus (**-**) button to the right of the clinic name.

3.2.3 Status Panel

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

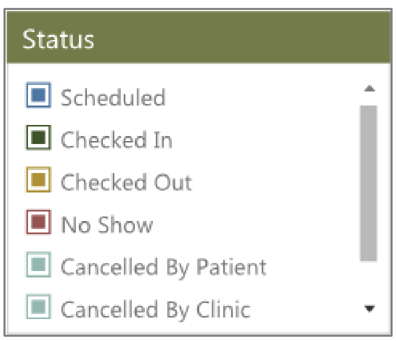

Figure 3-17: **Status** panel

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

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

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

The status panel can also be minimized by clicking on the panel header to allow more clinics to display in the Clinics panel.

3.3 Resource Group Tabs

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

Figure 3-18: Resource Group tabs

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

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

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

3.3.1 Removing a Resource Group from the Tabbed Listing

To remove a Resource Group tab from the listing, select the group and inactivate it from within the Settings module. See Section 4.6.2 for information about editing Resource Groups.

3.4 Appointment Grid Workspace

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

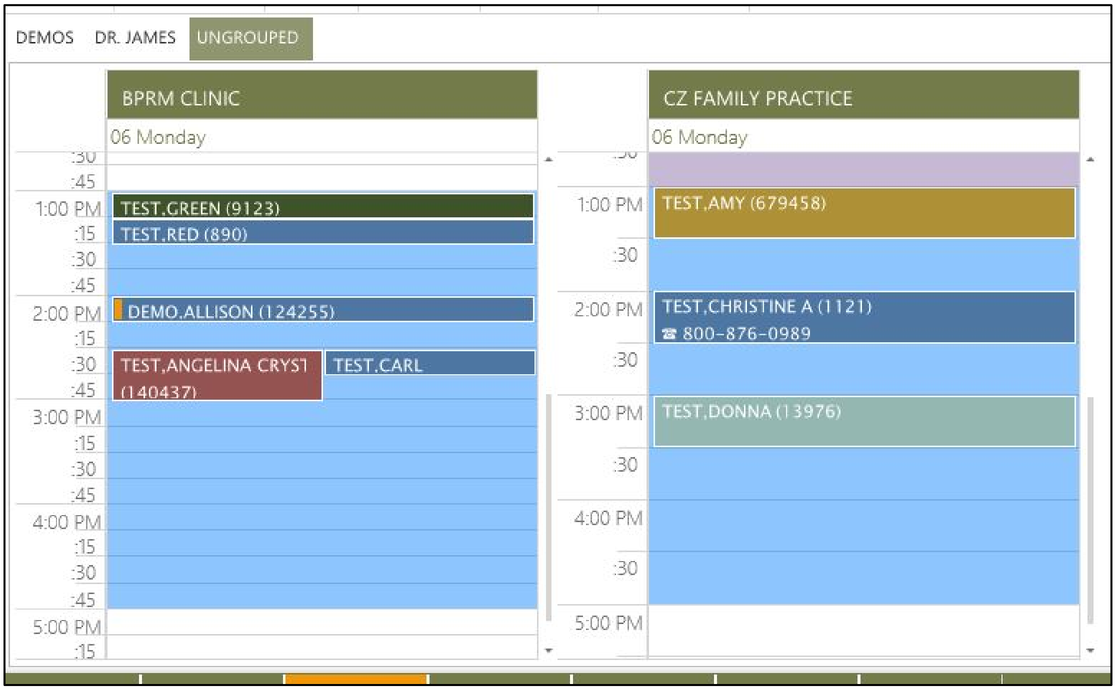

Figure 3-19: Appointment Grid workspace

3.4.1 Appointment Slots

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

Figure 3-20: Appointment Slot example

The color of each Appointment slot varies depending on the status of that appointment. Different colors are displayed for scheduled, checked-in, canceled, and no-show appointments. Also, walk-in appointments are shown with an orange bar on the left side of the appointment slot.

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

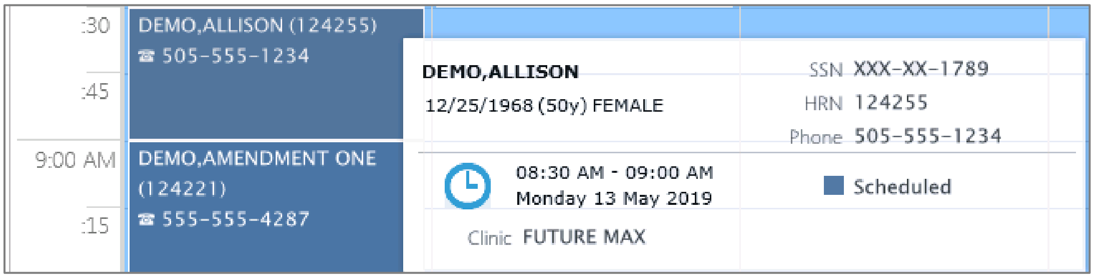

Figure 3-21: Appointment Details Pop-up example

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

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

3.5 Using the Context Menus

Right-click within the Appointment Grid workspace to open a context menu (Figure 3-23) offering a variety of options for creating and working with patient appointments. The options available will vary, depending on whether you right-click a blank appointment slot or in a previously scheduled appointment slot.

3.5.1 Blank Appointment Slot Context Menu

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

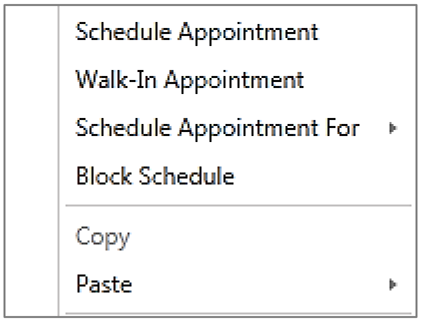

Figure 3-22: Blank appointment slot context menu example

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

Table 3-2: Blank appointment slot context menu options

Option	Description
Schedule Appointment	Select this option to schedule an appointment for a patient.
Walk-In Appointment	Select this option to schedule a walk-in appointment for a patient. Note that this option is only available for the current day.
Schedule Appointment For	Select this option to schedule an appointment for a patient whose record is currently open in the Patient Record pane. (See the *BPRM Application Overview User Manual* for more information about the Patient Record pane.) If no patient records are open, this option is not available.
Block Schedule	Select one or more unscheduled access blocks then use this option to block schedule availability for the selected access blocks. This option is only available to Scheduling Supervisors. This also creates a new schedule in the Clinic Availability that is only in effect for that specific week.
Copy	This option is not available from the blank appointment context menu. It is, however, available from the scheduled appointment slot context menu described in Section 3.5.2.
Paste	Select this option to paste patient information from an existing appointment into the appointment slot on which you right clicked.

3.5.2 Scheduled Appointment Slot Context Menu

When you right-click a previously-scheduled appointment slot, the options shown in Figure 3-23 display.

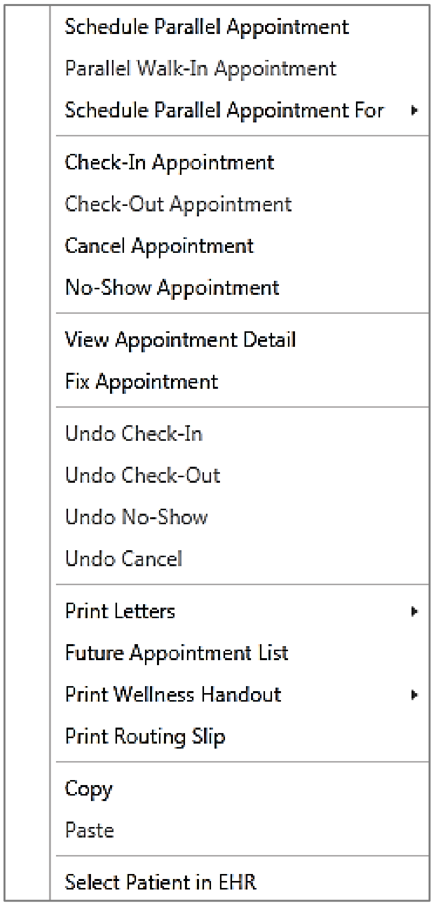

Figure 3-23: Scheduled appointment slot context menu example

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

Table 3-3: Scheduled appointment slot context menu options

Option	Description
Schedule Parallel Appointment	Select this option to schedule an appointment for an additional patient in the selected appointment slot. The number of allowable parallel appointments is controlled by the number of slots designated for that Access Block. See Section 4.2.2.1 for more information about Access Blocks.

Option	Description
Parallel Walk-In Appointment	Select this option to schedule a walk-in appointment for an additional patient in the selected appointment slot. The number of allowable parallel appointments is controlled by the number of slots designated for that Access Block. See Section 4.2.2.1 for more information about Access Blocks.
Schedule Parallel Appointment For	Select this option to schedule a parallel appointment for a patient whose record is currently open in the Patient Record pane. (See the *BPRM Application Overview User Manual* for more information about the Patient Record pane.)
View Appointment Detail	Select this option to see detailed information about the selected appointment.
Fix Appointment	Select this option to correct a scheduled appointment that may have issues or errors (i.e. length of appointment set to zero). This action will refresh the appointment data and ensure it is properly scheduled.
Check-In Appointment	Select this option to mark an appointment as checked in. A Routing Slip can be generated from this option, by clicking on the Print Routing Slip check box option. The routing slip will display current and future appointments. If the patient has been checked in, the routing slip will display the check in time below the current appointment. This action also creates the visit for this appointment in PCC if the **Create Visit at Check In** option has been selected in the Clinic Configuration. See Section 4.1 for more information about Clinic Configuration. In EHR, the status will update to Ambulatory once that appointment has been checked in.
Check-Out Appointment	Select this option to mark an appointment as checked out.
Cancel Appointment	Select this option to mark an appointment as cancelled.
No-Show Appointment	Select this option to mark an appointment as a no-show.
Undo Check-In	Select this option to reverse a checked in appointment. In EHR, the status will be removed.
Undo Check-Out	Select this option to reverse a checked out appointment.
Undo No-Show	Select this option to reverse a no-show appointment.
Undo Cancel	Select this option to reverse a cancelled appointment.

Option	Description
Print Letters	Select this option to print patient letters based on the status of this appointment. Depending on the appointment status, you can print pre-appointment, no-show, clinic cancelled, and patient cancelled letters. The letter allows you to adjust for font size normal/medium/large. These letters can serve as reminders about upcoming or missed appointments and are configured in the Settings module described in Section 4.1.7.
Future Appointment List	Select this option to print a Future Appointment List report for the selected patient. This report will display a list of the patient's upcoming appointment date and times.
Print Wellness Handout	Select this option to print a patient wellness handout (PWH) for the selected patient. Depending on the PWH setup at your site, the list of handouts may vary.
Print Routing Slip	Select this option to print a routing slip for the selected patient. The routing slip will display current, future and checked in appointments.
Copy	Select this option to copy the selected patient's information in order to paste it into one or more other appointment slots.
Paste	Select this option to paste previously-copied patient information into each appointment slot on which you right-click.
Select Patient in EHR	Select this option to open the patient's record in the Electronic Health Record (EHR) application. EHR will need to have a session running for the same user in order to run options.

3.6 Schedule an Appointment

To create a patient appointment:

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

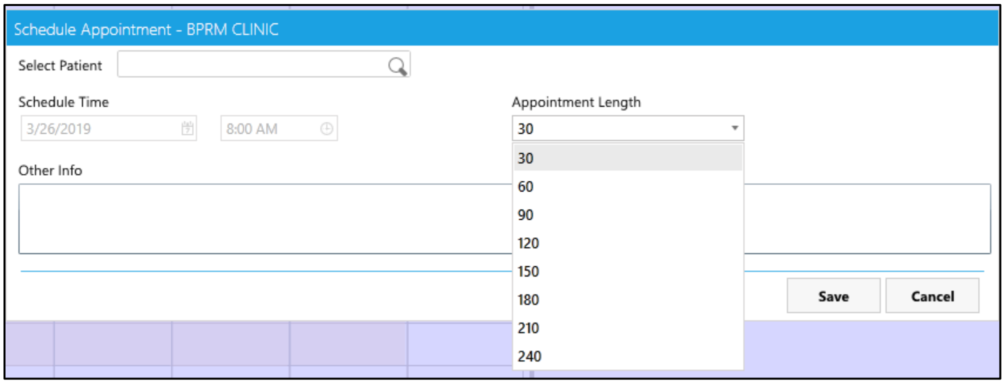

Figure 3-24: **Schedule Appointment** dialog with Variable Appointment Length menu

4. Type all or part of the patient's name (using a LAST,FIRST format) in the **Select Patient** field. If the name is found, click the patient's name in the listing displayed. (If the name is not found, you are given the option to register the patient via the Mini Registration option described in Section 3.6.1.)

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

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

7. Click **Save** to save the scheduled appointment or click **Cancel** to return to the Appointment Grid workspace without saving the appointment.

3.6.1 Mini Registration Option

In order to schedule a patient appointment for a specific clinic, the patient must first be registered at that facility. If the patient is not registered or their record cannot be found when you attempt to schedule an appointment, the Mini Registration option (Figure 3-25) displays.

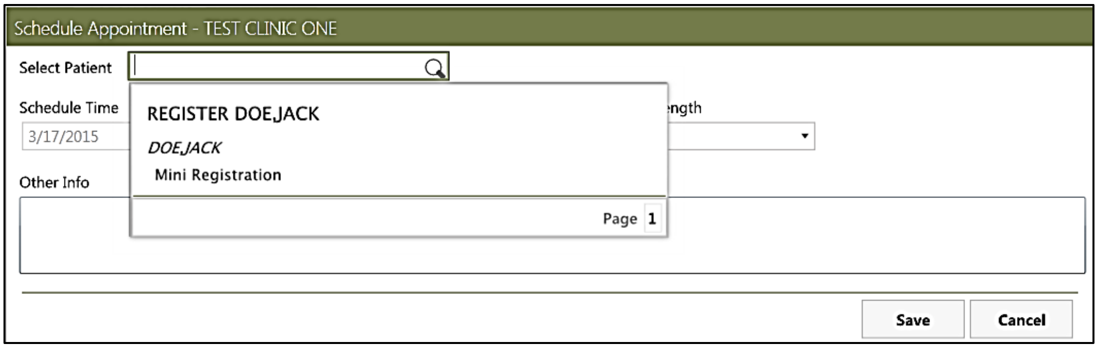

Figure 3-25: **Mini Registration** option

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

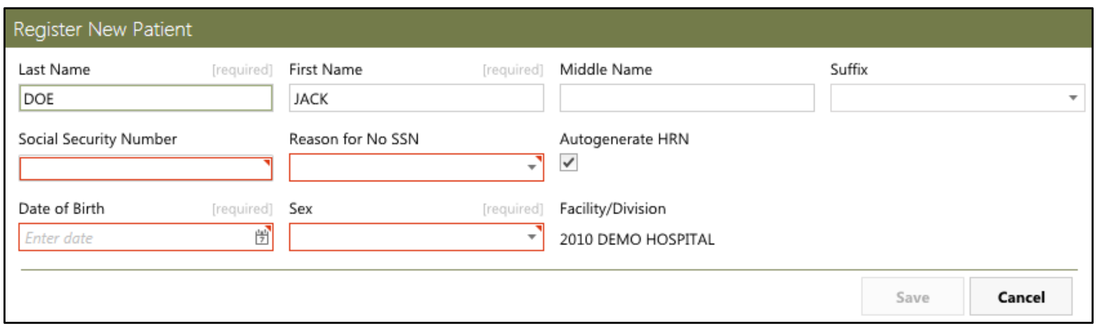

Figure 3-26: **Register New Patient** form

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

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

3.7 Manage Scheduled Appointments

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

3.7.1 Change the Length of an Appointment

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

1. Position the mouse cursor on the top or bottom edge of the scheduled appointment slot.

2. Click and hold the left mouse button and move the edge of the slot to the desired time. This is based on the Length of Appointment defined in Clinic Settings
3. At clinics that allow variable length appointments, the appointment slot can be overlapped with other appointments, up to the limit of slots allowed for that Access Block. See Section 4.1.7 for more information about Access Blocks.

3.7.2 Move an Appointment

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

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

> **Notes:** The rescheduled appointment will display in two locations (and two different colors). The original appointment slot will display as canceled, and the new appointment slot will display as scheduled.
>
> If you are moving an appointment to the same date and time, a warning will display notifying that the previous appointment will be deleted instead of cancelled.
>
> Also, appointments can only be moved in the Day or Week display modes. See Section 3.7.3 for information about moving an appointment to a different week or month.

3.7.3 Copy and Paste Patient Information

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

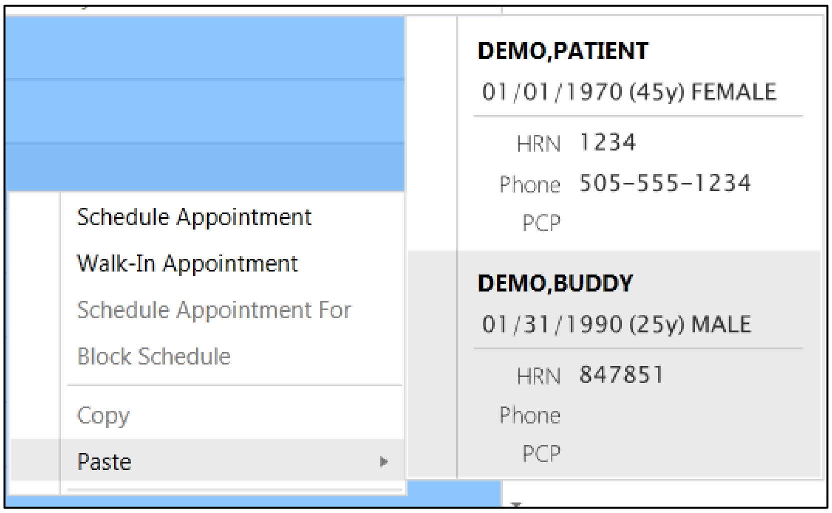

Figure 3-27: Scheduling Clipboard

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

3.7.4 Use the Filter

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

3.7.5 Check-in Appointment

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

To do this, right-click on the appointment and select **Check-in Appointment**. Figure 3-31 shows an example of the **Appointment Detail** dialog.

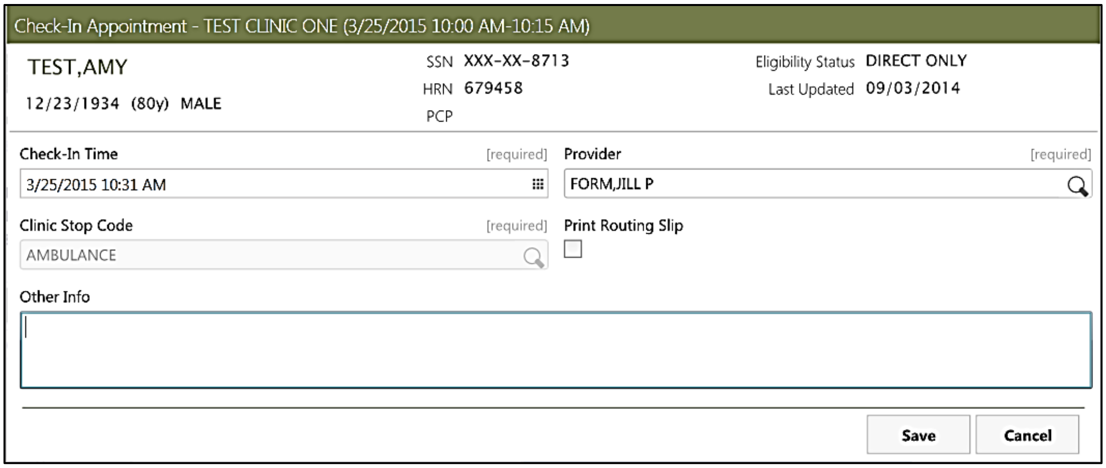

Figure 3-28: **Check-in Appointment** dialog

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

Table 3-4: Fields on the **Check-in Appointment** form

Field	Description
Check-in Time	Date field defaults to current time. User can change the time if needed.
Provider	Field will auto-populate if a default provider is specified in Clinic Configurations. User can change the default provider or search for a different provider if needed. This field can be set as required under Clinic Configurations and is needed to create a visit. See Section 4.1.3 for more information on Clinic Configurations.
Clinic Stop Code	Field will auto-populate with the specified clinic code set in the Clinic Configuration. If the **Multiple Clinic Code Used** field is selected under Clinic Configurations, the user is allowed to search for and select other clinic codes. See Section 4.1.3 for more information on clinic configurations.
Print Routing Slip	Select this check box to display the routing slip for printing after clicking Save Checked In appointments are displayed in the Current Appointment section with Checked In time indicated. Current appointments not yet checked in are displayed in the Current Appointment section, as shown below. Any future appointments for this Clinic are also displayed.
Other Info	Use this field to enter the abbreviated name of the clinic.

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

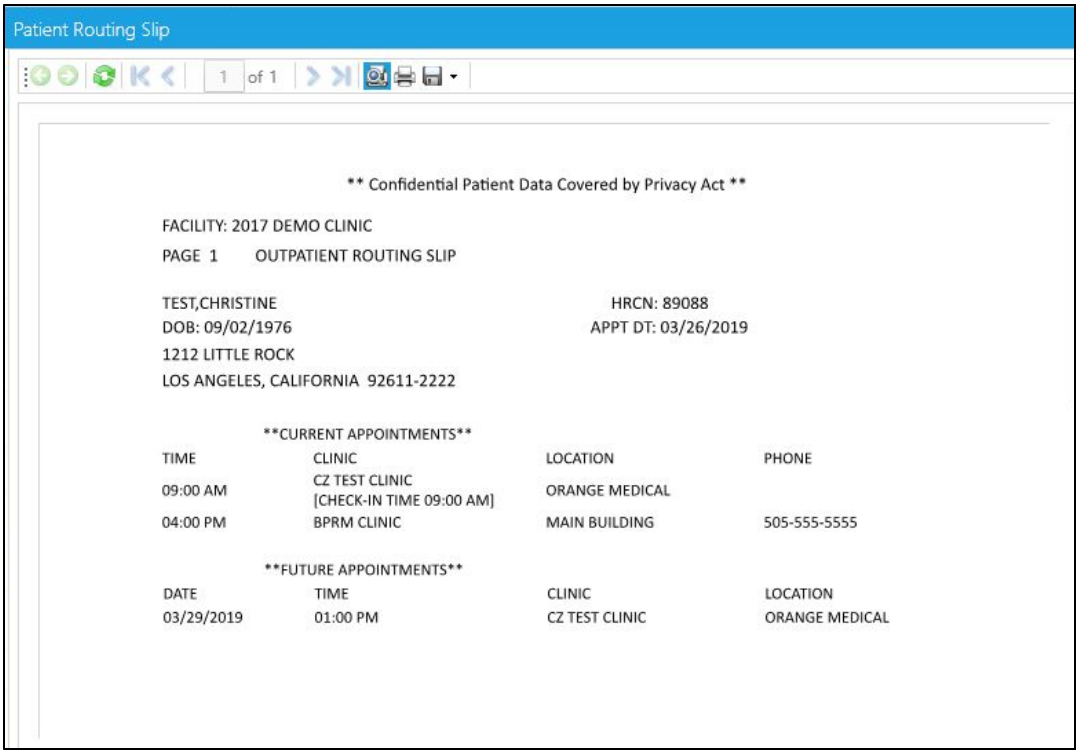

Figure 3-29: Sample Patient Routing slip displaying Current and Future Appointments

3.7.6 Check-Out Appointment

The **Check-out appointmen**t option can be used to update the appointment status to Checked Out.

To do this, right-click on the appointment and select **Check-out Appointment**. The **Check-out Time** field will auto-populate with the current time. You can also select a different time. Figure 3-31 shows an example of the **Appointment Detail** dialog.

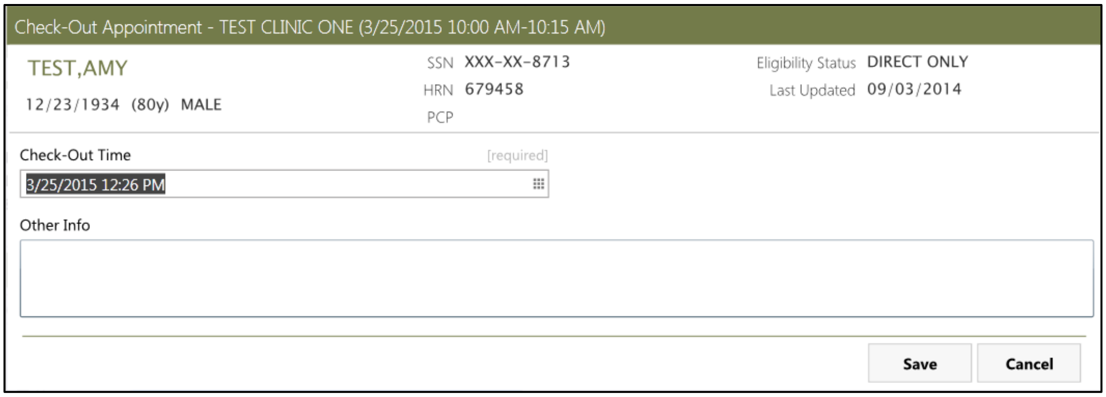

Figure 3-30: **Check-out Appointment** dialog

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

3.7.7 Add Comments to an Appointment

When you create an appointment, you can use the **Other Info** field to add comments about the appointment. You can add comments to an existing appointment in a similar manner. To do this, right-click on the appointment and select **View Appointment Detail**. Use the **Other Info** field to add comments about the appointment in the dialog displayed. Figure 3-31 shows an example of the **Appointment Detail** dialog.

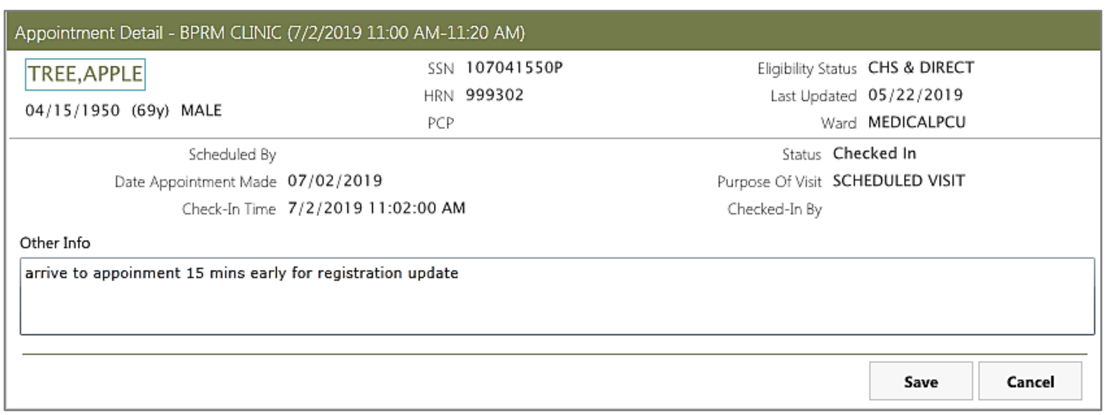

Figure 3-31: **Appointment Detail** dialog

4.0 Scheduling Configuration

Unlike the other modules in BPRM, the Settings module does not directly control or modify patient records. Instead, it controls a variety of application settings for other modules, allowing you to change or add such things as available appointment types, employer names, insurers, and clinics. Changes made within the Setting module are typically done by a Supervisor or Site Manager. In most cases, once these settings have been established, they will rarely need to be changed.

> **Notes:** The options available in the Settings module may vary for different users, depending on the RPMS functionality enabled at your site and the access permissions granted to each user.
>
> You must log off and log back in to the BPRM application for any scheduling configuration changes to take effect.

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

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

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

4.1 Configure Clinics

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

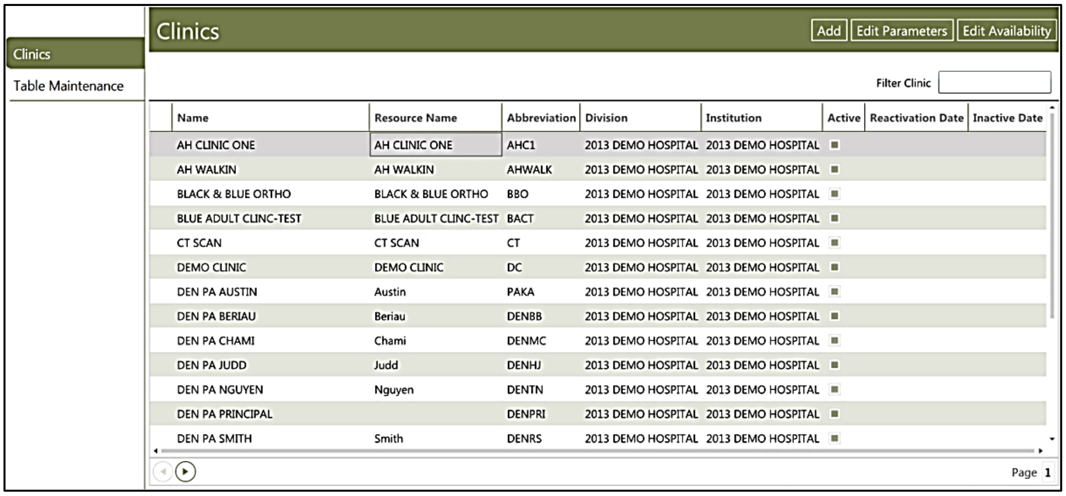

Figure 4-2: **Settings Module** – **Clinics** page

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

4.1.1 Find a Clinic

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

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

4.1.2 Add a Clinic

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

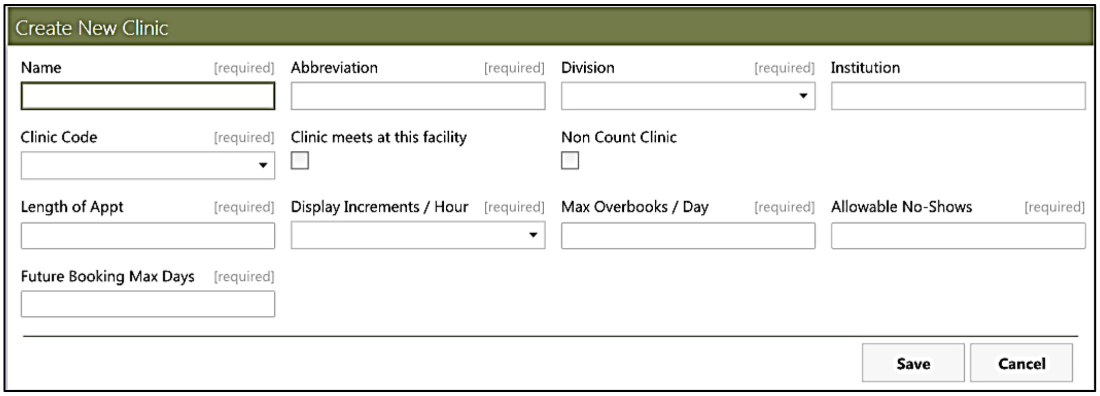

Figure 4-3: **Create New Clinic** form

4.1.2.1 Fields on the Create New Clinic Form

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

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

Field	Description
Name	Use this field to enter the name of the clinic. Note that BPRM automatically assigns the Clinic name to the Resource name. Some earlier versions of scheduling software allowed the Clinic and Resource names to be different. This is no longer the case.
Abbreviation	Use this field to enter the abbreviated name of the clinic.
Division	Use this field to specify the division with which the clinic is associated. Click within the field then choose one of the divisions shown on the list to populate this field.
Institution	This read-only field is automatically populated based on the Division you specify in the **Division** field.
Clinic Code	Use this field to specify the clinic stop code for the clinic. Click within the field, then choose one of the codes shown on the list to populate this field.
Clinic meets at this facility	Select this check box if the clinic meets at this facility.
Non Count Clinic	Select this check box if the clinic is a non-count clinic for workload purposes. Clear the check box if this clinic is to be included in workload statistics.

Field	Description
Length of Appt	Use this field to specify the default length of appointment (in minutes) used by the clinic. Maximum length allow is 240 minutes.
Display Increments / Hour	Use this field to specify the number of increments per hour to show when viewing schedules set for the clinic. Click within the field then choose one of the increments shown on the list to populate this field.
Max Overbooks / Day	Use this field to set the maximum number of overbooks that will be allowed per day. If overbooks are not allowed at this clinic, set this field to zero.
Allowable No-Shows	Use this field to set the number of times in a row a patient can be a no-show before being flagged for possible discharge from the clinic. The Allowable No-Shows number is used in combination with the No-Show Waiting Period field described in Section 4.1.5.
Future Booking Max Days	Use this field to specify the number of days into the future that appointments can be booked. This will be the maximum number of days that will be available when searching for open appointment slots in the future.

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

4.1.3 Edit Clinic Parameters

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

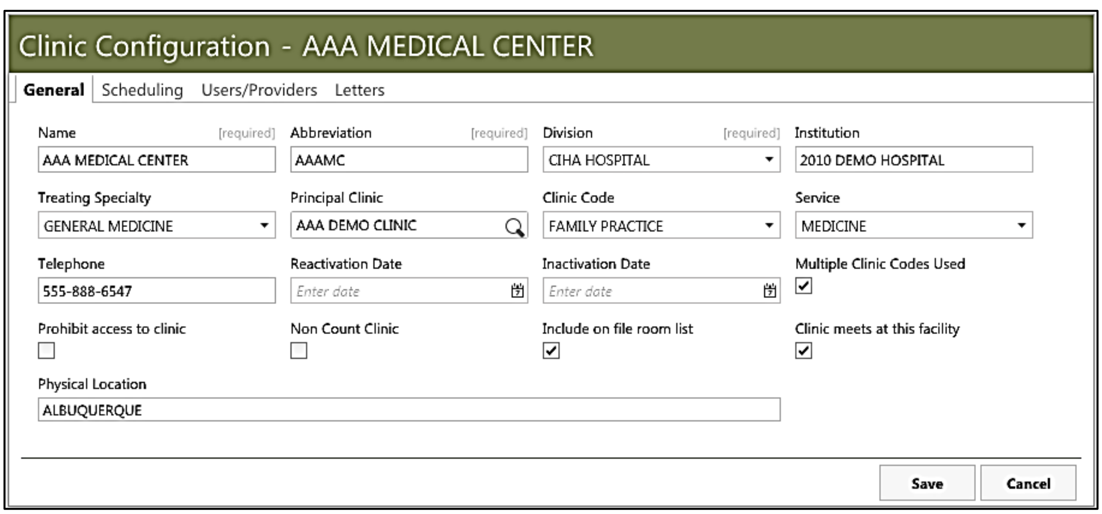

Figure 4-4: **Clinic Configuration** form

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

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

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

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

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

4.1.4 Clinic Configuration – General Tab

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

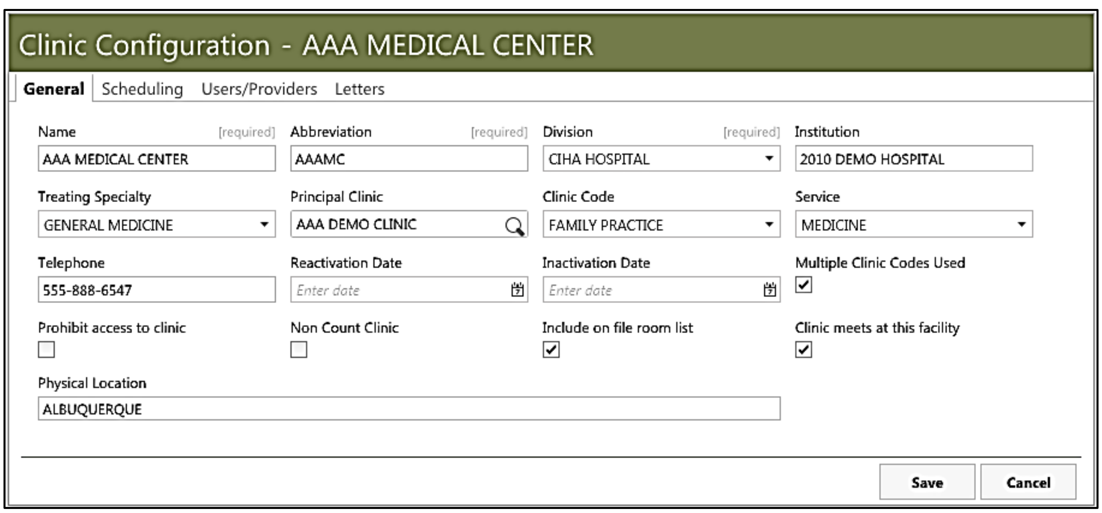

Figure 4-5: **Clinic Configuration - General** tab

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

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

Field	Description
Name	This field shows the name of the clinic, as entered when the clinic was added to the system.
Abbreviation	This field shows the abbreviated name of the clinic, as entered when the clinic was added to the system.
Division	This field shows the division with which the clinic is associated, as entered when the clinic was added to the system.
Institution	This read-only field shows the institution with which the clinic is associated, as determined when the clinic was added to the system.
Treating Specialty	Use this field to specify the treating specialty of the clinic. Click within the field then choose one of the specialties shown on the list to populate this field.
Principal Clinic	Use this field to specify the principal clinic with which this clinic is associated (if any). If enrollment in this clinic is equivalent to enrollment in a larger one, this field should contain the name of the larger clinic. To search for a principal clinic, click within the field and type one or more of the letters contained in the clinic name to display a list of search results. Click on a clinic name to populate the field.
Clinic Code	This is the clinic stop code assigned to a specific location, as entered when the clinic was added to the system.
Service	Use this field to specify the service provided by the clinic. Click within the field then choose one of the options shown on the list to populate this field.
Telephone	Use this field to enter the telephone number for the clinic.
Reactivation Date	Use this field to indicate the date on which an inactivated clinic was reactivated.
Inactivation Date	Use this field to indicate the date on which the clinic is inactivated.
Multiple Clinic Codes Used	Enable this check box to allow the user to select a clinic stop code when a patient is checked in for an appointment.
Prohibit access to clinic	Enable this check box to allow only users with sufficient access rights to book appointments at this clinic. See Section 4.1.6 for more information about establishing user access rights.
Non Count Clinic	Select this check box if the clinic is a non-count clinic for workload purposes. Clear the check box if this clinic is to be included in workload statistics.
Include on file room list	Select this check box if this is a non-count clinic that should be included on the file room lists.
Clinic meets at this facility	Select this check box if the clinic meets at this facility.
Physical Location	Use this field to show the physical location of the clinic.

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

4.1.5 Clinic Configuration – Scheduling Tab

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

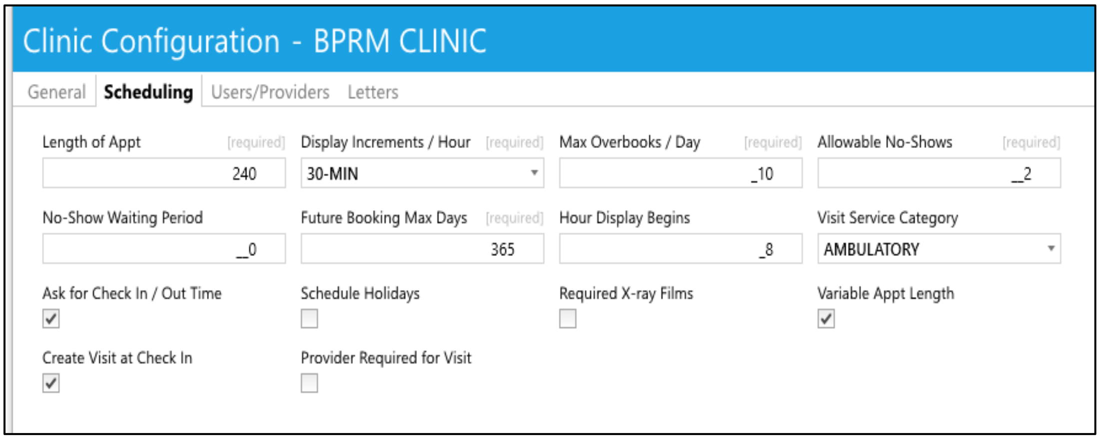

Figure 4-6: **Clinic Configuration** - **Scheduling** tab

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

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

Field	Description
Length of Appt	Use this field to specify a two- or three-digit number indicating the default length of appointment (in minutes) used by the clinic. The maximum length is 240 minutes.
Display Increments / Hour	Use this field to specify the number of increments per hour to show when viewing schedules set for the clinic. Click within the field then choose one of the options shown on the list to populate this field. If variable appt length is set, this field will also set the display of the appointment length when scheduling an appointment.
Max Overbooks / Day	Use this field to set the maximum number of overbooks that will be allowed per day. If overbooks are not allowed at this clinic, set this value to zero.
Allowable No-Shows	Use this field to set the number of times in a row a patient can be a no-show before being flagged for possible discharge from the clinic.
No-Show Waiting Period	Use this field to specify the number of days in the past to be included when searching for previous no-shows at this clinic.

Field	Description
Future Booking Max Days	Use this field to specify the number of days into the future that appointments can be booked. This will be the maximum number of days that will be available when searching for open appointment slots in the future.
Hour Display Begins	Use this field to specify the time of day when the clinic availability schedule for this clinic begins. This field accepts whole numbers from 0 through 16, representing times from 12:00 midnight to 4:00 PM, respectively. This parameter works in conjunction with the appointment Access Blocks established with the Clinic Availability Configuration page. See Section 4.2.1 for more information about the Clinic Availability Configuration page.
Visit Service Category	Use this field to specify the visit service category for the clinic. Click within the field then choose one of the categories shown on the list to populate this field.
Ask for Check In / Out Time	Enable this check box to be prompted for check-in and check-out times when checking a patient in or out. When this option is enabled, the current date and time is the default. When this option is not enabled, you will not be prompted for check-in or check-out times, and the current date and time will be automatically entered. If an appointment is scheduled retroactively, then the date and time of the appointment will be used as the check-in or check-out time. This date and time will either be entered automatically or use as a default, depending on how this parameter is set.
Schedule Holidays	Enable this check box to allow appointments to be scheduled on holidays at this clinic.
Required X-ray Films	Enable this check box if x-ray films are required for patients at the selected clinic.
Variable Appt Length	Enable this check box to allow appointments of variable lengths to be set at the selected clinic. This allows users to change the length of appointment.
Create Visit at Check In	Enable this check box to automatically create a PCC/EHR visit when a patient checks in at this clinic.
Provider Required for Visit	Enable this check box if the **Create Visit at Check In** option has also been selected. This will require that a provider is specified when checking in an appointment as part of the PCC visit creation process.

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

4.1.6 Clinic Configuration – Users/Providers Tab

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

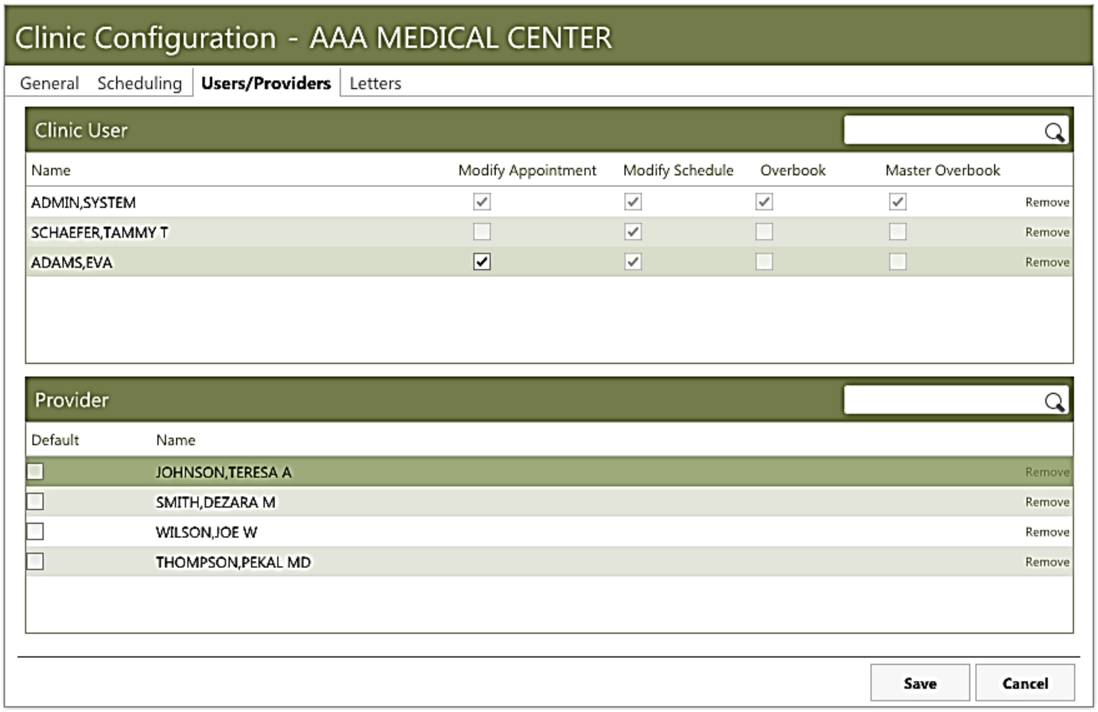

Figure 4-7: **Clinic Configuration** - **Users/Providers** tab

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

4.1.6.1 Clinic User

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

- **Modify Appointment**. Users with Modify Appointment rights can change appointment times and dates, and also change other aspects of patient appointments.
- **Modify Schedule**. Users with Modify Schedule rights can add and change Access Blocks on the **Availability** tab of the **Clinic Configuration** page.
- **Overbook**. Users with Overbook rights are allowed to overbook appointment slots in the Scheduling module. They can overbook slots up to the limit established by the **Max Overbooks/Day** parameter on the **Scheduling** tab of the **Clinic Configuration** page.

- **Master Overbook**. Users with Master Overbook rights are allowed to overbook appointment slots in the Scheduling module. They are also allowed to bypass any limits established by the **Max Overbooks/Day** parameter on the **Scheduling** tab of the **Clinic Configuration** page.

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

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

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

4.1.6.2 Provider

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

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

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

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

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

4.1.7 Clinic Configuration – Letters Tab

As described in Section 5.9, the Scheduling module can generate and print a variety of appointment letters. Use the **Letters** tab of the **Clinic Configuration** page to configure these appointment letters for each specific clinic.

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

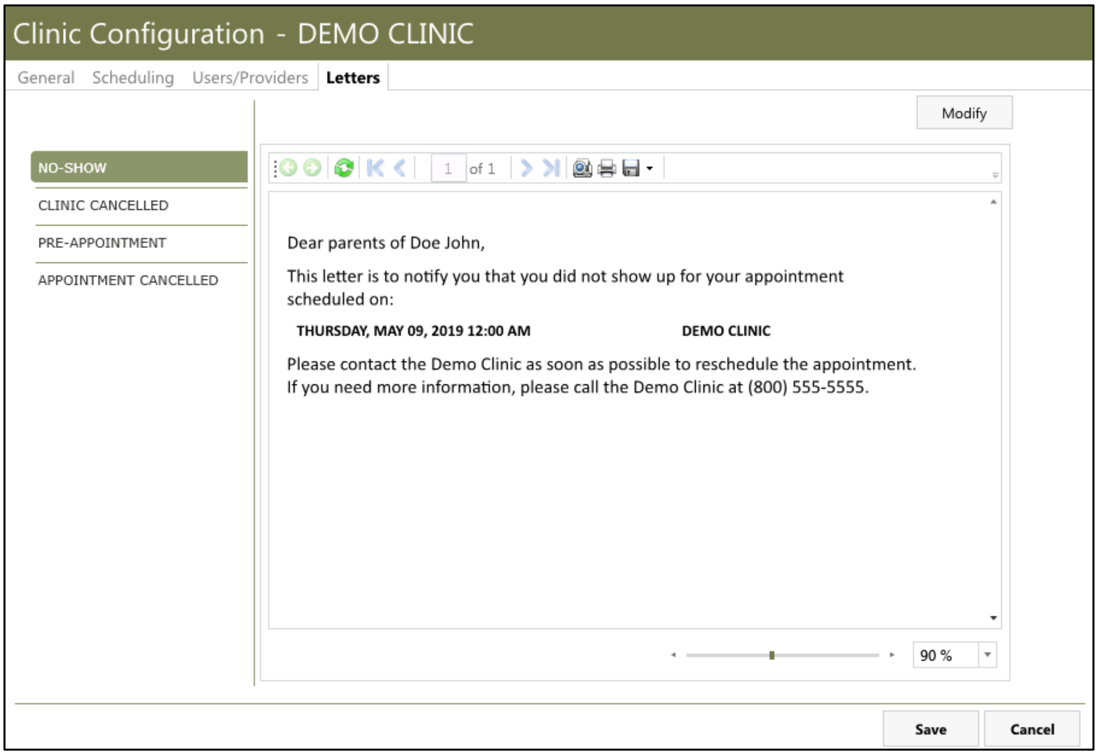

Figure 4-8: **Clinic Configuration** - **Letters** tab

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

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

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

1. Select an Appointment Type.
2. Select the Corresponding Appointment Letter.
3. Click the **Modify** button to edit the letter.
4. Complete the Initial Section.
5. Complete the Final Section.
6. Click **Save**.

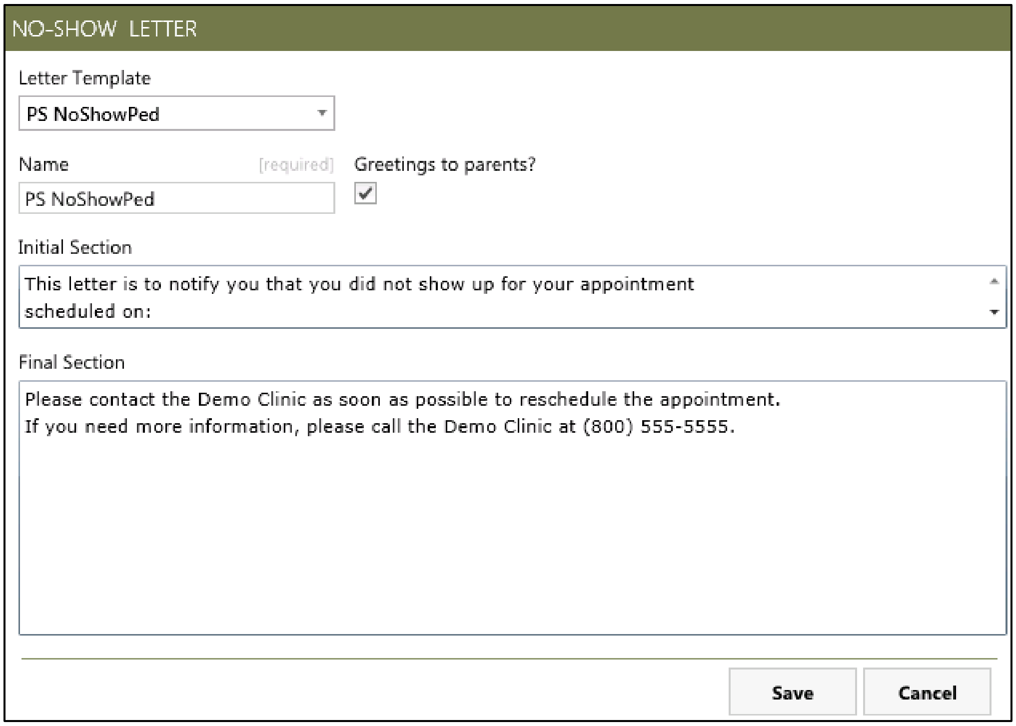

Figure 4-9: No-show letter example

4.1.7.1 Create a New Letter Template

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

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

To create a new letter template:

1. Click the **Letters** tab, then select one of the letter types listed in the selection pane on the left of the page. In the example shown in Figure 4-10, **No-Show** is selected.

Figure 4-10: No-Show Letter template selected

2. Click **Modify** in the upper right corner of the page to open the letter configuration dialog (Figure 4-11).

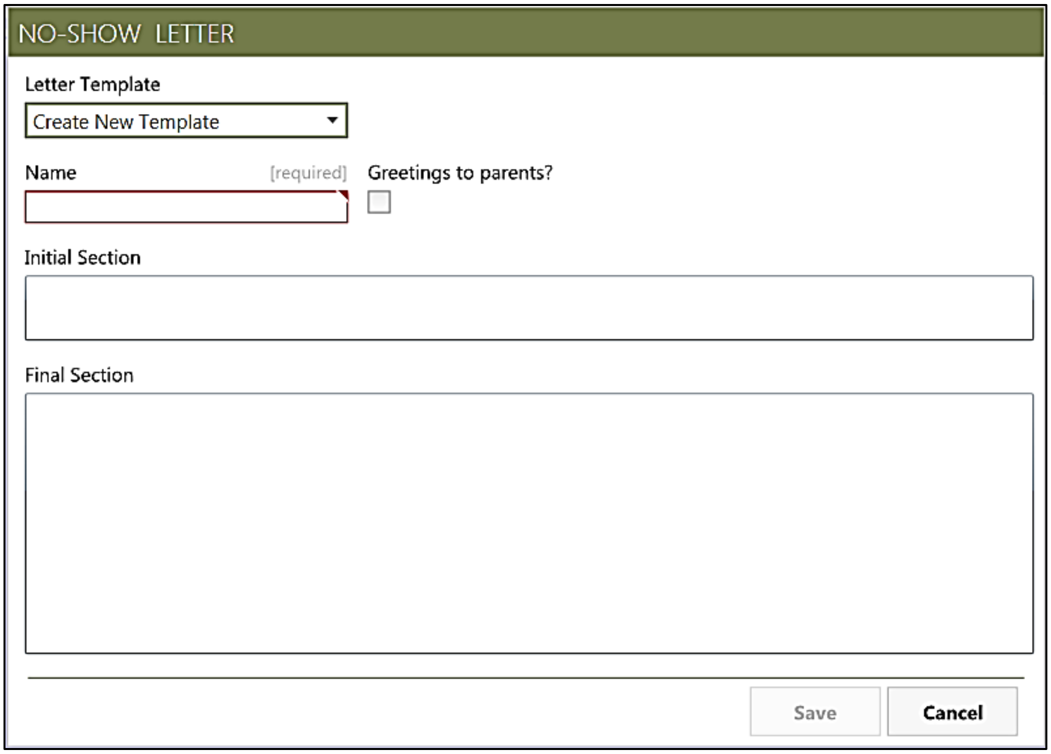

Figure 4-11: Blank Letter Configuration dialog

3. Select **Create New Template** in the **Letter Template** list, and type the name you want to give the new letter template in the **Name** field. For this example, the letter template is named NO-SHOW EXAMPLE.
4. Select the **Greetings to parents?** check box if you want the salutation of the letter to be addressed to the patient's parents. This is useful for letters sent for pediatric patients.
5. Type the text you want to appear in the letters in the **Initial Section** and **Final Section** fields of the **Letter Configuration** dialog. The text you type in the **Initial Section** will be displayed after the salutation of the letter, but before the appointment date, time, and clinic. Text in the **Final Section** will be displayed after the appointment date, time, and clinic. Figure 4-12 shows an example of the letter configuration dialog after adding text to the appropriate fields.

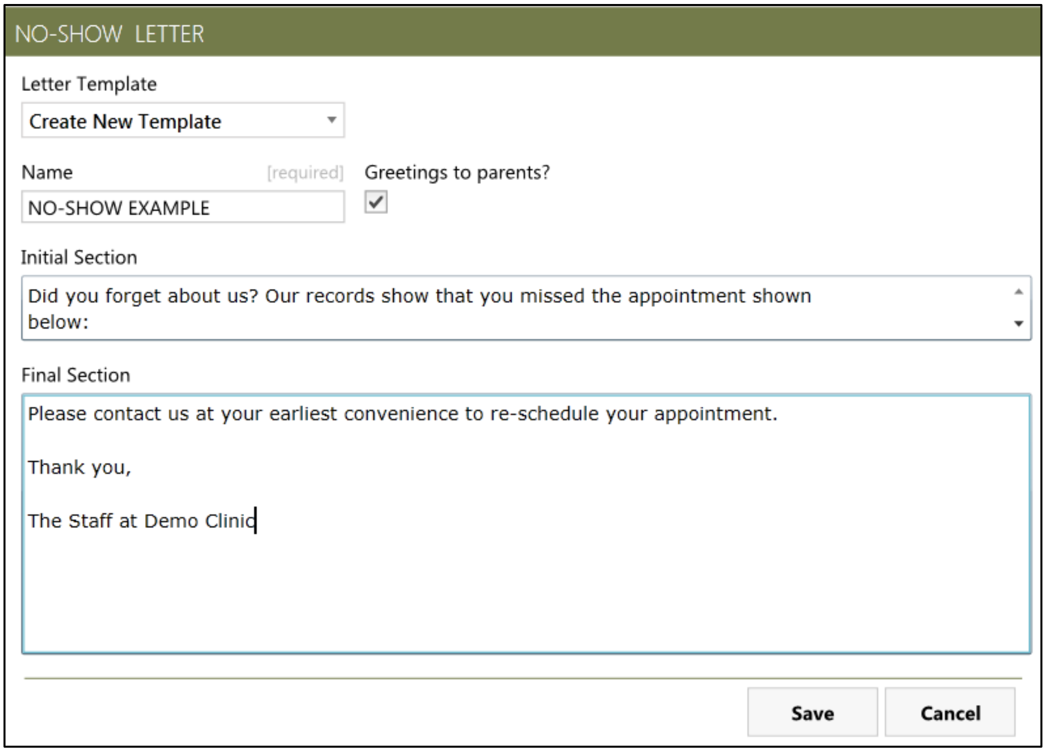

Figure 4-12: Completed Letter Configuration dialog

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

Figure 4-13 shows an example of the No-Show letter template created using these steps.

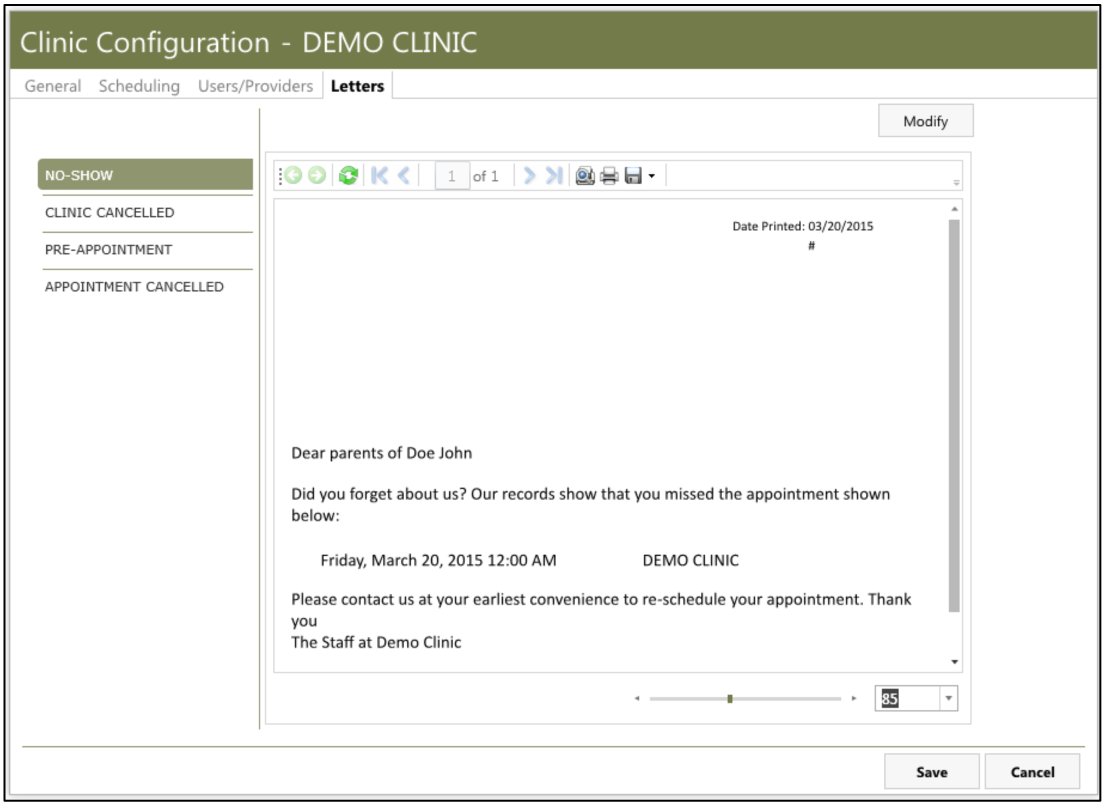

Figure 4-13: **No-Show Letter** template example

4.1.7.2 Modify an Existing Letter Template

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

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

4.2 Configure Clinic Availability

Select a clinic and then click **Edit Availability** on the main **Clinics** page to establish the periods of time the selected clinic will be available for patient appointments and other scheduled events. Figure 4-14 shows an example of the **Clinic Availability Configuration** page.

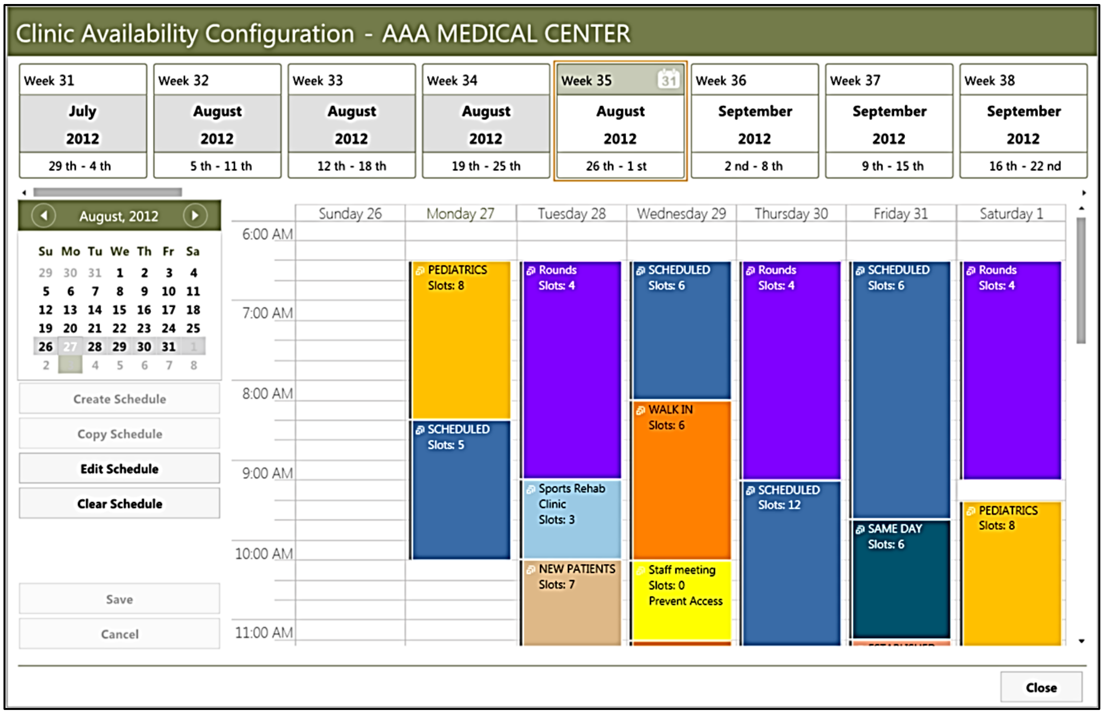

Figure 4-14: **Clinic Availability Configuration** page

Clinic availability displays as a schedule in a week-long grid.

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

Before setting appointment schedules for a clinic, it is necessary to establish the times of day when appointment slots are available. Scheduling availability for a clinic is divided into Access Blocks, which are color-coded representations of the amount of time allotted for a specific type of clinic access (such as appointments). Each Access Block can represent one or more appointment slots. In essence, Access Blocks are sections of the clinic schedule that are available for patient appointments or other events. Different colors represent different types of access, and the colors can be customized.

4.2.1 Clinic Availability Configuration Page

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

4.2.1.1 Timeline

The Timeline panel of the **Clinic Availability Configuration** page (Figure 4-15) shows 52 weeks, spanning from four weeks in the past to 48 weeks into the future.

Figure 4-15: Timeline panel

Use the horizontal scroll bar (seen at the lower left corner of the example shown in Figure 4-15) to navigate to any of the weeks displayed on the Timeline. Click on any of the weeks shown to display that week's clinic availability in the schedule grid panel. A yellow border displays around the currently selected week in the Timeline. In the example shown in Figure 4-15, Week 36 (September 2 through 8) is selected.

The Timeline also shows the weeks for which an availability schedule has been created (as opposed to a week that had "inherited" its schedule from a previous week). This is indicated by shading in the upper part of each week block. In the example shown in Figure 4-15, Weeks 35, 37, and 40 each have an availability schedule. All of the other weeks displayed on the timeline also have a schedule, but it is inherited from a previous week. In the example shown in Figure 4-15, the schedule for Week 36 is inherited from Week 35. Similarly, Weeks 38 and 39 will have the same schedule as Week 37.

Past weeks are indicated on the Timeline with shading in the middle of the week block. In the example shown in Figure 4-15, Weeks 32 through 35 are in the past, while the other weeks displayed are either the current week or weeks in the future.

4.2.1.2 Calendar Panel

Use the Calendar panel of the **Clinic Availability Configuration** page (Figure 4-16) to quickly navigate to a specific year, month, or week.

Figure 4-16: Calendar panel – week view

The calendar panel provides three different views, showing weeks, months, or years. The example in Figure 4-16 shows the week view for the month of July. Use the left and right arrows at the top of the calendar to navigate to other months.

When in the week view, click the month in the heading portion of the calendar to display all of the available months for the chosen year. Figure 4-17 shows an example of the month view.

Figure 4-17: Calendar panel - month view

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

When in the month view, click the year in the heading portion of the calendar to display all of the years available for clinic availability configuration. Figure 4-18 shows an example of the year view.

Figure 4-18: Calendar panel - year view

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

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

4.2.1.3 Availability Schedule Menu

Use the menu on the left side of the **Clinic Availability Configuration** page (Figure 4-19) to create, copy, edit, or clear an availability schedule.

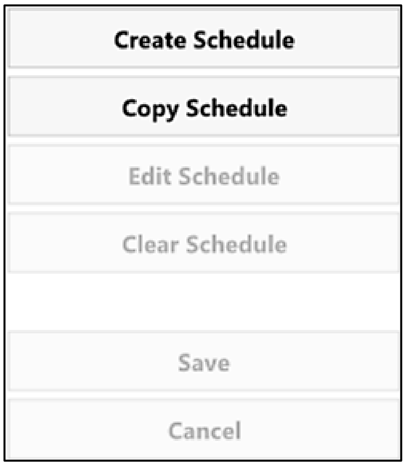

Figure 4-19: Availability Schedule menu

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

4.2.1.4 Availability Schedule Grid

The Availability Schedule grid panel of the **Clinic Availability Configuration** page (Figure 4-20) shows any clinic availability schedules that have been established. This panel is also used to configure new availability schedules or edit existing ones.

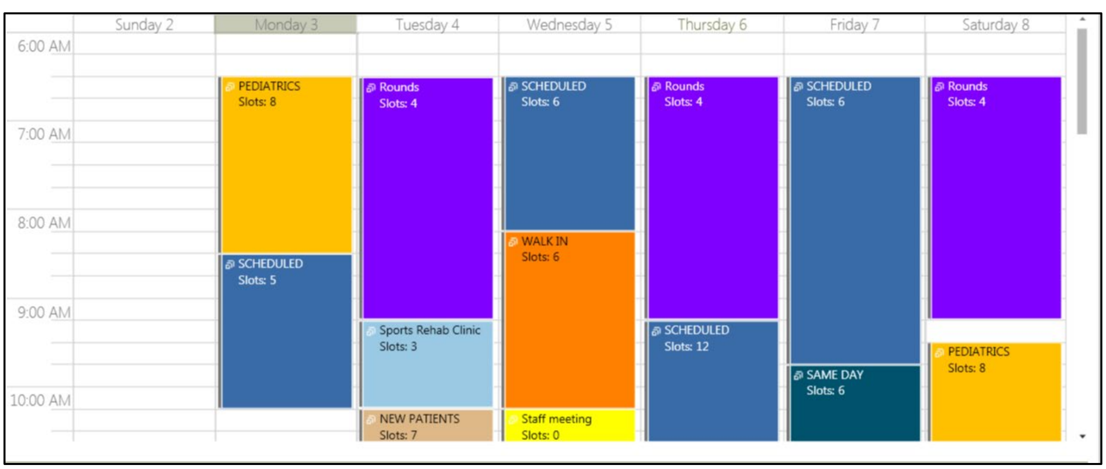

Figure 4-20: Availability Schedule grid

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

4.2.2 Create an Availability Schedule

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

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

To create an availability schedule:

1. In the **Clinics** page of the **Settings** module, highlight the name of the clinic for which you want to add an availability schedule, and then click **Edit Availability**.
2. On the **Clinic Configuration** page displayed, navigate to the week for which you want to establish an availability schedule.
3. Click **Create Schedule** on the menu on the left side of the page. This causes a blank availability schedule (Figure 4-21) to display.

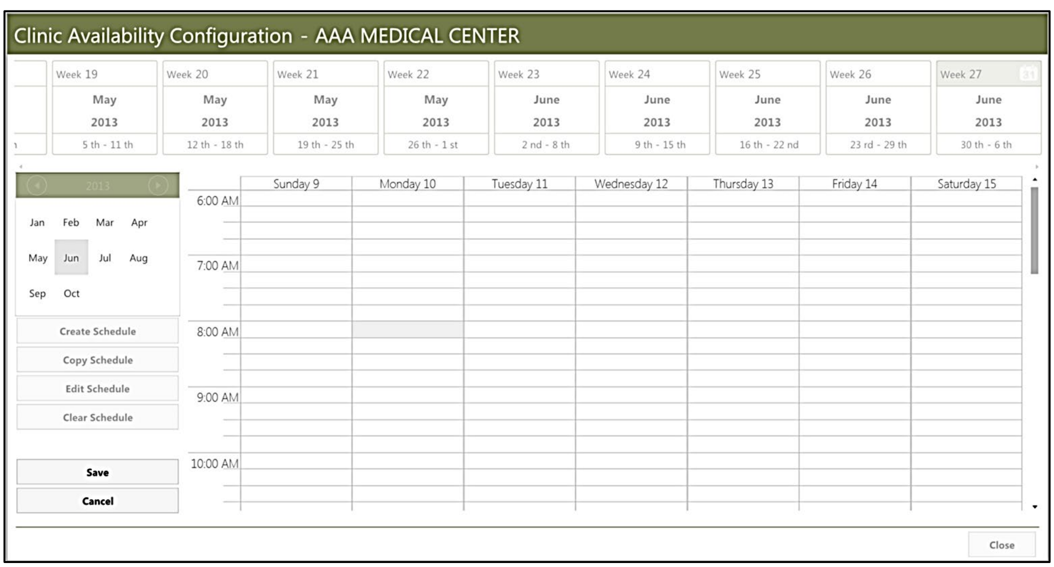

Figure 4-21: Blank availability schedule

4.2.2.1 Create an Access Block

In order to establish an availability schedule, you must create Access Blocks to specify the times and days of the week the clinic will be available, and what types of access (such as appointment types) it will be available for.

To create a new Access Block:

1. Open a blank availability schedule for the desired week as described in Section 4.2.2.
2. In the blank grid displayed, select the grid cells for which you want to create an Access Block. In the example shown in Figure 4-22, the cells representing Mondays from 8:00 AM to 10:15 AM have been selected.

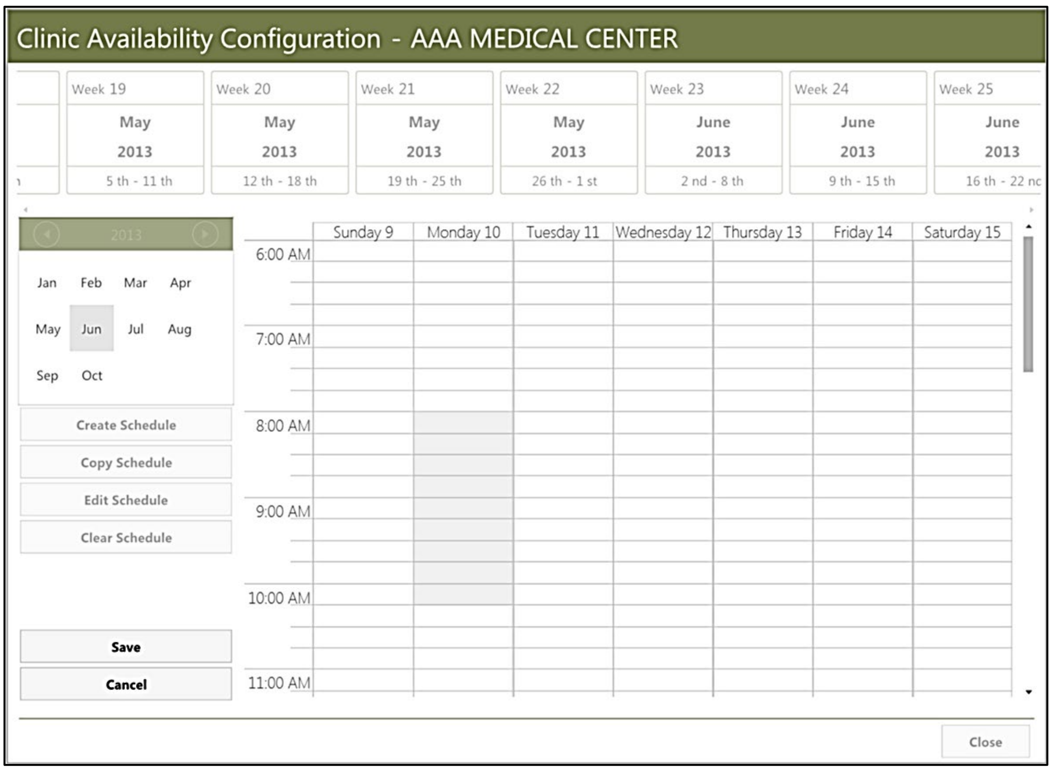

Figure 4-22: Access block times selected

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

3. Right-click within the selected cells and select **Create Access Block** from the menu displayed to specify the access type. The **Configure Access Block** dialog shown in Figure 4-23 displays:

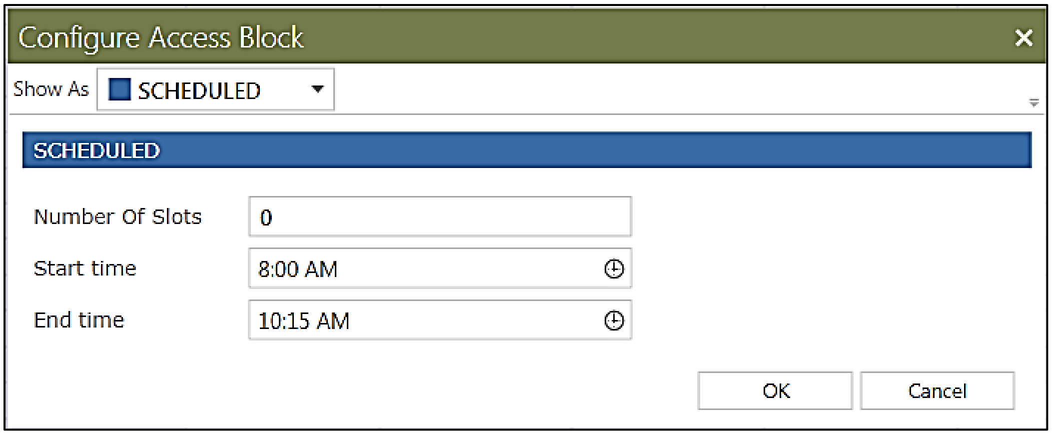

Figure 4-23: **Configure Access Block** dialog

4. Use the **Show As** list to select the access type for the selected schedule cells. In the example shown in Figure 4-24, **Pediatrics** is being selected.

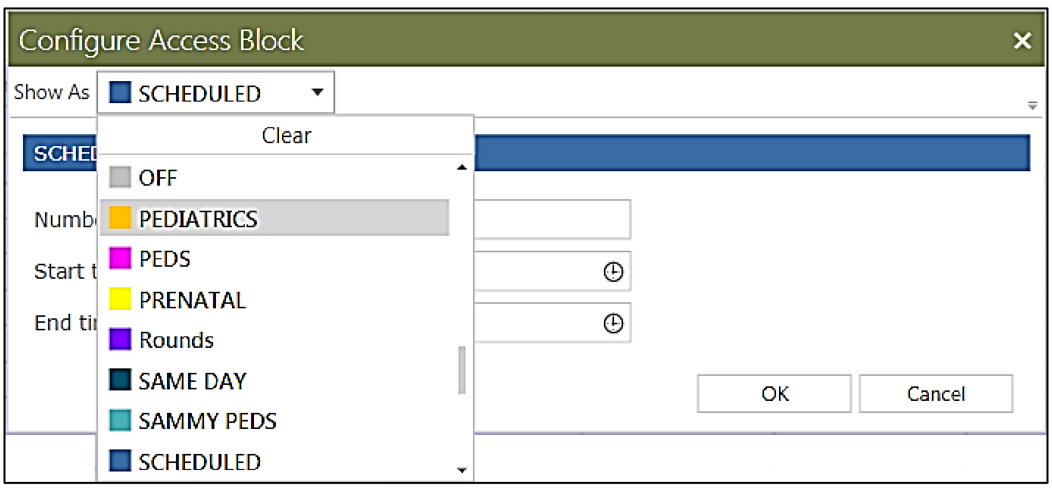

Figure 4-24: **Configure Access Block** dialog – Pediatrics selected

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

5. After selecting the Access Type, specify the number of appointment slots for this Access Block in the **Number of Slots** field, and make any changes necessary to the **Start time** and **End time** fields. Figure 4-25 shows a typical **Configure Access Block** dialog after selecting the access type (**PEDIATRICS**) and **Number Of Slots** (**6**).

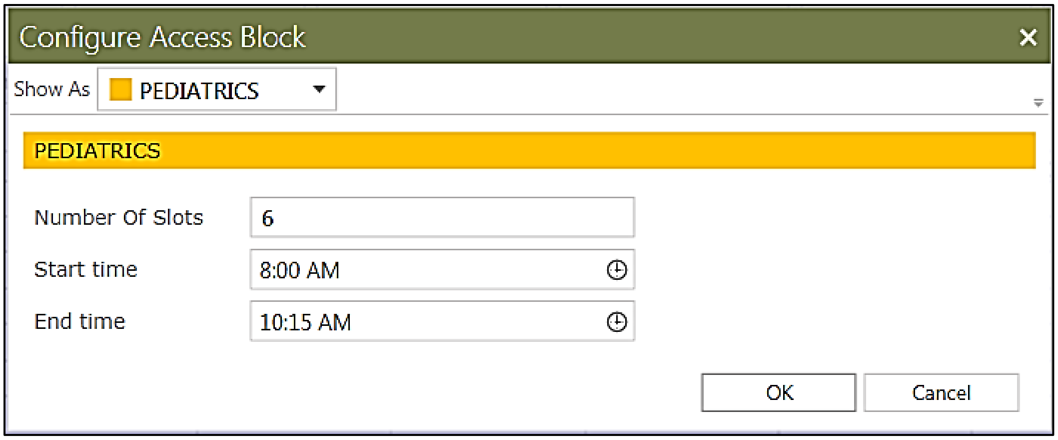

Figure 4-25: Configure Access Block dialog – completed

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

6. When done, click **OK** to accept the settings for the new Access Block and return to the schedule grid. Figure 4-26 shows the results of adding the Access Block used in this example:

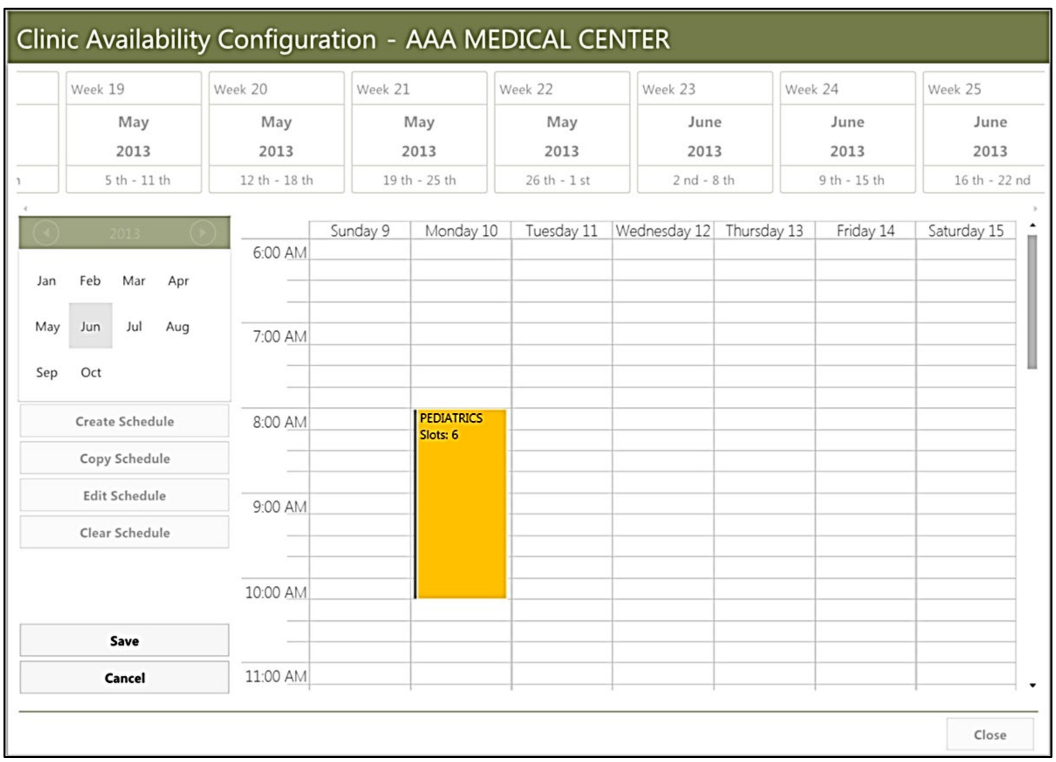

Figure 4-26: Availability schedule with new Access Block added

7. Create any other Access Blocks necessary, and then click **Save** on the Action menu to save the availability grid or click **Cancel** to exit without saving your changes.
8. When you click **Save**, the confirmation dialog shown in Figure 4-27 displays.

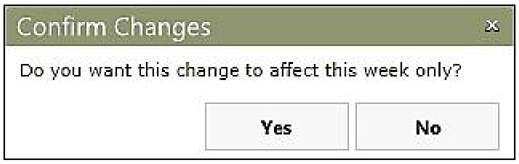

Figure 4-27: Confirm Changes Dialog

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

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

4.2.3 Edit an Access Block

To edit an Access Block after it has been created, double-click the block you want to edit. This causes an Appointment dialog similar to that shown in Figure 4-23 to display. (Alternatively, you can right-click an Access Block and select **Change Access Block** from the context menu displayed.) Within that dialog, you can change the **Access Type**, **Number of Slots**, **Start time**, and **End time** fields. Click **OK** to close the dialog and save your changes or click **Cancel** to close the dialog without saving any changes.

4.2.4 Copy Access Blocks

You can copy a day's worth of existing Access Blocks to a different day of the schedule availability grid. To do so, right-click on an empty grid cell for the day where you want the Access Block to be copied, select the **Copy From** option, then select the day you want to copy. In the example shown in Figure 4-28, all of the Access Blocks from the Monday column of the grid will be copied to the selected day.

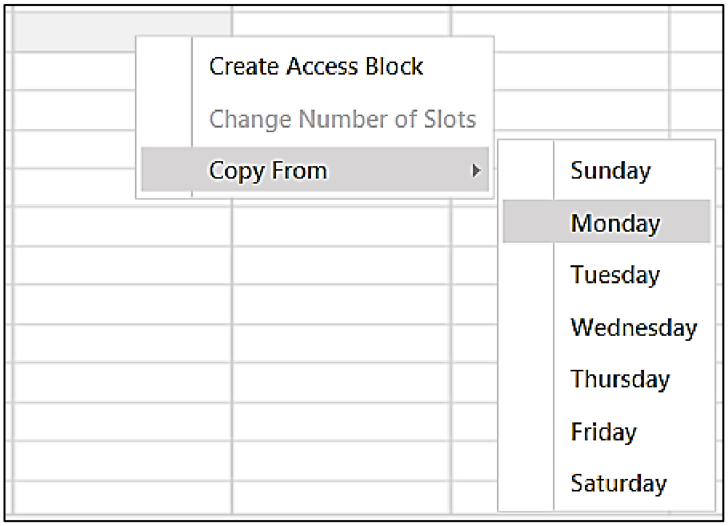

Figure 4-28: Copying Access Blocks

4.2.5 Delete an Access Block

To delete an Access Block, hold your mouse cursor over the Access Block, then click the circled **X** in the upper right corner of the block as shown in Figure 4-29.

Figure 4-29: Deleting an Access Block

When you click the **X**, a confirmation dialog (Figure 4-30) displays. Click **OK** to accept the deletion or click **Cancel** to close the confirmation without deleting the Access Block.

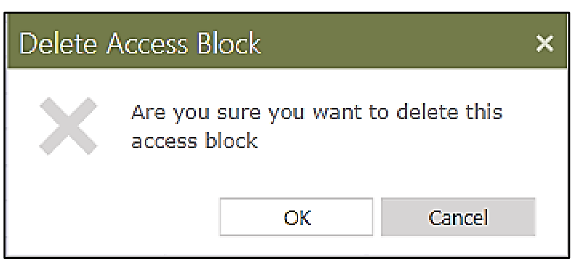

Figure 4-30: **Delete Access Block** confirmation dialog

4.2.6 Copy an Availability Schedule

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

1. Use the Timeline at the top of the Clinic Availability Configuration screen to navigate to the week to which you want to copy an existing availability schedule.

2. Click **Copy Schedule** in the Availability Schedule menu on the left side of the screen. The **Copy Schedule** dialog (Figure 4-31) will display. The current availability schedule for the selected week is shown in the **Copy From** list box. In this example, the week of 7/14/2013 displays.

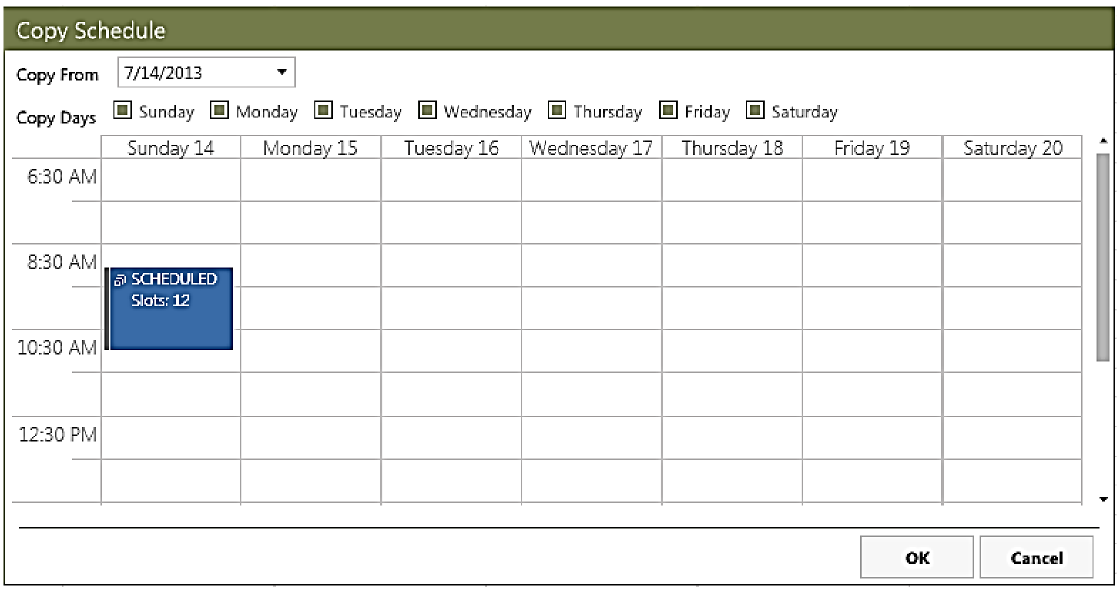

Figure 4-31: Copy Schedule dialog – before

3. Use the **Copy From** list box at the top of the dialog to choose the week from which you want to copy the schedule to the selected week. The Copy Schedule dialog will display the schedule for the week you select from the list. In the example shown in Figure 4-32, the schedule from the week of 9/30/2012 will be copied to the selected week (7/14/2013).

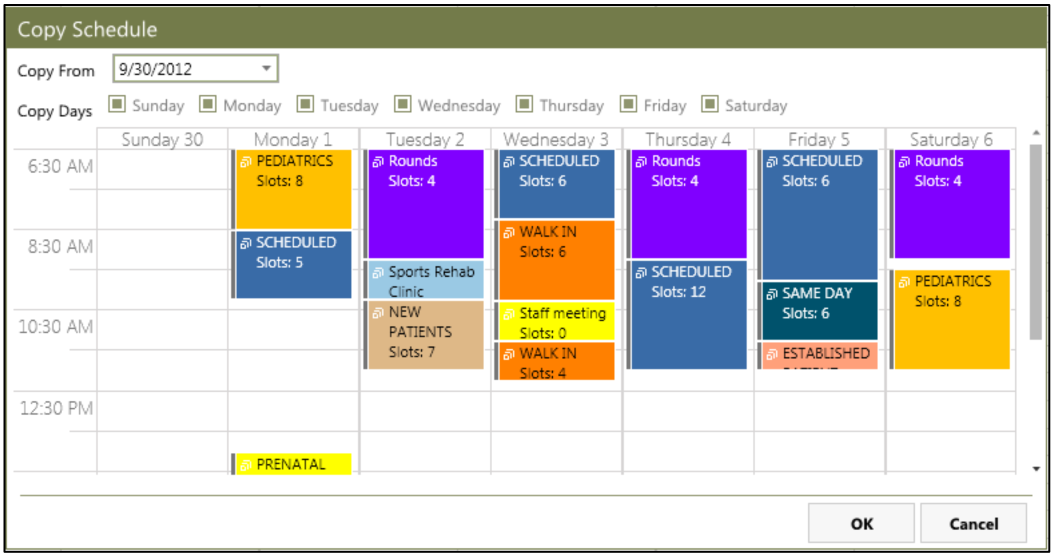

Figure 4-32: **Copy Schedule** dialog - after

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

4. After selecting the week to copy from, click **OK** to copy the schedule to the selected week.

5. As a final step, click **Save** in the Availability Schedule menu on the left side of the screen. The **Confirm Changes** dialog shown in Figure 4-33 displays.

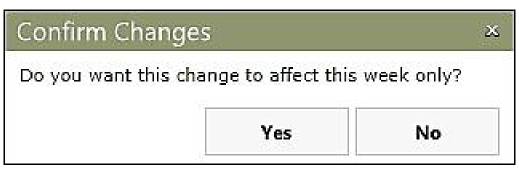

Figure 4-33: **Confirm Changes** dialog

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

4.3 Table Maintenance Page

Click **Table Maintenance** in the selection pane of the Settings Module to see the main **Table Maintenance** page. Figure 4-34 shows an example of the Settings module with the **Table Maintenance** page displayed.

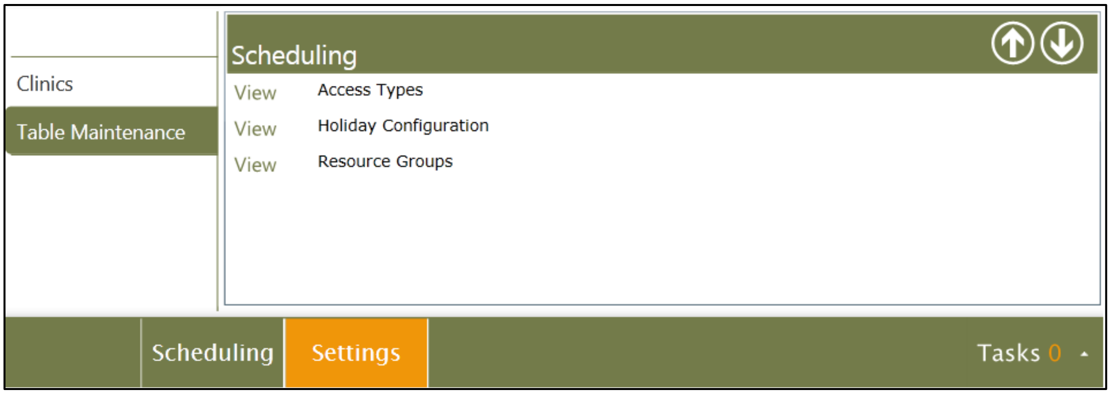

Figure 4-34: Settings Module - **Table Maintenance** page

4.4 Access Types

As described in Section 4.2, scheduling availability for a clinic is divided into Access Blocks, which are color-coded representations of the amount of time allotted for a specific type of clinic access (such as appointments). The **Access Types** option on the Table Maintenance page provides a way to define the types of Access Blocks available. You can add new Access Types and edit existing ones.

4.4.1 Add an Access Type

To add a new Access Type:

1. From the **Table Maintenance** page of the Settings module, select **Access Types** and click **View** adjacent to the **Access Types** label. The **Access Types** listing page (Figure 4-35) displays.

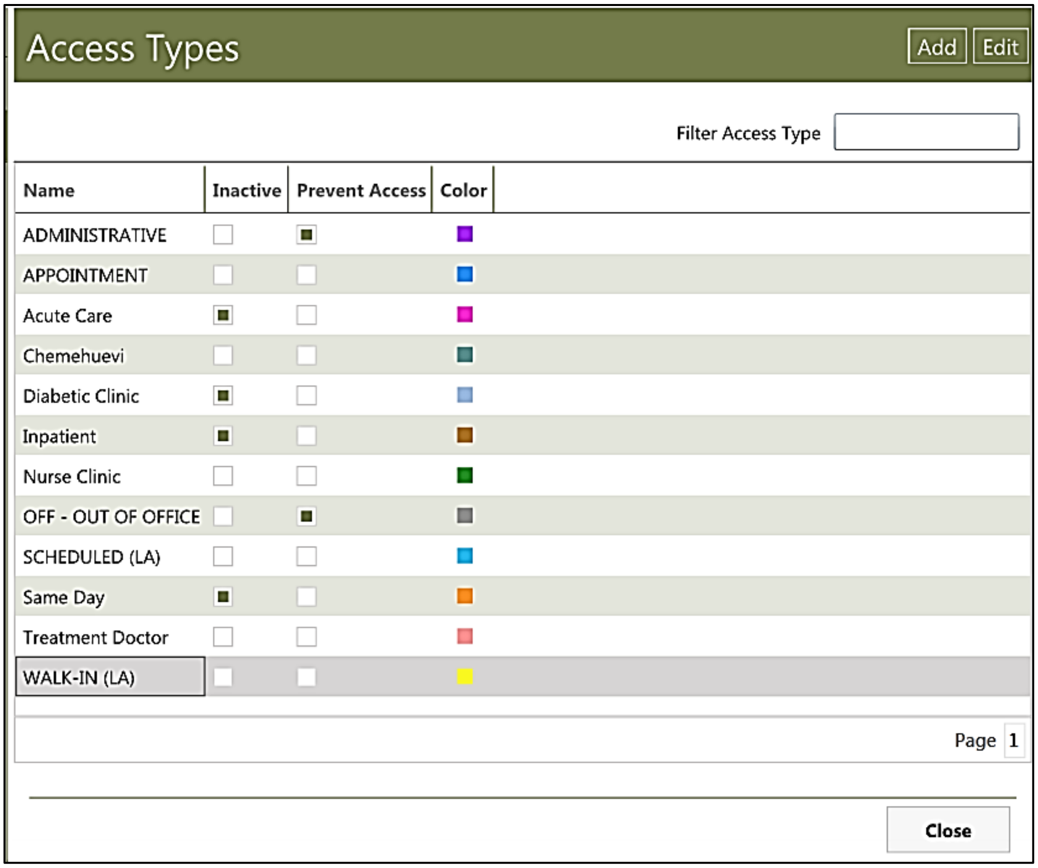

Figure 4-35: Access Types listing page

2. Click **Add** in the upper right corner of the Access Types listing page to display the **Access Type** description page (Figure 4-36).

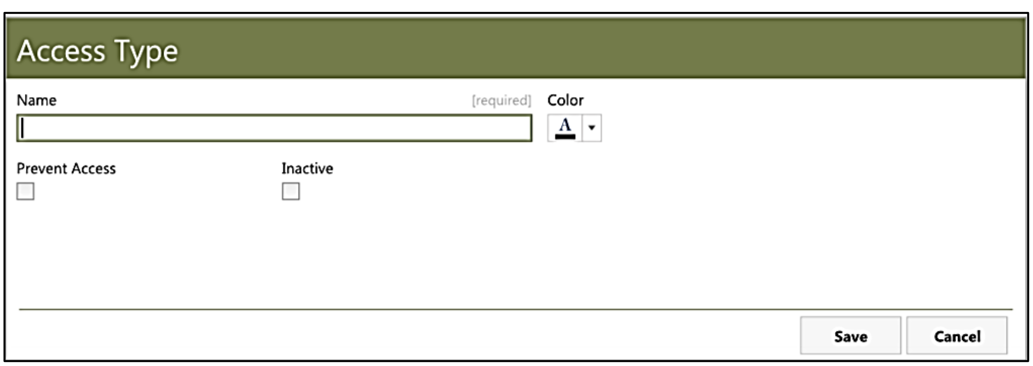

Figure 4-36: **Access Type** description page

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

Optionally, select the **Prevent Access** check box to use this Access Block as a time period during which appointments cannot be scheduled. Also optionally, select the **Inactive** check box to create the new Access Type without making it active. Figure 4-37 shows an example of the **Access Type** description page after creating a new Access Type named **TEST ACCESS TYPE**.

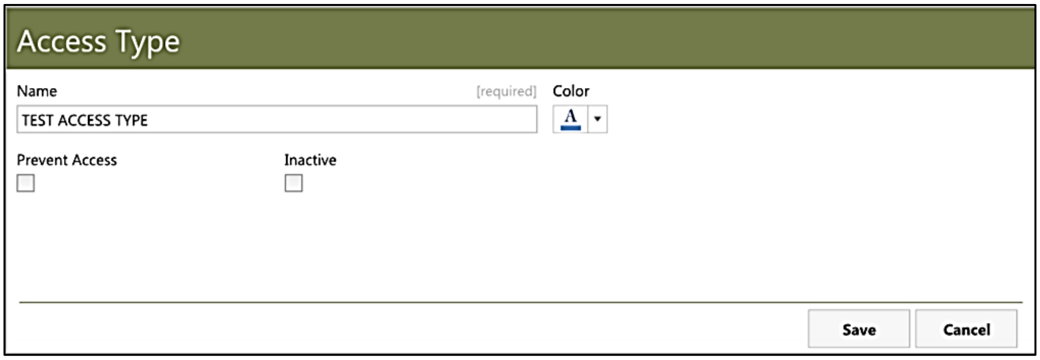

Figure 4-37: Creating a New Access Type

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

4.4.2 Edit an Access Type

To edit an existing Access Type:

1. From the **Table Maintenance** page of the Settings Module, select **Access Types** and click **View** (located to the left of the **Access Types** label). The Access Type listing page will be displayed.
2. Use one of these methods to find the Access Type you want to edit:
   - Use the left and right arrows in the lower left corner of the page and the vertical scroll bar on the right of the page to navigate through each page of the Access Type listing.
   - Type the first few letters of the Access Type name in the **Filter Access Type** field in the upper right corner of the page and press Enter.
3. Select the Access Type you want to edit and click **Edit** in the upper right corner of the page. (Alternately, you can double-click the Access Type name.) A page similar to that shown in Figure 4-38 will display.

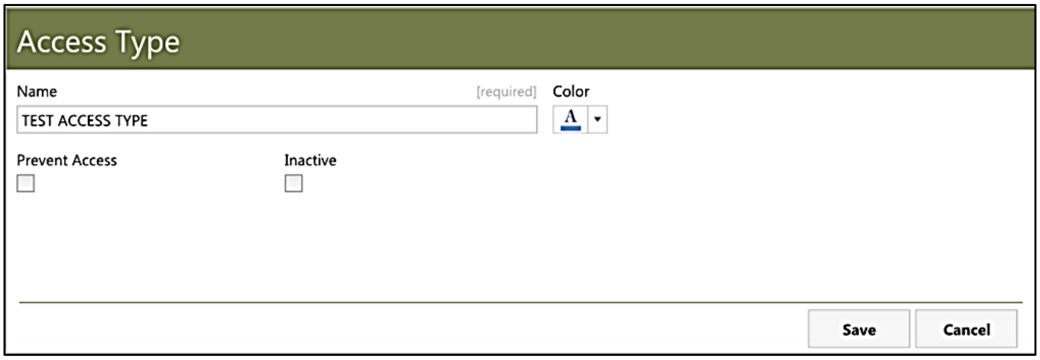

Figure 4-38: Editing an Access Type

4. Make any changes necessary to the Access Type name, color, and active/inactive status and click **Save** to save your changes or click **Cancel** to close the page without saving the changes. In the example shown in Figure 4-39, the **Name** has been changed from **TEST ACCESS TYPE** to **DENTAL SPECIALTY** and the **Color** has been changed from pale blue to bright red.

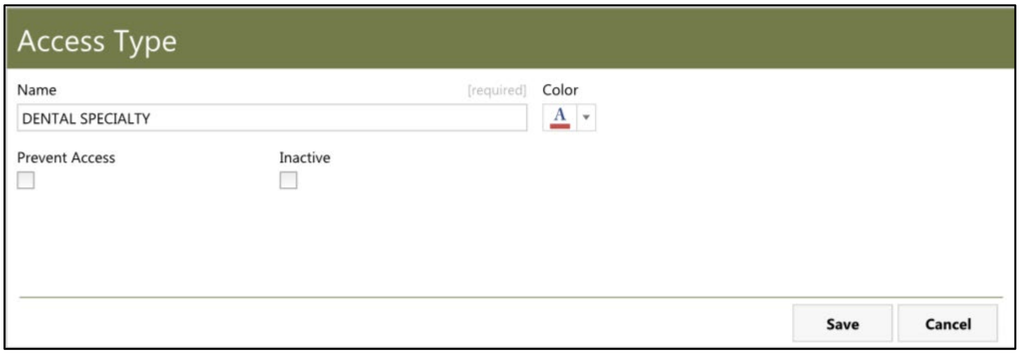

Figure 4-39: Access Type after editing

4.5 Holiday Configuration

Holiday Configuration allows users to configure a customized list of holidays that are recognized by the site. The recognized holidays can be used in conjunction with the Clinic Configuration – Schedule Holiday parameter (see Section 4.1.5) to restrict appointment scheduling on certain days.

To access the Holiday Configuration, go to the **Table Maintenance** page of the Settings Module, select **Holiday Configuration** and click **View** (located to the left of the **Holiday Configuration** label). A **Federal Holidays** listing page similar to the one shown in Figure 4-40 will be displayed.

Use the **Year** filter list at the top of the page to displays a list of holidays for the selected calendar year. The list can display up to five years of holidays from the current year. Use the **Sort By** filter list to sort the listed holidays by Date or Name.

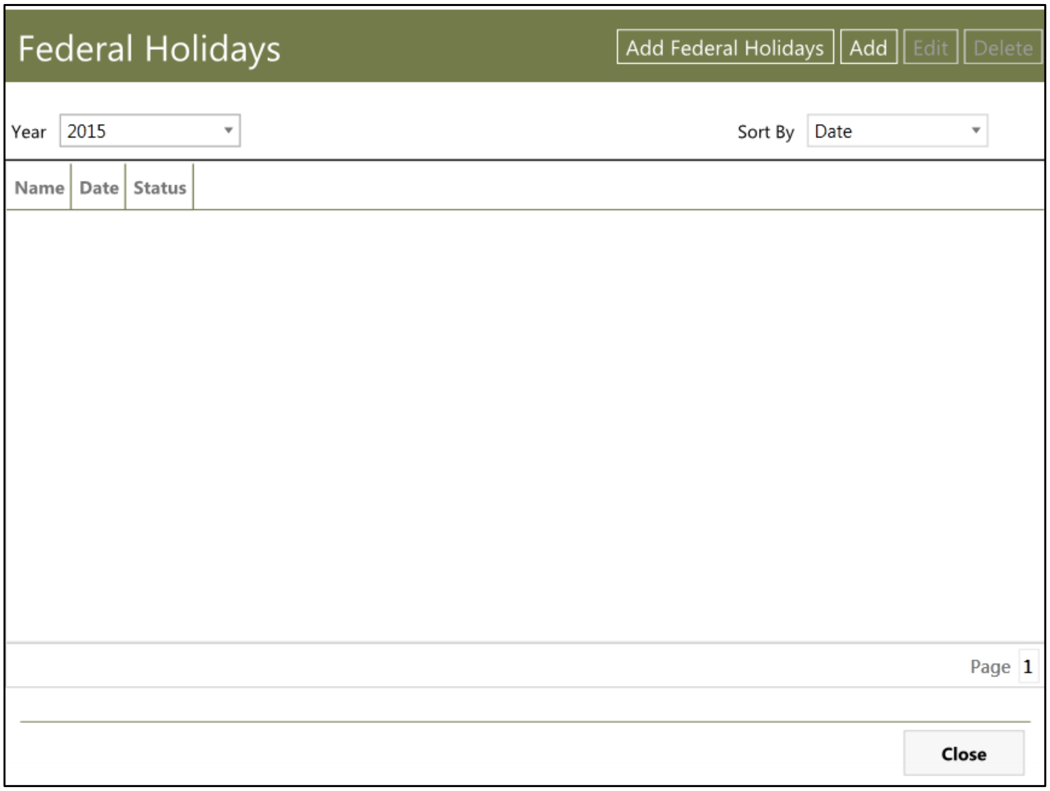

Figure 4-40: Federal Holidays listing page

4.5.1 Add Federal Holidays

To add Federals Holidays to clinics schedules:

1. Click **Add Federal Holidays** in the upper right corner of the holidays page to display the **Edit Federal Holidays** page (Figure 4-41).

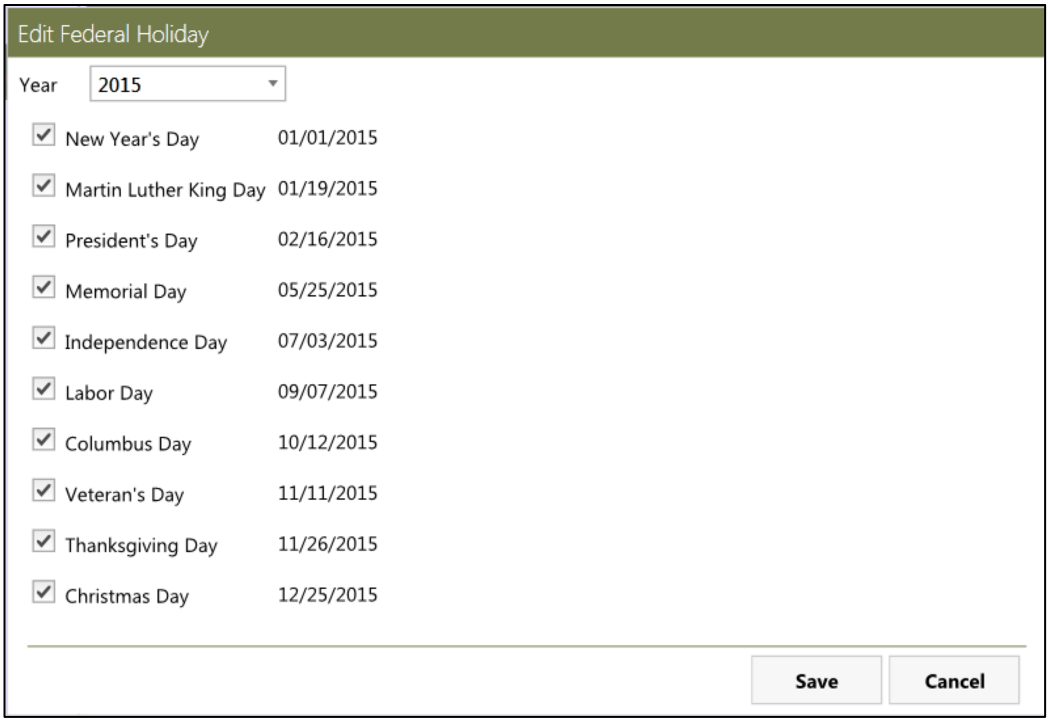

Figure 4-41: **Federal Holidays** listing page

2. Click the **Year** list filter to select which calendar year you would like to apply the federal holidays for all clinic schedules. In the example we have selected to apply federal holidays to 2015.

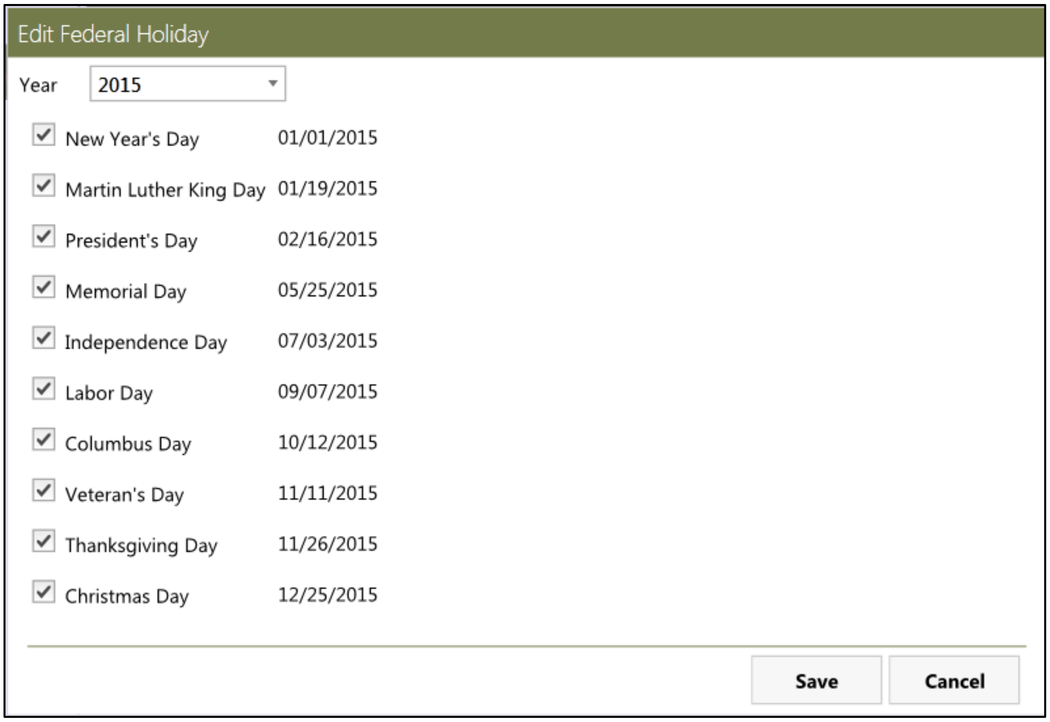

Figure 4-42: **Edit Federal Holidays** page

3. The check boxes indicate which holiday dates you would like to add to the clinic schedules. De-select any holidays dates that are not recognized as holidays for your clinic schedules (Figure 4-43).

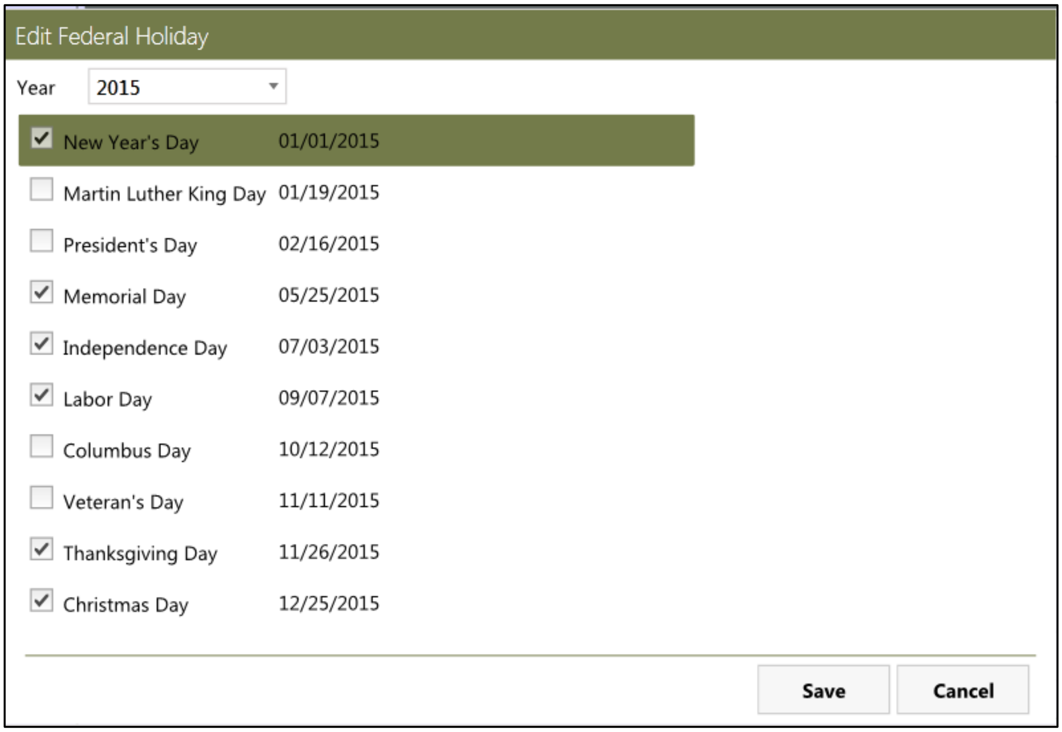

Figure 4-43: **Edit Federal Holidays** page – Deselected dates

4. Once you have completed your edit, click **Save** to confirm the changes.
5. The Federal Holidays page will now display the newly added holidays applied to the clinic schedules for your selected year. (Figure 4-44).

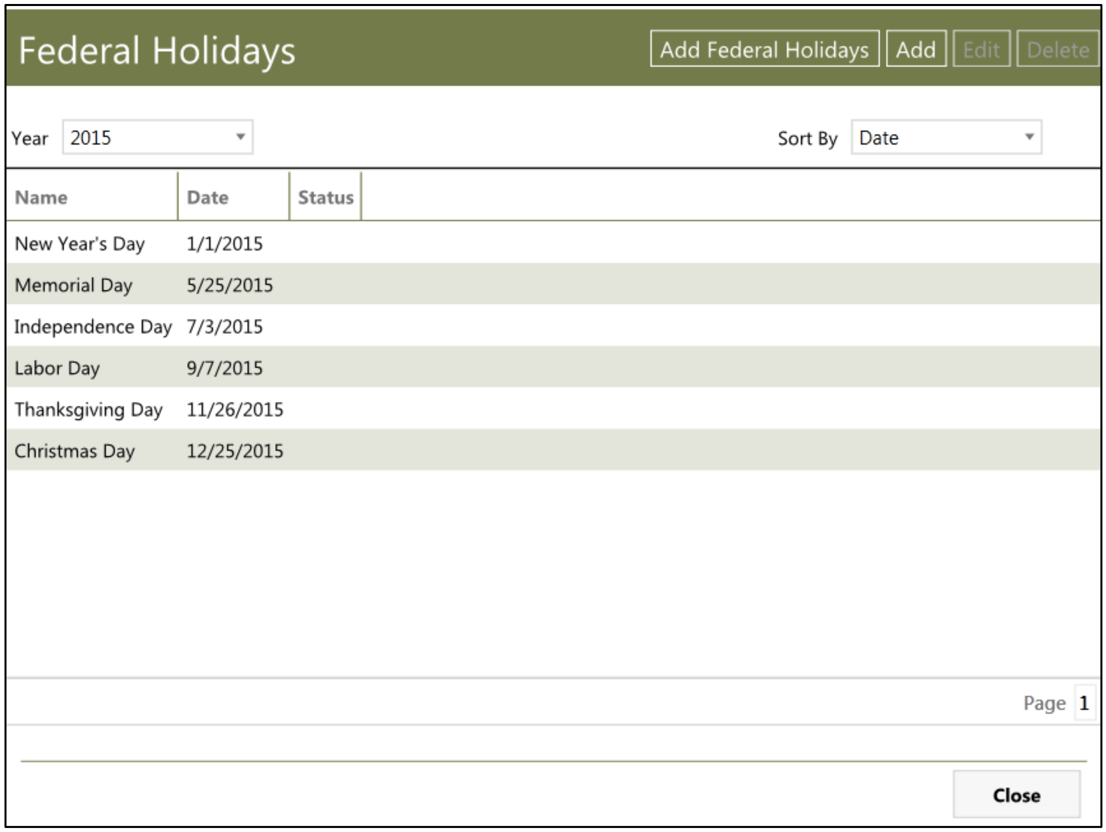

Figure 4-44: **Federal Holidays** listing page – new dates added

4.5.2 Add Site-Specific Holidays

To add non-federal holidays to clinic schedules:

1. Click **Add** in the upper right corner of the holiday page to display the **Add Holiday** form (Figure 4-41).

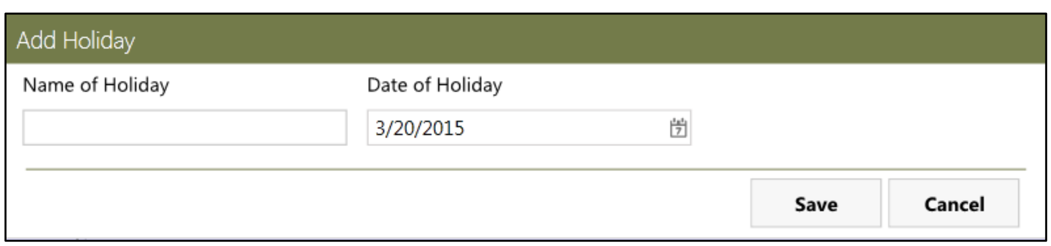

Figure 4-45: Add Holidays form

2. Type a name for the site-specific holiday in the **Name of Holiday** field and select the date that this holiday will occur.

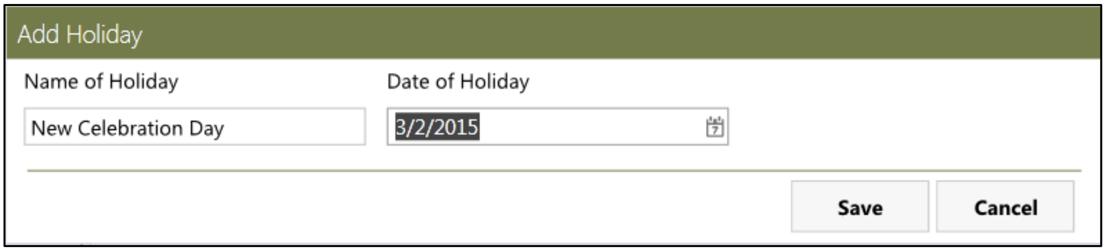

Figure 4-46: **Add Holiday** form – New Holiday

3. Once you have completed your edit, click **Save** to confirm the changes.
4. The Federal Holidays page will now display the newly added holiday for your selected year. (Figure 4-44).

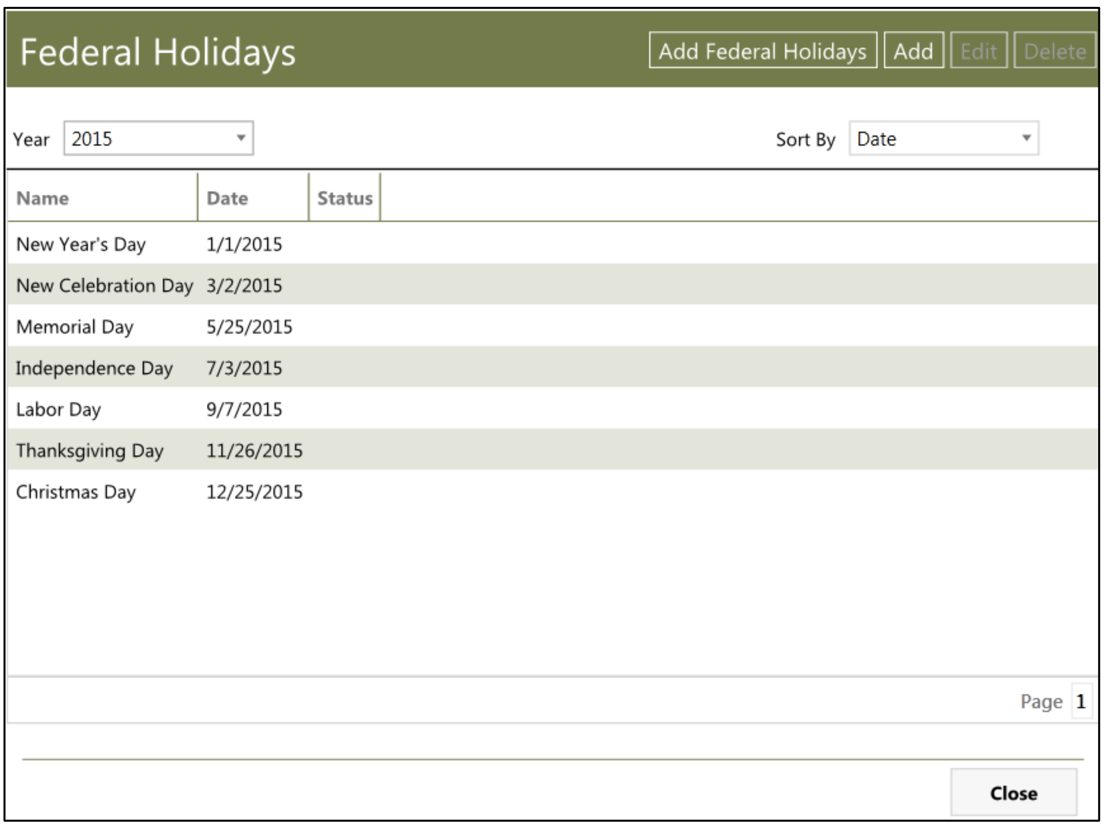

Figure 4-47: **Federal Holidays** listing page – New holiday added

4.5.3 Edit Holiday Name

To edit the name for an existing Holiday:

1. Select the Holiday you want to edit and click **Edit** in the upper right corner of the page. (Alternately, you can double-click the Access Type name.) A page similar to that shown in Figure 4-48 will display.

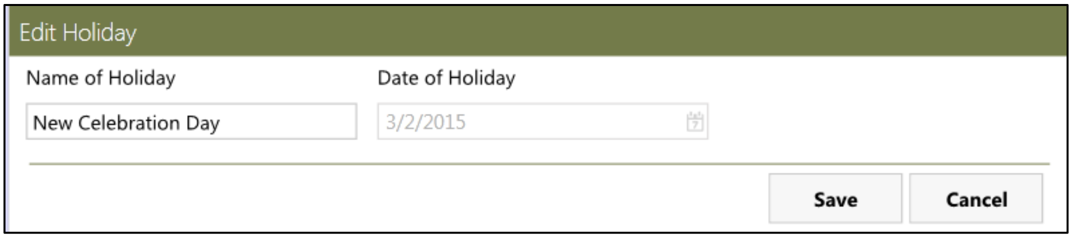

Figure 4-48: Editing an Access Type

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

4.5.4 Delete Holidays

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

1. Select the Holiday you want to remove and click **Delete** in the upper right corner of the page. (Alternately, you can double-click the Access Type name.) A page similar to that shown in Figure 4-49 will be displayed.

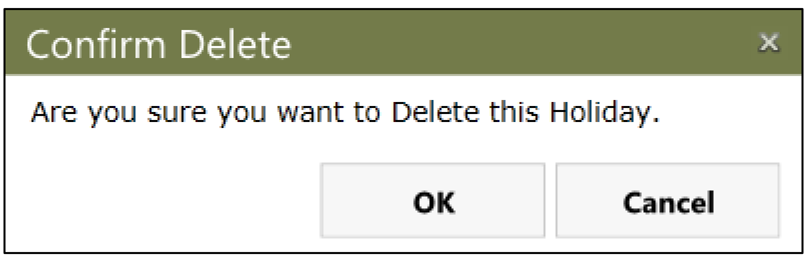

Figure 4-49: Confirm Holiday deletion

2. Click OK to confirm deletion or click **Cancel** to close the page without saving the change.

4.6 Resource Groups

Resource Groups are user-defined lists of clinic resources grouped together to streamline appointment scheduling for those resources. These resources can include providers (such as Dentists and Physicians), facilities, equipment, or other kinds of scheduled services. Note that a resource must first be on the Clinics list before it can be included in a Resource Group.

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

4.6.1 Add a Resource Group

To add a new Resource Group:

1. From the **Table Maintenance** page of the Settings module, select **Resource Groups** and click **View** (located to the left of the **Resource Groups** label). A **Resource Groups** listing page similar to the one shown in Figure 4-50 will display.

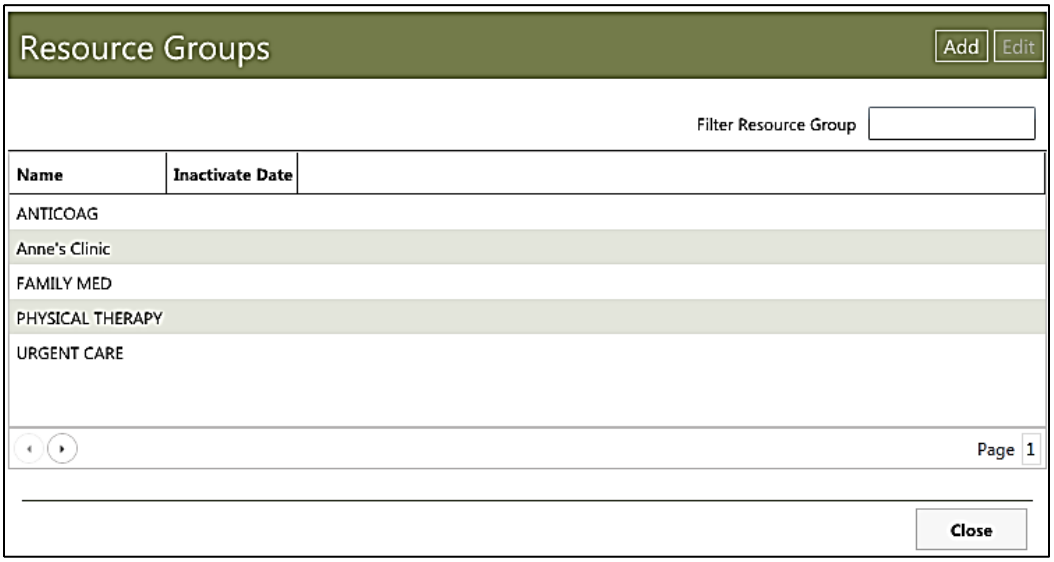

Figure 4-50: Resource Groups listing page

2. Click **Add** in the upper right corner of the Resource Groups listing page to display the **Resource Group** description page (Figure 4-51).

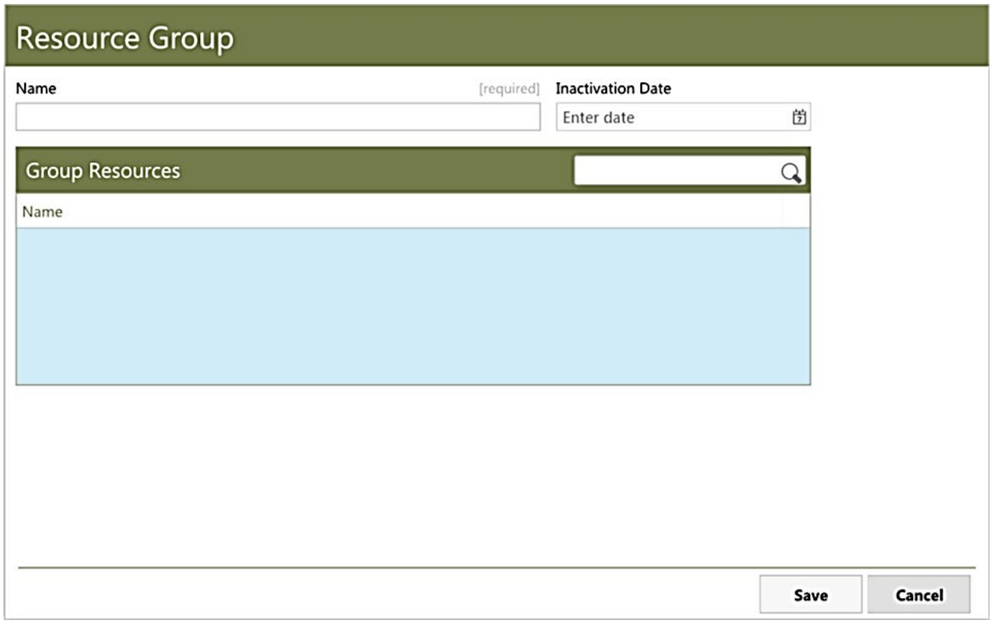

Figure 4-51: Resource Group description page

3. Type a name for the Resource Group in the **Name** field at the top of the page.

4. Use the **Group Resources** search field to find and select one or more clinics or resources to add to the Resource Group. In the example shown in Figure 4-52, a Resource Group named **XYZ GROUP** was created. The **AAA DEMO CLINIC** has been added to the group and **AAA MEDICAL CENTER** will be added once the mouse is clicked.

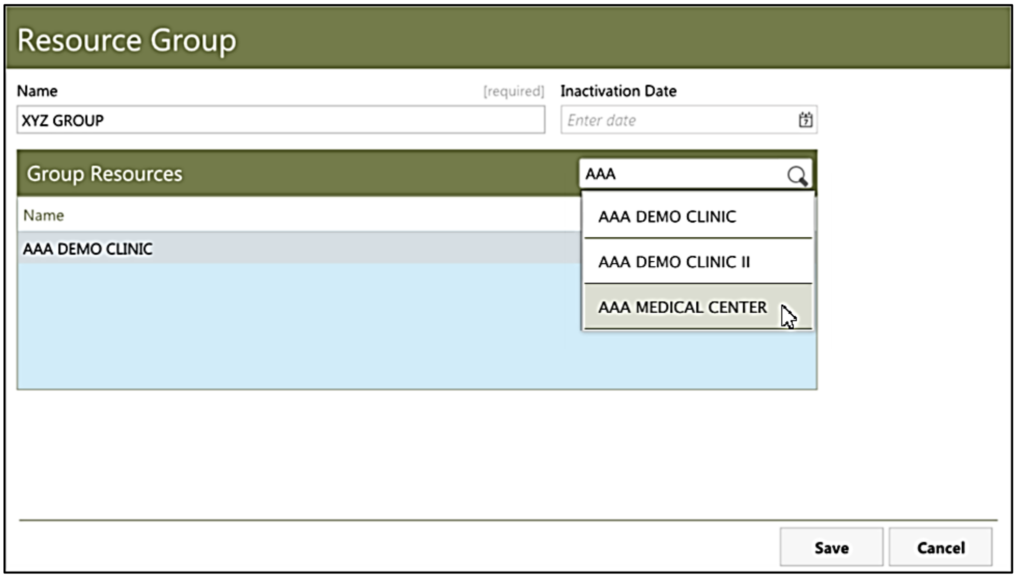

Figure 4-52: Adding a Group Resource

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

4.6.2 Edit a Resource Group

To edit an existing Resource Group:

1. From the **Table Maintenance** page of the Settings Module, select **Resource Groups** and click **View** in the upper right corner of the page. (Alternately, you can double-click the **Resource Groups** label.) If you have a large number of Resource Groups, you can use the **Filter Resource Group** field in the upper right corner of the page to assist in finding the desired group.

2. Select the Resource Group you want to edit, and then click **Edit** in the upper right corner of the page. (Alternatively, you can double-click the label for the selected Resource Group.) A Resource Group description page similar to that shown in Figure 4-53 displays.

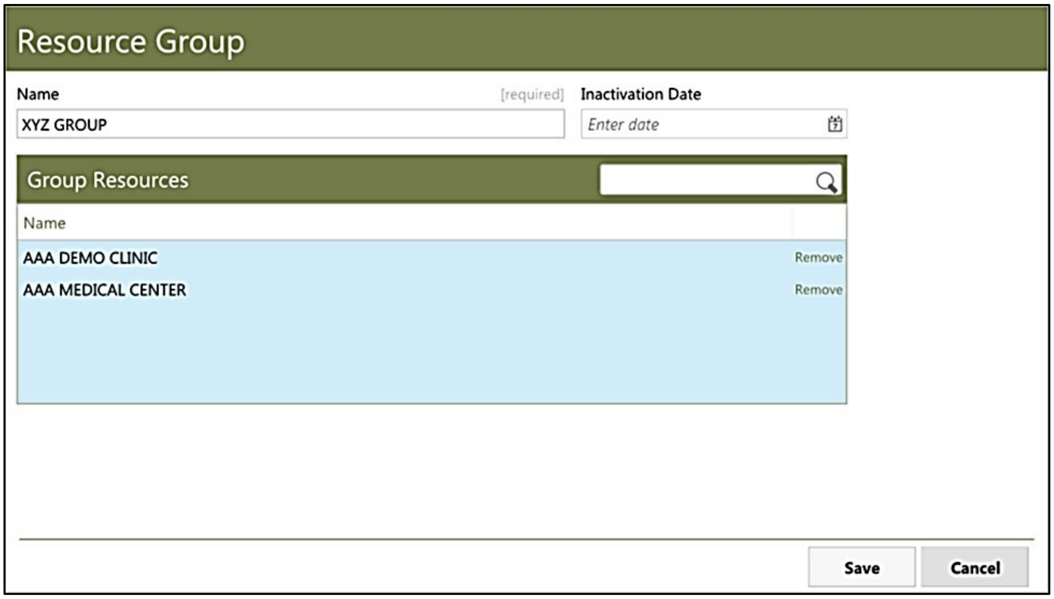

Figure 4-53: Resource Group description page ready to be edited

3. From this page, you can edit the **Name** of the Resource Group, add resources to the group as described in Section 4.6.1, or remove resources by clicking **Remove** to the right of the resource name.
4. Optionally, you can inactivate the Resource Group by entering a date in the **Inactivation Date** field. To re-activate a Resource Group, clear the date in this field.
5. When the desired changes are done, click **Save** to save your changes or click **Cancel** to close the page without saving your changes.

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

5.0 Scheduling Reports

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

5.1 Reports Module Overview

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

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

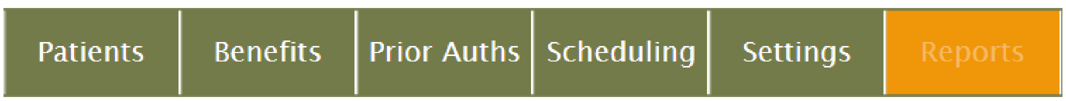

Figure 5-1: Taskbar with **Reports** module highlighted

5.2 Reports Toolbar

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

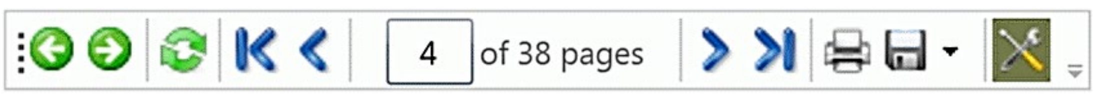

Figure 5-2: Reports Toolbar

5.2.1 Previous/Next Buttons

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

Figure 5-3: Previous/Next buttons

5.2.2 Refresh Button

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

Figure 5-4: Refresh button

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

5.2.3 Page Selection Buttons

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

Figure 5-5: Page Selection buttons

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

5.2.4 Print Button

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

Figure 5-6: Print button

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

5.2.5 Save Button

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

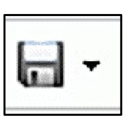

Figure 5-7: Save button

The following file formats are supported:

- Acrobat (PDF)

- CSV (comma delimited)
- Excel 97-2003
- TIFF

5.2.6 Show/Hide Parameters Button

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

Figure 5-8: Show/Hide Parameters button

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

5.3 Scheduling Report Types

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

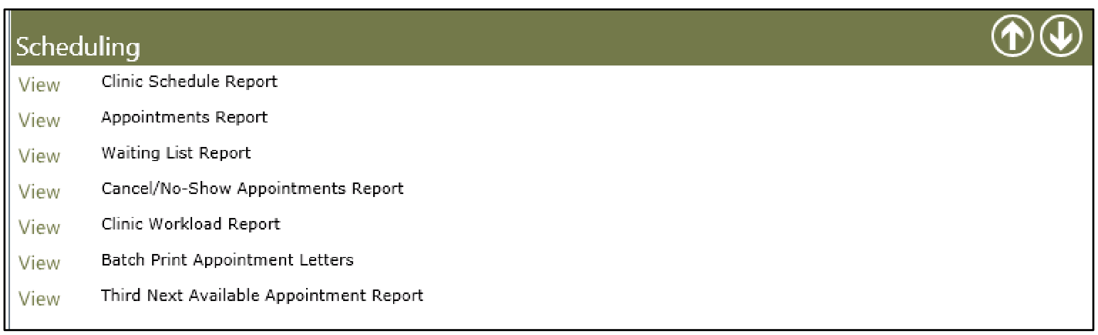

Figure 5-9: **Scheduling Reports** listing

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

5.4 Clinic Schedule Report

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

5.4.1 Clinic Schedule Report Parameters

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

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

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

5.4.2 Information in the Clinic Schedule Report

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

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

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

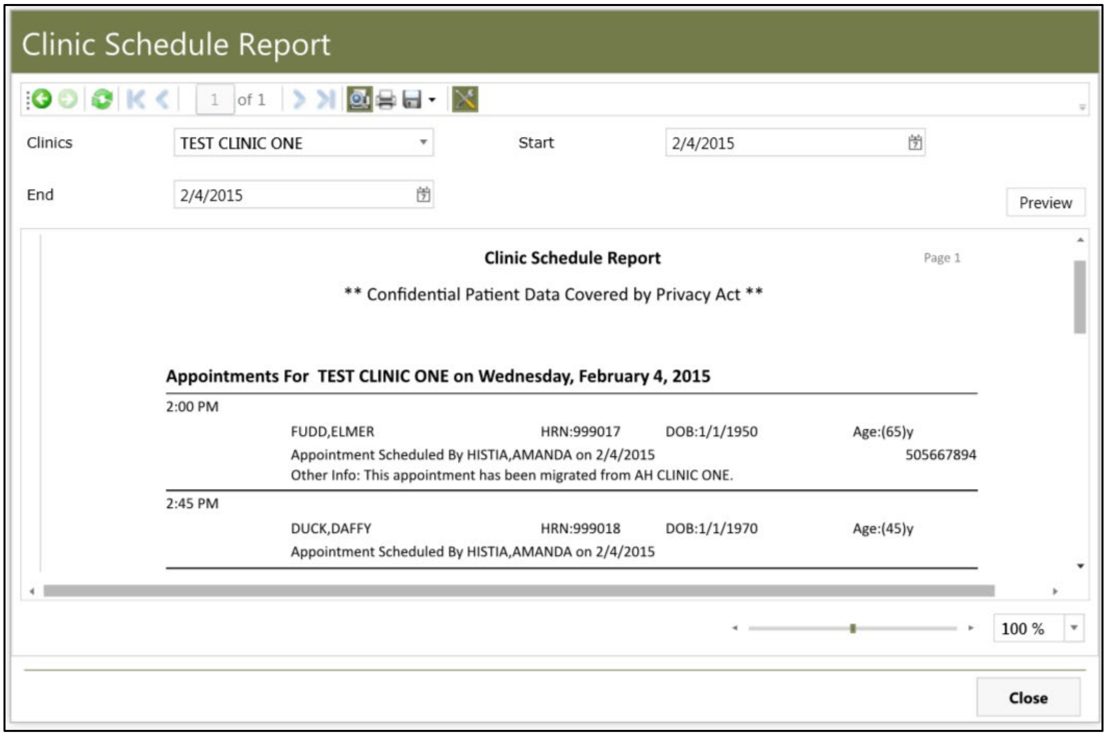

Figure 5-11: **Clinic Schedule Report** example

5.5 Appointments Report

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

5.5.1 Appointments Report Parameters

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

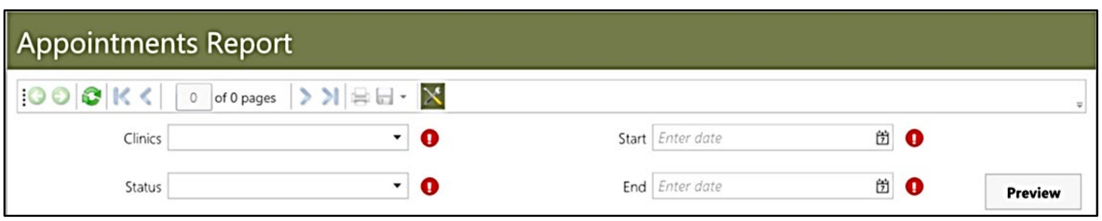

Figure 5-12: **Appointments Report** parameters

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

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

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

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

5.5.2 Information in the Appointments Report

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

- Clinic name
- Appointment day and date
- Time
- Patient name
- Patient HRN
- Scheduled by
- Status
- Check-in time and by whom
- Check-out time and by whom
- Other information such as notes, if entered

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

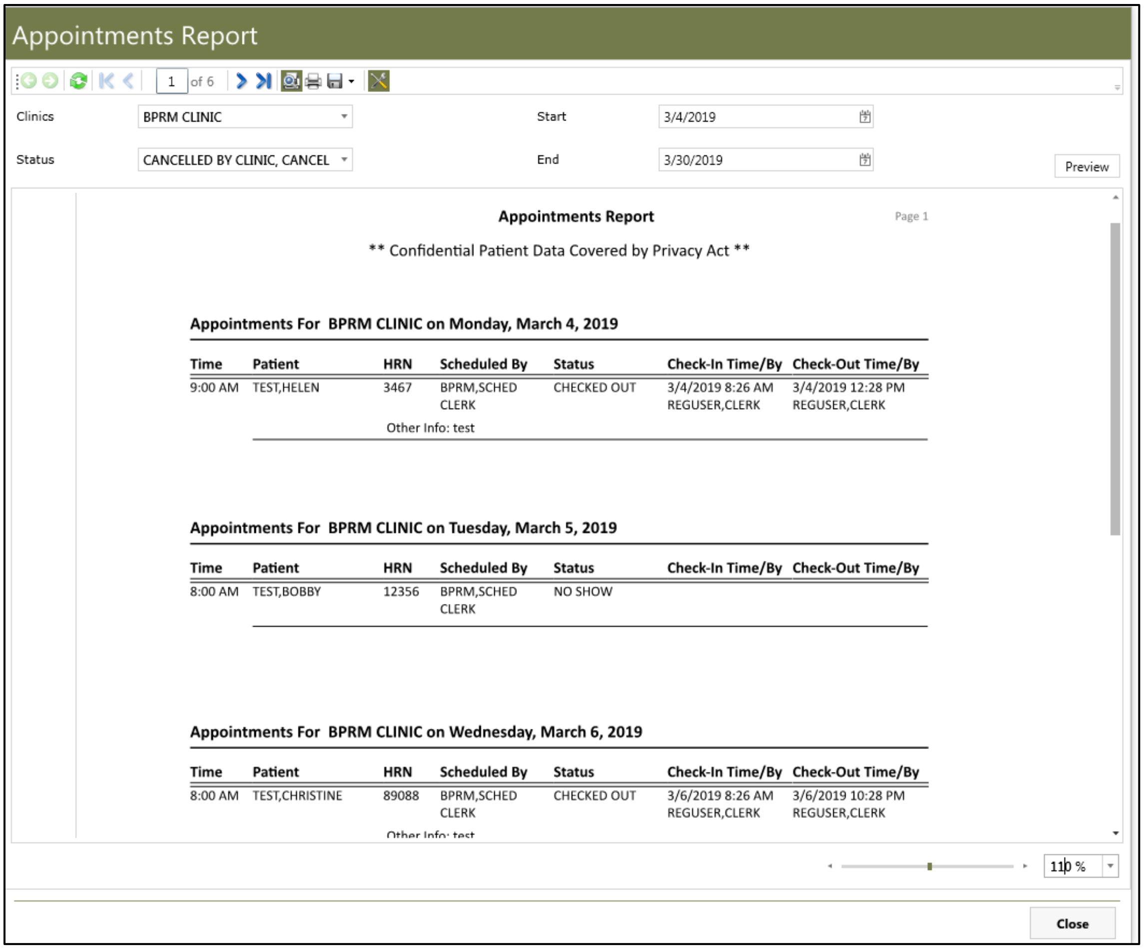

Figure 5-13: **Appointments Report** example

5.6 Waiting List Report

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

5.6.1 Waiting List Report Parameters

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

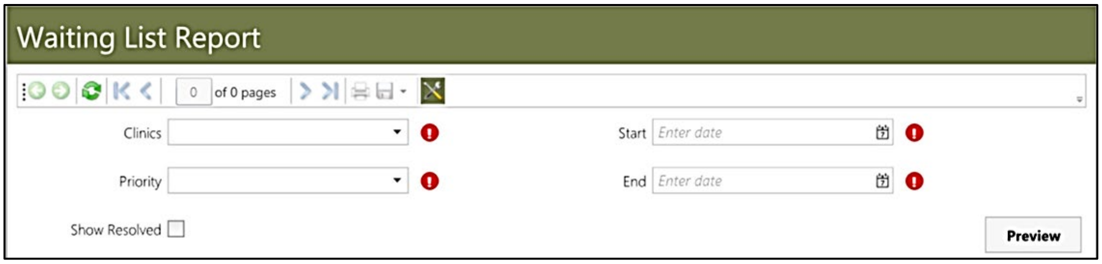

Figure 5-14: **Waiting List Report** parameters

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

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

- **None**
- **High**
- **Low**
- **Middle**

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

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

5.6.2 Information in the Waiting List Report

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

- Clinic name
- Patient name and HRN
- Patient home and work phone numbers
- Patient address
- Recall date
- Reason
- Resolution (if show resolved is selected)
- Priority
- Provider

- Comments (if any have been added)

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

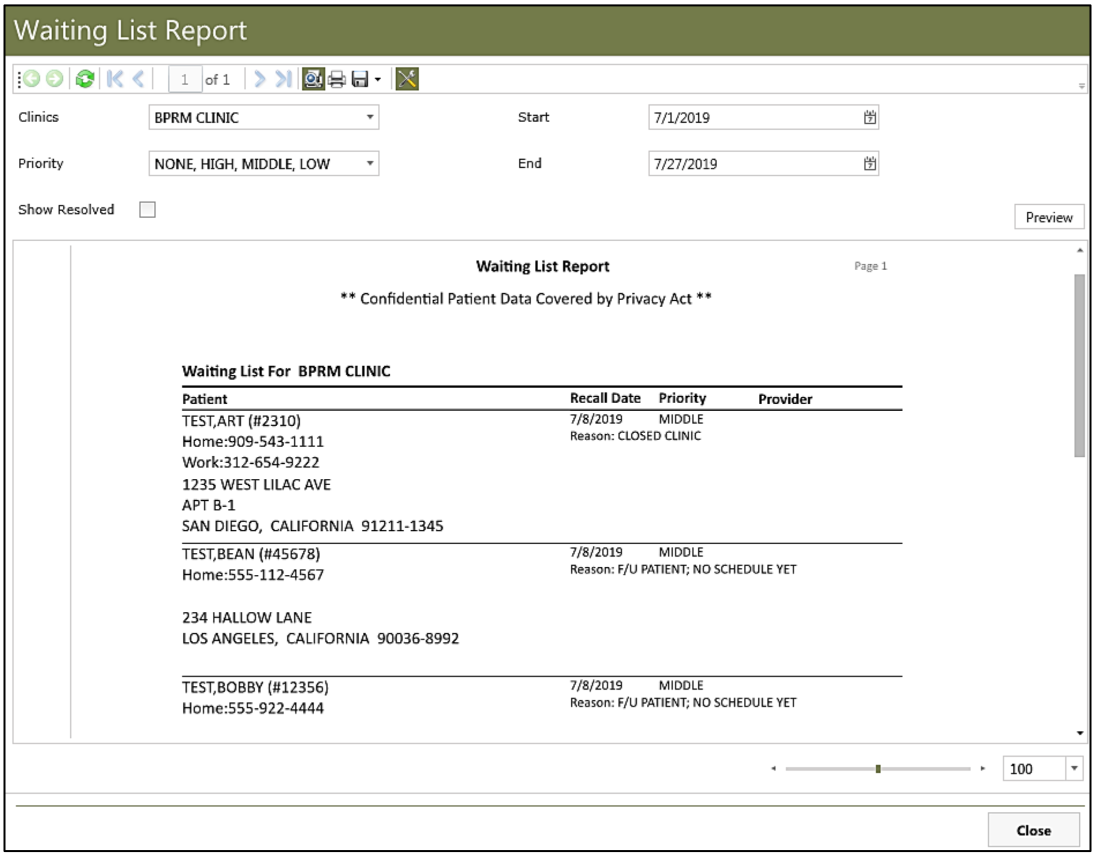

Figure 5-15: **Waiting List Report** example

5.7 Cancel/No-Show Appointments Report

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

5.7.1 Cancel/No-Show Appointments Report Parameters

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

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

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

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

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

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

5.7.2 Information in the Cancel/No-Show Appointments Report

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

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

- Cancellation reason (if given)
- Other remarks (if entered)

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

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

5.8 Clinic Workload Report

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

5.8.1 Clinic Workload Report Parameters

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

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

5.8.2 Information in the Clinic Workload Report

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

The summary view includes this information:

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

The statistical view includes this information:

- Clinic name
- Number of visits for the specified date range
- Number of visits for the same date range for the previous years
- Net change in number of visits
- Percentage of change in number of visits

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

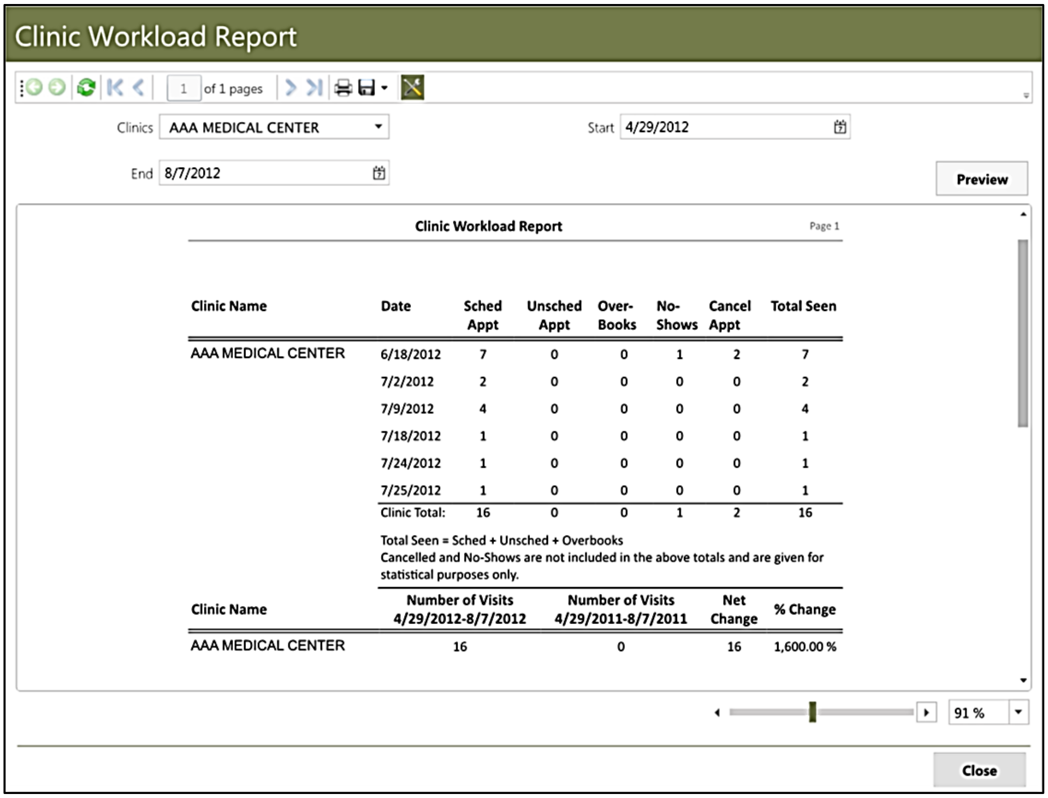

Figure 5-19: **Clinic Workload Report** example

5.9 Batch Print Appointment Letters

The **Batch Print Appointment Letters** option in the Reports module provides a way to print one or more pre-configured appointment letters to be sent to patients. These letters can serve as reminders about upcoming or missed appointments, and are configured in the Settings module described in Section 4.1.7.

5.9.1 Batch Print Appointment Letters Parameters

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

Figure 5-20: **Batch Print Letters** parameters

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

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

5.9.2 Batch Print Appointment Letters

To batch print one or more appointment letters:

1. Open the **Batch Print Appointment Letters** page as described in Section 5.9
2. In the **Clinics** list, select one or more clinics for which you want to print appointment letters.
3. In the **Start** and **End** date fields, enter the start and end dates for the time period the appointment letters should cover.
4. Use the **Type** list to select the type of letter you want to print.
5. Click **Preview** to generate the appointment letters and display a preview of them. Use the left and right arrows in the toolbar to navigate from one letter to the next.

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

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

5.10 Third Next Available Appointment Report

The Next Available Appointment Report provides a listing of active clinics noting the number of days until an appointment is available. The logic looks for the third next available appointment. This is considered to be an accurate indicator of appointment availability.

5.10.1 Third Next Available Appointment Report Parameter

When you open the report, select specific clinics or use the select all option. See Figure 5-21.

Figure 5-21: Third Next Available Report

5.10.2 Information on the Third Next Available Appointment Report

The report includes the following:

- Clinic Name
- Date of Third Next Available Appointment
- Number of days for the Third Next Available Appointment

Figure 5-22: Third Next Available Report information display

6.0 Appointments Tab in Patients Module

The **Appointments** tab (Figure 6-1) shows a comprehensive listing of appointments for the selected patient.

Figure 6-1: **Appointments** tab

An example of the **Appointments** tab page is shown in Figure 6-2.

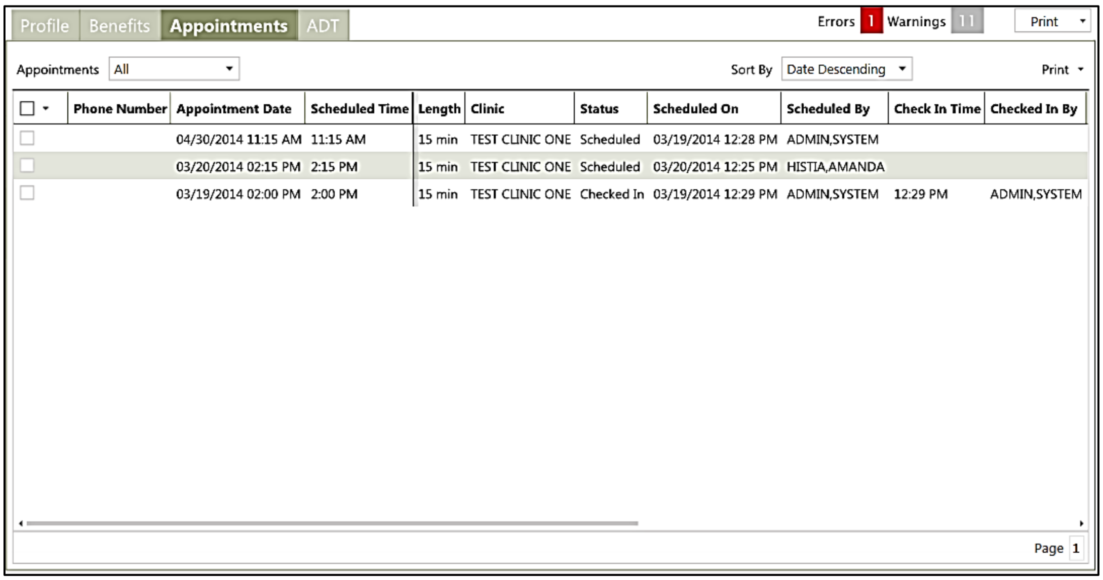

Figure 6-2: **Appointments** tab page example

6.1 Filtering and Printing

The **Appointments** tab page provides filters to quickly find appointments by various criteria, to sort them, and to print standard appointment-related letters to be sent to the patient.

6.1.1 Appointments Filter

Use the **Appointments** filter list (Figure 6-4) to show All appointments, Past appointments only, or Future appointments only.

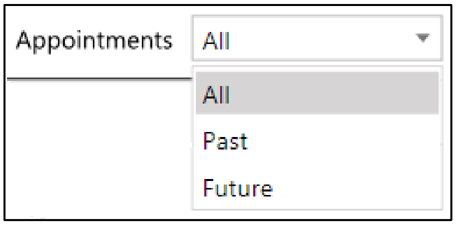

Figure 6-3: Appointments filter list box

6.1.2 Sort by Filter

Use the **Sort By** filter list (Figure 6-4) to sort the listed appointments by descending or ascending date, or by clinic.

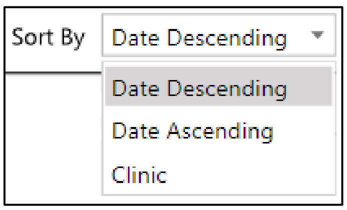

Figure 6-4: Sort By filter list box

6.1.3 Letter Printing Options

Click **Print** on the upper right of the Appointments page to display the listing shown in Figure 6-5.

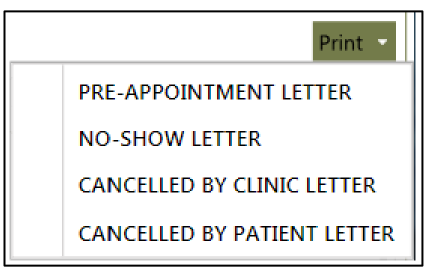

Figure 6-5: Print list box

Use the Print list box to print the following patient letters:

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

You must first select one or more specific appointments before you can print the related letter(s). For example, in order to print a No-show Letter, you must first select one or more appointments for which the status is shown as No Show. To select an appointment, enable the check box on the left side of the appointment listing. See Section 6.1.4 for information about finding and selecting appointments based on their status.

The text contained within the available letters is controlled through the Letters tab on the Clinic Configuration page for each clinic.

See Section 4.1.7 for more information about clinic configuration options and the Letters tab.

6.1.4 Finding and Selecting Appointments by Status

The **Appointments** tab page also provides a convenient way to select all appointments of a particular status. The **Status** filter list (Figure 6-6) is located in the upper left corner of the **Appointments** tab page as part of the first column.

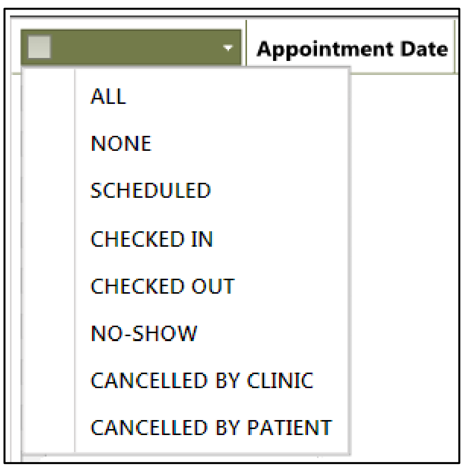

Figure 6-6: **Status** filter list

Select any of the options shown on the list to highlight all appointments that fit the selected criteria. This also causes those appointments to be selected via the check box, which is useful for printing patient letters as described in Section 6.1.3.

6.2 Appointment Information Listed

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

- Phone Number
- Appointment Date
- Scheduled Time

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

6.3 Managing Patient Appointments

The **Appointments** tab provides a streamlined way to check a patient in or out of an appointment, or to change the status of an appointment. Right-click an appointment in the **Appointments** tab listing to select the appointment and display a context menu offering these options:

- **Check-In Appointment**
- **Check-Out Appointment**
- **Cancel Appointment**
- **No-Show Appointment**
- **Fix Appointment**

Figure 6-7 shows an example of the context menu.

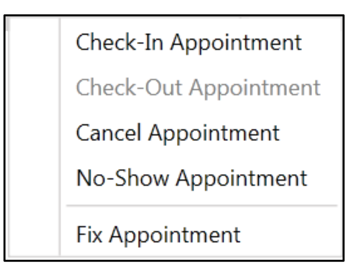

Figure 6-7: **Appointments** Tab context menu

The options available from this context menu will vary, depending on the current status of the selected appointment. Only one appointment can be selected at a time to use the context menu options. Choose any of the active options to update the appointment status. See section 3.5.2 for more information on the **Fix Appointment** option.

Appendix A: Rules of Behavior

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

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

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

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

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

A.1 All RPMS Users

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

A.1.1 Access

RPMS users shall:

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

RPMS users shall not

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

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

A.1.2 Information Accessibility

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

RPMS users shall

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

A.1.3 Accountability

RPMS users shall:

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

A.1.4 Confidentiality

RPMS users shall:

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

RPMS users shall not

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

A.1.5 Integrity

RPMS users shall:

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

RPMS users shall not:

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

A.1.6 System Logon

RPMS users shall:

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

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

A.1.7 Passwords

RPMS users shall:

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

RPMS users shall not:

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

A.1.8 Backups

RPMS users shall:

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

A.1.9 Reporting

RPMS users shall:

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

RPMS users shall not:

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

A.1.10 Session Timeouts

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

RPMS users shall:

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

A.1.11 Hardware

RPMS users shall:

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

RPMS users shall not:

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall

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

A.1.13 Remote Access

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

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

Remote RPMS users shall:

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

Remote RPMS users shall not:

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

A.2 RPMS Developers

RPMS developers shall:

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

RPMS developers shall not:

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

A.3 Privileged Users

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

Privileged RPMS users shall:

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and backup files.

- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator's database.
- Shall follow industry best standards for systems they are assigned to, and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not:

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

Glossary

Access Block

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

Access Group

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

Access Type

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

Appointment Slots

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

ASUFAC Number

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

Health Record Number

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

Overbooking

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

Preferred Resource List

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

Resource Group

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

Waiting List

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

Acronym List

Acronym	Definition
CSV	Comma-Separated Value
DOB	Date of Birth
EHR	Electronic Health Record
GUI	Graphical User Interface
HHS	Department of Health and Human Services
HRN	Health Record Number
IHS	Indian Health Service
PCC	Patient Care Component
PDF	Portable Document Format
PWH	Patient Wellness Handout
RPMS	Resource and Patient Management System
SSN	Social Security Number

Contact Information

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

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

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

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