



RESOURCE AND PATIENT MANAGEMENT SYSTEM

# **Patient Information Management System (PIMS)**

Scheduling  
(BSD)

**User Manual**

Version 5.3 Patch 1009  
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## Preface

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

# Table of Contents

<b>1.0</b>	<b>Introduction.....</b>	<b>1</b>
<b>2.0</b>	<b>Orientation .....</b>	<b>2</b>
2.1	How to Use This Manual .....	2
2.2	Online Help.....	2
2.3	Note to Users with “C-WYSE” Terminal Settings .....	3
<b>3.0</b>	<b>Appointment List (AL).....</b>	<b>4</b>
<b>4.0</b>	<b>Appointment Management (AM).....</b>	<b>7</b>
4.1	Check In (CI) .....	9
4.2	Walk In (WI) .....	11
4.3	Change Patient (PT).....	12
4.4	Check Out (CO).....	12
4.5	Expand Entry (EX).....	14
4.6	Change Clinic (CL).....	15
4.7	Cancel Appointment (CA).....	16
4.8	Make Appointment (MA) .....	17
4.9	Change Date Range (CD) .....	19
4.10	No Show (NS).....	20
4.11	Delete Check Out (DE).....	20
4.12	Appt Profiles (AP) .....	21
4.13	Patient Registration (PR).....	22
4.14	Add/Edit Other Info (OI).....	23
4.15	Ancillary Tests (AT) .....	24
4.16	Update PCP (PC) .....	25
4.17	Health Summary (HS).....	25
4.18	Rx Profiles (RX).....	27
<b>5.0</b>	<b>Chart Requests (CR) .....</b>	<b>28</b>
<b>6.0</b>	<b>List Patient Check-In Status (CHK).....</b>	<b>30</b>
<b>7.0</b>	<b>Display a Patient's Appointments (DA) .....</b>	<b>32</b>
<b>8.0</b>	<b>Multiple Appointment Booking (MB).....</b>	<b>34</b>
<b>9.0</b>	<b>Multiple Clinic Display/Book (MC).....</b>	<b>38</b>
<b>10.0</b>	<b>Month-at-a-Glance Display (MD) .....</b>	<b>42</b>
<b>11.0</b>	<b>Original Clinic Setup Display (OAS) .....</b>	<b>44</b>
<b>12.0</b>	<b>Print Scheduling Letters (PL) .....</b>	<b>46</b>

<b>13.0</b>	<b>Print Custom Letter(s) (PCL)</b> .....	<b>48</b>
<b>14.0</b>	<b>View Provider's Schedule (PS)</b> .....	<b>50</b>
<b>15.0</b>	<b>Waiting List Enter/Edit (WL)</b> .....	<b>52</b>
<b>16.0</b>	<b>Primary Care Provider Menu (PCP)</b> .....	<b>57</b>
16.1	Add/Edit Provider Change Reasons (AER) .....	57
16.2	Primary Care Providers List (PCL) .....	58
16.2.1	Change PCP by Patient.....	59
16.2.2	Change PCP by Community.....	60
16.2.3	Change PCP for All .....	61
16.2.4	Print List .....	61
16.3	Set Up Primary Care Teams (STM).....	62
16.4	Update Primary Care Provider (UPC).....	63
<b>17.0</b>	<b>Patient Mini Registration (PMR)</b> .....	<b>65</b>
<b>18.0</b>	<b>Reports Menu (Scheduling) (SCR)</b> .....	<b>69</b>
18.1	Address/Insurance Update (AIU).....	69
18.2	Chart Locator (CHL) .....	71
18.3	List Charts Requested (LCR) .....	73
18.4	List Routing Slips Printed (LRS).....	75
18.5	File Room List (FRL) .....	77
18.6	Health Summaries by Clinic (HSC).....	79
18.7	Radiology Pull List (RPL) .....	80
18.8	Routing Slips (RS).....	82
18.9	Appointment Management Reports (AMR).....	84
18.9.1	Appointment Management Statistics .....	85
18.9.2	Appointments Requiring Action .....	88
18.9.3	Uncoded Checked-in Appointments .....	90
18.9.4	Eligibility Appointment List .....	91
18.9.5	Cancelled Appointment Listing.....	93
18.9.6	Online Help (Report Descriptions) .....	95
18.10	Clinic Availability Reports (CAR).....	96
18.10.1	Clinic List (Day of Week).....	97
18.10.2	Month-at-a-glance Display .....	99
18.10.3	Clinic Availability Report .....	100
18.10.4	Clinic Capacity Report.....	102
18.10.5	Next Available Appointment Report.....	105
18.10.6	Number of Available Appointments .....	106
18.10.7	Number of Appointments Made & Wait Times .....	108
18.10.8	Clinic Abbreviations.....	110
18.10.9	Online Help (Report Descriptions) .....	111
18.11	Clinic Profile (CPF).....	112
18.12	No-Show Reports (NSR) .....	115

18.12.1	No-Show Report .....	115
18.12.2	Frequent No-Shows.....	117
18.12.3	Online Help (Report Descriptions) .....	119
18.13	Waiting List Report (WLR) .....	120
18.14	Workload/Statistical Reports (WSR) .....	124
18.14.1	Statistics by Type of Appointment .....	124
18.14.2	Scheduled vs. Patients Seen .....	127
18.14.3	Detailed Appointment Listing.....	130
18.14.4	Monthly Workload Comparisons .....	133
18.14.5	Clinic Workload Report .....	135
18.14.6	Turn Around Time Report.....	137
18.14.7	Routing Slip/Chart Request Report.....	139
18.14.8	On-line Help (Report Descriptions) .....	141
<b>19.0</b>	<b>Supervisor Menu (Scheduling) (SCS) .....</b>	<b>142</b>
19.1	Application Coordinator Menu (ACM).....	143
19.1.1	Add Cancellation Reasons (ACR) .....	143
19.1.2	Add/Edit a Holiday (AEH) .....	145
19.1.3	Add Waiting List Reasons (AWR) .....	147
19.1.4	Change Patterns to 30-60 (CHG).....	148
19.1.5	Create Visit Status Report (CVS) .....	150
19.1.6	Edit Scheduling Parameters (ESP) .....	152
19.1.7	Inactivate/Reactivate Clinic (IRC) .....	155
19.1.8	View Scheduling Keys (KEY) .....	158
19.1.9	Users with Overbook to All Clinics (OVB) .....	159
19.1.10	Purge Scheduling Data (PSD).....	161
19.1.11	Remap Clinic (RMC).....	163
19.1.12	Scheduling Templates (SCT) .....	165
19.1.13	View Event Driver (VED) .....	167
19.2	Clinic Profile (CPF).....	168
19.3	Cancel/Restore Clinic Availability (CRA).....	170
19.4	Display Scheduling User (DSU) .....	173
19.5	Enter/Edit Letters (EEL).....	174
19.6	List Appts Made by Clinic (LAM) .....	177
19.7	Month-at-a-Glance Display (MON).....	179
19.8	Set Up a Clinic (SET) .....	181
19.8.1	Setting up a clinic options .....	182
19.8.2	Setting up clinic availability .....	190
<b>20.0</b>	<b>Printing PCC+ Forms .....</b>	<b>192</b>
<b>21.0</b>	<b>Glossary .....</b>	<b>194</b>
<b>22.0</b>	<b>Appendix A: RPMS Rules of Behavior .....</b>	<b>197</b>
22.1	All RPMS Users .....	197

22.1.1	Access .....	197
22.1.2	Information Accessibility .....	198
22.1.3	Accountability .....	198
22.1.4	Confidentiality .....	199
22.1.5	Integrity .....	199
22.1.6	System Logon .....	200
22.1.7	Passwords .....	200
22.1.8	Backups .....	201
22.1.9	Reporting .....	201
22.1.10	Session Timeouts .....	202
22.1.11	Hardware .....	202
22.1.12	Awareness .....	202
22.1.13	Remote Access .....	202
22.2	RPMS Developers .....	203
22.3	Privileged Users .....	204
<b>23.0</b>	<b>Contact Information .....</b>	<b>206</b>

## 1.0 Introduction

The PIMS user manual is divided into three modules, ADT, Scheduling and Sensitive Patient Tracking.

The information gathered through the Scheduling package is available online to a wide range of users throughout the medical facility. Important features of the Scheduling module include clinic setup, appointment management and file room reports for pulling paper charts. Some of the reports available are clinic availability statistics, workload analysis, appointment listings and patient letters.

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

## 2.0 Orientation

### 2.1 How to Use This Manual

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

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

### 2.2 Online Help

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

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

```
Sort by TREATING SPECIALTY: ?  
  CHOOSE FROM:  
          04 SURGERY  
          11 PEDIATRICS  
          18 UROLOGY  
Sort by TREATING SPECIALTY:
```

Figure 2-1: Example of obtaining a help message

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

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



## 2.3 Note to Users with “C-WYSE” Terminal Settings

Most options in PIMS are written using list manager. Certain terminal type settings do not work using this browse function. To see if you are set with a “C-WYSE” terminal type and to fix it, follow these steps: At any menu in RPMS, type TBOX to access the User’s Toolbox menu. From that menu, select *Edit User Characteristics*. The first question will be your terminal type. If the default answer contains the term “C-WYSE” change it to “C-VT220.” A ScreenMan data entry screen will now open. Close it by pressing the F1 key once and then the E key. That’s it.

### 3.0 Appointment List (AL)

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

#### Running an Appointment List

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

```

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

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

Select Scheduling Menu Option: AL

```

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

2. If you are a multiple division site (hospital with outlying clinics), type the division name or press the Enter key for all divisions at the "Select division:" prompt. Type ?? at the "Select division:" prompt for a list of available options.
3. Type the name of the clinic or press the Enter key for all clinics at the "Select clinic:" prompt. Type ?? at the "Select Clinic:" prompt for a list of available options. You can enter more than one clinic by typing additional clinics at the "Select Another Clinic:" prompt.
4. When you have finished entering clinics, you may press the Enter key at a blank "Select Another Clinic:" prompt. You can also enter a principal clinic name to print out all clinics grouped under that heading.

5. Type the date at the “For Date:” prompt. Type ?? at the “For Date:” prompt for a description of valid dates.

```
Select Scheduling Menu Option: AL

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

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

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

6. Type **Y** or **N** to the prompts that follow to customize your listing. You can press the Enter key to accept the default entry.
7. Type **B** (browse onscreen) or **P** (print on paper) at the “Select One of the Following:” prompt. If you select **P**, type answers to the prompts that follow. If you select **B**, the list will appear on the screen (Figure 3-4).

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

Select one of the following:

    B          BROWSE ON SCREEN
    P          PRINT ON PAPER

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

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

```
Appointment List           Mar 14, 2007 08:34:12           Page:    1 of    2
      Confidential Patient Data Covered by Privacy Act
Time  Patient Name          HRCN      DOB (Age)          Lab@    X-Ray@    EKG@
      Insurance & Appointment Information

Appointments for GEN-OTT clinic on Jan 29, 2007
=====
3:00 PM (15 Min)  Checked in at 1:31 P(MEDI)
      WILLIAMS,MARK A          #123456  10/3/1968 (38Y)
      (MCR/MCD/
      Current Community: SITKA

4:00 PM (15 Min)  Checked in at 3:06 P(Outpatient)
      * SMITH,AARON           #148311  11/25/1947 (59Y)
      (MCR)
      Current Community: SALINA
      Enter ?? for more actions

Select Action:Quit//
```

Figure 3-4: Sample appointment list

## 4.0 Appointment Management (AM)

Use this option to perform appointment based functions for a selected patient or clinic. Functions include such things as make appointment, cancel, view, check in and check out.

If a patient is selected, all appointments for the selected patient within the designated time frame will be displayed. The beginning date of the report range is determined by the Appt Search Threshold parameter in the Scheduling Parameters (today's date minus the parameter entry), and the ending date will be 999 days in the future.

If selecting a clinic, you will be prompted for the date range of the display. Only clinic appointments within the designated time frame are displayed. Following is a list of actions that may be accomplished through the *Appointment Management Screen*.

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

```

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

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

Select Scheduling Menu Option: AM

```

Figure 4-1: Managing appointments (step 1)

2. Type a specific patient or clinic name at the "Select Patient name or Clinic name:" prompt. You can type a portion of a patient or clinic name and the system will give you the closest matches to your request. Select by number then type **Y** or **N** at the "OK?" prompt to either confirm or reject your selection. To quickly select a clinic, you can type a "**C.**" then the clinic name, no space after the period. This will bypass trying to find a patient by that name.

- If you are selecting a clinic, type the beginning date of the search at the “Select Beginning Date:” prompt. Then type the ending date of the search at the “Select Ending Date:” prompt.

```

APPOINTMENT MANAGEMENT

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

Select Patient name or Clinic name: C.CARDIO

Searching for a Patient

Searching for a Clinic

1  CARDIOLOGY-KATE          DOCTOR, KATHRYN
2  CARDIOLOGY-JOE          DOCTOR, JOSEPH
CHOOSE 1-2: 1

CARDIOLOGY-KATE          DOCTOR, KATHRYN
...OK? Y

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

```

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

- Following is an example of selecting by patient:

```

Select Patient name or Clinic name: PATIENT

Searching for a Patient

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

```

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

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

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

+ Enter ?? for more actions

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

Select Action:

Figure 4-4: Appointment Management Module (excerpt)

## 4.1 Check In (CI)

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

5. Type **CI** at the "Select Action:" prompt.
6. Type the number of the appointment you want to check in at the "Select Appointment:" or "Select Patient:" prompt. A brief summary of patient's appointment information will be displayed.
7. Type the date and time the patient checked in. If the patient is checking in now, just press the Enter key to accept the current date and time at the "Checked-In:" prompt.
8. If the Other Info at Check In parameter is set to yes, type in the reason for the appointment at the "Other Info:" prompt. This entry is free text. The system will then ask you to confirm the check-in time.
1. If the clinic is set up to create visits at check-in, you will be asked to supply the clinic code and provider name. Based on how the clinic was set up, the default answers may be displayed for you.

2. If there are more than 1 visits that match the visit being created for that day, you will be asked to attach the check in to an existing visit (which are displayed) or create a new
3. If the clinic uses PCC+, you will be asked to print the PCC+ form at this time. Simply follow the PCC+ questions as you would inside the PCC+ application.

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

```

Select Action: CI
Select Appointment(s): (10-18): 11
  11  8618 DEMO,Ventura      10/17/2001@09:00  No Action Taken
      Last Registration Update: JAN 17, 2001
CHECKED-IN: OCT 09, 2002@08:34// [ENTER]
CLINIC CODE for VISIT: 02// [ENTER]
VISIT PROVIDER: DOCTOR,B A// [ENTER]

  PATIENT: PATIENT,DEMO has one or more VISITs on this date.
  If one of these is your visit, please select it

1  TIME: 08:00 LOC: CIMH TYPE: I CAT: A CLINIC: GENERAL DEC: 5 VCN:54614.4A
  Hospital Location: GEN-OTT
  Provider on Visit: SMITH,BONNIE
2  TIME: 08:30 LOC: CIMH TYPE: I CAT: A CLINIC: GENERAL DEC: 2
  Hospital Location: GEN-OTT
  Provider on Visit: SMITH,BONNIE
3  Create New Visit

Select: (1-3):

Visit Created.
Provider added to visit.

```

Figure 4-5: Checking in a patient

```

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

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

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

```

Figure 4-6: Displaying a checked-in patient (106290 Demo, Patient)



## 4.2 Walk In (WI)

Use this option to schedule a patient who has come into the clinic without an appointment and will be seen by a provider. It combines the functions of making an unscheduled appointment and checking in the patient.

4. Type **WI** at the “Select Action:” prompt.
5. Type the name of the patient or clinic you want to check in at the “Select Patient:” or “Select Clinic:” prompt. A brief summary of patient information will be displayed.
6. Type the appointment time or press the Enter key to accept the current time and date at the “Appointment Time:” prompt.
7. Type in the reason for the appointment at the “Other Info:” prompt. This entry is free text. The system will then ask you to confirm the check-in time.
8. Type **Y** at the “Okay to Print a Routing Slip in Medical Records Now?” prompt, if you need the paper chart pulled. Type **N** if you don’t need it.
  - a. If you selected Y, you will be prompted to type the name of the printer in medical records where the routing slip should be printed, and then type Y or N at the “Do You Want Your Output Queued” prompt.
  - b. The walk-in is now logged into the system.
9. As with regular check-in, if your system is set up to create visits at check-in and print PCC+ forms, those questions will be asked. See the previous Check-in section for details.

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

APPOINTMENT TIME: NOW// [ENTER]
OTHER INFO: high blood pressure check

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

FILE ROOM PRINTER: MIH108

Do you want your output QUEUED? Y
```

Figure 4-7: Checking in a walk-in

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

### 4.3 Change Patient (PT)

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

1. Type **PT** at the “Select Action:” prompt.
2. Type the name of the patient you want, and the system will bring up the information on your patient.

### 4.4 Check Out (CO)

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

1. Type **CO** at the “Select Action:” prompt.
2. Type the appointment number needing check out at the “Select Appointment(s):” prompt.
3. Type Yes or No at the “Do you wish to make a follow-up appointment?” prompt. If you enter yes, you will be prompted to enter the date and time of the follow-up appointment in any clinic. If you enter no, you will only be prompted to enter the time and date of the check out.

```

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

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

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

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

Select CLINIC: CARDIOLOGY-JOE
ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T+14 (FEB 16, 2004)

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

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

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

```

Figure 4-8: Checking out a patient

- The Patient Status updates to indicate that the patient has been checked out and the time of check out. Note the bold text in the following example screen.

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

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

Enter ?? for more actions

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

Select Action:Quit//

Figure 4-9: Sample of updated checking out screen

## 4.5 Expand Entry (EX)

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

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

```

Select Action: EX
Select Appointment(s): (1-9): 1
=====
Expanded Profile          Nov 17, 2005 10:44:06          Page: 1 of 2
          Confidential Patient Data Covered by Privacy Act
Patient: PATIENT,ALLISON (4298) Phone: 464-4775          Ward: PED
Appointment #: 1                                          Clinic: PEDIATRIC
=====
*** Appointment Demographics ***
          Name: PATIENT,ALLISON          Clinic: CARDIOLOGY
          ID: 35033          Date/Time: OCT 09, 2002@14:42
          Status: INPATIENT/CHECKED OUT
Purpose of Vst.: SCHEDULED
          Overbook: OVERBOOK
          Length of Appt: 20
          Lab:
          X-ray:
          EKG:
          Other Info: HEADACHES
+          Enter ?? for more actions
Select Action:Next Screen//
=====
Expanded Profile          Oct 18, 2002 11:05:18          Page: 2 of 2
          Confidential Patient Data Covered by Privacy Act
Patient: PATIENT,ALLISON (4298) Phone: 464-4775          Ward: PED
Appointment #: 1                                          Clinic: PEDIATRIC
+
*** Appointment Event Log ***
Event          Date          User
-----
Appt Made          OCT 09, 2002@14:42:44          NURSE,JOHN
Routing Slip Printed
Check In          OCT 09, 2002@14:42          NURSE,JOHN
Check Out          OCT 09, 2002@15:50          CLERK,AMY
Check Out Entered          OCT 09, 2002@15:50:23
No-Show/Cancel

          Checked Out: YES
          Cancel Reason:
          Cancel Remark:
          Rebooked Date:
          Enter ?? for more actions
Select Action: Quit//

```

Figure 4-10: Displaying an expanded entry

## 4.6 Change Clinic (CL)

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

1. Type **CL** at the "Select Action:" prompt.

2. Type the name of the new clinic at the “Select Clinic:” prompt and the system will change to new clinic. You can type ?? for a list of available clinics. To change the date parameters, you will have to then use the CD – Change Date Range action.

## 4.7 Cancel Appointment (CA)

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

1. Type **CA** at the “Select Action:” prompt.
2. Type the number of the appointment which you want to cancel at the “Select Appointment(s):” prompt.
3. Type either P (patient) or C (clinic) depending on who canceled the appointment at the “Appointments Cancelled by (P)atient or (C)linic:” prompt.
4. Type the reason the appointment was cancelled at the “Select Cancellation Reasons Name:” prompt. Type ?? at the “Select Cancellation Reasons Name:” prompt for a list of available reasons. If you cannot find a reason close to one you need, contact your site manager to add the new reason to the system.
5. Type any other remarks you have about the cancellation at the “Cancellation Remarks:” prompt. This is a free-text field. If you do not have any remarks for this prompt, press the Enter key.
6. Type Y or N at the “Do You Wish to Rebook Any Appointment(s) That You Have Cancelled?” prompt. If you select Y, you will be taken through a series of steps that will automatically reschedule the appointment. You will *not* be given a choice for the new appointments. The system selects them for you. Follow the prompts and screens as they are displayed.

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

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

Select CANCELLATION REASONS NAME: Weather

CANCELLATION REMARKS: None

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

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

Figure 4-11: Canceling an appointment

## 4.8 Make Appointment (MA)

Use this option to schedule one appointment for a patient. If the patient is currently on a waiting list, you will be given the opportunity to remove them after making an appointment.

1. Type **MA** at the “Select Action:” prompt.
2. Type the name of the clinic or principal clinic at the “Select Clinic” prompt. For principal clinics you will be asked for a date range, so it can display open appointment slots for clinics under that grouping. To actually make an appointment, you must select a single clinic, once you are back to the “Select Clinic” prompt.
3. If you want to find an appointment with a particular provider, with the patient’s primary care provider or with anyone on that provider’s team, press ENTER past the “Select Clinic” prompt. At the “Select Provider/PCPR/PCTM” prompt, either type in a provider’s name or “PCPR” to search based on the patient’s primary care provider or “PCTM” to find open appointments within the primary care team. For any of them, you will be asked for a date range. To actually make an appointment, you must select a single clinic once you are back to the “Select Clinic” prompt.
4. Once you have selected the exact clinic, at the “Enter the Date Desired for this Appointment:” prompt, type in the exact date and time of the desired appointment if you know it. Otherwise type the beginning date for displaying the clinic’s schedule. Typing T for Today is a simple way to pull up a clinic’s schedule.

```

Select Action: MA

Clinic: CARDIOLOGY

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

  Select one of the following:

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

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: 10/30/05 (OCT 30, 2005)

```

Figure 4-12: Making an appointment (steps 1-4)

5. If you typed in a starting date, the Month-at-a-Glance screen will be displayed. Scroll through the listing to find the appointment slot desired. To review appointments already made on a specific date, type either AL (appointment list) or SL (short list) at the “Select Action:” prompt. These reports can help when trying to balance types of visits within a day or the best time to try overbooking an appointment.
6. When you are done browsing the appointments, type Q (quit) at the “Select Action:” prompt. *You cannot make an appointment while in the Month-at-a-Glance screens.* A clinic’s Special Instructions for making appointments is displayed in the heading of the Month-at-a-Glance screen and *again* after you quit back into Make Appointment mode.
7. Type the date and time of the desired appointment at the “Date/Time:” prompt.
8. Type Y at the “Want Patient Notified of Lab, X-Ray, or EKG Stops?” prompt to set up stops the patient should make before arriving for their appointment. These will show up on the patient’s appointment letter. This is done *only* if your site does *not* make appointments for these stops. Type the stops like this: LAB@8:30. You can enter more than one stop, by entering new ones at the next “Enter Type and Time:” prompt.
9. Type Y or N at the “Want to Print Appointment Letter for Patient?” prompt. If you select Y, you will be prompted for the printer where you want your letter printed.



```

MONTH-AT-A-GLANCE                      Nov 17, 2005 11:20:30                      Page: 1 of 4
      (special instructions display here)
-----
                                CARDIOLGY-JOE
                                Nov 2005
TIME | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 | 4 | 5 | 6 | 7
DATE |  |  |  |  |  |  |  |  |  |  |  |  |  |
TH 17 |  |  |  |  |  |  | [1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 |
FR 18 |  |  |  |  |  |  | [1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 |  |  |  |
TH 24 |  |  |  |  |  |  | [1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 |
FR 25 |  |  |  |  |  |  | [1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 |  |  |  |

                                Dec 2005
TIME | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 | 4 | 5 | 6 | 7
DATE |  |  |  |  |  |  |  |  |  |  |  |  |  |
TH 01 |  |  |  |  |  |  | [1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 |
FR 02 |  |  |  |  |  |  | [1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 |  |  |  |
TH 08 |  |  |  |  |  |  | [1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 | 1 1 1 |
+
      Enter ?? for more actions
AL Appointment List      SL Short Appt List      Q Quit
Select Action:Next Screen//  QUIT

15 MINUTE APPOINTMENTS
DATE/TIME: 11/17/05@1400

*****
      15-MIN. APPOINTMENT MADE FOR PATIENT,ALLISON
      IN CARDIOLOGY-JOE CLINIC FOR Nov 17, 2005@14:00
*****

WANT PATIENT NOTIFIED OF LAB,X-RAY, OR EKG STOPS? No// Y (Yes)
ENTER TYPE AND TIME (I.E. 'LAB@8:30'): lab@1345 SCHEDULED
ENTER TYPE AND TIME (I.E. 'LAB@8:30'): [ENTER]
      OTHER INFO: bp meds follow-up
Want to Print Appointment Letter for Patient? Y

DEVICE: MY PRINTER
    
```

Figure 4-13: Making appointments (steps 5-9)

## 4.9 Change Date Range (CD)

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

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

```

Select Action: CD      Change Date Range

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

Figure 4-14: Changing the date range

## 4.10 No Show (NS)

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

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

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

3. Type **Y** or **N** at the "Want to Auto-Rebook No-Show Appointments Now?" prompt. If you select **Y**, the system will automatically book the patients in the next available slots. If you select **N**, you will have to reschedule the appointments using the **MA** option.
4. Type **Y** or **N** at the "Want Letters Printed Now?" prompt. If you type **Y**, you will be prompted to select a letter and a printer.

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

Figure 4-15: Entering a no-show

## 4.11 Delete Check Out (DE)

Use this option to delete a check out.

1. Type **DE** at the "Select Action:" prompt.
2. Type the number of the checked out appointment you want to correct at the "Select Appointment(s):" prompt.
3. The system displays a warning.
4. Type **Yes** or **No** at the "Are you sure you want to delete the appointment check out?" prompt.

- If you entered yes, the system will delete the check out date and time and return the appointment to its previous status. Press the Enter key at the “Enter Return to continue or '^' to exit:” prompt.

```

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

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

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

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

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

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

Enter RETURN to continue or '^' to exit:

```

Figure 4-16: Deleting a check out

## 4.12 Appt Profiles (AP)

Use this action to change the criteria for which appointments to display.

- Type **AP** at the “Select Action:” prompt.
- Type the letters that corresponds to the customized appointment list you want to see at the “Select Profile:” prompt. For example, choosing CI means only checked in appointments will be displayed. The default is TA.

```

Select Action: AP

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

Select Profile: CI

```

Figure 4-17: Listing appointment files

## 4.13 Patient Registration (PR)

Use this option to access Patient Registration. The access level is based on site parameters and security keys. You may have no access, just be able to edit address and phone number or full edit capabilities.

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

```

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

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

Additional Registration Information:

1-8-99 COMP UPDT,CONSENT,CHS,PRI.ACT,ON FILE,SIGNED TODAY AND VALID
THROUGH 1-8-00 OR OTHER CHGS,CONSENTED TO ALL SERVICES,VT.
12-10-99 ABRV UPDT ON FILE,VT
3-30-2000 ABRV UPDT ON FILE,VT
9-14-2001 ABRV UPDT ON FILE,VT
*****

Want to Edit this Registration Record? Y

```

Figure 4-18: Editing patient registration (steps 1-3)

4. If you enter YES, you will be dropped into “*EDIT a patient's file*” on the Patient Registration menu. When you have finished, you will be returned to the Appointment Management screen.

```

PATIENT REGISTRATION
UNSPECIFIED HO
EDIT a patient's file

There are patients on file with TEMPORARY CHART NUMBERS.
Please print the list of these patients and supply the missing data.
Press the Enter key to continue. [ENTER]

```

Figure 4-19: Editing patient registration (step 4)

```

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

```

Figure 4-20: Editing patient registration, excerpt of IHS registration editor

## 4.14 Add/Edit Other Info (OI)

Use this option to add or change the reason for the appointment stored in the Other Information field.

1. Type **OI** at the “Select Action:” prompt.
2. Type the number of the appointment which you need to make the change at the “Select Appointment(s):” prompt.

3. The “Other Info:” prompt will appear. If there is information in the field, it will appear next to the prompt. If there is no information, the prompt will be blank. Type the new or edited information at the “Other Info:” prompt and then press the Enter key to record the changes.

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

Figure 4-21: Changing the other info field

## 4.15 Ancillary Tests (AT)

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

1. Type **AT** at the “Select Action:” prompt.
2. Type **A** (add test) (2a) or **D** (delete test) (2b) at the next “Select Action:” prompt.
3. To add a test, type the number of the appointment to which you would like to add an appointment at the “Select Appointment(s)” prompt then enter the type of test and the time of the test at the “Enter Type and Time:” prompt. When you are finished adding tests, press the Enter key at a blank “Enter Type and Time:” prompt.

```
Select one of the following:
      A      ADD Ancillary Test
      D      DELETE Ancillary Test

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

Figure 4-22: Adding an ancillary test (step 2a)

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

```

Select one of the following:

      A          ADD Ancillary Test
      D          DELETE Ancillary Test

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

```

Figure 4-23: Deleting an ancillary test (step 2b)

## 4.16 Update PCP (PC)

Use this option to update or change a patient's Primary Care Provider (PCP). You must have the appropriate security key to access this action.

1. Type **PC** at the "Select Action:" prompt.
2. The patient's current PCP will be displayed. Type **Y** or **N** at the "Want to Change This Patient's Providers?" prompt.
3. Type the name of the new PCP or press the Enter key to accept the default PCP at the "Primary Care Provider:" prompt
4. Type the reason the change was made at the "Reason Prim Care Prov Changed:" prompt. Type **??** for a list of available reasons. New reasons can be added by your site manager.

```

Select Action: PC

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

REASON PRIM CARE PROV CHANGED: PROVIDER TRANSFERRED

```

Figure 4-24: Updating a patient's PCP

## 4.17 Health Summary (HS)

Use this option to display a patient's detailed health summary. This is available in case a health summary was not requested with the paper chart and the provider now wants one.

1. Type **HS** at the "Select Action:" prompt.
2. Type the name of the patient at the "Select Patient:" prompt.

3. Type the name of the specific type of health summary you need at the “Select Health Summary Type Name:” prompt. Type ?? at the “Select Health Summary Type Name:” prompt for a list of available summary types.
4. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```

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

  Select one of the following:

      B          BROWSE ON SCREEN
      P          PRINT ON PAPER

PRINT MODE: B

```

Figure 4-25: Listing a health summary (steps 1-4)

5. If you selected B (browse onscreen), the Patient Health Summary screen will appear (Figure 4-26). Use the options at the bottom of the screen to navigate through the report.

```

Patient Health Summary   Oct 18, 2002 11:44:07   Page:   1 of   7
***** CONFIDENTIAL PATIENT INFORMATION -- 10/18/2002 11:44 AM [JAC] *****
***** PATIENT,ALLISON #4298 (PEDIATRIC SUMMARY) pg 1 *****

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

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

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

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

+          Enter ?? for more actions

Select Action:Next Screen//

```

Figure 4-26: Listing a health summary (step 5)



## 4.18 Rx Profiles (RX)

Use this option to view or print a patient's medication or action profile. This is available here in case a medication profile was not requested with the paper chart and the provider now needs one.

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

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

      Select one of the following:
          1      Medication Profile
          2      Action Profile

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

Figure 4-27: Listing RX profiles

## 5.0 Chart Requests (CR)

Use this option to request a patient's chart for review without actually scheduling the patient for an appointment. It could be used in a case where a physician has ordered lab tests for a particular patient and wishes to review those results. It is also used by providers who perform chart reviews on batches of charts. You may type multiple patients for any selected date.

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

Future chart requests can be processed in two ways depending on a site parameter. You can set up your system to print future chart requests immediately and you can assign a specific printer to receive those. Otherwise, future chart requests are processed when the appointments for that date are printed. These will be sorted along with the nightly routing slip run. Please request charts as many days in advance as possible.

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

```

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

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

Select Scheduling Menu Option: CR

```

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

2. Type the name of the clinic at the “Select Clinic Name:” prompt. It is recommended that facilities set up clinics used just for requesting charts. They can be generic clinics or provider or department specific.
3. Type where the charts are to be delivered at the “Deliver Charts To (Provider/Location/Ext.):” prompt. This prompt allows for free text typing.
4. Type the date the chart is to be delivered at the “Select Chart Delivery Date:” prompt. Type ?? at the “Select Chart Delivery Date:” prompt for more information about typing a response at this prompt.
5. Type the patient’s name, chart number, or date of birth at the “Select Patient:” prompt. If the patient is currently registered as an inpatient or the chart has already been requested for that date, you will see a message asking you to confirm your chart request.
6. To continue requesting charts for the date entered, type another patient name at the “Select Patient:” prompt. Press the Enter key when you have finished requesting charts for the date you entered.

**Note:** It is *very important* to always press Enter after the last patient.

If you jump out using the “^” key for today’s chart requests, none of them will print!

7. If you are requesting charts for today or future charts to be printed immediately, type the printer at which you want the chart request(s) to print at the “Chart Request Printer:” prompt. Otherwise, you will not see that prompt.

```

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

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

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

      chart request recorded...

Select PATIENT: [ENTER]

Chart Request Printer: fdesk

```

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

## 6.0 List Patient Check-In Status (CHK)

Use this option to produce a listing of a clinics check in status. You can select individual clinics or a principal clinic. The display will show the patient's name, chart number, appointment date and time, and status (future, checked in, no-show, etc.). You have the option of setting the screen for Auto Refresh which will update the status every 60 seconds. You can toggle this off and on. You can also manually refresh the screen.

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

```

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

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

Select Scheduling Menu Option: CHK

```

Figure 6-1: Display Check In Status (step 1)

2. Select the division (if multidivisional), at the “Select division:” prompt.
3. Select the clinic at the “Select Clinic:” prompt.
4. Type the date to see check in status for at the “Select Date:” prompt.

```

Select division: ALL//
Select Clinic:    GEN-OTT
Select Date: T//

```

Figure 6-2: Displaying check in status (steps 2-4)

5. A list of the patient's appointments during the chosen date range will be displayed (Figure 7-3). If there are no appointments available, the system will display a message indicating that there are no appointments.
6. A list of your options will be displayed at the bottom of the screen. Select either RF (Refresh), OF (Auto Refresh Off), ON (Auto Refresh On), EP (Expand Entry) or ?? (display more options). Follow the prompts for each selection. RF – Manually refreshes the status, OF – Toggles the Auto Refresh feature off, ON – Toggles the Auto Refresh Feature ON, EP gives you the same display as Expand Entry under Appointment Management.

```

Clinic Check In Display      Mar 14, 2007 09:33:02      Page:    1 of    1
Clinic: GEN-OTT
Checked In Appointments      01/29/07 thru 01/29/07
Auto Refresh is:    OFF
  Patient or Clinic          Appt Date/Time      Status
-----
 1  226183 Jones,Aaron        01/29/2007@17:00   Checked In
 2  148311 Smith,Aaron        01/29/2007@16:00   Checked In

Enter ?? for more actions
RF  Refresh
OF  Auto Refresh Off
ON  Auto Refresh On
EP  Expand Entry
Select Action:Quit//

```

Figure 6-3: Displaying check in status (steps 5-6)

## 7.0 Display a Patient's Appointments (DA)

Use this option to produce a listing of a specific patient's appointments. The display will show the patient's name, chart number, appointment date and time, length of appointment, clinic, type of appointment (scheduled vs. walk-in) and status (future, checked in, no-show, etc.). You may choose to print only pending appointments, or pending and past appointments depending on the date range you specify. If the patient is currently active on a waiting list, that information will also display.

You may select one of the appointments from the list to view in more detail or to view the PCC visit attached.

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

```

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

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

Select Scheduling Menu Option: DA

```

Figure 7-1: Displaying appointments (step 1)

2. Type the patient name, chart number or date of birth at the "Select Patient:" prompt.
3. Type the date where you want to start your appointment search at the "Select Beginning Date:" prompt.
4. Type the date where you want to end your appointment search at the "Select Ending Date:" prompt.

```

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

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

Figure 7-2: Displaying appointments (steps 2-4)

5. A list of the patient’s appointments during the chosen date range will be displayed (Figure 7-3). If there are no appointments available, the system will display a message indicating that there are no appointments.
6. A list of your options will be displayed at the bottom of the screen. Select either VA (view appointment), VV (view visit), or ?? (display more options). Follow the prompts for each selection. VA – View Appointment gives you the same display as Expand Entry under *Appointment Management*. See that section for more details. VV – View Visit drops you into the PCC Display Data for a Patient’s Visit option. A visit will only be available after the patient has been checked in and the visit was created by the Scheduling check-in process.

```

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

          **** ACTIVE WAIT LIST ENTRIES FOR PATIENT ****
  Date Added/Recall Date      Wait List Name      Provider      Priority
-----
  JUL 22, 2003          DENTAL          DENTIST,SALLY      HIGH

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

Figure 7-3: Displaying appointments (steps 5-6)

## 8.0 Multiple Appointment Booking (MB)

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

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

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

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



```

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

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

Select Scheduling Menu Option: MB

```

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

2. Type the name of the clinic for which you want to book an appointment at the “Select Clinic:” prompt.
3. Type the patient name at the “Select Patient Name:” prompt.
4. Type the date, or the date and time of the desired appointment, F (first available), or ?? at the at the “Enter the Date Desired for this Appointment:” prompt. If you select F, you will be prompted to type a date range for the search.

```

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

Select one of the following:

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

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: F

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

```

Figure 8-2: Booking multiple appointments (steps 2-4)

```

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

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

                                Nov 2002

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

Select Action:

```

Figure 8-3: Booking multiple appointments (step 5)

5. When you are done browsing the appointments, type Q (quit) at the “Select Action:” prompt.
6. Type D (daily), W (weekly), B (biweekly), or M (monthly) at the “Select Type of Appointments:” prompt. Select the option that best fits how you want to schedule the patient’s appointments.
7. Type the date and time of the first appointment at the “Date/Time:” prompt.
8. Type the number of consecutive appointments you want to schedule for the patient at the “For How Many Consecutive XXX’s Do You Want Appointments Scheduled at (Time)?” prompt.
9. Type the reason for the appointment at the “Other Info:” prompt or press the Enter key skip this step.
10. Type Y or N at the “Want Chart Requested?” prompt. If you select Y, you will be prompted to type which printer you want to print the request.
11. Type Y or N at the “Want to Print Appointment Letter for Patient:” prompt. If you select Y, you will be prompted to select a printer for the letter.
12. The computer will display the number of appointments made.

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

  Select one of the following:

      D      DAILY
      W      WEEKLY
      B      BIWEEKLY
      M      MONTHLY

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

Figure 8-4: Booking multiple appointments (steps 6-12)

## 9.0 Multiple Clinic Display/Book (MC)

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

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

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

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

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

```

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

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

Select Scheduling Menu Option: MC

```

Figure 9-1: Booking multiple clinic appointments (step 1).

2. Type the patient name at the “Select Patient Name:” prompt.
3. Type the name of the first clinic you want to search at the “Select Clinic:” prompt.
4. Type the name of the second clinic you want to search at the “Select Clinic:” prompt.
5. When you are done selecting clinics, press the Enter key at the “Select Clinic:” prompt. A list of the selected clinics you selected will be displayed (Figure 9-2).
6. Type Y or N at the “OK to proceed?” prompt.
7. Type the date that you want to begin your search at the “Look for Clinic Availability Starting When:” prompt.

```

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

YOU MAY SELECT FROM 2-4 CLINICS

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

PEDIATRIC                        15 MINUTE APPOINTMENT
CARDIOLOGY                       15 MINUTE APPOINTMENT

OK to proceed? Yes// [ENTER]

LOOK FOR CLINIC AVAILABILITY STARTING WHEN: T
    
```

Figure 9-2: Booking multiple clinic appointments (steps 2-7)

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

```

                                DATE: (WEDNESDAY) OCT 16, 2002

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

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

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

Figure 9-3: Booking multiple clinic appointments (step 8)

9. Type the time of the appointment you want to book at the “Schedule Time:” prompt.
10. Type the minutes the appointment will last at the “Length of Appointment (In Minutes):” prompt. The system will display a confirmation of the appointment.
11. Type Y or N at the “Want Patient Notified of Lab, X-Ray, or EKG Stops?” prompt. If you select Y, you will be required to type the schedule time of the stop at the “Enter Type and Time (i.e. 'Lab@8:30'):” prompt. When you are done entering individual stops, press the Enter key at the “Enter Type and Time (i.e. 'Lab@8:30'):” prompt.

12. Type the reason for the appointment and any comments at the “Other Info:” prompt.
13. Type Y or N at the “Want to Print Appointment Letter for Patient?” prompt. If you select Y, you will be required to type the name the printer you want the letter to print. It would be best to only answer YES on the last appointment made in the grouping.
14. The system will display a message indicating that the time of the appointment made and in which clinic it was made (Figure 9-4). Repeat steps 9-14 for each clinic you selected to make an appointment. The “Select Patient Name:” prompt will appear when all appointments are entered.

```

Make appt in : PEDIATRIC

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

SCHEDULE TIME: 9

LENGTH OF APPOINTMENT (IN MINUTES): 15

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

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

15 minute appointment made in PEDIATRIC

Select PATIENT NAME:

```

Figure 9-4: Booking multiple clinic appointments (steps 9-14)

## 10.0 Month-at-a-Glance Display (MD)

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

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

```

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

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

Select Scheduling Menu Option: MD

```

Figure 10-1: Displaying month-at –a –glance (step 1)

2. Type the clinic name or principal clinic name at the "Select Clinic:" prompt.
3. For single clinics, type in the starting date for your display. For principal clinics, answer both the beginning and ending date questions.

```

Select CLINIC: PEDIATRIC

Select one of the following:

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

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T

```

Figure 10-2: Displaying month-at –a –glance (steps 2-3)



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

MONTH-AT-A-GLANCE		Oct 10, 2002 13:12:05				Page: 1 of 4			
CARDIOLOGY									
Oct 2002									
TIME	8	9	10	11	12	1	2	3	4
DATE									
TH 10	[1 1 1 1]	0 1 1 1	0 1 1 1	1 1 1 1	1 1 1 1	0 1 1 1	0 1 1 1	0 1 1 1	0 1 1 1
FR 11	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SA 12	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SU 13	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
MO 14	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
WE 16	[1 1 1 1]	1 1 1 1	0 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
TH 17	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	0 1 1 1	0 1 1 1	0 1 1 1
FR 18	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SA 19	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SU 20	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
MO 21	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
WE 23	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1

+ Enter ?? for more actions >>>

AL Appointment List SL Short Appt List

Select Action:

Figure 10-3: Displaying Month-at-a-Glance (step 4)

- The >>> on the message bar indicates there are more slots hidden off the right side of the screen. Type one > to shift the display over to see them. Type one < to shift back. This allows RPMS Scheduling to set up long clinic days.

## 11.0 Original Clinic Setup Display (OAS)

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

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

```

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

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

Select Scheduling Menu Option: OAS

```

Figure 11-1: Displaying Original Clinic Setup (step 1)

2. Select the date you wish to see the original clinic setup for at the "Select Date:" prompt.
3. Select division (if multidivisional) at the "Select Division:" prompt.
4. Select clinic at the "Select clinic:" prompt.
5. Select another clinic (if applicable) at the "Select another clinic:" prompt.

```

Select Date: 1/29 (JAN 29, 2007)
Select division: ALL//
Select clinic: ALL// gen-ott
Select another clinic:

```

Figure 11-2: Displaying Original Clinic Setup (steps 2-5)

6. The Original Availability Setup screen will be displayed. The >>> on the message bar indicates there are more slots hidden off the right side of the screen. Type one > to shift the display over to see them. Type one < to shift back. This allows RPMS Scheduling to set up long clinic days.

```

ORIGINAL MONTH SETUP DISPLAY Mar 14, 2007 13:00:47 Page: 1 of 1
Original Availability Setup Display
For date: Jan 29, 2007

GEN-OTT - Jan 29, 2007
TIME |8 |9 |10 |11 |12 |1 |2 |3 |4
DATE | | | | | | | | | |
MO 29 [1 1 1 1|1 1 1 1|1 1 1 1|1 1] | [1 1 1 1|1 1 1 1|1 1]

FOR CLINIC AVAILABILITY PATTERNS:
0-9 and j-z --denote available slots where j=10,k=11...z=26
A-W --denote overbooks with A being the first slot to be overbooked
and B being the second for that same time, etc.
*,$,!,@,# --denote overbooks or appts. that fall outside of a clinic's
regular hours

Enter ?? for more actions >>>

Select Action:

```

Figure 11-3: Displaying Original Clinic Setup (step 6)

## 12.0 Print Scheduling Letters (PL)

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

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

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

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

```

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

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

Select Scheduling Menu Option: PL

```

Figure 12-1: Printing Scheduling Letters (step 1)

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

3. Type the name of the letter at the “Select Letter Name:” prompt. Type ? at the “Select Letter Name:” prompt to see a list of available letters.
4. If you are a multiple division facility, type the name of the division for which you want to print the letters at the “(Type of Letter) for Which Division:” prompt. Type ? at the “(Type of Letter) for Which Division:” prompt to see a list of available divisions.
5. Type P (letter for individual patient) or C (letters for entire clinic) at the “Enter 'P' for Individual Patient Letters or ‘C’ for Letters by Clinic:” prompt. If you select P, you will be prompted to type the individual patient’s name. If you select C, type the clinic name. If you wish to print letters for the majority of clinics, type ALL at the “Select clinic” prompt. You will then be prompted to exclude any clinics and, if so, to name those clinics. This action prevents having to type numerous individual clinic names

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

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

```

SELECT THE TYPE OF LETTER TO PRINT: ??

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

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

Choose from:
APPOINTMENT CXL      CLINIC CANCELLED

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

```

Figure 12-2: Printing Scheduling letters (steps 2-6)

## 13.0 Print Custom Letter(s) (PCL)

This option allows you to print any one of the following types of scheduling letters for a single or group of patients. The patient does not need to have an appointment to print the letter.

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

To print custom letters:

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

```

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

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

Select Scheduling Menu Option: PCL

```

Figure 13-1: Printing Custom Letter(s) (step 1)

2. Select the Letter Name at the “Select LETTER NAME:” prompt.
3. Select the patient at the “Select patient:” prompt.
4. Select another patient (if applicable) at the “Select another patient:” prompt.
5. Select the device t the “DEVICE:” prompt.

```
Select LETTER NAME:    SURGERY CLINIC  PRE-APPOINTMENT
Select patient:
  WILLIAMS,MARK A           M 10-03-1968  550069532  CIMH 123456
Select another patient:

DEVICE: HOME//   Virtual   Right Margin: 80//
```

Figure 13-2: Printing Custom letter(s) (steps 2-5)

## 14.0 View Provider's Schedule (PS)

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

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

```

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

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

Select Scheduling Menu Option: PS

```

Figure 14-1: Viewing provider's schedule (step 1)

2. Type the name of the provider at the “Select Provider:” prompt.
3. Type **D** (to view a daily schedule) or **W** (to view a weekly schedule) at the “Select Display Timeframe:” prompt.

```

Select PROVIDER: DOCTOR, Kathryn
                  CARDIOLOGY

Select one of the following:

      D          DAILY
      W          WEEKLY

Select DISPLAY TIMEFRAME: W

```

Figure 14-2: Viewing provider's schedule (steps 2-3)

The provider's schedule will be displayed (Figure 14-3).



4. All appointments linked to this provider will display in date and time order. If there are any breaks in the schedule, they are shown by blank lines. To view details on any appointment, type VA (view appointment).

Times	Clinic	Patient	Appointment Info_____
Provider's Weekly Schedule      Oct 10, 2002 14:38:25      Page: 1 of 2			
Appointments for DOCTOR,KATHRYN for week of Oct 10, 2002			
Appointments for Oct 10, 2002			
1. 09:00-09:15	CARDIO-KATE	ALLISON PATIENT	bp med follow-up
2. 10:00-10:15	CARDIO-KATE	HARRY PATIENT	headaches
3. 13:00-13:15	CARDIO-KATE	CLARE DEMO	yearly check-up
4. 13:15-14:15	CARDIO-KATE	BRIAN PATIENT	review stress test results
5. 15:00-15:15	CARDIO-EVE	PATIENT DEMO	new patient
6. 15:15-15:30	CARDIO-EVE	BABY DEMO	3 week post-op check-up
+      Enter ?? for more actions			
VA	View Appointment	Q	Quit
Select Action:			

Figure 14-3: Viewing providers schedule (step 4)

## 15.0 Waiting List Enter/Edit (WL)

Use this option to place a patient on the waiting list for admission to the medical center or for appointments in a clinic. This option can be used to trigger follow-up reminders.

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

```

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

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

Select Scheduling Menu Option: WL

```

Figure 15-1: Using the waiting list option (step 1)

2. Type the waiting list by name or ward at the “Select Waiting List Clinic or Ward:” prompt. Only holders of the application coordinator key (SDZAC) may add a new clinic or ward as a waiting list.
3. You are then asked what you want to sort by, your choices are Patient Name, Date Added to List, Priority or Recall Date, select one of them at the “Sort By:” prompt.

```

Select WAITING LIST CLINIC OR WARD:

  Select one of the following:

      P      Patient Name
      D      Date Added to List
      O      Priority
      R      Recall Date

Sort By: Patient Name//

```

Figure 15-2: Using the waiting list option (step 2-3)

4. A list manager screen will open displaying all patients currently active on the waiting list selected. They will display in alphabetical order with chart number, date added, recall date and priority displayed. Off the right side of the screen (accessed by typing >), will be provider and brief comments.

```

Waiting List Entry/Edit      Nov 25, 2005 09:54      Page:      1 of      3
      Confidential Patient Data Covered by Privacy Act
                        DENTAL
      Patient Name      Chart # Date Added      Recall Date Priority
1. PATIENT,DEBORAH      12345 JUN 10, 2005      OCT 20, 2005
2. PATIENT,LOUIS        34511 AUG 09, 2005      AUG 21, 2005
3. PATIENT,THOMAS       345   JUN 04, 2005      JUN 26, 2005 HIGH
4. PATIENT,VICTOR       81999 JUN 04, 2005      JUL 29, 2005

+      Enter ?? for more actions      >>>
1  Add Patient to List  3  Remove From List      5  List Closed Cases
2  Edit Entry on List  4  View Single Entry    Q  Quit
Select Action: Next Screen//

```

Figure 15-3: Using the waiting list option (step 4)

5. The following actions can be performed: add a new patient to the list, change an entry already there, remove a patient from the list, view all waiting list information on a patient and see a list of closed (removed) cases.
6. When adding a new patient to a waiting list, the system checks to see if the patient is already on the list and asks if you want to add them again. At the end of the waiting list questions, the user has the opportunity to edit the patient's address and phone numbers.

```

Select Action: Next Screen// 1   Add Patient to List
Select Patient: DEMO,PAT
  DEMO,PATIENT                    <A>   F 10-01-1955 444444444   THC 999999
  PATIENT DATE ADDED TO LIST: TODAY//   (NOV 25, 2005)
  PATIENT REASON ADDED TO LIST: PROVIDER SCHEDULE UNKNOWN
PRIORITY: 2  MIDDLE
PROVIDER: DOCTOR,K
RECALL DATE: T+60  (JAN 24, 2006)
COMMENTS:
==[ WRAP ]==[ INSERT ]=====< COMMENTS >===== [ <PF1>H=Help ]====
patient needs follow-up appointment to review blood pressure based on new
meds.  provider scheduled for January not available yet.

<=====T=====T=====T=====T=====T=====T=====T=====T=====T>====

      Date of Last Registration Update: AUG 16, 2005

POB 235
ACOMA PUEBLO, NEW MEXICO  87034
123-4567 (home)  456-1234 (work)
Does patient's address or phone # need to be updated? NO//

```

Figure 15-4: Using the waiting list option (step 6)

7. When editing a patient already on a waiting list, you will be asked the same questions as under the add action. At the end of the waiting list questions, the user has the opportunity to edit the patient's address and phone numbers.

```

Select Action: Next Screen// ed   Edit Entry on List
Select Patient:  (1-14): 11

DEMO,PATIENT
DATE ADDED TO LIST: NOV 25,2005//
REASON ADDED TO LIST: PROVIDER SCHEDULE UNKNOWN//
PRIORITY: MIDDLE//
PROVIDER: KEELING,G J//
RECALL DATE: JAN 24,2006//
COMMENTS:
patient needs follow-up appointment to review blood pressure based on new
meds.  provider scheduled for January not available yet.

      Edit? NO//

      Date of Last Registration Update: AUG 16, 2005

POB 235
ACOMA PUEBLO, NEW MEXICO  87034
1800 TIDE (home)  1800 GET HOME (work)
Does patient's address or phone # need to be updated? NO//

```

Figure 15-5: Using the waiting list option (step 7)

8. Once a patient no longer needs to stay on a waiting list (appointment made or no longer needed), you can remove them. This hides the entry but all the data is kept for future inquiry and reporting. When making an appointment for a patient who is on a waiting list, users will be asked if they want to remove the patient then. This reduces the need to exit the Appointment Management option just to remove a patient from a waiting list.

```
Select Action: Next Screen// 3   Remove From List
Select Patient: (1-14): 10

DEMO,FRED
DATE REMOVED FROM LIST: T (NOV 25, 2005)
RESOLUTION: appoINTMENT MADE
COMMENTS:
Comments about being on the list.
Can add more comments concerning being removed from list.

Edit? NO//
```

Figure 15-6: Using the waiting list option (step 8)

9. To view all information on a patient's entry on a waiting list, simple select action 4.

```
Select Action: Next Screen// 4   View Single Entry
Select Patient: (1-14): 10

=====
Waiting List View Entry          Nov 25, 2005 12:23:26          Page: 1 of 1
                Confidential Patient Data Covered by Privacy Act
DEMO,PATIENT                    #999999                DOB: 10/01/1955          Sex: FEMALE
-----
                CLINIC:          DENTAL
                DATE ADDED TO LIST: NOV 25, 2005 by FELS,LINDA J
                REASON ADDED TO LIST: PROVIDER SCHEDULE UNKNOWN
                PRIORITY:          MIDDLE
                PROVIDER:          DOCTOR, K
                RECALL DATE:       JAN 24, 2006
                PHONE NUMBER [RESIDENCE]:
                PHONE NUMBER [WORK]:

Comments:
patient needs follow-up appointment to review blood pressure based on new
meds. provider scheduled for January not available yet.

                DATE REMOVED FROM LIST:          by
                RESOLUTION:
                Enter ?? for more actions

Select Action:Quit//
```

Figure 15-7: Using the waiting list option (step 9)

10. To view a list of patients who have been removed from the current waiting list, select action 5. The only action available from this listing is to edit and view.

```
Closed Waiting List Entries      Nov 25, 2005 12:27:12      Page: 1 of 1
      Confidential Patient Data Covered by Privacy Act
      DENTAL
      Patient Name      Chart#      Date Added      Date Removed      Priority_
1. DEMO,WAYNE      12344      JUN 04, 2002      JUL 22, 2005      LOW
2. DEMO,BRIAN      33055      JUN 22, 2005      JUL 22, 2005      HIGH
3. DEMO,FRED      5107      JUL 22, 2005      NOV 25, 2005      MIDDLE
4. TEST,EILEEN      9887      OCT 15, 2004      JUL 28, 2005      MIDDLE

      Enter ?? for more actions
1  Edit Closed Case      2  View Single Entry      Q  Quit
Select Action:Quit//      >>>
```

Figure 15-8: Using the waiting list option (step 10)

## 16.0 Primary Care Provider Menu (PCP)

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

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

```

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

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

Select Scheduling Menu Option: PCP

                                Primary Care Provider Menu
                                (UNSPECIFIED HO)

AER     Add/Edit Provider Change Reasons
PCL     Primary Care Providers List
STM     Set Up Primary Care Teams
UPC     Update Primary Care Provider

Select Primary Care Provider Menu Option:

```

Figure 16-1: Selecting Primary Care Provider menu

### 16.1 Add/Edit Provider Change Reasons (AER)

Use this option to add those reasons your facility uses for changing a patient's primary care provider.

1. To access the Primary Care Providers list, type AER at the “Select Primary Care Provider Menu Option:” prompt. Type in the new reason and answer YES when asked “Are you adding 'xxxxxxxxxx' as a new PROVIDER CHANGE REASON?” To see a list of reasons already in the file, type ??.

## 16.2 Primary Care Providers List (PCL)

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

1. To access the Primary Care Providers list, type PCL at the “Select Primary Care Provider Menu Option:” prompt.
2. Type the name of the provider at the “Select a Primary Care Provider:” prompt. Type ?? for a list of available providers. A patient list for the provider selected will be displayed (Figure 16-3).
3. Select how you would like to sort the list, your choices are Community of Residence or Patient Name, select your choice at the “Sort By:” prompt.

```

Primary Care Provider Menu
(UNSPECIFIED HO)

AER  Add/Edit Provider Change Reasons
PCL  Primary Care Providers List
STM  Set Up Primary Care Teams
UPC  Update Primary Care Provider

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

Select one of the following:

C      Community of Residence
P      Patient Name

Sort By: Community of Residence//

```

Figure 16-2: Accessing the Primary Care Providers list



Patient	Chart	Community	Last Visit		
1 PATIENT,FRANK	12345	TULSA	11/3/01	AMB	DIABETIC
2 PATIENT,KYLE	54321	ANCHORAGE	9/30/02	DAY	DAY SURGERY
3 PATIENT,ALLISON	55443	PHOENIX	10/7/02	HOS	

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

Figure 16-3: Primary Care Providers list

### 16.2.1 Change PCP by Patient

Use this action to change the PCP by individual patient.

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

```

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

Patient                    Chart   Community      Last Visit
1 PATIENT,NADIYA A        100001  GLACIER        9/30/99  DAY  DAY SURGERY
2 PATIENT,ALLISON ST     100009  HOT SPRINGS    1/15/04  AMB  CARDIOLOGY
3 PATIENT,NIJONI         100000  DEMMING        2/01/04  AMB  FAM PRACTICE

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

1 PATIENT,NADIYA D.:
PRIMARY CARE PROVIDER: DOCTOR,FLOYD G// DOCTOR,DANIELLE      DA

REASON PRIM CARE PROV CHANGED: PROVIDER TRANSFERRED
Building Patient List. . .Please wait.

```

Figure 16-4: Changing PCP by patient

## 16.2.2 Change PCP by Community

Use this action to change a PCP for an entire community. This is used when facilities assigned primary care providers by community and they want to quickly change the provider for that community.

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

```

Select Action: Quit// 2   Change PCP by Community

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

I will now convert the Primary Care Provider for patients of
                        DOCTOR,FLOYD G in LINCOLN
to
                        DOCTOR,DANIELLE
Ready to continue? NO// YES
Building Patient List. . .Please wait.

```

Figure 16-5: Changing PCP by community

### 16.2.3 Change PCP for All

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

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

```

Select Action: 3
                        CONVERT PRIMARY CARE PROVIDER

Enter new PRIMARY CARE PROVIDER: DOCTOR,DANIELLE   DD
Select REASON for CHANGE: PROVIDER TRANSFERRED

I will now convert the Primary Care Provider for patients of
                        DOCTOR,FLOYD G
to
                        DOCTOR,DANIELLE
Ready to continue? NO// YES
Building Patient List. . .Please wait.

```

Figure 16-6: Changing PCP for All

### 16.2.4 Print List

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

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

```

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

```

Figure 16-7: Printing PCP list

## 16.3 Set Up Primary Care Teams (STM)

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

1. Type **STM** at the “Select Primary Care Provider Menu Option:” prompt.

```

                          Primary Care Provider Menu
                          (UNSPECIFIED HO)

AER  Add/Edit Provider Change Reasons
PCL  Primary Care Providers List
STM  Set Up Primary Care Teams
UPC  Update Primary Care Provider

Select Primary Care Provider Menu Option: STM

```

Figure 16-8: Selecting the Set up Primary Care Team option

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

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

Figure 16-9: Editing a primary care team (step 2)

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

```

                                PRIMARY CARE TEAM UPDATES

TEAM NAME:  CARDIOLOGY
SERVICE:   MEDICAL
INACTIVATION DATE:

PRIMARY CARE PROVIDERS
DOCTOR,B A
DOCTOR,F G
DOCTOR,A R
NURSE PRACT,W C
NURSE PRACT,M T

_____

COMMAND:                                     Press <PF1>H for help      Insert

```

Figure 16-10: Editing a primary care team (step 3)

- To make a change to the first three fields, simply type over the current answer. To add a new provider, move your cursor to the empty line below the last name and then enter the name. Answer YES to the “Are you adding?” question. To delete a provider already on the list, move your cursor over that name and type @. Answer YES to the “Are you sure you want to delete?” question. If you are deleting a provider’s name for the primary care list, the system will display the warning seen in Figure 16-11.

```

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

```

Figure 16-11: Editing a primary care team (step 5)

## 16.4 Update Primary Care Provider (UPC)

This option is used to assign patients individually to a primary care provider (PCP). At any given time, a patient may only be assigned to one primary care practitioner and through that provider to one primary care team (PCT). Only active teams and practitioners are available for selection.

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

4. Type the name of the new PCP at the “Primary Care Provider: (current PCP)//” prompt. Type ?? at the “Primary Care Provider: (current PCP)//” prompt to display a list of available PCP.
5. Type the reason for the PCP change at the “Reason Prim Care Prov Changed:” prompt.
6. You may continue to change patient’s PCPs. When you are done changing PCPs, press the Enter key at a blank “Select Patient Name:” prompt.

```
Primary Care Provider Menu
(UNSPECIFIED HO)

AER  Add/Edit Provider Change Reasons
PCL  Primary Care Providers List
STM  Set Up Primary Care Teams
UPC  Update Primary Care Provider

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

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

Figure 16-12: Updating primary care providers

## 17.0 Patient Mini Registration (PMR)

Use this option to temporarily register a new patient requiring an appointment at the clinic. The patient will be assigned a temporary chart number until the patient arrives for the appointment. At that time, before being seen, you must assign a permanent (or official) chart number and complete the registration process.

7. Type PMR at the “Select Scheduling Menu Option:” prompt.

```

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

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

Select Scheduling Menu Option: PMR

```

Figure 17-1: Using patient mini-registration (step 1)

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

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

To create a mini registration for a patient:

1. *Always* answer **YES** the first time through to search the current database for the patient you are registering. Type Y at the “Do You Wish to Scan for Similar Names or Chart Numbers?” prompt.

- a. Type the patient's name, Social Security Number, or Date of Birth at the "Select Patient Name:" prompt. Try scanning by at least two of these identifiers before answering NO to scan and create a new patient record.
- b. If the patient is already registered at the clinic, the following screen will display when the patient's scan number is selected (Figure 17-2), and you cannot use PMR. If you cannot find the patient in the system, press the Enter key at the "Select Patient Name:" prompt and you will be returned to the "Do You Wish to Scan for Similar Names or Chart Numbers?" prompt.

```

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

This patient is already registered at this facility!

```

Figure 17-2: Using patient mini registration (step 1)

2. Once you are certain the patient is not in the database, type N at the "Do You Wish to Scan for Similar Names or Chart Numbers?" prompt.
  - a. Type the patient's full name at the "Enter the Patient's Name:" prompt.
  - b. Type Y (to continue with the registration process) or N (to return to the "Enter Patient's Name:" prompt) at the "Are You Adding 'Smith, Jeff' as a New Patient?" prompt.
  - c. If you did not type the patient's middle name, you will be prompted to either type the patient's middle name or press the Enter key, otherwise you will be directly sent to step 3d.
  - d. Type the patient's sex (Male or Female) at the "Type the Patient Sex:" prompt.
  - e. Type the patient's date of birth at the "Patient Date of Birth:" prompt.
  - f. Type the patient's social security number at the "Patient Social Security Number:" prompt. If the patient does not have a social security number, leave the field blank. You will be asked to give a reason later in the process.



```

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

Entering NEW Patient for UNSPECIFIED HO

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

```

Figure 17-3: Using patient mini registration (steps 2a-2-f)

- g. The system will search for possible duplicate patients in the database.
  - If there are no duplicates, the patient will be added (Figure 17-4).

```

...searching for potential duplicates.

No potential duplicates have been identified.

...adding new patient

```

Figure 17-4: Using patient mini-registration—no duplicates (step 2g)

- If the system finds a patient with similar information you will be prompted to confirm whether or not you want to continue with the registration process. Type Y or N at the “Do you still want to add 'Patient Name' as a new patient?” prompt (Figure 17-5).

```

...searching for potential duplicates..

The following patients have been identified as potential duplicates:

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

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

```

Figure 17-5: Using patient mini-registration— potential duplicates found (step 2g)

- h. Type Y (to continue with registration) or N (to delete the patient and leave PMR) at the “Do you need a temporary chart number for this new patient? (Y/N)” prompt.
- i. The system will assign the patient a temporary chart number press the Enter key at the “Press Return” prompt to continue with PMR.

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

```

Do you need a temporary chart number for this new patient? (Y/N) Y
The new patient's TEMPORARY chart number is T00003
Press RETURN...[ENTER]
DATE OF BIRTH: 12/12/1912// [ENTER]
SEX: MALE// [ENTER]

```

Figure 17-6: Using patient mini- registration (steps 2h-2j)

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

```

Press RETURN...

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

Select one of the following:

      1      Not Available
      2      Patient Refused
      3      Patient will Submit

REASON for No SSN: 1 Not Available

```

Figure 17-7: Using patient mini-registration (step 2k)

## 18.0 Reports Menu (Scheduling) (SCR)

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

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

```

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

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

Select Scheduling Menu Option: MD

```

Figure 18-1: Sample of reports menu

### 18.1 Address/Insurance Update (AIU)

Use this option to print a form with patient addresses and insurance information which can be handed to the patient to verify that the information is still current. When setting up clinics, these forms can be set to automatically print when routing slips are printed. There is a site parameter that defines how often these print. If the site parameter is set to 90 days and a patient filled one out last week, a new form will not print.

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

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

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

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

Figure 18-2: Updating insurance and address information (step 1)

2. Type the name of the patient for which you need the update at the “Select Patient:” prompt.
3. Type the name of the printer where you would like the update to print at the “Device” prompt.

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

Figure 18-3: Updating insurance and address information (steps 2-3)

```

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

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

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

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

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

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

ELIGIBILITY: CHS & DIRECT

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

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

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

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

Does this include Dental coverage?  Yes___ No___

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

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

The Business Office, UNSPECIFIED HO          Printed 10:07 AM  Jan 09, 2001
    
```

Figure 18-4: Sample of insurance/address update form

## 18.2 Chart Locator (CHL)

Use this report to assist you in finding the paper chart if not in its proper place in the file room. It lists all hospitalizations, appointments (scheduled and walk-ins) and chart requests for a patient within a date range.

1. Type **CHL** at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.
2. Type the patient’s name whose chart you are looking for at the “Select Patient:” prompt.
3. Type the beginning date for the search at the “Select Beginning Date for Search:” prompt.

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

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

Select Reports Menu (Scheduling) Option: CHL
Select Patient: PATIENT,ALLISON
Select Beginning Date for Search: T-365
```

Figure 18-5: Using chart locator (steps 1-3)

4. The Chart Locator screen will be displayed (Figure 18-16).

```

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

Current Status: Patient currently an Inpatient on PED

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

Enter ?? for more actions                                >>>

Select Action:Quit//
    
```

Figure 18-6: Using chart locator (step 4)

### 18.3 List Charts Requested (LCR)

Use this report to print a list of all chart requests for a particular date. This report lists only chart requests and does not include scheduled appointments or walk-ins. Your sorting choices are by date/time the request was made, by clinic, by principal clinic or by terminal digit. The total number of chart requests is included at the end of the report.

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

```

Reports Menu (Scheduling)
(UNSPECIFIED HO)

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

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

Figure 18-7: Listing charts requested (step 1)

2. Type the date that you would like to print the chart request listing at the “Select Date:” prompt.
3. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.
4. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.
5. Type the number from the option list that corresponds to the way you would like your report sorted at the “Charts Requested by Date Sort Order:” prompt.
6. Type the name of the printer where you would like the report to print at the “Device” prompt. A report similar to Figure 18-8 is displayed or is printed.

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

      Select one of the following:

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

CHARTS REQUESTED BY DATE SORT ORDER:  D

Use wide paper or condensed print if printing to paper

DEVICE:  MY PRINTER
```

Figure 18-8: Listing charts requested (steps 2-6)



HRCN	Patient Name	Clinic	Requested On	By	Printed On
12345	Demo, Patient	CARDIOLOGY	12/25/03	dp	01/04/04@2304
65432	Demo, Person	PEDS	01/05/04	ab	01/05/04@0745

Total Chart Requests: 2; Total Not Printed: 0

Enter ?? for more actions >>>

Select Action:Quit//

Figure 18-9: Sample screen for the LCR option

## 18.4 List Routing Slips Printed (LRS)

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

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

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

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

Figure 18-10: Listing routing slips printed (step 1)

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

3. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.
4. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.
5. Type the letter that corresponds to the way you would like your report sorted at the “Charts Requested by Date Sort Order:” prompt.

```

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

      Select one of the following:

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

CHARTS REQUESTED BY DATE SORT ORDER:  D

Use wide paper or condensed print if printing to paper

DEVICE:  MY PRINTER

```

Figure 18-11: Listing routing slips printed (steps 2-5)

6. Type the name of the printer where you would like the report to print at the “Device” prompt. Routing slips similar to Figure 18-12 are displayed or are printed

```

APPT ROUTING SLIPS PRINTED  Jan 09, 2004 10:31:13          Page:    1 of    1
                Confidential Patient Data Covered by Privacy Act
                APPT ROUTING SLIPS for Jan 09, 2004
  HRCN  Patient Name      Clinic  Appt Made On      By  Printed On_____
106290  PATIENT,ALAN RAY  CARDIO  Jan 09, 2004@09:29  JT  01/08/04@1932
105441  DEMO,CISCO          CARDIO  Jan 09, 2004@10:25  JT  01/08/04@1933

Total Appts: 2; Total Not Printed: 0

                Enter ?? for more actions                                >>>

Select Action:Quit//

```

Figure 18-12: Sample screen of the LRS option

## 18.5 File Room List (FRL)

The File Room List option is used to generate a listing of all charts to be pulled for a specific date. These include appointments and chart requests. If a clinic does *not* need charts pulled for its appointments, then the clinic setup must state that it should not be included on the file room list. The sorting choices are by clinic name, by clinic code, by principal clinic or by terminal digit.

Information provided includes the patient chart number, name and date of birth, clinic and appointment time. For chart requests, “Cht Req” will be displayed instead of the appointment time. When printed on paper, each clinic will print on a separate page.

1. Type **FRL** at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.
2. Type the appointment date at the “List Appointments for What Date:” prompt.
3. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.
4. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.
5. Type the letter corresponding to how you want the report sorted at the “File Room List Sort Order:” prompt.
6. Type the name of the printer where you would like the report to print at the “Device” prompt.

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: FRL

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

    Select one of the following:

        N      BY CLINIC NAME
        C      BY CLINIC CODE
        P      BY PRINCIPAL CLINIC
        T      BY TERMINAL DIGIT
        A      BY APPOINTMENT TIME
        U      BY PATIENT NAME

FILE ROOM LIST SORT ORDER: BY CLINIC NAME//
Include CHART REQUESTS? NO// YES
DEVICE: HOME
```

Figure 18-13: Running a file room list (steps 1-6)

7. The File Room List screen will be displayed to the screen or printed to paper. For an example of the screen display (see Figure 18-14).

FILE ROOM LIST		Oct 15, 2002 13:07:05	Page: 1 of 1	
Confidential Patient Data Covered by Privacy Act				
FILE ROOM LIST FOR APPOINTMENTS & CHART REQUESTS for Oct 10, 2002				
HRCN	Patient Name	Clinic	Appt Time	Insurance
**GEN-OTT**				
123456	WILLIAMS, MARK A	GEN-OTT	15:00	MCR/MCD/PVT
148311	SMITH, AARON	GEN-OTT	16:00	MCR
226183	JONES, AARON	GEN-OTT	17:00	IHS
Enter ?? for more actions				
Select Action:Quit//				

Figure 18-14: Running a file room list (step 7)

## 18.6 Health Summaries by Clinic (HSC)

Use this option to print PCC health summaries for clinics that want them for appointments on a specific date. This option is used by sites wanting health summaries but which print the short form of the routing slip on small cards. A separate run on 8x11 paper for health summaries would have to be run.

1. Type **HSC** at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.
2. Type the date at the “Print Health Summaries for Which Date:” prompt.
3. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.
4. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.
5. Type the letter that corresponds to the way you would like your report sorted at the “Health Summaries Sort Order:” prompt.
6. Type Y or N at the “Do you want to also print other forms?” prompt. This would include medication profiles and address/insurance update forms. They would only print for those clinics set up to do so.
7. Type the name of the printer where you would like the report to print at the “Device:” prompt.

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: HSC

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

    Select one of the following:

        C          BY CLINIC NAME
        P          BY PRINCIPAL CLINIC
        T          BY TERMINAL DIGIT
        N          BY PATIENT NAME

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

```

Figure 18-15: Listing health summaries by clinic (steps 1-7)

## 18.7 Radiology Pull List (RPL)

The Radiology Pull List option is used to generate a listing of all patients whose radiology reports/films are required for their scheduled appointments. The report is run by date and sorted by the terminal digit format of patient chart numbers. The listing includes chart number, patient name, clinic, and appointment date/time. Any appointments the patient has scheduled for later that same day will also be displayed.

1. Type **RPL** at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.
2. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.

3. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics.
4. Type the date that interests you at the “Print for Which Date:” prompt.
5. Type the name of the printer where you would like the report to print at the “Device” prompt.

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

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

Select Reports Menu (Scheduling) Option: RPL

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

Figure 18-16: Listing the radiology pull list (steps 1-5)

6. The Radiology Pull List screen will be displayed (Figure 18-17).

Chart #	Patient Name	Clinic	Appt Time
105441	DEMO,CISCO	CARDIOLOGY	1/9/2004@17:00
106290	PATIENT,ALAN RAY	CARDIOLOGY	1/9/2004@14:00

Enter ?? for more actions

Select Action:Quit//

Figure 18-17: Listing the radiology pull list (step 6)

## 18.8 Routing Slips (RS)

Use this option to print routing slips for one individual patient even if there are no clinic visits scheduled for that patient on that day. Usually this option is used to print routing slips for all patients for a specific appointment date, or add-ons (patients scheduled for appointments since routing slips were last printed). These are used as charge-out slips in the File Room.

If the Print Health Summaries with Routing Slips field is set to YES in the Scheduling Parameters, and the Health Summary and Rx Profile fields are set to YES in the each Clinic Profile, these documents will be printed with the routing slips.

The routing slips may be sorted to print by terminal digit, clinic, principal clinic or patient name. When sorted by clinic, one, many (limit 20), or all clinics may be included. If this is a reprint of a previous run, the original run date is also shown. Any future appointments are also listed.

The number of routing slips per patient and the format are determined by site parameters.

1. Type **RS** at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports Menu.
2. If you are a multiple division facility, type the name of the division from where you would like the information at the “Routing Slips for Which Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions.



3. Type Y or N at the “Do You Want Routing Sheet for a Single Patient?” prompt. If you type Y, you will be prompted to type the name of the patient then taken to step 9.
4. Type A or O at the “Select All Routing Slips (A) or Only Add-ons (O):” prompt to choose between printing all routing slips or only add-ons.
5. Type the number that corresponds to the way you would like your routing slips sorted at the “Choose Sort Order:” prompt. The secondary sort is always in terminal digit order.
6. Only type Y at the “Is This a Reprint of a Previous Run?” prompt if your printer screwed up and the last run did not print correctly. It will reprint *all* routing slips you attempted to print on a specific date, this will only display if you select Add-ons.
7. Type appropriate answers to the remaining prompts as they appear on the screen. The prompts will change depending on what sort order you chose in step 5.
8. Type the name of the printer where you would like the report to print at the “Device” prompt.
9. Type Y at the “Do you want your output Queued?” prompt. This is a long run and you do not want to tie up your terminal.

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

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

    Select one of the following:

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

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

DEVICE: MIH108
Do you want your output QUEUED? Y

```

Figure 18-18: Running routing slips

## 18.9 Appointment Management Reports (AMR)

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

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

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: AMR

```

Figure 18-19: Accessing appointment management report

- Sections 18.9.1 through 4 explain how to use each of the options in the AMR menu.

### 18.9.1 Appointment Management Statistics

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

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

```

1. Appointment Management Statistics
2. Appointments Requiring Action
3. Uncoded Checked-in Appointments
4. Eligibility Appointment List
5. Cancelled Appointment Listing
6. On-line Help (Report Descriptions)

Select REPORT: (1-4): 1

```

Figure 18-20: Using the Appointment Management Statistics option (step 1)

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

```

_____ Date Range Selection _____
Select Beginning Date: T-365
Select Ending Date: T

```

Figure 18-21: Using the Appointment Management Statistics option (step 2)

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

```

_____ Statistics Criteria _____

Select one of the following:

    1      Statistics
    2      Division(s) Only Statistics

Which Visits: 1

```

Figure 18-22: Using the Appointment Management Statistics option (step 3)

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

```

_____ Report Format _____

Select one of the following:

    1      Appointment Clinic
    2      Stop Code

Select Report Format: 1

```

Figure 18-23: Sample of using the Appointment Management Statistics option (step 4)

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

```

_____ Division Selection _____
Select division: UNSPECIFIED INDIAN HOSPITAL

```

Figure 18-24: Using the Appointment Management Statistics option (step 5)

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

```

_____ Division Selection _____
Select division: UNSPECIFIED INDIAN HOSPITAL

_____ Clinic Selection _____
Select division: UNSPECIFIED INDIAN HOSPITAL
Select clinic: ALL

```

Figure 18-25: Using the Appointment Management Statistics option (step 6)

7. The Report Specifications screen appears (Figure 18-26). You can now see the options for your report. Type Y or N at the “Continue?” prompt. If you type N, you will be returned to step 2.
8. Type the name of the printer where you would like this printed at the “Device:” prompt. All reports should be queued to a printer at 132 columns.

```

_____ Report Specifications _____

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

          Divisions                Clinics
          -----                -
          UNSPECIFIED INDIAN HOSPITAL          All

Continue? Y

_____ Device Selection _____

If printing to paper, this report requires 132 columns.

DEVICE: HOME

```

Figure 18-26: Using the Appointment Management Statistics option (steps 7-8)

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

```

APPOINTMENT MANAGEMENT REPORT Oct 16, 2002 15:54:44          Page:    1 of
1
  Division: UNSPECIFIED INDIAN HOSPITAL      Date Range: 10/16/02 to 10/16/02
  Clinic      Chkd-In    Chkd-Out  No Action  ___No-show___  ___Cancelled___
Inpatient    Total
-----
Tot    CI    RB    Tot    CI    RB
-----
CARDIOLOGY      34      32      3      1    0    0      3    0    1    2
76
PEDIATRIC      56      45      0      5    0    0      1    0    0    0
107
=====
TOTAL          90      77      3      6    0    0      4    0    1    2
183

* CI=Checked-In ; RB=Rebooked
* Cancelled appointments only reflect appointments cancelled using
  the "Cancel Clinic Availability" option, not Cancel Appointment.
* Checked-In does not include no-shows or cancelled appointments
  that have been checked in. They are listed under those categories.

+      Enter ?? for more actions

Select Action:Next Screen//
    
```

Figure 18-27: Sample Appointment Management Report (excerpt)

### 18.9.2 Appointments Requiring Action

Use this report to list all appointments with the specific status of no action taken. These are appointments that need to be checked in, marked as no-shows or canceled. In order for the workload reports to be accurate, appointments must have an appropriate status defined.

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

```

1. Appointment Management Statistics
2. Appointments Requiring Action
3. Uncoded Checked-in Appointments
4. Eligibility Appointment List
5. Cancelled Appointment Listing
6. On-line Help (Report Descriptions)

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

Figure 18-28: Running an Appointments Requiring Action report (step 1)

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

3. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division.
4. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.
5. Type the date that you would like to begin your search and the date you would like to end your search at the “Select First Date to Search:” and “Select Last Date to Search:” prompts.
6. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print. See Figure 18-29 as an example.

```
Select one of the following:

      C      Clinic
      P      Principal Clinic
      V      Provider
      T      Team
Subtotal Report by: C
Select division: ALL
Select clinic: ALL
Select First Date to Search: T-365
Select Last Date to Search: T

      Select one of the following:

      B      BROWSE ON SCREEN
      P      PRINT ON PAPER
PRINT MODE: B
```

Figure 18-29: Running an Appointments Requiring Action report (steps 2-6)

APPOINTMENTS REQUIRING ACTION Jan 09, 2004 11:03:30					Page:	1 of 1
Confidential Patient Data Covered by Privacy Act						
For dates: Jan 09, 2003 to Jan 09, 2004						
Appt Date/Time	Type	HRCN	Patient Name	Sex	Age	
AUDIOLOGY						
May 07, 2003@14:00	Scheduled	104076	DEMO,ELSIE	F	66	
May 08, 2003@14:00	Scheduled	104076	DEMO,ELSIE	F	66	
Jul 22, 2003@09:00	Scheduled	105968	DEMO,CHRISTINA BEN	F	8	
Jul 22, 2003@10:00	Scheduled	106924	DEMO,AARON R.	M	6	
CARDIOLOGY						
Jan 09, 2004@17:00	Overbook	105191	PATIENT,ANISSA RAE	F	11	
DENTAL						
Sep 19, 2003@09:00	Scheduled	105367	DEMO,ADORA BETH	F	19	
ENT CLINIC						
May 01, 2003@12:00	Same Day	105193	DEMO,TRINA ANN	F	38	
MANNING						
Feb 25, 2003@17:30	Same Day	103682	BLAKE,MIHLENE DESH	F	15	
Enter ?? for more actions						
Select Action:Quit//						

Figure 18-30: Sample appointments requiring action screen

### 18.9.3 Uncoded Checked-in Appointments

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

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

<ol style="list-style-type: none"> <li>1. Appointment Management Statistics</li> <li>2. Appointments Requiring Action</li> <li>3. Uncoded Checked-in Appointments</li> <li>4. Eligibility Appointment List</li> <li>5. Cancelled Appointment Listing</li> <li>6. On-line Help (Report Descriptions)</li> </ol> <p>Select REPORT: (1-4): <b>3</b></p>
--

Figure 18-31: Running an Uncoded Checked-in Appointments report (step 1)

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



3. Type the letter that corresponds to how you would like your report sorted at the “Sort the report by:” prompt.
4. Type the name of the printer where you would like your report to print at the “Device:” prompt. A screen similar to Figure 18-39 displays or prints.

```

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

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

Select one of the following:

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

Sort the report by:  T
DEVICE:

```

Figure 18-32: Running an Uncoded Checked-in Appointments report (steps 2-4)

```

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

PATIENT NAME   HRN   VISIT DATE&TIME   SC CL HOSPITAL LOC   PROV   # visits
-----
DEMO, PATIENT  1234  JAN 09, 2003@07:45 A  02  CARDIOLOGY   100ABC  2  2
DEMO,FRED      5107  JAN 09, 2003@08:00 I  28  FMS (JANIS)   100WCJ  1  0
TEST,EILEEN    81215  JAN 09, 2003@08:10 A  01  GENERAL       100HKR  0  0

End of report.  HIT RETURN:

```

Figure 18-33: Sample uncoded check-in visits report

## 18.9.4 Eligibility Appointment List

Use this report to list all appointments with patient’s Insurance Eligibility. You will be required to have security key BSDRMZ ELIG REPORT. You will be asked to select which type of coverage to display as well as what to sort the report by.

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

```

1. Appointment Management Statistics
2. Appointments Requiring Action
3. Uncoded Checked-in Appointments
4. Eligibility Appointment List
5. Cancelled Appointment Listing
6. On-line Help (Report Descriptions)

Select REPORT: (1-4): 4

```

Figure 18-34: Running an Eligibility Appointment Listing report (step 1)

2. Select the division (if multidivisional) at the “Select division:” prompt.
3. Select the clinic at the “Select clinic:” prompt.
4. If desired, select another clinic at the “Select another clinic:” prompt.
5. Select the first date to search at the “Select First Date to Search:” prompt.
6. Select the last date to search at the “Select Last Date to Search:” prompt.
7. Select the sort, your choices are by Date/Time, Patient Name, and Coverage Type, at the “Sort By:” prompt.
8. Select the coverage type to display, your choices are Medicaid, Medicare, Private Insurance or All, at the “Show which Coverage Type(s):” prompt.

```

Select division: ALL//
Select clinic: ALL// GEN-OTT
Select another clinic:
Select First Date to Search: T-100 (DEC 04, 2006)
Select Last Date to Search: T (MAR 14, 2007)

Select one of the following:

D      Date/Time
P      Patient Name
C      Coverage Type

Sort By: Date/Time//

1) Medicaid
2) Medicare
3) Private Insurance
4) All

Show which Coverage Type(s): (1-4): 4

Select one of the following:

B      BROWSE ON SCREEN
P      PRINT ON PAPER

PRINT MODE: BROWSE//

```

Figure 18-35: Running an Eligibility Appointment Listing report (steps 2-8)

Eligibility Appointment List		Mar 14, 2007 14:06:41		Page: 1 of 3	
Confidential Patient Data Covered by Privacy Act					
For dates: Dec 04, 2006 to Mar 14, 2007					
For Coverage Type(s): MCR/MCD/PI					
Appointment Date/Time	Chart#	Patient Name	SSN	Insurance Inf	
Clinic GEN-OTT					
Dec 06, 2006@13:00	123456	WILLIAMS,MARK A	550069532	*MCR/MCD/PVT/*	
Dec 13, 2006@13:00	123456	WILLIAMS,MARK A	550069532	*MCR/MCD/PVT/*	
Dec 20, 2006@13:00	123456	WILLIAMS,MARK A	550069532	*MCR/MCD/PVT/*	
Dec 27, 2006@15:00	123456	WILLIAMS,MARK A	550069532	*MCR/MCD/PVT/*	
Jan 04, 2007@11:00	123456	WILLIAMS,MARK A	550069532	*MCR/MCD/PVT/*	
Jan 11, 2007@13:00	123456	WILLIAMS,MARK A	550069532	*MCR/MCD/PVT/*	
Jan 15, 2007@10:00	123456	WILLIAMS,MARK A	550069532	*MCR/MCD/PVT/*	
+ Enter ?? for more actions					
Select Action:Next Screen//					

Figure 18-36: Sample Eligibility Appointment Listing report

### 18.9.5 Cancelled Appointment Listing

Use this report to list all appointments that were cancelled. This report may take some time as it has to search through the entire patient file to obtain the information needed for the report.

1. Type **5** at the “Select Report:” prompt in the Appointment Management Reports submenu.

<ol style="list-style-type: none"> <li>1. Appointment Management Statistics</li> <li>2. Appointments Requiring Action</li> <li>3. Uncoded Checked-in Appointments</li> <li>4. Eligibility Appointment List</li> <li>5. Cancelled Appointment Listing</li> <li>6. On-line Help (Report Descriptions)</li> </ol> <p>Select REPORT: (1-4): 3</p>
---

Figure 18-37: Running an Uncoded Cancelled Appointment Listing report (step 1)

2. Select the division (if multidivisional) at the “Select division:” prompt.
3. Select the clinic at the “Select clinic:” prompt.
4. If desired, select another clinic at the “Select another clinic:” prompt.
5. Select the first date to search at the “Select First Date to Search:” prompt.

6. Select the last date to search at the “Select Last Date to Search:” prompt.
7. Select the type of cancellation you wish to display, your choices are by Clinic or Patient, at the “Cancelled By:” prompt.

```

Select division: ALL//
Select clinic: ALL//      GEN-OTT
Select another clinic:
Select First Date to Search: T-30 (FEB 12, 2007)
Select Last Date to Search: T (MAR 14, 2007)

      Select one of the following:

          C          Clinic
          P          Patient

Cancelled By: Clinic//

      Select one of the following:

          B          BROWSE ON SCREEN
          P          PRINT ON PAPER

PRINT MODE: BROWSE//
DEVICE:

```

Figure 18-38: Running Cancelled Appointment Listing report (steps 2-7)

```

Cancelled Appointment Listing Mar 14, 2007 14:03:26      Page:      1 of      1
      Confidential Patient Data Covered by Privacy Act
      For dates: Dec 04, 2006 to Mar 14, 2007
      Cancelled by: Patient

Patient Name      HRCN      Phone      Appt Date/Time      Reason
GEN-OTT
WILLIAMS, MATTHEW R 979797  907-349-2244  Feb 15, 2007@15:00  OTHER (THIS IS

      Enter ?? for more actions      >>>

Select Action:Quit//

```

Figure 18-39: Sample Cancelled Appointment Listing report

### 18.9.6 Online Help (Report Descriptions)

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

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

```

1. Appointment Management Statistics
2. Appointments Requiring Action
3. Uncoded Checked-in Appointments
4. Eligibility Appointment List
5. Cancelled Appointment Listing
6. On-line Help (Report Descriptions)

Select REPORT: (1-4): 6

```

Figure 18-40: Using the online help option (step 1)

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

```

                                APPOINTMENT MANAGEMENT REPORTS

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

1   Appointment Management Statistics

2   Appointments Requiring Action

3   Uncoded Checked-in Appointments

4   Eligibility Appointment List

5   Cancelled Appointments

Select HELP SYSTEM action or <return>:

```

Figure 18-41: Using the online help option (step 2)

3. Depending on the option you selected, a report description displays similar to Figure 18-42.

```
APPOINTMENT MANAGEMENT STATISTICS

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

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

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

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

Figure 18-42: Sample online help

## 18.10 Clinic Availability Reports (CAR)

Use this option to run a variety of reports that provide different ways of looking at your clinics' schedules, how long it takes to get an appointment and how much they are overbooked. You may run these reports for all clinics and divisions within your facility, or you may specify individual divisions and clinics. The reports available in the Clinic Availability Reports submenu are:

1. Clinic List (Day of Week)
2. Month-at-a-glance Display
3. Clinic Availability Report
4. Clinic Capacity Report
5. Next Available Appointment Report
6. Number of Available Appointments
7. Number of Appts Made & Wait Times
8. Clinic Abbreviations
9. On-line Help (Report Descriptions)
10. To run a Clinic Availability Report, type **CAR** at the "Select Reports Menu (Scheduling) Option:" prompt in the Reports Menu as shown in Figure 18-43.

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: CAR

```

Figure 18-43: Accessing the Clinic Availability Report submenu

### 18.10.1 Clinic List (Day of Week)

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

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

```

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

Select REPORT: (1-9): 1

```

Figure 18-44: Running a clinic list (day of week) (step 1)

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

3. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.
4. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```

Select division: ALL
Select clinic: ALL

      Select one of the following:

          B          BROWSE ON SCREEN
          P          PRINT ON PAPER

PRINT MODE: B
    
```

Figure 18-45: Running a clinic list (day of week) (steps 2-4)

5. If you selected B (Browse onscreen), the report will be displayed on your screen (Figure 18-46). Use the options at the bottom of the screen to navigate through the report.

```

CLINIC LIST - DAY OF WEEK      Oct 17, 2002 08:33:16      Page:      1 of      3
FACILITY: UNSPECIFIED INDIAN HOSPITAL
CLINIC LIST BY DAY OF WEEK AS OF OCT 17, 2002

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

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

Select Action:Next Screen//
    
```

Figure 18-46: Running a clinic list (day of week) (step 5)



## 18.10.2 Month-at-a-glance Display

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

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

```

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

Select REPORT: (1-9): 2

```

Figure 18-47: Displaying month-at -a -glance (step 1)

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

```

Select CLINIC: PEDIATRIC

Select one of the following:

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

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T

```

Figure 18-48: Displaying month-at -a -glance (steps 2-3)

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

MONTH-AT-A-GLANCE		Oct 10, 2002 13:12:05					Page: 1 of 4			
CARDIOLOGY										
Oct 2002										
TIME	8	9	10	11	12	1	2	3	4	
DATE										
TH 10	[1 1 1 1]	0 1 1 1	0 1 1 1	1 1 1 1	1 1 1 1	0 1 1 1	0 1 1 1	0 1 1 1	0 1 1 1	0 1 1 1
FR 11	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SA 12	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SU 13	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
MO 14	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
WE 16	[1 1 1 1]	1 1 1 1	0 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
TH 17	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	0 1 1 1	0 1 1 1	0 1 1 1
FR 18	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SA 19	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
SU 20	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
MO 21	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1
WE 23	[1 1 1 1]	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1

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

Select Action:

Figure 18-49: Displaying month-at -a -glance (step 4)

### 18.10.3 Clinic Availability Report

Use this report for a combined month-at-a-glance display and appointment list. For the clinics and date range you select, the month-at-a-glance display for those dates in presented with explanations of any odd characters used. Then for each date, the appointments are listed by time with patient name, chart number and length of appointment. You have the choice to also include no-shows and cancellations.

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

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

Figure 18-50: Using the Clinic Availability report (step 1)

2. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division.
3. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.
4. Type the date that you would like to begin your search and the date you would like to end your search at the “Beginning Visit Date:” and “Ending Visit Date:” prompts.
5. Type Y or N at the “Include Cancellations and/or No-Shows?” prompt.
6. Type the name of the printer where you would like your report to print or type HOME to display the report on the screen at the “Device:” prompt.

```
Select division: ALL
Select clinic: ALL

**** Date Range Selection ****

Beginning DATE : T

Ending DATE : T+7

INCLUDE CANCELLATIONS AND/OR NO-SHOWS? N

DEVICE: HOME
```

Figure 18-51: Using the Clinic Availability report (steps 2-6)

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

```

CLINIC AVAILABILITY REPORT   Nov 18, 2005 15:17:25           Page:   1 of   3
                               NOV 18,2005@15:17   PAGE 1
                               TAOS HEALTH CENTER
                               DM (BLEVINS)
                               JULY 2004

TIME|6      |7      |8      |9      |10     |11     |12     |1      |2      |3      |4
DATE|        |        |        |        |        |        |        |        |        |        |
TH 29|0 1 1|1 1 1|1 1 1|1 1 1|      |      |0 0 1|1 1 1|0 0 1|1 1 1|1 1 1|1]

FOR CLINIC AVAILABILITY PATTERNS:

0-9 and j-z --denote available slots where j=10,k=11...z=26
A-W --denote overbooks with A being the first slot to be overbooked
and B being the second for that same time, etc.
*,$,!,@,# --denote overbooks or appts. that fall outside of a clinic's
regular hours

THURSDAY JUL 29,2004
      8:00 AM PATIENT,LINDA           12345      (20) MINUTES
      2:00 PM DEMO,MORGAN             2468       (40) MINUTES
      4:00 PM PATIENT,LEO             99887      (40) MINUTES

FOR INDIVIDUAL APPOINTMENT LISTINGS:
* --APPTS CANCELLED
** --NO-SHOW
*** --UNSCHEDULED VISIT

+      Enter ?? for more actions

Select Action:Next Screen//

```

Figure 18-52: Using the Clinic Availability report (step 7)

### 18.10.4 Clinic Capacity Report

Use this report to compare how many appointments have been made vs. how many slots are available in the clinics you select. For past dates this report will also display the number of actual patient encounters that day, the number of new appointments made that day along with the average number of days between making the appointment and the appointment date itself.

**Note:** Running this report for past dates takes a long time to process!

Running it for clinic codes instead of select clinic names also takes much longer to process.

1. Type **4** at the "Select Report: (1-9):" prompt in the Clinic Availability Report submenu.
2. Press the Enter key at the "Press Enter to Continue:" prompt.

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

Select REPORT: (1-9): 4

Use this report to compare appointment slots assigned vs.
open slots left. For past dates this report will also
display the number of actual patient encounters that day,
the number of new appointments made that day along with
the average number of days between making the appointment
and the appointment date itself.

Press ENTER to continue: [ENTER]
```

Figure 18-53: Running a clinic capacity report (steps 1-2)

3. Type S (summary for date range) or D (detail by day) at the “Select Report Format:” prompt to select how you would like your report to be formatted.
4. Type CL (clinic name) or CC (clinic code) at the “Specify Limiting Category for Detail:” prompt to select how would like to type the clinic information. If you select CL, you will be prompted to type the clinic name. If you select CC, you will be prompted to type the clinic code. When you are done entering all the clinics you want included, press the Enter key.
5. Type the name of the printer where you would like your report to print or type HOME to display the report on your screen at the “Device:” prompt.

```

          Clinic Appointment Capacity Report
Select one of the following:

      S          SUMMARY FOR DATE RANGE
      D          DETAIL BY DAY

Select report format: S

Select one of the following:

      CL          CLINIC NAME
      CC          CLINIC CODE

Specify limiting category for detail: C

Select CLINIC: CARDIOLOGY
Select CLINIC: [ENTER]

DEVICE: HOME
    
```

Figure 18-54: Running a clinic capacity report (steps 3-5)

- If you selected to display the report onscreen, the Clinic Capacity Report screen will be displayed (Figure 18-55). Use the options at the bottom of the screen to navigate the report.

```

CLINIC CAPACITY REPORT      Oct 17, 2002 09:37:08      Page: 1 of 1
-----
      <*> Clinic Appointment Capacity Report <*>
      Summary for division: UNSPECIFIED HO (202301)
-----
For clinic availability dates OCT 17,2002 through OCT 24,2002
Date printed: OCT 17,2002@09:37      Page: 1
-----
Clinic Code      Avail.      Pct. Actual      ---Future Appts---
Clinic Name      Clinic      Appt.      Slots      Clinic      Total      Ave
                  Capacity  Slots      Avail.      Enc.      Made      Wait
-----
02-CARDIAC      252      247      98%      0      0      0.0
CARDIOLOGY      252      247      98%      0      0      0.0
Division total:      252      247      98%      0      0      0.0
-----
NOTE: Clinic Capacity = total # of appointments slots
      Avail. Appt. Slots = # of slots still open
+      Enter ?? for more actions

Select Action:Next Screen//
    
```

Figure 18-55: Running a clinic capacity report (step 6)

### 18.10.5 Next Available Appointment Report

Use this report to find the next available appointment slot for a patient for a particular clinic, within a specific date range and with an appointment duration time as specified. You can select to use the logic of looking for the 3rd next available appointment instead of the very next available one. This has been determined to be a more accurate indicator of appointment availability.

1. Type **5** at the “Select Report: (1-9):” prompt in the Clinic Availability Report submenu.

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

Select REPORT: (1-9): 5
```

Figure 18-56: Running the Next Available Appointment report (step 1)

2. Type **Y** or **N** at the “Search for Next 3rd Available Appt.?” prompt. Answer Yes to use the 3rd next available appointment in your calculations, using the 3rd next available appointment instead of the very next one, gives a clearer picture of the clinic schedule. Answer No to use next available appointment.
3. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division.
4. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic.
5. Type **B** (to browse the report onscreen) or **P** (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```

Search for Next 3rd Available Appt.? N
Select division: ALL
Select clinic: ALL

      Select one of the following:

          B          BROWSE ON SCREEN
          P          PRINT ON PAPER

PRINT MODE: B

```

Figure 18-57: Running the Next Available Appointment report (steps 2-5)

- If you selected B (browse onscreen), the Next Available Appointment screen will be displayed (Figure 18-58). Use the options at the bottom of the screen to navigate through the report.

```

NEXT AVAILABLE APPOINTMENT   Oct 17, 2002 11:18:35           Page:    1  of  1
UNAFFILIATED CLINICS
          AUDIOLOGY           Oct 17, 2002    0 days
          CARDIOLOGY          Oct 17, 2002    0 days
          DENTAL              Oct 17, 2002    0 days
          PEDIATRIC           Oct 23, 2002    6 days

      Enter ?? for more actions

Select Action:Quit//

```

Figure 18-58: Running the Next Available Appointment report (step 6)

### 18.10.6 Number of Available Appointments

Use this report to view and print the total number of available appointments within each respective clinic for each day of the next two weeks. This makes short work of the scheduling process and for figuring out which clinics have openings.

- Type **6** at the “Select Report: (1-9):” prompt in the Clinic Availability Report submenu.



```

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

Select REPORT: (1-9): 6

```

Figure 18-59: Running the number of available appointments (step 1)

2. Type the start date of the report at the “Starting Date:” prompt.
3. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division.
4. Type the clinic name at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Enter key.
5. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```

Starting Date: T TODAY (OCT 17, 2002)
Select division: A (ALL)
Select clinic: A (ALL)

Select one of the following:

    B          BROWSE ON SCREEN
    P          PRINT ON PAPER

Print Mode: B

```

Figure 18-60: Running the number of available appointments (steps 2-5)

6. If you selected B (browse onscreen), the Number of Available Appointments will be displayed (Figure 18-61). Use the options at the bottom of the screen to navigate through the report.

```

Number of Available Appts.      Oct 17, 2002 12:44:32      Page:      1 of      1
NUMBER OF APPTS AVAILABLE BY CLINIC AND DATE
Oct 17, 2002 to Oct 30, 2002

| 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 |
Principal Clinic: UNAFFILIATED CLINICS
GYN      | 7  | 7  | 0  | 0  | 7  | 7  | 7  | 7  | 7  | 0  | 0  | 7  | 7  | 7  |
AUD      | 24 | 28 | 0  | 0  | 0  | 28 | 8  | 24 | 28 | 0  | 0  | 0  | 28 | 8  |
CARDIO   | 29 | 32 | 32 | 32 | 32 | 0  | 32 | 30 | 32 | 32 | 32 | 32 | 0  | 32 |
PEDS     | 0  | 0  | 0  | 0  | 0  | 0  | 50 | 0  | 0  | 0  | 0  | 0  | 0  | 50 |

Enter ?? for more actions

Select Action:
    
```

Figure 18-61: Running the number of available appointments (step 6)

### 18.10.7 Number of Appointments Made & Wait Times

Use this report to review the number of appointments made each day by principal clinic and individual clinic. The number made by day of week is also included as well as the wait time between making the appointment and the actual appointment date. The wait times are listed as low, high, and average number of days.

1. Type **7** at the “Select Report: (1-9):” prompt in the Accessing the Clinic Availability Report submenu

```

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

Select REPORT: (1-9): 7
    
```

Figure 18-62: Listing the Number of Appointments Made & Wait Times (step 1)

2. If you are a multiple division facility, type the division name at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division. When you are done entering division names, press the Enter key.

3. Type the clinic name at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Enter key.
4. Type the beginning date of the report at the “Select First Date to Search:” prompt.
5. Type the ending date of the report at the “Select Last Date to Search:” prompt.
6. Type Y or N at the “Include Daily Totals?” prompt.
7. Type Y or N at the “Display Individual Clinic Totals?” prompt.
8. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select division: ALL
Select clinic: CARDIOLOGY
Select another clinic: [ENTER]
Select First Date to Search: T-365
Select Last Date to Search: T
Include Daily Totals? N
Display Individual Clinic Totals? N

      Select one of the following:

          B          BROWSE ON SCREEN
          P          PRINT ON PAPER

PRINT MODE: B
```

Figure 18-63: Listing the Number of Appointments Made & Wait Times (steps 2-8)

9. If you selected B (browse onscreen), the Count Number of Appointments Made screen will be displayed (Figure 18-64). Use the options at the bottom of the screen to navigate through the report.

COUNT # OF APPTS MADE		Oct 17, 2002 13:13:14	Page:	1 of	1
Appointments Made from Oct 17, 2001 to Oct 17, 2002					
Date Appt Made	Day of Week	# Appts Made	Ave # Appts Made__		
UNAFFILIATED CLINICS					
Total for this principal clinic:		16	16		
Oct 10, 2002	Thursday	16			
Average for Sundays:		0	0		
Average for Mondays:		0	0		
Average for Tuesdays:		0	0		
Average for Wednesdays:		0	0		
Average for Thursdays:		16	16		
Average for Fridays:		0	0		
Average for Saturdays:		0	0		
Wait Times: Low - High - Average					
0 - 28 - 9					
CARDIOLOGY					
Total for this clinic:		16	16		
Oct 10, 2002	Thursday	16			
+ Enter ?? for more actions					
SELECT ACTION:					

Figure 18-64: Listing the Number of Appointments Made &amp; Wait Times (step 9)

### 18.10.8 Clinic Abbreviations

Use this report to list all of the clinic abbreviations. This report is useful for printing out the list of active clinics, sorted by their appropriate abbreviations. Since space on many reports is limited, clinic names are abbreviated and sorted thereby.

1. Type **8** at the “Select Report: (1-9):” prompt in the Clinic Availability Report submenu.

<ol style="list-style-type: none"> <li>1. Clinic List (Day of Week)</li> <li>2. Month-at-a-glance Display</li> <li>3. Clinic Availability Report</li> <li>4. Clinic Capacity Report</li> <li>5. Next Available Appointment Report</li> <li>6. Number of Available Appointments</li> <li>7. Number of Appts Made &amp; Wait Times</li> <li>8. Clinic Abbreviations</li> <li>9. On-line Help (Report Descriptions)</li> </ol> <p>Select REPORT: (1-9): <b>8</b></p>
---

Figure 18-65: Listing Clinic Abbreviations (step 1)

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

```

Select one of the following:

      B          BROWSE ON SCREEN
      P          PRINT ON PAPER

PRINT MODE: B

```

Figure 18-66: Listing Clinic Abbreviations (step 2)

- If you selected B (browse onscreen), the Clinic Abbreviations screen will be displayed (Figure 18-67). Use the options at the bottom of the screen to navigate through the report.

```

CLINIC ABBREVIATIONS          Oct 17, 2002 13:28:11          Page: 1 of 1
AUD          AUDIOLOGY
CARDIO       CARDIOLOGY
CC           COLPO CLINIC
DM           DIABETIC PRINCIPAL
DM           DIABETIC CLINIC
DM #1       DIABETIC DOC #1
DM #2       DIABETIC DOC #2
DM #3       DIABETIC DOC #3
ENT         ENT CLINIC
GC          11-17
GEN         GENERAL
GW          gw
MAMM       MAMMOGRAM CLINIC
MDC        Multiple Dental Chairs
MH         Mental Health
MH/SS      MENTAL HEALTH
MS         MEDICAL STUDENT
NA         NURSES APPT
NC         NEPHROLOGY
+          Enter ?? for more actions

Select Action:

```

Figure 18-67: Listing Clinic Abbreviations (step 3)

### 18.10.9 Online Help (Report Descriptions)

Use this option to help you select a report from the CAR submenu that suits you best. This option will give you detail help as to each report in the CAR submenu. Select from a list of reports dealing with clinic schedules and appointment availabilities. All these report descriptions will be displayed onscreen.

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

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

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

Figure 18-68: Using on-line help (step 1)

2. Type the number that corresponds to the report with which you need help at the “Select Help System action or <return>:” prompt.

```
CLINIC AVAILABILITY REPORTS

Use this option to select from a list of reports dealing with clinic
schedules and appointment availabilities. All reports can be viewed in
browse mode when HOME is the print device selected.

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

Select HELP SYSTEM action or <return>: 1
```

Figure 18-69: Using on-line help (step 2)

## 18.11 Clinic Profile (CPF)

Use this report to produce a profile of one, many or all clinics. At multidivisional facilities, you may choose to generate the profile of clinics associated with one, many, or all divisions. The clinics will be profiled as of the date the report is requested, providing the most current information available.

Some of the data elements included in each profile may be: clinic name, abbreviation (if any), telephone number and location of clinic, days clinic meets, start date, increments, hour display begins, appointment length, variable length, max overbooks/day, stop code, credit stop code, non-count clinic, access to clinic prohibited, and max number days for future booking. Look at parameters including default provider and diagnosis for each clinic are also displayed.

The following is a brief explanation of some of the data elements listed on the report:

- Non-Count Clinic: If you answered Yes, clinic will not impact on statistics.
- Start Date: Date clinic was initially set up.
- Increments: Number of slots per hour.
- Variable: Variable length appointments.
- Prohibit Access To Clinic: Indicates if the clinic is restricted to privileged users. If the clinic is temporarily or permanently inactivated, or is scheduled to be inactivated, this information will be displayed in the profile.

To create a profile of one or more clinics:

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

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: CPF

```

Figure 18-70: Running a clinic report (step 1)

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

3. Type the name of the clinic you are interested in at the "Select Clinic:" prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinics, press the Enter key at a blank "Select Clinic:" prompt.
4. Type B (to browse the report onscreen) or P (to print the report on paper) at the "Print Mode:" prompt. If you select P, you must then select the printer where you would like your report to print.

```

Select division: ALL
Select clinic: CARDIOLOGY
Select another Clinic: [ENTER]

      Select one of the following:

          B          BROWSE ON SCREEN
          P          PRINT ON PAPER

PRINT MODE: B

```

Figure 18-71: Running a clinic report (steps 2-4)

5. If you selected B (browse onscreen), the Clinic Profile screen will be displayed (Figure 18-72). Use the options at the bottom of the screen to navigate through the report

```

CLINIC PROFILE          Oct 17, 2002 11:34:25          Page:    1 of    2
  Clinic: CARDIOLOGY          Abbrv: CARDIO
  Facility: UNSPECIFIED HO    Service: CLINIC
  Location: 1st floor, N Wing  Clinic Code: 02 - CARDIAC
  Telephone: 247-0011        Principal Clinic: UNAFFILIATED CLINICS

  Clinic Meets: SU,MO,WE,TH,FR,SA    Sched Holidays: YES
  Appt. Display: Begins at 8 AM      Appt. Length: 15 min.
  Increments: 15-MIN              Variable Length: NO
  Overbooks/Day: 0                Future Booking: 45 days max.
  Auto-Rebook: Start at 9 AM        Max. Auto-Rebook: 45 days
  No-Shows: 2 allowed              Wait Period: 14
                                   Pull Prev X-rays: YES

Appointment List Statement:
Special Instructions: None
Clinic's Letters -
+      Enter ?? for more actions
Select Action:Next Screen//

```

Figure 18-72: Running a clinic report (step 5)



## 18.12 No-Show Reports (NSR)

Use this option to access reports of all no-shows entered into the system for specified clinics. The reports can be run for one, many or all clinics. A range of clinics may also be selected, such as all clinics whose names begin with the same letters. This will limit the number of keystrokes needed to choose those clinics. The output can be generated for a date range or a single date. At multidivisional facilities, you may print the report for a single division or all divisions. The No-Show reports submenu gives you three options:

- No-Show Report
- Frequent No-Shows
- On-line Help (Report Descriptions)

To access the No-Show reports, type NSR at the “Select Reports Menu (Scheduling) Option:” prompt in the Report menu.

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: NSR

```

Figure 18-73: Selecting No-Show reports

### 18.12.1 No-Show Report

Use this report to track and list the number of no-shows by date subtotaled by clinic and division.

1. Type 1 at the “Select Report:” prompt in the No-Show Report submenu.

```

1. No-Show Report
2. Frequent No-Shows
3. On-line Help (Report Descriptions)

Select REPORT: (1-3): 1

```

Figure 18-74: Running a no-show report (step 1)

2. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division. When you are done entering divisions, press the Enter key.
3. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinics, press the Enter key at a blank “Select Clinic:” prompt.
4. Type the date range you wish the report to cover.
5. Type Y or N at the “Print report totals only?” prompt.
6. Type the name of the printer where you would like your report to print or type HOME to display the report on your screen at the “Device:” prompt

```

Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [ENTER]
Select clinic: CARDIOLOGY
Select another clinic: [ENTER]

You may enter only a beginning date if you would like
to see a report of No-Shows for only one date.

**** Date Range Selection ****

Beginning DATE : T-365

Ending DATE : T

Print report totals only? Y

DEVICE: HOME

```

Figure 18-75: Running a no-show report (steps 2-6)

7. If you typed HOME, the No-Show report will be displayed (Figure 18-76). Use the options at the bottom of the screen to navigate through the report.

```

No-Show Report                Oct 17, 2002 13:58:13                Page:    1 of    3
                                Confidential Patient Data Covered by Privacy Act

FOR PERIOD COVERING:          OCT 17, 2002 TO OCT 17, 2002
FOR DIVISION:                 HEALTH CENTER
FOR CLINIC:                   DIABETES (PRINCIPAL)
=====
Clinic                        Without      With
                              Rebooked    Rebooked
                              Appts.      Appts.
-----
DM (DOC A)                    4            0            4            3%
DM (DOC B)                    0            0            0            0%
DM (DOC C)                   10           0           10           30%
DM (DOC D)                    0            0            0            0%
=====
                                NO SHOW REPORT TOTALS
=====
FOR PERIOD COVERING:          OCT 17, 2002 TO OCT 17, 2002
FOR DIVISION:                 HEALTH CENTER
=====
                                TOTALS FOR    HEALTH CENTER
                                TOTAL NO-SHOWS W/NO    TOTAL NO-SHOWS W/    TOTAL NO-SHOWS
                                REBOOKED APPTS.      REBOOKED APPTS.
=====
                                14                0                14
+      Enter ?? for more actions
Select Action:Next Screen//
    
```

Figure 18-76: Running a no show report (step 7)

### 18.12.2 Frequent No-Shows

Use this report to track patients with a specified number of recorded no-shows by clinic, by principal clinic or for your whole facility. Each time you run the report, you can select the number of no-shows that will determine who to include in the listing.

1. Type **2** at the “Select Report:” prompt in the No-Show Report submenu.

```

1. No-Show Report
2. Frequent No-Shows
3. On-line Help (Report Descriptions)

Select REPORT: (1-3): 2
    
```

Figure 18-77: Listing frequent no-shows (step 1)

2. If you are a multiple division facility, type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division. When you are done entering divisions, press the Enter key.
3. Type the name of the clinic you are interested in at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinics, press the Enter key at a blank “Select Clinic:” prompt.
4. Type the starting and ending date range you wish the report to cover.
5. Type the number of no-shows that you want to define as frequent at the “Number of No-Shows that defines Frequent: (1-99):” prompt.
6. Type F (Facility), P (Principal Clinic), or C (Clinic) at the “No-Show Limit Based on Which Category:” prompt to determine how you want your no-show category based.
7. Type Y or N at the “Display Appt. Other Info?” prompt. Answer YES to include appointment length and other info (used for appt reason). Answer no to list patient name, chart number, last no-show, and counts only.
8. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```

Select division: UNSPECIFIED Indian Hospital
Select division: [ENTER]
Select clinic: CARDIOLOGY
Select clinic: [ENTER]
Select First Date to Search: T (OCT 17, 2002)
Select Last Date to Search: T (OCT 17, 2002)
Number of No-Shows that defines Frequent: (1-99): 5

    Select one of the following:

        F          Facility
        P          Principal Clinic
        C          Clinic

No-Show Limit based on which category: F
Display Appt. Other Info? N

    Select one of the following:

        B          BROWSE ON SCREEN
        P          PRINT ON PAPER

PRINT MODE: B

```

Figure 18-78: Listing frequent no-shows (step 2-8)

- If you select B (browse onscreen), the Frequent No-Shows screen will be displayed (Figure 18-79). Use the options at the bottom of the screen to navigate through the screen.

Frequent No-Shows		Oct 17, 2002 14:11:02		Page: 1 of 1	
Confidential Patient Data Covered by Privacy Act					
For appointments between Oct 17, 2001 and Oct 17, 2002					
Patients with at least 5 no-shows for the facility					
Patient	HRCN	Last No-show	#No-shows:	Clinic	Princ Cln
Principal Clinic: UNAFFILIATED CLINICS			(Count back 30 days)		
PEDIATRIC (Count back 30 days)					
PATIENT,MARILEE	8888	11/28/01@09:30	1	0	1
		15MIN WELL CHILD CLINIC			
PATIENT,SEQUANA	9999	11/28/01@10:30	1	0	1
		15MIN WELL CHILD CLINIC			
Enter ?? for more actions					
Select Action:Quit//					

Figure 18-79: Listing frequent no-shows (step 9)

### 18.12.3 Online Help (Report Descriptions)

Use this option to give you help with the no-show reports. This option gives you detailed report descriptions for the No-Show, and Frequent No-Show reports. All the report descriptions will be displayed onscreen.

- Type **3** at the “Select Report:” prompt in the No-Show Report submenu.

<ol style="list-style-type: none"> <li>No-Show Report</li> <li>Frequent No-Shows</li> <li>On-line Help (Report Descriptions)</li> </ol>
Select REPORT: (1-3): <b>3</b>

Figure 18-80: Using on-line help (step 1)

- Type the number of the report with which you need help at the “Select Help System Action or <Return>:” prompt.

```

                                NO-SHOW REPORTS

Use this option to access various reports on no-shows for scheduled clinic
appointments. Reports include statistics and patient listings. These
reports assume you are marking your no-shows at the end of every clinic
day. Various reports under the Appointment Management Reports option can
assist you in finding appointments that need to be marked as checked in,
no-show or cancelled.

1      No-Show Report

2      Frequent No-Shows

Select HELP SYSTEM action or <return>:

```

Figure 18-81: Using on-line help (step 2)

## 18.13 Waiting List Report (WLR)

Use this report when the respective clinic is completely booked, and the demand still exists for medical attention at the clinic. This report lists those patients who have been put on a waiting list for the specific clinic. It can be sorted by Provider to be Seen, Date Added to List or Recall Date, or by the date entered into the system.

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

```

                                Reports Menu (Scheduling)

                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: WLR

```

Figure 18-82: Running a waiting list report (step 1)

2. Type the name of the clinic or ward that you would like to see at the “Select Clinic or Ward:” prompt.
3. You can select three ways to list the report. Type the number of your selection at the “Select Date Range Type:” prompt:
  - 1- Date Added to List
  - 2- Recall Date
  - 3- Date Removed from List
4. Type the beginning date at the “Select Beginning Date:” prompt.
5. Type the ending date at the “Select Ending Date:” prompt.
6. Type Yes or No at the “Include Entries Already Removed from List?” prompt.
7. You can further sort the report by the following options. Type the number of your selection at the “Select Sort:” prompt.
  - 1-By Dates Selected
  - 2-By Priority
  - 3-By Provider
  - 4-By Reason Added
  - 5-By Resolution
8. You can then choose to print the report by the following options. Type the number of your selection at the “Print By:” prompt.
  - 1-By Dates Selected
  - 2-By Priority
  - 3-By Provider
  - 4-By Reason Added
  - 5-By Resolution
9. Type P (print) or B (browse) at the “Print Mode:” prompt.

Use this option to list patients on your waiting list by date added, recall date or date removed. You can sort the report by date, priority, provider, reason for adding or resolution. For a list displayed on your screen, you can select any entry to review all information including the comments added.

Select Clinic or Ward: **TEEN HEALTH**

1) Date Added to List  
2) Recall Date  
3) Date Removed from List  
Select Date Range Type: (1-3): **1**

Select Beginning Date: **T-365** (FEB 02, 2003)  
Select Ending Date: **T** (FEB 02, 2004)

Include Entries Already Removed from List? NO// **YES**

1) By Dates Selected  
2) By Priority  
3) By Provider  
4) By Reason Added  
5) By Resolution  
Select Sort: (1-5): **1**  
Select item to Print By? NO// YES

1) By Dates Selected  
2) By Priority  
3) By Provider  
4) By Reason Added  
5) By Resolution  
Print By: (1-5):

Select one of the following:

B	BROWSE ON SCREEN
P	PRINT ON PAPER

PRINT MODE: BROWSE// **B**

Figure 18-83: Running a waiting list report (step 2-9)

10. The Waiting List Report displays (Figure 18-84).



```

Waiting List Report      Feb 02, 2004 15:24:35      Page:    1 of    1
      Confidential Patient Data Covered by Privacy Act
      Waiting List for TEEN HEALTH
      Sorted by DATE ADDED TO LIST; for Date Added to List

  Date Selected  Patient Name      Chart #   Age   Sex  Home Phone
-----
      ** DATE ADDED TO LIST: May 21, 2003 **
1.  May 21, 2003  DEMO,TROY HANSON  101010   16   M   555-555-4560
      "First line of comments displays here"

      ** DATE ADDED TO LIST: Aug 01, 2003 **
2.  Aug 01, 2003  DEMO,BEATRIC     232323   12   F   555-555-5287
      "First line of comments displays here"

      ** DATE ADDED TO LIST: Aug 30, 2003 **
3.  Aug 30, 2003  DEMO,ANDRE BENSON 454545   11   M   555-555-5010
      "First line of comments displays here"

      Enter ?? for more actions
V   View Entry                      Q   Quit
Select Action:Quit//
    
```

Figure 18-84: Running a waiting list report (step 10)

11. Type V at the “Select Action:” prompt, to view the patient’s information or Q to exit.

```

Select Action:Quit//  v   View Entry
Select Patient: (1-5): 1

=====
Waiting List View Entry      Feb 02, 2004 15:26:33      Page:    1 of    1
      Confidential Patient Data Covered by Privacy Act
DEMO,TROY HANSON      #101010      DOB: 03/31/1988      Sex: MALE
Pcp/Team: None/None

-----
          CLINIC:      TEEN HEALTH
          DATE ADDED TO LIST:      MAY 21, 2003
          REASON ADDED TO LIST:      PROVIDER SCHEDULED NOT READY
          PRIORITY:      MIDDLE
          PROVIDER:      DEMO,DANIELLE
          RECALL DATE:      OCT 21, 2003
          PHONE NUMBER [RESIDENCE]:      555-555-2446
          PHONE NUMBER [WORK]:      555-999-9609

Comments:
"First line of comments here"
"Second line of comments here"
"Third line of comments here"
. . .

          DATE REMOVED FROM LIST:
          RESOLUTION:
          Enter ?? for more actions

Select Action:Quit//
    
```

Figure 18-85: Running a waiting list report (step 11)

## 18.14 Workload/Statistical Reports (WSR)

Use this option to generate a variety of reports showing clinic workload, facilitating the determination of the kinds of activity within clinics during a specified date range. It allows for comparison within a clinic name or code activity for a specified time frame between the selected year and the previous year.

**Note:** Depending on selected specifications, this report may be quite lengthy. You may choose to run the report during off hours.

To access the Workload/Statistical Reports menu, type WSR at the “Select Reports Menu (Scheduling) Option:” prompt in the Reports menu.

```

                                Reports Menu (Scheduling)
                                (UNSPECIFIED HO)

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

Select Reports Menu (Scheduling) Option: WSR Workload/Statistical Reports

```

Figure 18-86: Accessing the workload/statistical reports menu

### 18.14.1 Statistics by Type of Appointment

Use this report to view counts of completed appointments broken down by type of appointment (scheduled, same day, walk-in, overbook or inpatient). Sorts include clinic, principal clinic, provider, or team. Optional sub-sorts include morning vs. afternoon appointments, pediatric vs. adult patients, and male vs. female patients.

1. Type **1** at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```

1. Statistics by Type of Appointment
2. Scheduled vs. Patients Seen
3. Detailed Appointment Listing
4. Monthly Workload Comparisons
5. Clinic Workload Report
6. Turn Around Time Report
7. Routing Slip/Chart Request Report
8. On-line Help (Report Descriptions)

Select REPORT: (1-5): 8

```

Figure 18-87: Listing statistics by type of appointment (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.

```

Select one of the following:

C      Clinic
P      Principal Clinic
V      Provider
T      Team

Subtotal Report by: C

```

Figure 18-88: Listing statistics by type of appointment (step 2)

3. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Enter key at a blank “Select Another Division:” or “Select Another Clinic:” prompt.

```

Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [ENTER]
Select clinic: PEDIATRIC
Select another clinic: [ENTER]

```

Figure 18-89: Listing statistics by type of appointment (step 2a)

4. If you type V, you will be prompted to type the name of the provider(s) you would like included. When you are done typing in the providers you want included, press the Enter key at a blank “Select Another Provider:” prompt.

```

Subtotal Report by: V
Select provider: DOCTOR, KATHRYN
Select another provider: DOCTOR, JOHN
Select another provider: [ENTER]

```

Figure 18-90: Listing statistics by type of appointment (step 2b)

5. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are done typing in the providers you want included, press the Enter key at a blank “Select Another Team:” prompt.

```
Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [ENTER]
```

Figure 18-91: Listing statistics by type of appointment (step 2c)

6. Type the first date of the search at the “Select First Date to Search:” prompt.
7. Type the ending date of the search at the “Select Last Date to Search:” prompt.
8. Type Y or N at the “List Individual Dates?” prompt.

```
Select First Date to Search: T-365
Select Last Date to Search: T
List Individual Dates? N
```

Figure 18-92: Listing statistics by type of appointment (steps 3-5)

9. Type the number of the additional sort option you would like to use at the “Select Addition Sort (optional):” prompt. If you do not want any additional sorts, press the Enter key at the “Select Addition Sort (optional):” prompt.
10. Type Y or N at the “Assume Patient Seen if Appt Not Checked In?” prompt. Type ?? at the “Assume Patient Seen if Appt Not Checked In?” prompt, if you need further details on this selection.
11. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select one of the following:

    1      Morning vs. Afternoon
    2      Pediatric vs. Adult Patients
    3      Male vs. Female Patients

Select addition sort (optional): 1
Assume Patient Seen if Appt NOT Checked In? Y
Select one of the following:

    B      BROWSE ON SCREEN
    P      PRINT ON PAPER

PRINT MODE: B
```

Figure 18-93: Listing statistics by type of appointments (steps 6-8)

12. If you selected B (browse onscreen), the Workload Statistics screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

WORKLOAD STATISTICS		Oct 17, 2002 15:21:38				Page: 1 of 1	
Completed Appointments by Type							
For dates: Oct 17, 2001 to Oct 17, 2002							
Category Names	SCHED	SAMEDAY	WALKIN	OVERBK	INPT	TOTAL	SEEN
ASTHMA	0	0	5	0	0		5
TOTAL MALE	0	0	2	0	0		2
TOTAL FEMALE	0	0	3	0	0		3
Oct 31, 2001 - FEMALE	0	0	1	0	0	0	1
Nov 08, 2001 - FEMALE	0	0	1	0	0	0	1
Nov 12, 2001 - FEMALE	0	0	1	0	0	0	1
Nov 09, 2001 - MALE	0	0	1	0	0	0	1
Dec 14, 2001 - MALE	0	0	1	0	0	0	1
AUDIOLOGY	30	0	0	0	0		30
TOTAL MALE	25	0	0	0	0		25
TOTAL FEMALE	5	0	0	0	0		5
Nov 01, 2001 - FEMALE	1	0	0	0	0	0	1
Dec 06, 2001 - FEMALE	3	0	0	0	0	0	3
+ Enter ?? for more actions							
Select Action:Next Screen//							

Figure 18-94: Listing statistics by type of appointments (step 9)

### 18.14.2 Scheduled vs. Patients Seen

Use this report to compare the difference between expected and actual workload in a clinic. The number of patients expected will be calculated by adding the scheduled appointments to the overbooks while subtracting cancellations. The number of actual patients seen is calculated by subtracting no-shows and adding walk-ins to the expected amount.

1. Type **2** at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

<ol style="list-style-type: none"> <li>1. Statistics by Type of Appointment</li> <li>2. Scheduled vs. Patients Seen</li> <li>3. Detailed Appointment Listing</li> <li>4. Monthly Workload Comparisons</li> <li>5. Clinic Workload Report</li> <li>6. Turn Around Time Report</li> <li>7. Routing Slip/Chart Request Report</li> <li>8. On-line Help (Report Descriptions)</li> </ol> <p>Select REPORT: (1-8): <b>2</b></p>
--

Figure 18-95: Listing scheduled vs. patients seen (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.

```

Select one of the following:

C      Clinic
P      Principal Clinic
V      Provider
T      Team

Subtotal Report by: P

```

Figure 18-96: Listing scheduled vs. patients seen (step 2)

3. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Enter key at a blank “Select Another Division:” or “Select Another Clinic:” prompt.

```

Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [ENTER]
Select clinic: PEDIATRIC
Select another clinic: [ENTER]

```

Figure 18-97: Listing scheduled vs. patients seen (step 2a)

- a. If you type V, you will be prompted to type the name of the provider(s) you would like included. When you are done typing in the providers you want included, press the Enter key at a blank “Select Another Provider:” prompt.

```

Subtotal Report by: V
Select provider: DOCTOR, KATHRYN
Select another provider: DOCTOR, JOHN
Select another provider: [ENTER]

```

Figure 18-98: Listing scheduled vs. patients seen (step 2b)

- b. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are done typing in the providers you want included, press the Enter key at a blank “Select Another Team:” prompt.

```

Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [ENTER]

```

Figure 18-99: Listing scheduled vs. patients seen (step 2c)

4. Type the first date of the search at the “Select First Date to Search:” prompt.
5. Type the ending date of the search at the “Select Last Date to Search:” prompt.

- Type Y or N at the “List Individual Dates?” prompt.

```
Select First Date to Search: T-365
Select Last Date to Search: T
List Individual Dates? N
```

Figure 18-100: Listing scheduled vs. patients seen (steps 3-5)

- Type the number of the additional sort option you would like to use at the “Select Addition Sort (optional):” prompt. If you do not want any additional sorts, press the Enter key at the “Select Addition Sort (optional):” prompt.
- Type Y or N at the “Assume Patient Seen if Appt Not Checked In?” prompt. Type ?? at the “Assume Patient Seen if Appt Not Checked In?” prompt if you need further details on this selection.
- Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select one of the following:

    1      Morning vs. Afternoon
    2      Pediatric vs. Adult Patients
    3      Male vs. Female Patients

Select addition sort (optional): 1
Assume Patient Seen if Appt NOT Checked In? Y
    Select one of the following:

        B      BROWSE ON SCREEN
        P      PRINT ON PAPER

PRINT MODE: B
```

Figure 18-101: Listing scheduled vs. patients seen (steps 6-8)

- If you selected B (browse onscreen), the Scheduled Versus Seen screen will be displayed (Figure 18-102). Use the options at the bottom of the screen to navigate through the report.

SCHEDULED VS. SEEN		Oct 17, 2002 15:35:54				Page: 1 of 1		
For dates: Oct 17, 2001 to Oct 17, 2002								
(Assumes patients seen if not flagged as no-shows)								
Category Names	SCHED	+OVERBK	-CANCEL=EXPECTED	-NOSHOW	+WALKIN	=	SEEN	
ASTHMA	2	0	0	2	0	3	5	
TOTAL MALE	2	0	0	2	0	0	2	
TOTAL FEMALE	0	0	0	0	0	3	3	
Oct 31, 2001 - FEM	0	0	0	0	0	1	1	
Nov 08, 2001 - FEM	0	0	0	0	0	1	1	
Nov 12, 2001 - FEM	0	0	0	0	0	1	1	
Nov 09, 2001 - MAL	1	0	0	1	0	0	1	
Dec 14, 2001 - MAL	1	0	0	1	0	0	1	
AUDIOLOGY	30	0	0	30	0	0	30	
TOTAL MALE	25	0	0	25	0	0	25	
TOTAL FEMALE	5	0	0	5	0	0	5	
Nov 01, 2001 - FEM	1	0	0	1	0	0	1	
Dec 06, 2001 - FEM	3	0	0	3	0	0	3	
+ Enter ?? for more actions								
Select Action:								

Figure 18-102: Listing scheduled vs. patients seen (step 9)

### 18.14.3 Detailed Appointment Listing

Use this report to view a listing of completed appointments sorted by clinic and date. For each appointment, the type (scheduled, walk-in, inpatient, etc.), chart number, sex, age and appointment status (checked-in, no action taken) are listed can be sorted by principal clinic, provider or team.

1. Type **3** at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

<ol style="list-style-type: none"> <li>1. Statistics by Type of Appointment</li> <li>2. Scheduled vs. Patients Seen</li> <li>3. Detailed Appointment Listing</li> <li>4. Monthly Workload Comparisons</li> <li>5. Clinic Workload Report</li> <li>6. Turn Around Time Report</li> <li>7. Routing Slip/Chart Request Report</li> <li>8. On-line Help (Report Descriptions)</li> </ol> <p>Select REPORT: (1-8): <b>3</b></p>
--

Figure 18-103: Running a detailed appointment listing (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.



```

Select one of the following:

C          Clinic
P          Principal Clinic
V          Provider
T          Team

Subtotal Report by: C

```

Figure 18-104: Running a detailed appointment listing (step 2)

3. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Enter key at a blank “Select Another Division:” or “Select Another Clinic:” prompt.

```

Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [ENTER]
Select clinic: PEDIATRIC
Select another clinic: [ENTER]

```

Figure 18-105: Running a detailed appointment listing (step 2a)

4. If you type V, you will be prompted to type the name of the provider(s) you would like included. When you are done typing in the providers you want included, press the Enter key at a blank “Select Another Provider:” prompt.

```

Subtotal Report by: V
Select provider: DOCTOR, KATHRYN
Select another provider: DOCTOR, JOHN
Select another provider: [ENTER]

```

Figure 18-106: Running a detailed appointment listing (step 2b)

- a. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are don typing in the providers you want included, press the Enter key at a blank “Select Another Team:” prompt.

```

Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [ENTER]

```

Figure 18-107: Running a detailed appointment listing (step 2c)

5. Type the first date of the search at the “Select First Date to Search:” prompt.
6. Type the ending date of the search at the “Select Last Date to Search:” prompt.
7. Type Y or N at the “List Individual Dates?” prompt.

```
Select First Date to Search: T-365
Select Last Date to Search: T
List Individual Dates? N
```

Figure 18-108: Running a detailed appointment listing (steps 3-5)

8. Type the number of the additional sort option you would like to use at the “Select Addition Sort (optional):” prompt. If you do not want any additional sorts, press the Enter key at the “Select Addition Sort (optional):” prompt.
9. Type Y or N at the “Assume Patient Seen if Appt Not Checked In?” prompt. Type ?? at the “Assume Patient Seen if Appt Not Checked In?” prompt, if you need further details on this selection.
10. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```
Select one of the following:
    1      Morning vs. Afternoon
    2      Pediatric vs. Adult Patients
    3      Male vs. Female Patients

Select addition sort (optional): 1
Assume Patient Seen if Appt NOT Checked In? Y
Select one of the following:
    B      BROWSE ON SCREEN
    P      PRINT ON PAPER

PRINT MODE: B
```

Figure 18-109: Running a detailed appointment listing (steps 6-8)

11. If you selected B (browse onscreen), the Workload Appointment Listing screen will be displayed (Figure 18-110). Use the options at the bottom of the screen to navigate through the report.

WORKLOAD APPT LISTING		Oct 18, 2002 07:45:12			Page: 1 of 1	
Confidential Patient Data Covered by Privacy Act						
Appointments by Clinic and Date						
(does not include no-shows or cancellations)						
For dates: Sep 18, 2002 to Oct 18, 2002						
Appt Date/Time	Type	HRCN	Sex	Age	Status	
CARDIOLOGY						
Oct 10, 2002@09:00	Scheduled	1234	M	41	CHECKED OUT	
Oct 10, 2002@10:00	Inpatient	4298	M	41	INPATIENT/CHECKED IN	
Oct 10, 2002@13:00	Scheduled	8877	M	41	CHECKED IN	
Oct 10, 2002@14:00	Same Day	2334	M	41	CHECKED IN	
Oct 10, 2002@15:00	Scheduled	5634	M	41	CHECKED IN	
Oct 10, 2002@16:00	Scheduled	1212	M	41	NO ACTION TAKEN	
Oct 16, 2002@10:00	Walk-In	7845	M	41	CHECKED IN	
Oct 17, 2002@14:00	Inpatient	3490	M	41	INPATIENT APPOINTMENT	
Oct 17, 2002@15:00	Walk-In	12345	M	41	CHECKED IN	
Oct 17, 2002@16:00	Scheduled	789	M	41	CHECKED IN	
PEDIATRIC						
Oct 09, 2002@14:41	Walkin	452	M	7	CHECKED IN	
+ Enter ?? for more actions						
Select Action:						

Figure 18-110: Running a detailed appointment listing (step 9)

#### 18.14.4 Monthly Workload Comparisons

Use this report to see a statistical comparison between the current month and the same month a year prior. You will see that each month shows the net change and percent change. You have the option to sort the report by clinic, principal clinic, provider, or team. No sub-sorts are available.

1. Type **4** at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

<ol style="list-style-type: none"> <li>1. Statistics by Type of Appointment</li> <li>2. Scheduled vs. Patients Seen</li> <li>3. Detailed Appointment Listing</li> <li>4. Monthly Workload Comparisons</li> <li>5. Clinic Workload Report</li> <li>6. Turn Around Time Report</li> <li>7. Routing Slip/Chart Request Report</li> <li>8. On-line Help (Report Descriptions)</li> </ol> <p>Select REPORT: (1-8): <b>4</b></p>
--

Figure 18-111: Listing monthly workload comparisons (step 1)

2. Type the letter that corresponds to the way you want to subtotal your report at the “Subtotal Report by:” prompt.

```

Select one of the following:

C      Clinic
P      Principal Clinic
V      Provider
T      Team

Subtotal Report by: C

```

Figure 18-112: Listing monthly workload comparisons (step 2)

3. If you type C or P, you will be prompted to type the name of the division(s) and clinic(s) you would like included. When you are done typing in the clinics you want included, press the Enter key at a blank “Select Another Division:” or “Select Another Clinic:” prompt.

```

Select division: UNSPECIFIED INDIAN HOSPITAL
Select another division: [ENTER]
Select clinic: PEDIATRIC
Select another clinic: [ENTER]

```

Figure 18-113: Listing monthly workload comparisons (step 2a)

4. If you type V, you will be prompted to type the name of the provider(s) you would like included. When you have finished typing the providers you want included, press the Enter key at a blank “Select Another Provider:” prompt.

```

Subtotal Report by: V
Select provider: DOCTOR, KATHRYN
Select another provider: DOCTOR, JOHN
Select another provider: [ENTER]

```

Figure 18-114: Listing monthly workload comparisons (step 2b)

- a. If you type T, you will be prompted to type the name of the team(s) you would like included. When you are don typing in the providers you want included, press the Enter key at a blank “Select Another Team:” prompt.

```

Subtotal Report by: T
Select team: CARDIOLOGY
Select another team: UROLOGY
Select another team: [ENTER]

```

Figure 18-115: Listing monthly workload comparisons (step 2c)

5. Type the first date of the search at the “Select First Date to Search:” prompt.
6. Type the ending date of the search at the “Select Last Date to Search:” prompt.

7. Type Y or N at the “Assume Patient Seen if Appt Not Checked In?” prompt. Answer yes if you want the report to assume patients were seen even when their appointments were not checked-in or flagged as no-shows. Answer no if only appointments with a check-in date/time are to be counted.
8. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```

Select First Date to Search:  T-365
Select Last Date to Search:  T
Assume Patient Seen if Appt NOT Checked In?  N

      Select one of the following:

          B          BROWSE ON SCREEN
          P          PRINT ON PAPER

PRINT MODE:  B

```

Figure 18-116: Listing monthly workload comparisons (steps 3-6)

9. If you selected B (browse onscreen), the Workload Comparison screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

WORKLOAD COMPARISONS							Oct 18, 2002 08:24:20	Page: 1 of 1
Monthly Comparisons on Completed Appointments by Type For dates: Oct 18, 2002 to Oct 18, 2002 and corresponding dates from the previous year								
Category Name	SCHED	SAMEDAY	WALKIN	OVERBK	INPT	TOTAL	SEEN	
ASTHMA								
Oct 2001	34	5	0	0	0		39	
Oct 2002	51	10	0	0	0		61	
Net Change	17	5	0	0	0		22	
% Change	50	100	0	0	0		36%	
+       Enter ?? for more actions								
Select Action:								

Figure 18-117: Listing monthly workload comparisons (step 7)

### 18.14.5 Clinic Workload Report

Use this option to print out statistics on the number of appointments per clinic for a date range. The Expanded Report breaks down the numbers by scheduled and unscheduled appointments, cancellations and inpatients. You can choose to list the patients. The Brief Report lists only the number of appointments and compares it to the same date range of the previous year. It can take a long time to run. This report is *not* designed to be run on the terminal screen.

1. Type **5** at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```

1. Statistics by Type of Appointment
2. Scheduled vs. Patients Seen
3. Detailed Appointment Listing
4. Monthly Workload Comparisons
5. Clinic Workload Report
6. Turn Around Time Report
7. Routing Slip/Chart Request Report
8. On-line Help (Report Descriptions)

Select REPORT: (1-8): 5

```

Figure 18-118: Clinic Workload Report (step 1)

2. Select division (if multidivisional) at the “Select division:” prompt.

```
Select division: ALL//
```

Figure 18-119: Clinic Workload Report (step 2)

3. Enter the beginning and ending date at the appropriate prompts.

```

**** Date Range Selection ****

Beginning DATE : T-30 (FEB 13, 2007)

Ending DATE : T (MAR 15, 2007)

```

Figure 18-120: Clinic Workload Report (step 3)

4. Type in **C** to total by Clinic or **S** to total by Stop Code at the “Totals By (C)LINIC or (S)TOP CODE” prompt. Select the clinic at the “Select Clinic:” prompt. If appropriate select another clinic at the “Select another clinic:” prompt.

```

Totals by (C)LINIC or (S)TOP CODE?: C//CLINIC
Select clinic: ALL// gen-ott
Select another clinic:

```

Figure 18-121: Clinic Workload Report (step 4)

5. Select whether you want a Brief or Expanded report at the “Brief or Expanded Report?” prompt. If you select Expanded proceed to step 6.
6. Select (D)ETAIL BY DAY or (S)UMMARY BY MONTH at the prompt. If you select DETAIL you will be asked if you want to see patient names, answer Y or N at the prompt. You will then be asked if you want to compare this data to the same period in the previous year, select Y or N at the prompt. You are then prompted to select the device to print, enter the device at the “DEVICE:” prompt.

```

Brief or Expanded Report? E//EXPANDED
(D)ETAIL BY DAY or (S)UMMARY BY MONTH?: D//DETAIL BY DAY
Do you want to see patient names? No// (No)
Do you want to compare this data to the same period in the previous year? No//
(No)

Report will cover the period from: 02/13/2007 through 03/15/2007

DEVICE: HOME//
    
```

Figure 18-122: Clinic Workload Report (step 5-6)

CLINIC WORKLOAD REPORT										PAGE: 1
DETAILED BY DAY BY CLINIC										
PERIOD COVERING: 02/13/2007-03/15/2007										
DATE RUN ON: 03/15/2007@124										
CLINIC NAME	DATE	SCHED APPTS	UNSCH APPTS	INPAT APPTS	OVER-BOOKS	ADD/EDITS	NO-SHOWS	CANCEL APPTS	TOTAL PATIENTS SEEN	
GEN-MARK	02/26/2007	0	0	1	0	N/A	0	0	1	
	03/08/2007	0	0	2	0	N/A	0	0	2	

TOTAL PATIENTS SEEN = SCHED + UNSCHED + INPAT + OVERBOOKS + ADD/EDITS  
 CANCELLED APPTS AND NO-SHOWS ARE NOT INCLUDED IN THE ABOVE TOTALS AND:

Figure 18-123: Clinic Workload Report

### 18.14.6 Turn Around Time Report

Use this option to print out statistics on the turn around time of appointments. Turn around time (TAT) is the difference between time checked in and time checked out. Report can be summary and detailed. Summary lists number of appointments, number checked in and number checked out. Detailed includes summary information plus a listing of each appointment with patient name, chart number, appointment time, check in time, check out time, and TAT.

1. Type **6** at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```

1. Statistics by Type of Appointment
2. Scheduled vs. Patients Seen
3. Detailed Appointment Listing
4. Monthly Workload Comparisons
5. Clinic Workload Report
6. Turn Around Time Report
7. Routing Slip/Chart Request Report
8. On-line Help (Report Descriptions)

Select REPORT: (1-8): 6

```

Figure 18-124: Turn Around Time Report (step 1)

2. Select division (if multidivisional) at the “Select division:” prompt. Enter the beginning and ending date at the appropriate prompts. Select the clinic at the “Select Clinic:” prompt. If appropriate select another clinic at the “Select another clinic:” prompt. Select whether you want a detailed or summary report at the “Select type of report:” prompt. Select whether you want to browse the report on the screen or print to a device at the “PRINT MODE:” prompt.

```

Select division: ALL//
Select clinic: ALL// GEN-OTT
Select another clinic:
Select First Date to Search: T-30 (FEB 13, 2007)
Select Last Date to Search: T (MAR 15, 2007)

Select one of the following:

D      Detailed
S      Summary

Select type of report: Detailed

Select one of the following:

B      BROWSE ON SCREEN
P      PRINT ON PAPER

PRINT MODE: BROWSE//

```

Figure 18-125: Turn Around Time Report (step 2)



```

TURN AROUND TIME REPORT           Mar 15, 2007 13:09:54           Page: 1 of 1
                                Turn Around Time
                                For dates: Feb 13, 2007 to Mar 15, 2007
Appointment # Checked In      # Checked Out      Turn Around Time
GEN-OTT
Feb 19, 2007           1                   1                   45 min

Patient Name      Chart      Appointment      Check In      Check Out
-----
WILLIAMS,MARK A  123456  Feb 19, 2007@15:00  Feb 19, 2007@15:00  Feb 19, 2007

Enter ?? for more actions >>>

Select Action:Quit//

```

Figure 18-126: Turn Around Time Report

### 18.14.7 Routing Slip/Chart Request Report

Use this option to print out statistics on the number of chart requests and routing slips printed by month. The report displays number of routing slips printed, subtotals by chart requests, scheduled appointments and walk-in appointments. The report can be subtotaled by sorting criteria.

1. Type **7** at the "Select Report:" prompt in the Workload/Statistical Reports submenu.

```

1. Statistics by Type of Appointment
2. Scheduled vs. Patients Seen
3. Detailed Appointment Listing
4. Monthly Workload Comparisons
5. Clinic Workload Report
6. Turn Around Time Report
7. Routing Slip/Chart Request Report
8. On-line Help (Report Descriptions)

Select REPORT: (1-8): 7

```

Figure 18-127: Routing Slip/Chart Request Report (step 1)

2. Enter the beginning and ending date at the appropriate prompts. Select division (if multidivisional) at the “Select division:” prompt. Select the clinic at the “Select Clinic:” prompt. If appropriate select another clinic at the “Select another clinic:” prompt. Select how you want to sort the report at the “Sort By:” prompt. Select whether you want to Browse the report on the screen or print to a device at the “PRINT MODE:” prompt.

```

Select First Date to Search: t-30 (FEB 13, 2007)
Select Last Date to Search: t (MAR 15, 2007)
Select division: ALL//
Select clinic: ALL// gen-ott
Select another clinic:

    Select one of the following:

        C      Clinic Name
        P      Principal Clinic
        O      Clinic Code
        D      Date

Sort By: Clinic Name//

    Select one of the following:

        B      BROWSE ON SCREEN
        P      PRINT ON PAPER

PRINT MODE: BROWSE//
    
```

Figure 18-128: Turn Around Time Report (step 2)

```

ROUTING SLIP/CHART REQUESTS   Mar 15, 2007 13:18:07           Page:    1 of    1
                               Routing Slips and Chart Requests by Month
                               For dates: Feb 13, 2007 to Mar 15, 2007
# Routing Slips      Chart Requests      Scheduled Appts      Walkins
GEN-OTT
Feb 2007              1                0                0                1
Sub Total            1                0                0                1
REPORT TOTALS
                    1                0                0                1

    Enter ?? for more actions                                >>>

Select Action:Quit//
    
```

Figure 18-129: Turn Around Time Report

### 18.14.8 On-line Help (Report Descriptions)

Use this option to give you help with the workload reports. This option gives you detailed report descriptions for the all workload reports under the WSR option. All report descriptions will be displayed onscreen.

1. Type **8** at the “Select Report:” prompt in the Workload/Statistical Reports submenu.

```

1. Statistics by Type of Appointment
2. Scheduled vs. Patients Seen
3. Detailed Appointment Listing
4. Monthly Workload Comparisons
5. Clinic Workload Report
6. Turn Around Time Report
7. Routing Slip/Chart Request Report
8. On-line Help (Report Descriptions)

Select REPORT: (1-8): 8

```

Figure 18-130: Using on-line help (step 1)

2. Type the number of the report with which you need help at the “Select Help System Action or <Return>:” prompt.

```

                                WORLOAD/STATISTICAL REPORTS

Use this option to access various workload reports.  Some are statistical
and some are appointment listings.  This series assumes that Appointment
Management Reports have been run and deemed clean.  These reports count
past appointments.

1   Statistics by Type of Appointment

2   Scheduled vs. Patients Seen

3   Detailed Appointment Listing

4   Monthly Workload Comparisons

5   Clinic Workload Report

6   Turn Around Time Report

7   Chart Request and Routing Slip Report

Select HELP SYSTEM action or <return>:

```

Figure 18-131: Using on-line help (step 2)

## 19.0 Supervisor Menu (Scheduling) (SCS)

The Supervisor Menu, available as the last option on the main Scheduling menu, should be used by the clinic's scheduling supervisor or other personnel familiar with setting up a clinic, the appointment schedule matrix, and other inherent options available in this scheduling system as applicable to the specific clinic(s), since all relevant functions of the clinic are configured here.

**Note:** Caution should be taken when configuring a clinic. The individual setting up (or maintaining) this information into the clinic should have a thorough understanding of how the clinic is run and how it should be configured.

Sections 19.1-19.8 detail how to use each option within the Supervisor Scheduling menu.

To access the Supervisor menu, type SCS at the "Select Scheduling Menu Option:" prompt located in the Scheduling main menu.

```

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

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

Select Scheduling Menu Option: SCS

```

Figure 19-1: Accessing the Supervisor menu

## 19.1 Application Coordinator Menu (ACM)

This menu is used to access options that will allow you to customize your site. This menu contains sensitive options that are restricted to the Scheduling Application Coordinator. These options are only to be used when necessary and when the person using them has received specialized training. Sections 19.1.1-19.1.13 explain how to use each option in the ACM.

To access the Application Coordinator menu, type **ACM** at the “Select Supervisor Menu (Scheduling) option:” prompt.

```
Supervisor Menu (Scheduling)
(UNSPECIFIED HO)

ACM   Application Coordinator Menu ...
CPF   Clinic Profile
CRA   Cancel/Restore Clinic Availability
DSU   Display Scheduling User
EEL   Enter/Edit Letters
LAM   List Appts Made By Clinic
MON   Month-at-a-glance Display
SET   Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: ACM
```

Figure 19-2: Accessing the Application Coordinator menu

### 19.1.1 Add Cancellation Reasons (ACR)

Use this option to add a cancellation reason to the Cancellation Reason file. This can be used anytime you need to add a reason that had not been previously needed. You cannot delete reasons, but you can inactivate them, letting users know that this reason is no longer used.

To access ACR, type **ACR** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

                                Application Coordinator Menu
                                (UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVB   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: ACR

```

Figure 19-3: Adding a cancellation reason

**Edit or Inactivating Cancellation Reason:**

Use this option to edit or inactivate a reason that is already in your system.

1. Type the name of an existing reason at the “Select Cancellation Reason Name:” prompt. Type ?? for a listing of existing reasons.
2. Go through each prompt as it appears on the screen and edit where appropriate. The current setting will appear at each prompt. Type ?? at any prompt to see a list of available options. Type 1 at the “Inactive:” prompt to inactivate the reason or press the Enter key to bypass this prompt.

```

Select CANCELLATION REASONS NAME: COULDN'T MAKE IT
NAME: COULDN'T MAKE IT// (No Editing)
TYPE: BOTH// C
SYNONYM: COULDN'T// [ENTER]
INACTIVE: 1

```

Figure 19-4: Adding a cancellation reason code

**Add a New Cancellation Reason:**

Use this option to add a new cancellation reason into your system.

1. Type the name of the new reason at the “Select Cancellation Reason Name:” prompt.
2. Type Y at the “Are you adding ‘new reason’ as a New Cancellation Reason:” prompt.
3. To select who is associated with the reason, type P (patient), C (clinic), or B (both) at the “Type:” prompt.

4. Type an abbreviation for the reason code that can be used by users to choose this new code at the “Synonym:” prompt.
5. Press the Enter key at the “Inactive:” prompt to bypass this option.

```
Select CANCELLATION REASONS NAME: ??

Select CANCELLATION REASONS NAME: Patient Didn't feel like coming in
Are you adding 'Patient didn't feel like coming in' as
a new CANCELLATION REASONS (the 16TH)? Y
NAME: Didn't feel like coming in// (No Editing)
TYPE: P

SYNONYM: Didn't
INACTIVE: [ENTER]
```

Figure 19-5: Adding a new cancellation reason code

### 19.1.2 Add/Edit a Holiday (AEH)

Use this option to add, edit, or delete a holiday. Any clinic that is affected by the change of holidays dates must be remapped, which updates the clinic pattern to insure inclusion or exclusion of the holiday.

To access AEH, type AEH at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```
Application Coordinator Menu
(UNSPECIFIED HO)

ACR    Add Cancellation Reasons
AEH    Add/Edit a Holiday
AWR    Add Waiting List Reasons
CHG    Change Patterns to 30-60
CVS    Create Visit Status Report
ESP    Edit Scheduling Parameters
IRC    Inactivate/Reactivate Clinic
KEY    View Scheduling Keys
OVV    Users with Overbook to All Clinics
PSD    Purge Scheduling Data
RMC    Remap Clinic
SCT    Scheduling Templates
VED    View Event Driver

Select Application Coordinator Menu Option: AEH
```

Figure 19-6: Adding/Editing a holiday

#### **Add a New Holiday:**

Use this option to add an entirely new holiday into the system.

1. Type the date of the new holiday at the “Add/Edit Holiday:” prompt.

2. Type Y or N at the “Are You Adding ‘Date’ as a New Holiday?” prompt.
3. Type the name of the new holiday at the “Holiday Name:” prompt
4. If you need to make any corrections after typing the holiday name, make them at the “Name:” prompt or press the Enter key to keep the current name.

```
ADD/EDIT HOLIDAY: NOV 02, 2002
  Are you adding 'NOV 02, 2002' as a new HOLIDAY (the 20TH)? Y
  HOLIDAY NAME: My Birthday
NAME: My Birthday// [ENTER]
```

Figure 19-7: Adding a holiday

### Edit an Existing Holiday:

Use this option to edit a holiday that already exists in the system.

1. Type the date of the existing holiday at the “Add/Edit Holiday:” prompt. Type ?? for a list of available holidays.
2. Type the date to which you want to change the holiday or press the Enter key to keep the current date at the “Date: ‘Current Date’//” prompt.
3. Type the new name of the holiday or press the Enter key to keep the current name at the “Name: ‘Current Name’//” prompt.

```
ADD/EDIT HOLIDAY: May 29, 1995   MAY 29, 1995   M DAY
DATE: MAY 29,1995// [ENTER]
NAME: M DAY// MEMORIAL DAY
```

Figure 19-8: Editing a holiday

**Note:** If the holiday name is longer than 19 characters, you will be prompted to replace sections of the name with a new section. You will not be allowed to change the entire name only sections at a time.

```
ADD/EDIT HOLIDAY: Jan 15, 1996   JAN 15, 1996   DR. MARTIN LUTHER KING, JR.DAY
DATE: JAN 15,1996// [ENTER]
NAME: DR. MARTIN LUTHER KING, JR. DAY  Replace DAY With Birhtday
  Replace [ENTER]
  DR. MARTIN LUTHER KING, JR. Birhtday
```

Figure 19-9: Editing a holiday name longer than 19 characters



### 19.1.3 Add Waiting List Reasons (AWR)

Use this option to add or edit local reasons to the Waiting List Reason file. You cannot delete a reason, but you can inactivate it.

1. To access AWR, type **AWR** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.
2. To add a new waiting list reason, type the name of the new reason at the “Select Waiting List Reason Name:” prompt and then type Y to confirm your selection at the “Are you adding 'New Reason' as a new Waiting List Reason (# of reason)?” prompt. If you are editing or inactivating a reason, type the name of the existing reason at the “Select Waiting List Reasons Name:” prompt. Type ?? for a list of existing reasons.
3. Either edit the name of the name of the reason or press the Enter key at the “Name:” prompt.
4. Type the classification of waiting list reason at the “Type:” prompt. Type ?? at this prompt to see a detailed list of available options.
5. Type I (inactive) or A (active) at the “Inactive:” prompt. If you type I, the code will become inactive and you will no longer be allowed to use this reason.

```

Application Coordinator Menu
(UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVB   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: AWR

    You may enter a new WAITING LIST REASON, if you wish

Select WAITING LIST REASON NAME: BACK UP
Are you adding 'BACK UP' as a new WAITING LIST REASON (the 7TH)? No// Y
NAME: BACK UP// [ENTER]
TYPE: ??

    Choose from:
    A          ADD TO LIST
    R          REMOVE FROM LIST
TYPE: A ADD TO LIST
INACTIVE: [ENTER]

```

Figure 19-10: Adding waiting list reasons

### 19.1.4 Change Patterns to 30-60 (CHG)

Use this option to change patterns that were created with 15-minute increments to the 30-60 minute increment pattern.

You may be asked if you wish to delete clinic availability for a particular day of the week. The system will not permit deletion of existing appointments through this option.

Utilizing the Change Patterns to 30-60 option may adversely affect existing appointments. The system will check to see if any availability dates for the selected clinic have previously been cancelled. If so, a message will appear prompting you to see the days that have been affected.

**Note:** If you initially set up a clinic with 20-minute increments, using this option to change the pattern could cause the clinic availability pattern to display incorrectly. This option is **not** recommended for use with 20-minute increment appointment slots.

1. To access CHG, type **CHG** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

Application Coordinator Menu
(UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVB   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: CHG
```

Figure 19-11: Changing patterns to 30 –60 (step 1)

2. Type the name of the clinic that you want to change at the “Select Clinic Name:” prompt.
3. Type the number of minutes of the new appointment length at the “Length of Appt:” prompt.
4. Press the Enter key at the “Display Increments per Hour:” prompt. This prompt should not be edited when patterns have been established using another increment per hour. Editing this field will cause existing patterns to be erroneous and scheduling conflicts may also occur if the increments are changed
5. Type the date that the change will occur at the “Availability Date:” prompt.
6. Type the time range for the new appointment times at the “Time:” prompt. When you are done entering time ranges, press the Enter key.
7. Type the number of slots you want for the given time range at the “No. Slots:” prompt.

8. The system will display the new pattern. Type Y or N at the “Pattern OK for Mondays indefinitely?” prompt.
9. If you are done entering availability dates for the new appointment time change, press the Enter key at the “Availability Date:” prompt.

```

Select CLINIC NAME: Pediatric
LENGTH OF APP'T: 15// 30
DISPLAY INCREMENTS PER HOUR: 15-MIN // [ENTER]

AVAILABILITY DATE: 11/25/02 (NOV 25, 2002)

                                MONDAY

TIME: 0800-1200   NO. SLOTS: 1// 25
TIME: [ENTER]
[y y y y|y y y y|y y y y|y y y y]
...PATTERN OK FOR MONDAYS INDEFINITELY? y (Yes)
...SORRY, LET ME THINK ABOUT THAT A MOMENT...
PATTERN FILED!
AVAILABILITY DATE: [ENTER]

```

Figure 19-12: Changing patterns to 30 –60 (steps 2-9)

### 19.1.5 Create Visit Status Report (CVS)

Use this option to review the status of whether clinics have Create Visit at Check-in turned on or not. This report will list those clinics with the parameter turned off first sorted by principal clinic. All clinics on the list are active.

1. To access CVS, type **CVS** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

                                Application Coordinator Menu
                                (UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVV   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: CVS

```

Figure 19-13: Creating visit status report (step 1)

2. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division. When you are done entering division names, press the Enter key.
3. Type the clinic name at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Enter key.
4. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print

```
Use this report to review whether clinics have 'Create
Visit at Check-in' turned on or not. It lists those
clinics with the parameter turned OFF first sorted by
principal clinic. All clinics on the list are active.

Select division: ALL
Select clinic: ALL

Select one of the following:

      B          BROWSE ON SCREEN
      P          PRINT ON PAPER

PRINT MODE: B
```

Figure 19-14: Creating visit status report (steps 2-4)

5. If you selected to browse the report onscreen, the Create Visit Status Report screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```

Create Visit Status Report      Oct 23, 2002 14:31:21      Page:      1 of      4
                               Sorted by Status & Principal Clinic

Clinic Name                    Code    Mult Vst Cat  Clinic Provider      Req?

                               CLINICS WITH 'CREATE VISIT AT CHECKIN' TURNED OFF

UNAFFILIATED CLINICS
gw                             01
RHEUMATOLOGY                  38
zm                             16
zt                             16

                               CLINICS WITH 'CREATE VISIT AT CHECKIN' TURNED ON

DIABETES (PRINCIPAL)
DIABETES EDUCATION            A1     NO
DM (DOC A)                    06     NO          DOCTOR,A            YES
DM (DOC C)                    06     NO          DOCTOR,C            YES
DM (FOOT CLINIC)              B7     NO          DOCTOR,K            YES
DM (NIGHTS)                   06     NO          DOCTOR,A            YES

LEGEND:
Code=Clinic Code; Mult=Multiple Codes Used?
Vst Cat=Visit Service Category, optional
Req?=Is Visit Provider Required?
+      Enter ?? for more actions

Select Action:Next Screen//

```

Figure 19-15: Creating visit status report (step 5)

### 19.1.6 Edit Scheduling Parameters (ESP)

Use this option to set up and maintain facility and system parameters dealing with the Scheduling functions in PIMS. There are three files involved. The MAS Parameter file has only one entry and is used for system-wide items such as multi-division yes/no and appointment search threshold. All other parameters are based on facility and stored in either the Medical Center Division or the IHS Scheduling Parameter file.

To access ESP, type **ESP** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

Application Coordinator Menu
(UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVB   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: ESP

```

Figure 19-16: Accessing Edit Scheduling Parameters

### Editing System Wide Parameters

This option allows you to edit the Primary Facility Name, whether or not the facility is a Multidivisional Medical Center, and the appointment search threshold.

1. Type the name of the Primary Facility at the “Primary Facility Name:” prompt, or press the Enter key to keep the current default name.
2. Type Y or N depending if your facility is a multidivisional Medical Center at the “Multidivision Med Center?:” prompt.
3. Type the time in days for the appointment search threshold at the “Appt Search Threshold:” prompt. Enter the number of days in the past for which the “Appointment Management” option should initially search appointments. When the user selects a patient, this parameter will automatically be used to search that many days in the past for appointments. When a clinic is selected, this number will be used to calculate the default beginning date. If this field is not entered, then the system will use two days.

```

Editing system-wide parameters:

PRIMARY FACILITY NAME: UNSPECIFIED INDIAN HOSPITAL// [ENTER]
MULTIDIVISION MED CENTER?: YES// [ENTER]
APPT SEARCH THRESHOLD: 0// [ENTER]

```

Figure 19-17: Editing system wide parameters

**Editing facility-wide parameters:**

This option allows you to edit the parameters within your facility. You will be able to edit several scheduling parameters ranging from ancillary test start times, letter parameter, printer setups, and slip configurations.

1. Type the division name or number where you will be making changes at the “Select IHS Scheduling Parameters Division:” prompt.
2. Type Y to confirm your selection at the “OK?” prompt.
3. Type the number or name of the facility where you want to set the file pointer at the “Institution File Pointer:” prompt. Type ?? for more detail on this option.
4. Type the number of your facility at the “Facility Number:” prompt.

```
Editing facility-wide parameters:
Select IHS SCHEDULING PARAMETERS DIVISION: 1 UNSPECIFIED INDIAN HOSPITAL 1569
...OK? Y
INSTITUTION FILE POINTER: 1 UNSPECIFIED HO
FACILITY NUMBER: 1569
```

Figure 19-18: Editing facility-wide parameters (steps 1-4)

5. The system will display the Scheduling Parameters screen. This screen uses ScreenMan. When using ScreenMan for entering data, use the tab or arrow keys for moving between fields. You can type ?? at any prompt to display your options at the bottom of the screen
6. Type answers to each of the fields to customize your site. All fields that are underlined require an answer.
7. When you are done typing answers for page one, move the cursor to the command line located at the bottom of the screen and type NEXT PAGE.
8. Again, type answer to each of the fields to customize your site.
9. When you are done typing answers for page two, move the cursor to the command line and type EXIT. Make sure you answer YES to save changes if you made any you want to keep.



```

SCHEDULING PARAMETERS for UNSPECIFIED INDIAN HOS   Page 1 of 2
OUTPATIENT ONLY (answer only if YES):
    APPT LAB TEST START TIME: 0800
    APPT EKG START TIME: 0800
    APPT X-RAY START TIME: 0800
    ADDRESS LOCATION ON LETTERS: TOP
    REMOVE SALUTATION FROM LETTERS:
    ASK LETTER DURING MAKE APPT?: YES
    ASK LETTER FORMAT W/MAKE APPT?: YES
    RESTRICT VIEW OF WHO MADE APPT: YES
    WAITING PERIOD FOR NO-SHOWS: 30
    PATIENT REGISTRATION EDIT?: YES, FULL EDIT OR ADDRESS
    TERMINAL DIGIT CALCULATION: STYLE B (561234)
    REQUEST CHART AT CHECKIN:

```

---

```

COMMAND:                                     Press <PF1>H for help   Insert
-----
SCHEDULING PARAMETERS for UNSPECIFIED INDIAN HOS   Page 2 of 2
FILE ROOM USES TERMINAL DIGIT?: YES   FILE ROOM LIST SORT: BY CLINIC NAME
    ROUTING SLIP FORMAT: SHORT
    PRINT EXTRA ROUTING SLIP FOR CHART?: NO
    PRINT HEALTH SUMMARIES WITH ROUTING SLIPS?: YES
    WAITING PERIOD FOR AIU:
    CHART REQUEST PRINT TIMING: FUTURE
    DEFAULT FOR PRINTING A RS ON WALK INS:
    DEFAULT FOR WANT CHART REQ FOR SAME DAY:
    DEFAULT WALKIN PRINTER:
    CHART REQUESTS FOR TODAY PRINTER: SLAVE
    FUTURE CHART REQUESTS PRINTER: HFS
    DEFAULT HEALTH SUMMARY PRINTER:
    ACTION PROFILE TERMINAL TYPE:
    DEFAULT ROUTING SLIP PRINTER:

```

---

```

COMMAND:                                     Press <PF1>H for help   Insert

```

Figure 19-19: Editing facility-wide parameters (steps 5-9)

### 19.1.7 Inactivate/Reactivate Clinic (IRC)

Use this option to inactivate or reactivate a clinic. Once a clinic has been inactivated for a specific date, it can only be reactivated starting on the following date!

To access IRC, type **IRC** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```
Application Coordinator Menu
(UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVB   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: IRC
```

Figure 19-20: Accessing IRC

### Inactivate a Clinic

The Inactivate a Clinic option is used to make a clinic inactive (no activity allowed) as of a selected date. Once the clinic is inactivated, it will remain so until it is reactivated through the Reactivate a Clinic option. You may not inactivate a clinic which has appointments scheduled on and/or after the selected inactivation date.

If the clinic was previously scheduled to be inactivated, you will be able to choose one of the following courses of action: to delete the inactivate date and either restore or reconstruct the previous clinic availability patterns; to allow the present inactivation date to remain in effect; to change the present inactivation date to another date.

1. To inactivate a clinic, type I at the “Select Action:” prompt.
2. Type the name of the clinic you would like to inactivate at the “Select Clinic:” prompt.
3. Type the date you want the clinic inactivated at the “Enter Date Clinic is to be Inactivated:” prompt.
4. The system will then display a message stating the clinic will be inactivated on the entered date.

```
Select one of the following:

      I          INACTIVATE CLINIC
      R          REACTIVATE CLINIC

Select Action: I

Select CLINIC NAME: GENERAL
Enter Date Clinic is to be Inactivated: 11/01/02

Clinic will be inactivated effective 11/01/2002
```

Figure 19-21: Inactivating a clinic

### Reactivate a Clinic

If you decide to restore or reconstruct clinic availability patterns, you will be prompted to examine existing patterns and verify them and/or type each new availability date, time, and number of slots. See the Set Up a Clinic option for help in establishing clinic availability patterns.

This option enables the user to reactivate clinic availability for any clinic, which has been inactivated through the Inactivate a Clinic option.

**Note:** A valid reactivate date is any date that is later than the inactivate date.

When the clinic is initially reactivated, you will be prompted to establish clinic availability patterns for the reactivate date. It is imperative that a pattern be established for this date. Without re-establishing the pattern, users will be unable to book appointments into the reactivated clinic. Patterns for other dates may be established at this time, if desired. For assistance in establishing clinic availability patterns, please refer to the Set Up a Clinic option.

If the selected clinic was previously assigned a reactivate date, you may either change the old date to a new date or delete the old date entirely. It is important to note that if you choose to delete, the clinic will remain inactivated until a new reactivate date is entered.

1. To reactivate a clinic, type R at the “Select Action:” prompt.
2. Type the name of the clinic that you wish to reactivate at the “Select Clinic:” prompt.
3. Type the date that you want the clinic reactivated at the “Enter date clinic is to be reactivated:” prompt.
4. Type the time range for which the clinic will be available at the “Time:” prompt.
5. Type Y or N at the “Pattern OK for Sundays Indefinitely?” prompt.

- Type Y or N at the “Do you want to set up additional availabilities for this clinic now?” prompt. If you type Y, repeat steps 3-6.

```

Select Action: R
Select CLINIC NAME: GENERAL
Enter date clinic is to be reactivated: 11/03/02

AVAILABILITY DATE: 11/03/2002 (NOV 03, 2002)

                                SUNDAY

TIME: 0800-1700 NO. SLOTS: 1// 20
TIME: [ENTER]
[t t t t|t t t t|t t t t|t t t t|t t t t|t t t t|t t t t|t t t t]
...PATTERN OK FOR SUNDAYS INDEFINITELY? Y
...EXCUSE ME, THIS MAY TAKE A FEW MOMENTS...
PATTERN FILED!

Clinic will be reactivated effective 11/03/2002
Do you want to set up additional availabilities for this clinic now? Y

AVAILABILITY DATE: 11/05/02

                                TUESDAY

TIME: 0800-1700 NO. SLOTS: 1// 25
TIME:
[y y y y|y y y y|y y y y|y y y y|y y y y|y y y y|y y y y|y y y y]
...PATTERN OK FOR TUESDAYS INDEFINITELY? Y
...HMMM, HOLD ON...
PATTERN FILED!

```

Figure 19-22: Reactivating a clinic

### 19.1.8 View Scheduling Keys (KEY)

Use this option to view the current security keys in effect. The display will explain to whom each key is to be assigned.

- To access KEY, type **KEY** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

Application Coordinator Menu
(UNSPECIFIED HO)

ACR    Add Cancellation Reasons
AEH    Add/Edit a Holiday
AWR    Add Waiting List Reasons
CHG    Change Patterns to 30-60
CVS    Create Visit Status Report
ESP    Edit Scheduling Parameters
IRC    Inactivate/Reactivate Clinic
KEY    View Scheduling Keys
OVB    Users with Overbook to All Clinics
PSD    Purge Scheduling Data
RMC    Remap Clinic
SCT    Scheduling Templates
VED    View Event Driver

Select Application Coordinator Menu Option: KEY

```

Figure 19-23: Viewing scheduling keys (step 1)

2. The Scheduling Security Keys screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```

Scheduling Security Keys      Oct 23, 2002 13:36:15      Page: 1 of 4
Listing of security keys used by this module

SDMOB          (Unlocks Master Overbook)
  Allows user to exceed the maximum overbook parameter in ALL CLINICS!! Be
  very careful assigning this key. For most users who need master overbook
  access, assign by clinic or by principal clinic. This can be done under Set Up A Clinic.

SDOB          (Unlocks Overbook Access)
  Allows user to overbook a time slot up to the maximum per day for ALL
  CLINICS!! Be very careful assigning this key. For most users who need overbook
  access, assign by clinic or by principal clinic under Set Up A Clinic.

SDZAC          (Unlocks App Coordinator Menu)
  Assign this key ONLY to those users needing access to the restricted
  supervisor options that now live under the Application Coordinator Menu.

SDZCVDSTATUS   (CVD STATUS)
+             Enter ?? for more actions

Select Action:Next Screen//

```

Figure 19-24: Viewing scheduling keys (step 2)

### 19.1.9 Users with Overbook to All Clinics (OVB)

This option allows you to print a list of all users with SDOB or SDMOB security keys. These keys give the user overbook access to all clinics. It is recommended that you keep this list short. Overbook access by individual clinic or by principal clinic is available under Set Up A Clinic.

1. To access OVD, type **OVD** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

- A description of the report will be displayed. Press the Enter key at the “Press Enter to continue:” prompt to continue.

```

                                Application Coordinator Menu
                                (UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVB   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: OVB

Use this option to print a listing of all users holding the
SDOB or SDMOB keys.  These keys give users overbook access
to ALL clinics.  It is recommended that you keep this list
short.  Assigning overbook access by individual clinic or
by principal clinic is available under the Set Up a Clinic
option.

Press ENTER to continue: [ENTER]

```

Figure 19-25: Listing user with overbook to all clinics (steps 1-2)

- The Overbook Access Listing screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```

OVERBOOK ACCESS LISTING          Oct 23, 2002 13:28:48          Page:    1 of    2
      USERS WITH KEYS THAT GIVE THEM OVERBOOK IN ALL CLINICS
-----
SDOB:  OVERBOOK ACCESS
      USER,CHARLES
      USER,MD DEBORAH
      USER,KAREN ANN
      USER,MD
      USER,WALTER A
      USER,P
      USER,EDGAR
      USER,DEMO
      USER,EDWARD
      USER,JOHN

SDMOB:  MASTER OVERBOOK ACCESS
      USER,MD DEBORAH
      USER,KAREN ANN
+      Enter ?? for more actions

Select Action:Next Screen//

```

Figure 19-26: Listing user with overbook to all clinics (step 3)

### 19.1.10 Purge Scheduling Data (PSD)

Use this option to retrieve disk space and delete various non-essential nodes created by the Scheduling module in the hospital location and patient files. Appointments stored under each patient are never purged.

**Note:** You are required to keep one full fiscal year of data online.

You may select which files to purge and may choose to print the nodes as they are deleted. This option should be run during off-hours.

1. To access PSD, type **PSD** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

                                     Application Coordinator Menu
                                     (UNSPECIFIED HO)

ACR      Add Cancellation Reasons
AEH      Add/Edit a Holiday
AWR      Add Waiting List Reasons
CHG      Change Patterns to 30-60
CVS      Create Visit Status Report
ESP      Edit Scheduling Parameters
IRC      Inactivate/Reactivate Clinic
KEY      View Scheduling Keys
OVB      Users with Overbook to All Clinics
PSD      Purge Scheduling Data
RMC      Remap Clinic
SCT      Scheduling Templates
VED      View Event Driver

Select Application Coordinator Menu Option: RMC
```

Figure 19-27: Purging scheduling data (step 1)

2. The system will display a list of all the files that you can purge. To continue, type Y at the “OK to continue?” prompt.
3. To purge files in the Hospital Location file, type Y at the “Do you want to purge the Hospital Location file nodes?” prompt. If you do not wish to purge any of these files, type N.
4. To purge files in the Patient file, type Y at the “Do you want to purge the Patient file nodes?” prompt. If you do not wish to purge any of these files, type N.
5. If you selected Y in either step 3 or 4, you will be prompted to type a date through which you want these files purged. Type the date at the “Select date through which you want these files purged:” prompt.
6. Type Y or N at the “Do you want to print nodes (in Global format - %G) as they are deleted?” prompt.

7. The system will give you one last opportunity to confirm your selections. Type Y or N at the “Is everything OK to proceed?” prompt.
8. Type the name of the device where you would like a report of files purged at the “Device:” prompt.
9. The system will then begin the purge and a listing of purged files will be displayed.

```

The date you select to delete through may not exceed SEP 30, 2001.
The files you may choose to delete from and the nodes that will be deleted are:

from the HOSPITAL LOCATION File
- the 'S' nodes, APPOINTMENT multiple
- the 'ST' nodes, clinic PATTERN multiple
- the 'OST' nodes, clinic SPECIAL PATTERN multiple
- the 'C' nodes, CHART CHECK multiple
- the 'AAS' nodes, 10/10 visits cross-reference
from the PATIENT File
- the 'ASDPSD' nodes, Special Survey cross-reference

OK to continue? No// Y

Do you want to purge the Hospital Location file nodes? No// Y

Do you want to purge the Patient file nodes? No// Y

Select date through which you want these files purged: SEP 30, 2001

Do you want to print nodes (in GLOBAL format - %G) as they are deleted? N

Is everything OK to proceed? No// Y

DEVICE: HOME

*** SCHEDULING PURGE IN PROCESS ***

Begin purge of Hospital Location File nodes OCT 23, 2002@12:44:28
0 APPTS AND MISCELLANEOUS HOSPITAL LOCATION NODES DELETED
0 10/10 AND UNSCHEDULED XREFS PURGED

End of Hospital Location purge

*** SCHEDULING PURGE COMPLETED *** OCT 23, 2002@12:44:28
Hospital Location file nodes have been purged through: SEP 29, 2000@90:00

```

Figure 19-28: Purging scheduling data (steps 2-9)



### 19.1.11 Remap Clinic (RMC)

Use this option to reset the clinic availability patterns of established clinics. It updates the pattern to ensure knowledge of the holiday or deletion of the holiday. The Holiday file is usually updated annually. This option must be run for each clinic that meets on the date of the holiday. The Remap Clinic option would also be utilized if the clinic set-up is edited from no scheduling on holidays to scheduling on holidays or vice-versa. Before the clinic is remapped for any date on which existing appointments may be deleted, the appointments must be cancelled.

You may choose to remap for one/many/all clinics and, at multidivisional facilities, for one/many/all divisions. The system will insert the holiday name into clinic availability patterns even if the clinic does not meet on the day of the holiday.

The following messages may appear under the Remark section of the output generated by this option or on your screen while utilizing the option.

Message	Occurs When
Bogus clinic day- Appts!	The date and day of the week do not correspond.
[HOLIDAY NAME]- Appts!	Appointments exist on a holiday and the clinic does not schedule on holidays. This allows you to cancel and reschedule appointments if necessary.
No master pattern found for this day	No day of the week template exists for this day of the week.
The following message may appear on the output:	
Cancelled	Availability was cancelled. If appointments were originally scheduled on a holiday and later cancelled, you must restore availability for the selected date and remap that date to insert the holiday; otherwise, it will remain cancelled.
The following message may appear on the screen	
Cancelled - Appts!	Appointments were originally scheduled on a holiday and later cancelled. You must first restore clinic availability for the selected date in order to remap and to show the holiday in the pattern.

- To access RMC, type **RMC** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

                                Application Coordinator Menu
                                (UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVB   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: RMC

```

Figure 19-29: Remapping a clinic (step 1)

2. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division. When you are done entering division names, press the Enter key.
3. Type the clinic name at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Enter key.
4. Type the beginning date of the report at the “Select Beginning Date:” prompt.
5. Type the ending date of the report at the “Select Ending Date:” prompt.
6. Type a printer where you want this report printed at the “Device:” prompt or type HOME to display the listing on the screen.

```

Select division: UNSPECIFIED INDIAN HOSPITAL
Select division: [ENTER]
Select clinic: CARDIOLOGY
Select clinic: [ENTER]

**** Date Range Selection ****

Beginning DATE : T-365

Ending DATE : t+365

DEVICE: HOME//

```

Figure 19-30: Remapping a clinic (steps 2-6)

- If you select to display the remapping on the screen, the Clinic Remap Function screen will appear. Press the Enter key to changes pages or to exit from this display.

OCT 23,2002		Clinic Remap Function		pg 1 of 2
Clinic Name	Clinic Date	Remark		
-----	-----	-----		
11-17	SAT NOV 2,2002	My Birthday- Inserted		
AUDIOLOGY	SAT NOV 2,2002	My Birthday- Inserted		
Bariatric	SAT NOV 2,2002	My Birthday- Inserted		
CARDIOLOGY	MON NOV 25,2002	Cancelled		
COLPO CLINIC	SAT NOV 2,2002	My Birthday- Inserted		
DENTAL	SAT NOV 2,2002	My Birthday- Inserted		
DIABETIC CLINIC	SAT NOV 2,2002	My Birthday- Inserted		
DIABETIC DOC #1	SAT NOV 2,2002	My Birthday- Inserted		
DIABETIC DOC #2	SAT NOV 2,2002	My Birthday- Inserted		
DIABETIC DOC #3	SAT NOV 2,2002	My Birthday- Inserted		
DIABETIC PRINCIPAL	SAT NOV 2,2002	My Birthday- Inserted		
ENT CLINIC	SAT NOV 2,2002	My Birthday- Inserted		
GENERAL	SAT NOV 2,2002	My Birthday- Inserted		
MAMMOGRAM CLINIC	SAT NOV 2,2002	My Birthday- Inserted		
MEDICAL STUDENT	SAT NOV 2,2002	My Birthday- Inserted		
MENTAL HEALTH	SAT NOV 2,2002	My Birthday- Inserted		

Figure 19-31: Remapping a clinic (step 7)

### 19.1.12 Scheduling Templates (SCT)

Use this option to add and edit scheduling appointment availability templates as well as listing those already defined. Scheduling templates are daily appointment slot patterns that can be reused. If you have a complicated pattern that needs to be added to multiple clinics, creating a scheduling template will save you time.

- To access SCT, type **SCT** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```
Application Coordinator Menu
(UNSPECIFIED HO)

ACR   Add Cancellation Reasons
AEH   Add/Edit a Holiday
AWR   Add Waiting List Reasons
CHG   Change Patterns to 30-60
CVS   Create Visit Status Report
ESP   Edit Scheduling Parameters
IRC   Inactivate/Reactivate Clinic
KEY   View Scheduling Keys
OVV   Users with Overbook to All Clinics
PSD   Purge Scheduling Data
RMC   Remap Clinic
SCT   Scheduling Templates
VED   View Event Driver

Select Application Coordinator Menu Option: sct
```

Figure 19-32: Adding/editing scheduling templates (step 1)

2. Type 1 (add/edit templates) or type 2 (list defined templates) at the “Select Action:” prompt. If you select 2, you will be taken directly to the Scheduling Template screen. You can use the options at the bottom of the screen to navigate through the report. If you select 1, continue with steps 3-6.
3. Type an existing or new template name at the “Select Scheduling Templates Name:” prompt. If you are adding a new template, you will be prompted to confirm your selection. For a list of available templates, you can type ?? at the “Select Scheduling Templates Name:” prompt.
4. Type the time range for which you want the template to run at the “Select Time:” prompt. If you are adding a new time range, you will be prompted to confirm your selection. If you are editing a template, type the new time range you desire, or press the Enter key to accept the default range.
5. Type the number of slots that you want for the time range entered at the “Slots:” prompt.
6. If no more time ranges need to be entered, press the Enter key at the next “Select Time:” prompt to complete the template entry. If you want to add other time slots, type them here.

```

Select one of the following:

      1      Add/Edit Templates
      2      List Defined Templates

Select SCHEDULING TEMPLATES NAME: New Template
Are you adding 'new temp' as a new SCHEDULING TEMPLATES (the 1ST)? No// Y

Select TIME: 0900-1700
Are you adding '0900-1700' as a new TIME (the 1ST for this SCHEDULING
TEMPLATES)? No// Y
SLOTS: 5
Select TIME: [ENTER]

```

Figure 19-33: Adding/editing scheduling template (steps 2-6)

### 19.1.13 View Event Driver (VED)

Use this option to view the items linked to the Scheduling Event Driver. These are items fired whenever an appointment event is executed.

1. To access VED, type **VED** at the “Select Application Coordinator Menu Option:” prompt located in the Application Coordinator menu.

```

Application Coordinator Menu
(UNSPECIFIED HO)

ACR      Add Cancellation Reasons
AEH      Add/Edit a Holiday
AWR      Add Waiting List Reasons
CHG      Change Patterns to 30-60
CVS      Create Visit Status Report
ESP      Edit Scheduling Parameters
IRC      Inactivate/Reactivate Clinic
KEY      View Scheduling Keys
OVB      Users with Overbook to All Clinics
PSD      Purge Scheduling Data
RMC      Remap Clinic
SCT      Scheduling Templates
VED      View Event Driver

Select Application Coordinator Menu Option: VED

```

Figure 19-34: Viewing event driver (step 1)

2. The Scheduling Event Driver screen will be displayed. Use the options at the bottom of the screen to navigate through the report.

```

SCHEDULING EVENT DRIVER      Oct 23, 2002 10:02:02      Page:    1 of    3

  Seq  Protocol                Description_____
  BSDAM APPOINTMENT EVENTS Protocol - Scheduling Event Driver Menu

  5    BSDAM CREATE VISIT - INTERACTICreate Visit at Check-in
5.1   BSDAM CREATE VISIT - SILENT  Create Visit at Check-in
  6    BSDAM ADD ENCOUNTER          Add Outpatient Encounter
  8    BSDAM APPT SLIP              Appointment Slip Print

Documentation:
This extended action contains all the actions that need to be performed
when an action is taken upon an appointment such as check-in or check-out.
This is a copy of SDAM APPOINTMENT EVENTS with only IHS items attached.

The protocol item BSDAM CREATE VISIT must have a lower sequence number
than any other item where the visit ien is required. The protocol returns
the variables BSDVSTN (visit ien) and BSDVCN (visit control number or null
and error codes) IF CREATE VISIT is turned ON for clinic. They are killed
in the exit action of this event driver.
+      Enter ?? for more actions

Select Action:Next Screen//

```

Figure 19-35: Sample of event driver screen

## 19.2 Clinic Profile (CPF)

Use this option to produce a profile of one, many, or all clinics. At multidivisional facilities, you may choose to generate the profile of clinics associated with one, many, or all divisions. The clinics will be profiled as of the date the report is requested, providing the most current information available.

Some of the data elements included in each profile may be: clinic name, abbreviation (if any), telephone number and location of clinic, days clinic meets, start date, increments, hour display begins, appointment length, variable length, max overbooks/day, stop code, credit stop code, non-count clinic, access to clinic prohibited, and max number of days for future booking. Checkout parameters including default provider and diagnosis for each clinic are also displayed.

1. To access CPF, type **CPF** at the "Select Supervisor Menu (Scheduling) Option:" prompt.

```

Supervisor Menu (Scheduling)

(UNSPECIFIED HO)

ACM   Application Coordinator Menu ...
CPF   Clinic Profile
CRA   Cancel/Restore Clinic Availability
DSU   Display Scheduling User
EEL   Enter/Edit Letters
LAM   List Appts Made By Clinic
MON   Month-at-a-glance Display
SET   Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: CPF

```

Figure 19-35: Listing a clinic profile (step 1)

2. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division. When you are done entering division names, press the Enter key.
3. Type the clinic name at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you have finished entering clinic names, press the Enter key.
4. Type B (to browse the report onscreen) or P (to print the report on paper) at the “Print Mode:” prompt. If you select P, you must then select the printer where you would like your report to print.

```

Select division: ALL
Select clinic: CARDIOLOGY
Select another clinic: [ENTER]

Select one of the following:

    B          BROWSE ON SCREEN
    P          PRINT ON PAPER

PRINT MODE: B

```

Figure 19-36: Listing a clinic profile (steps 2-4)

5. If you selected B (browse onscreen), the clinic profile screen will be displayed (Figure 19-37). Use the option s at the bottom of the screen to navigate through the report.

CLINIC PROFILE	Oct 21, 2002 10:28:48	Page: 1 of 2
Clinic: CARDIOLOGY	Abbrv: CARDIO	
Facility: UNSPECIFIED HO	Service: CLINIC	
Location: 1st floor, N Wing	Clinic Code: 02 - CARDIAC	
Telephone: 247-0011	Principal Clinic: UNAFFILIATED CLINICS	
Clinic Meets: SU,MO,WE,TH,FR,SA	Sched Holidays: YES	
Appt. Display: Begins at 8 AM	Appt. Length: 15 min.	
Increments: 15-MIN	Variable Length: NO	
Overbooks/Day: 0	Future Booking: 45 days max.	
Auto-Rebook: Start at 9 AM	Max. Auto-Rebook: 45 days	
No-Shows: 2 allowed	Wait Period: 14	
	Pull Prev X-rays: YES	
Appointment List Statement:		
Special Instructions: None		
Clinic's Letters -		
+ Enter ?? for more actions		
Select Action:Next Screen//		

Figure 19-37: Listing a clinic profile (step 5)

The following is a brief explanation of some of the data elements listed on the report:

#### **Non-Count Clinic**

If answered YES, clinic will not impact statistics

#### **Start Date**

Date clinic was initially set up.

#### **Increments**

Number of slots per hour

#### **Variable**

Variable length appointments

## 19.3 Cancel/Restore Clinic Availability (CRA)

Use this option to cancel a clinic's availability for either a whole day or portions of a day. Only one portion of a day may be cancelled at a time. If several portions of a day are to be cancelled, the option must be re-entered to cancel each portion. If part of the same day has been cancelled previously, the cancellation(s) will be listed. You may cancel another portion(s) as long as the new cancellation does not overlap any previous cancellation(s).

1. To access CRA, type **CRA** at the "Select Supervisor Menu (Scheduling) Option:" prompt.



```

Supervisor Menu (Scheduling)

(UNSPECIFIED HO)

ACM   Application Coordinator Menu ...
CPF   Clinic Profile
CRA   Cancel/Restore Clinic Availability
DSU   Display Scheduling User
EEL   Enter/Edit Letters
LAM   List Appts Made By Clinic
MON   Month-at-a-glance Display
SET   Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: CRA

```

Figure 19-38: Canceling/Restoring clinic availability (step 1)

2. Type C (cancel clinic) or R (restore clinic) at the “Select Action:” prompt.
3. Type the name of the clinic that you want to either cancel or restore availability.
4. Type the date that you want availability changed at the “Restore/Cancel ‘Clinic’ for What Date:” prompt. If you are restoring clinic availability, confirm the date and time you are restoring and clinic availability will be restored. If you are canceling availability, continue with steps 5-9.
5. After you have entered the desired clinic name and date, the system will list any scheduled appointments that exist during that time in a report entitled Pre-cancellation List. If you want to browse this report on your screen, type HOME at the “Device:” prompt.

```

Select one of the following:

      C          CANCEL CLINIC AVAILABILITY
      R          RESTORE CLINIC AVAILABILITY

Select Action: C
Select CLINIC NAME: CARDIOLOGY
CANCEL 'CARDIOLOGY' FOR WHAT DATE: 11/25/02 (NOV 25, 2002)
FIRST, I'LL LIST THE EXISTING APPOINTMENTS

DEVICE: HOME

```

Figure 19-40: Canceling/Restoring clinic availability (steps 2-5)

6. The Pre-Cancellation report lists the patient name, chart number, appointment time, appointment length, and the patient's telephone number. Type Y or N at the “Want to Cancel Whole Day?” prompt. If you type N, meaning you only want to cancel part of the day. Follow the prompts as they appear on your screen to cancel the specific part of the day.

7. Type in an optional message as to why the clinic availability was changes at the “(Optional) Message:” prompt. To bypass this prompt, press the Enter key.
8. Type Y or N at the “Want to Auto-Rebook Appointments Now?” prompt.
  - a. If you type N, the appointments will need to be rescheduled through the Make Appointment option in the Appointment menu. The information requested to accomplish this could be taken from the Pre-Cancellation List report. The report could also be an aid in notifying patients of cancellations by telephone in the event there was not enough time to reach them by mail.
  - b. If you type Y, the Cancelled Clinic Auto-Rebook Report will be generated. This report provides the clinic name, date cancelled, patient name and chart number, old appointment time, and new date and time. Auto-rebooking of appointments has occurred while utilizing this option, the Cancelled Clinic Auto-Rebook Report will be generated. This report shows the new date/time of the rebooked appointments including the ancillary test time. There are three parameters that affect the auto-rebooking of appointments with associated ancillary tests. They are: OP lab test start time, OP EKG start time, and OP x-ray start time. If a time is entered at these parameters, the ancillary test time will not rebook before the start time specified in the parameter
9. Type Y or N at the “Want Letters Printed Now?” prompt. This prompt provides you the capability to print cancellation letters. A cancellation letter must have been previously entered through the Enter/Edit Letters option and assigned to the clinic being cancelled through the Set up a Clinic option. This letter will notify patients of the appointment cancellation and the new date/time scheduled. You will have to designate a printer to print the letters.

A status of Cancelled by Clinic will appear on the Patient Profile of each patient whose appointments are cancelled through this option. The user who entered the cancellation will also be noted.

```

CARDIOLOGY Clinic Pre-cancellation list for Nov 25, 2002
PATIENT NAME                ID          APPT TIME    LENGTH  TELEPHONE
-----
PATIENT,ALLISON             4298         8:00 AM     15      555-4775
PATIENT,KYLE                 T00006       8:15 AM     15
PATIENT,AHL                  T00005       8:30 AM     15
PATIENT,ALICIA               129          9:00 AM     15      555-4432
PATIENT,NAOMI REBECCA       4294         9:15 AM     15      NONE
PATIENT,ARICELI HONEY       6593         1:15 PM     15      555-4703
PATIENT,DANIEL NEIL         2886         5:00 PM     15

WANT TO CANCEL THE WHOLE DAY? N
WANT TO CANCEL PART OF THE DAY? Y
STARTING TIME: 9
ENDING TIME: 10

(OPTIONAL) MESSAGE: Snow Day

CANCELLED!
WANT TO AUTO-REBOOK APPOINTMENTS NOW? Y
WANT LETTERS PRINTED NOW? N

DEVICE: HOME

```

Figure 19-39: Canceling/Restoring clinic availability (steps 6-9)

## 19.4 Display Scheduling User (DSU)

Use this option to view the user's access level in the Scheduling system. This feature displays the current keys and allows for upgrading to advanced privilege-based keys.

1. To access DSU, type **DSU** at the "Select Supervisor Menu (Scheduling) Option:" prompt.

```

Supervisor Menu (Scheduling)
(UNSPECIFIED HO)

ACM   Application Coordinator Menu ...
CPF   Clinic Profile
CRA   Cancel/Restore Clinic Availability
DSU   Display Scheduling User
EEL   Enter/Edit Letters
LAM   List Appts Made By Clinic
MON   Month-at-a-glance Display
SET   Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: DSU

```

Figure 19-40: Displaying scheduling user (step 1)

2. Type the name of the user for whom you want to see information at the "Select Scheduling User:" prompt.

3. Type the name of the printer where you want this report printed at the “Device:” prompt or type **HOME** to display the report onscreen.

```

Use this option to view a user's access level in the IHS
Scheduling software. It will list all major functions a
user can perform based on security keys. It will also list
which restricted clinics the user can access and the user's
overbook level.

Select SCHEDULING USER: DOCTOR,JOHN
DEVICE: HOME

```

Figure 19-41: Displaying scheduling user (steps 2-3)

4. If you selected to display the report onscreen, the User’s Access in Scheduling screen will be displayed (Figure 19-42). Use the options at the bottom of the screen to navigate through the report.

```

USER'S ACCESS IN SCHEDULING   Oct 22, 2002 11:06:07   Page:   1 of   2
-----
Name: DOCTOR,JOHN           Service: CLINIC

User's Access based on Security Keys:
  Unlocks App Coordinator Menu
  CVD STATUS
  (OBSOLETE - No Longer Used)
  Unlocks Scheduling Menu
  OBSOLETE - No longer used
  Allows updating MH PCP
  Unlocks Clinic Visit Setup
  Unlocks PCP Menu
  Unlocks Scheduling Purge
  Unlocks Full Registration
  Unlocks Pat Mini Reg
  Unlocks Supervisor Menu
  OBSOLETE - No longer used
  OBSOLETE - No longer used
  Unlocks Waiting List

+           Enter ?? for more actions

Select Action:Next Screen//

```

Figure 19-42: Displaying scheduling user (step 4)

## 19.5 Enter/Edit Letters (EEL)

Use this option to type individual letters under the following four letter types: Pre-appointment, Appointment Cancelled, No-Show, and Clinic Cancelled. At the time a clinic is set up, the user may choose which specific letter for each letter type he/she wants associated with that clinic. These letters will then be generated through selected Scheduling options.

The purposes of the four letter types are:

**Pre-Appointment:** to remind the patient of pending appointment(s).

**Clinic Cancelled:** to notify patient(s) that a clinic appointment has been cancelled by the clinic; due to either cancellation of the entire clinic or cancellation of an individual appointment, and to inform them if a new appointment was made through auto-rebook.

**No-Show:** to alert the patient to the fact that a scheduled appointment was missed.

**Appointment Cancelled:** to inform the patient that a new appointment was made through auto-rebook when the patient cancelled the appointment.

Whether the patient's address appears at the top or bottom of the page when these letters are generated depends on how the site parameter, address location on letter, is set at your facility. If parameter, use temporary address, is set to no, the patient's permanent address will be used when printing the letters even if the temporary address date range is in effect.

1. To access EEL type **EEL** at the “Select Supervisor Menu (Scheduling) Option:” prompt.

```

Supervisor Menu (Scheduling)

(UNSPECIFIED HO)

ACM   Application Coordinator Menu ...
CPF   Clinic Profile
CRA   Cancel/Restore Clinic Availability
DSU   Display Scheduling User
EEL   Enter/Edit Letters
LAM   List Appts Made By Clinic
MON   Month-at-a-glance Display
SET   Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: EEL

```

Figure 19-43: Editing a letter (step 1)

2. Select the type of letter you want to create or edit and type the corresponding letter at the “Select Type of Letter:” prompt.
3. Type the name of the letter you want to edit or type the name of the new letter at the “Select Letter:” prompt. You may type ?? to display a list of letters available for editing. If you are creating a new letter, you will be prompted to confirm that you are adding a new letter.

4. If you are editing an existing letter, go through the prompts that are displayed and make edits where appropriate. At a prompt, if you do not want to make any changes, press the Enter key to advance to the next prompt. If you are entering a new letter, type answers at the prompts, each field is required. You can type ?? at any prompt to see a listing of available options.
5. The system will then display the initial section of the letter. To edit the initial section of a letter or to type a new letter, type Y at the "Edit?" prompt or type N to bypass the editing option. The Scheduling software will automatically list the appointments between the initial and final sections of the letter.

```

Use this option to enter a new or edit an existing letter.
The letter types available are:
  (A)ppointment Cancelled - appointment cancelled by Cancel
                          Appointment action under Appt Mgt.
  (C)linic Cancelled - appointment cancelled by Cancel
                          Clinic Availability option.
  (N)o-Show - reminder to patient who did not show, to make
                          another appointment.
  (P)re-Appointment - reminder to patient of upcoming appt.
SELECT TYPE OF LETTER: C
SELECT LETTER: APPOINTMENT CXL
NAME: APPOINTMENT CXL// [ENTER]
GREETINGS TO PARENTS?: NO//[ENTER]
TYPE: C//[ENTER]
INITIAL SECTION OF LETTER:
The following clinic appointment(s) were cancelled:

Edit? Y

```

Figure 19-44: Editing a letter (steps 2-5)

6. You will be taken to the RPMS Full Screen Text Editor. In many ways, the Full Screen Text Editor works just like a traditional word processor. The lines wrap automatically, the up, down, right, and left arrows move the cursor around the screen, and a combination of upper and lower case letters can be used. On the other hand, some of the conventions of a traditional word processing program do not apply to the RPMS full screen editor. For example, the Delete key does not work. Delete text by moving one space to the right of the error and backspacing to remove the erroneous entry.

When entering or editing the letter, you can type the text in a traditional word processing application like Word or Word Perfect and then paste the text into the open RPMS window, or simply type the letter in the display.

Table 19-1 lists the most commonly used RPMS text editor commands.

**Table 19-1. Text Editor Commands**

Command	Key Combination
Delete a line (extra blank or text)	PF1(F1) followed by <b>D</b>
Join two lines (broken or too short)	PF1(F1) followed by <b>J</b>
Save without exiting	PF1(F1) followed by <b>S</b>
Exit and save	PF1(F1) followed by <b>E</b>
Quit without saving	PF1(F1) followed by <b>Q</b>
Top of text	PF1(F1) followed by <b>T</b>

```
==[ WRAP ]==[ INSERT ]=< INITIAL SECTION OF LETTER >====[ <PF1>H=Help ]===== Type
the text of the letter here, or simply edit the existing text.
```

```
<====T=====T=====T=====T=====T=====T=====T=====T=====T>=====T
Bottom of text                                PF1(F1) followed by B
```

Figure 19-45: Editing a letter (step 6)

**Note:** You can display all of the commands available for the RPMS Full Screen Editor by pressing the PF1 (F1) key, then typing H. Type a caret (^) to exit the help screens.

- When you are done typing the initial text of the letter, press the F1 key and then type E.
- The final section of the letter will be displayed. To finish editing or entering a letter type Y at the “Edit?” prompt or type N to bypass the editing option.

```
FINAL SECTION OF LETTER:. . .
```

```
FOR RE-APPOINTMENT PLEASE CALL THE FRONT DESK OR THE MEDICAL RECORDS
DEPARTMENT.
```

```
Edit? NO// Y
```

Figure 19-46: Editing a letter (steps 7-8)

- When you are done typing the final section of the letter, press the F1 key and then type E. The letter is now edited/entered.

## 19.6 List Appts Made by Clinic (LAM)

This option allows the user to list all appointments made for a particular clinic or all clinics within a date range. Note that the user initiating the appointment is identified.

1. To access LAM type **LAM** at the “Select Supervisor Menu (Scheduling) Option:” prompt.

```

                                     (UNSPECIFIED HO)

ACM   Application Coordinator Menu ...
CPF   Clinic Profile
CRA   Cancel/Restore Clinic Availability
DSU   Display Scheduling User
EEL   Enter/Edit Letters
LAM   List Appts Made By Clinic
MON   Month-at-a-glance Display
SET   Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: LAM

```

Figure 19-47: Listing appointments made by clinic (step 1)

2. Type 1 at the “Select Type of Report:” prompt to list all appointments scheduled for a date range, who made the appointment and when. Or type 2 at the “Select Type of Report:” prompt to list who made appointments scheduled for a given date range, how many they made and their percentage of the total.
3. Type the name of the division from where you would like the information at the “Select Division:” prompt. Type ?? for a listing of available divisions or type ALL for all divisions. You may type more than one division. When you are done entering division names, press the Enter key.
4. Type the clinic name at the “Select Clinic:” prompt. Type ?? for a listing of available clinics or type ALL for all clinics. You may type more than one clinic. When you are done entering clinic names, press the Enter key.
5. Type the beginning date of the report at the “Select Beginning Date:” prompt.
6. Type the ending date of the report at the “Select Ending Date:” prompt.
7. Type a printer where you want this report printed at the “Device:” prompt or type HOME to display the listing on the screen.

```

Select one of the following:

      1          LIST APPOINTMENTS
      2          LIST USERS WITH COUNTS

Select Type of Report: 1 LIST APPOINTMENTS
Select division: ALL//
Select clinic: ALL//
Select beginning date: T-365
Select ending date: T
DEVICE: HOME

```

Figure 19-48: Listing appointments made by clinic (steps 2-7)



8. If you selected to display the listing on the screen, use the options at the bottom of the screen to navigate through the report.

APPTS MADE BY USERS		Oct 23, 2002 08:34:05		Page: 1 of 289	
		Oct 23, 2001 to Oct 23, 2002			
Appt Date	Chart #	Age	Who Made Appt	Date Appt Made	_____
DIABETIC DOC #1					
Oct 26, 2001@09:00	6756	65 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@09:00	4748	69 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@09:30	6572	51 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@09:30	4238	59 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@09:30	4409	76 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@10:00	6432	73 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@10:00	5090	63 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@10:00	5696	56 YRS	OTHERPROVIDER,MD.	Oct 09, 2001	
Oct 26, 2001@10:11	5636	46 YRS	OTHERPROVIDER,MD	Oct 26, 2001	
+ Enter ?? for more actions					
Select Action:Next Screen//					

Figure 19-49 Listing appointments made by clinic (step 8)

## 19.7 Month-at-a-Glance Display (MON)

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

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

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

```

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

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

Select Scheduling Menu Option: MD

```

Figure 19-50: Displaying month-at -a -glance (step 1)

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

```

Select CLINIC: PEDIATRIC

Select one of the following:

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

ENTER THE DATE DESIRED FOR THIS APPOINTMENT: T

```

Figure 19-51: Displaying month-at -a -glance (steps 2-3)

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

```

MONTH-AT-A-GLANCE          Oct 10, 2002 13:12:05          Page:    1 of    4
For first time patients, please make 30 minute appointments.

                                CARDIOLOGY
                                Oct 2002

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

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

Select Action:
    
```

Figure 19-52: Displaying Month-at-a-Glance (step 4)

## 19.8 Set Up a Clinic (SET)

The Set up a Clinic option is used to define/edit clinic parameters and establish appointment availability patterns for the clinics at your facility. Appointments may not be made through the scheduling package to clinics not defined through this option.

Following is some of the basic clinic information established through this option:

- Clinic code associated with the clinic
- Is clinic grouped under a principal clinic
- Clinic owners – those who can change this clinic’s setup
- Default length of appointments and whether or not they can be variable
- Can/cannot schedule to this clinic on holidays
- Print health summaries with routing slips or not
- Assign default letters to clinic
- Whether or not to create a visit at check-in time

Prior to assigning default letters (no-show, pre-appointment, clinic cancelled, and appointment cancelled), these letters must have been defined through the Enter/Edit Letters option of this menu. Each letter type may have several differently worded letters associated with it. Letters are automatically generated when the appropriate action is taken through one of the scheduling menu options.

### 19.8.1 Setting up a clinic options

1. To access SET, type **SET** at the “Select Supervisor Menu (Scheduling) Option:” prompt.

```

Supervisor Menu (Scheduling)

(UNSPECIFIED HO)

ACM   Application Coordinator Menu ...
CPF   Clinic Profile
CRA   Cancel/Restore Clinic Availability
DSU   Display Scheduling User
EEL   Enter/Edit Letters
LAM   List Appts Made By Clinic
MON   Month-at-a-glance Display
SET   Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: SET

```

Figure 19-53: Setting up a clinic (step 1)

2. Type either an existing clinic name or the name of a new clinic at the “Select Clinic Name:” prompt. If you are adding a new clinic, you will be prompted to confirm that you are adding a new clinic. If you are editing an existing clinic, you will be taken directly to the screen shown in Figure 19-54.
3. For new clinics, type the length the appointments at the “Length of Appt:” prompt. This entry must be in minutes ranging from 10 to 240 minutes.

```

Select CLINIC NAME: UNSPECIFIED MENTAL HEALTH
Are you adding 'UNSPECIFIED MENTAL HEALTH' as a new HOSPITAL LOCATION? No// Y
(Yes)
LENGTH OF APP'T: 30

```

Figure 19-54: Setting up a clinic (steps 2-3)

The Set Up Clinic screens will be displayed. When editing the parameters of an existing clinic, previous entries will appear as defaults. When setting up a new clinic, certain prompts will appear with defaults. All underlined fields require an answer. There are four information screens.

To navigate through this screen you can use the up (↑), or down (↓) arrows, the Tab key, or the Enter key. When you have a question about filling out a particular prompt, type ?? and the available options will be displayed at the bottom of the screen. To display the available commands, type a caret (^) at any prompt or move the cursor to the bottom of the screen and the “Command:” prompt will be displayed at the bottom of the screen.

```

                                SET UP A CLINIC                                Page 1 of 4
CLINIC NAME: CARDIOLOGY                ABBREVIATION: CARDIO
  DIVISION: INDIAN HOSPITAL            FACILITY: UNSPECIFIED HO

    MEETS AT THIS FACILITY?: YES
  NON-COUNT CLINIC? (Y OR N): NO
  INCLUDE ON FILE ROOM LISTS?: NO
    PRINCIPAL CLINIC:
  PHYSICAL LOCATION: 1st floor, N Wing    TELEPHONE: 247-0011
      CLINIC CODE: CARDIAC
    HOSPITAL SERVICE: CLINIC

CLINIC OWNERS (responsible for setup)
DEMO,WALTER

Exit      Save      Next Page      Refresh
Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND:                                     Press <PF1>H for help      Insert

```

Figure 19-55: Setting up a new clinic (page 1)

```

                                SET UP A CLINIC                                Page 2 of 4
SPECIAL INSTRUCTIONS for make appt. (3 lines max.)

    PROHIBIT ACCESS TO CLINIC?:                OVERBOOK USERS & LEVEL
      SCHEDULE ON HOLIDAYS?:
    HOUR CLINIC DISPLAY BEGINS: 8
      LENGTH OF APPOINTMENT: 30
    VARIABLE APPOINTMENT LENGTH: YES,
    DISPLAY INCREMENTS PER HOUR: 30-MIN
      OVERBOOKS/DAY MAXIMUM: 0
    MAX # DAYS FOR FUTURE BOOKING: 999
      START TIME FOR AUTO REBOOK:
    MAX # DAYS FOR AUTO-REBOOK: 14

COMMAND:                                     Press <PF1>H for help      Insert

```

Figure 19-56: Setting up a new clinic (page 2)

```

                                SET UP A CLINIC                                Page 3 of 4

PRE-APPOINTMENT LETTER:
CLINIC CANCELLATION LETTER:
APPT. CANCELLATION LETTER:
      NO SHOW LETTER:
ALLOWABLE CONSECUTIVE NO-SHOWS: 999
      WAITING PERIOD FOR NO-SHOWS: 30

PRINT HEALTH SUMMARY?: YES   HEALTH SUMMARY TYPE: ADULT REGULAR
PRINT ADDRESS/INSURANCE UPDATE?: YES
      PRINT RX PROFILES?: YES, ACTION PROFILE
      REQUIRE X-RAY FILMS?:

-----

COMMAND:                                Press <PF1>H for help   Insert

```

Figure 19-57: Setting up a clinic (page 3)

```

                                SET UP A CLINIC                                Page 4 of 4

ASK FOR CHECK IN/OUT TIME: YES
CREATE VISIT AT CHECK-IN?: YES   -Can only access visit questions
      VISIT SERVICE CATEGORY:     if user holds SDZPCC key
MULTIPLE CLINIC CODES USED?: NO
      VISIT PROVIDER REQUIRED: YES
      TRIAGE CLINIC?:
      PYXIS LOCATION:

CLINIC PROVIDERS      DEFAULT
DOCTOR,A              YES

-----

COMMAND:                                Press <PF1>H for help   Insert

```

Figure 19-58: Setting up a clinic (page 4)

### 19.8.1.1 Page One Data Elements

4. If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, type @ to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

**CLINIC NAME**

Specific name given for the clinic, such as PEDS-DR JOE or GYN-EVENINGS.

**ABBREVIATION**

An abbreviation for the clinic name 1-7 characters in length.

**DIVISION**

Name of your medical center division. For multiple division service units, make sure each clinic is linked to the correct division and facility. These names are defined by the facility.

**FACILITY**

Official IHS institution name assigned to the facility where the clinic meets.

**CLINIC MEETS AT THIS FACILITY?: YES**

Press the Enter key to accept the default of YES. NO if the clinic meets elsewhere.

**NON-COUNT CLINIC? (Y OR N)**

YES if visits should *not* affect statistics. NO if visits *should* affect statistics

**INCLUDE ON FILE ROOM LISTS**

YES to include this clinic on file room lists; NO to not include. Clinics that do NOT need paper charts pulled for their clinic will answer NO here. This also affects whether or not routing slips print.

**PRINCIPAL CLINIC**

Name of overall grouping under which this clinic falls. Must be a defined clinic but one that does NOT have appointments attached. Principal clinics are used for grouping purposes only.

**PHYSICAL LOCATION**

Enter the location within your facility where this clinic meets (0-25 characters).

**TELEPHONE**

Telephone number for the specific location.

**CLINIC CODE**

Two digit clinic code number assigned to this clinic. Type ?? for a list of codes.

**SERVICE**

The hospital service associated with this clinic.

**CLINIC OWNERS**

Enter the people that are responsible for the setup of the clinic. Once at least one name is listed here, only these people and anyone holding the application coordinator key (SDZAC) may access this clinic's setup. If no names are listed, then anyone who has access to the supervisor menu may change this clinic.

**19.8.1.2 Page two data elements**

5. If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO but the only choice is YES, type @ to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

**SELECT SPECIAL INSTRUCTIONS**

Type up to three lines of special instructions for making appointments to this clinic.

**PROHIBIT ACCESS TO CLINIC**

Should only privileged users have access to book to this clinic? If so, type YES which will open a small data entry box in which those names can be entered. If not, then leave blank.

**SCHEDULE ON HOLIDAYS**

Does this clinic meet on holidays? If set to YES it will ignore the holidays entered for the facility in mapping out appointment slots.

**OVERBOOK USERS & LEVEL**

Enter the users who have overbook capability. TAB over to this column and enter names starting at the first blank line. For each name enter the overbook level (R for regular and M for master overbook). Master overbook is given to users who can override the clinic's maximum number of overbooks per day parameter.

**HOURLY CLINIC DISPLAY BEGINS**

Enter a whole number indicating the first hour for the clinic display. If left blank, it will assume 8 AM. Use military time so 2 PM would be 14. Examples:

9AM = 9    1PM = 13  
10AM = 10    2PM = 14  
11AM = 11    3PM = 15  
NOON = 12    4PM = 16



**LENGTH OF APP'T**

Enter the time, in minutes, of an average appointment for this clinic (must be a multiple of 10 or 15). The length of time entered here directly affects the INCREMENTS PER HOUR display set up later. Be sure to calculate the desired time/increment relationship before entering them as you are not able to edit INCREMENTS PER HOUR after an availability date has been entered.

**VARIABLE APPOINTMENT LENGTH**

Does this clinic have variable appointment lengths? Enter V to allow for a varied appointment length or leave blank to not allow variable appointment length.

**DISPLAY INCREMENTS PER HOUR: 4**

The number of increments that will be displayed per hour for this clinic. Accept the default or type a ? for a list of choices. For example, if you entered 15 minutes as the length of appointment, then enter 4 here.

**OVERBOOKS/DAY MAXIMUM**

Enter the number of allowable overbooks per day to this clinic. If overbooks are not allowed, enter zero. This can be overridden by anyone having master overbook access.

**MAX # DAYS FOR FUTURE BOOKING**

Maximum number of days available when searching for open clinic slots for this clinic in the future. A number between 11 and 999.

**START TIME FOR AUTO REBOOK**

Start time (hour of day) that should be searched for when auto rebooking an appointment to this clinic. Enter the time or press the Enter key to begin at the clinic start time.

**MAX # DAYS FOR AUTO REBOOK**

Maximum number of days the system can be set to search up to when auto rebooking appointments. A number between 1 and 365.

**19.8.1.3 Page Three Data Elements**

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO and YES is the only choice, type @ to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

**PRE-APPOINTMENT LETTER**

This letter will be generated when making an appointment and through the Print Scheduling Letters option advising patients of their upcoming appointments to this clinic. Enter the name of the pre-appointment letter. Type ? for a list of pre-appointment letters.

**CLINIC CANCELLATION LETTER**

This letter will be generated for this clinic whenever either the clinic availability is cancelled through the Cancel Clinic Availability option of this menu, or when an appointment is cancelled through the Cancel Appointment option of the Appointment menu and the cancellation is at the request of the clinic. Enter the name of the clinic cancellation letter. Type ? for a list of clinic cancellation letters.

**APPT. CANCELLATION LETTER**

This letter will be generated for this clinic whenever an appointment is cancelled at the patient's request through the Cancel Appointment option of the Appointment menu. Enter the name of the appt. cancellation letter. Type ? for a list of appt. cancellation letters.

**NO-SHOW LETTER**

This letter will be generated in conjunction with no-shows entered for this clinic through the No-Show option of the Appointment menu. Enter the name of the no-show letter. Type ? for a list of no-show letters.

**ALLOWABLE CONSECUTIVE NO-SHOWS**

This is the number of times in a row that a patient can be a no-show in this clinic before being flagged for possible discharge from the clinic.

**WAITING PERIOD FOR NO-SHOWS**

Enter the number of days you want the computer to use in searching of previous no-shows in this clinic.

**PRINT HEALTH SUMMARY**

Answer YES if you want Health Summaries printed with Routing Slips.

**PRINT HEALTH SUMMARY TYPE**

Enter the type of Health Summary you would like printed.

**PRINT ADDRESS/INSURANCE UPDATE**

Answer YES if you want Address/Insurance Updates printed with Routing Slips.

**PRINT RX PROFILES**

Enter No, Yes (Medication profile), Yes (Action profile), or Both.

**REQUIRE X-RAY FILMS**

YES to have x-ray films pulled for visits to this clinic.

**19.8.1.4 Page Four Data Elements****ASK FOR CHECK IN/OUT TIME**

YES to ask the date/time each time a patient is checked in or out of this clinic. Press the Enter key for NO to have the system automatically enter the current date/time. It is recommended you set this parameter to YES for most clinics.

**CREATE A VISIT AT CHECK-IN**

Answer YES to create a PCC visit when checking in a patient to this clinic. Access to this and the next six questions is based on holding the SDZPCC key. Since these questions affect creating entries in another application, a user must be trained before being given this access.

**VISIT SERVICE CATEGORY**

Choose from Ambulatory, Chart Review, Telecommunications or Day Surgery. If left blank, the system will assume Ambulatory.

**MULTIPLE CLINIC CODES USED**

Answer YES if more than one clinic code is used for this clinic. If set to YES, then the user will have to enter the clinic code at check-in. Used for clinics where each appointment may use a different clinic code.

**VISIT PROVIDER REQUIRED**

Enter YES or NO. If provider is not necessarily known at check-in, answer NO here.

**TRIAGE CLINIC**

Answer YES if this is a triage clinic where patient may be seen in a related clinic later in the day. By answering YES here, that later appointment will use the same PCC visit as was created when this triage appointment was checked in.

**PYXIS Location**

Used to link with PYXIS unit. Only needed based on the PYXIS software you are running.

**CLINIC PROVIDERS**

Enter the provider associated with this clinic. This will be the provider added to the PCC visit at check-in. It is also the provider linked for viewing appointments by provider. Make sure to answer YES under DEFAULT and only enter ONE provider here.

**DEFAULT PROVIDER**

Enter YES if you have entered a provider name.

## 19.8.2 Setting up clinic availability

To access clinic availability when editing an existing or new clinic, you must leave the ScreenMan screens. At the “Command:” prompt, type EXIT (and answer YES to save if you made any changes).

**Availability Date**

At the “Availability Date:” prompt, enter the first date appointments can be made to this clinic. For each day of the week that this clinic meets, enter the FIRST date available. You will then be asked for the range of appointment times and the number of slots per appointment. If you enter a date that has already been set up, you will be changing its appointment schedule.

**Time**

At the “TIME:” prompt, enter the time range the clinic will be available. Decide upon times/slots prior to entering them into the system as each day the clinic will meet in the future will need to be changed individually if the data is entered erroneously. Times should be entered in this format: 0800-1200.

You may also enter a scheduling template name(s): [FMS C1 or [PEDS B3AM;PEDS D1PM. A template name must be preceded by a bracket [. If you need to enter more than one template per day (am and pm), separate them by a semicolon. To see a list of current templates, type [? at TIME prompt. Section 19.1.12 explains how to enter a scheduling template for use in this prompt.

**No of Slots**

At the “NO. OF SLOTS:” prompt, enter the number of patients which will be seen in each increment per hour. Press the Enter key to accept the default or enter another number up to 9. If you enter 10 to 26, the display will be in letters of the alphabet starting with *j* and ending with *z*. Block scheduling should only be used for group clinics such as group therapy. The Time and No. of Slots prompts will repeat until you press the Enter key instead of a time.

Once you have established the pattern for the clinic, you will be asked if that pattern is correct for that day of the week indefinitely. If you answer yes, the Availability Date prompt will appear again. You may type a date for a new day of the week and then establish the pattern, or press the Enter key to exit. If you answer No, you must then verify the pattern for each consecutive matching day of the week as far into the future as is necessary.

When editing an existing clinic set up through this option, the software will check to see if any availability dates for that clinic have previously been cancelled. If so, the following message will appear and you will be given the opportunity to print a listing of the affected days.

```
AVAILABILITY DATE: T

TIME: 0800-1700 NO. SLOTS: 1// 20
TIME: [ MUST BEGIN AFTER LAST ENDING TIME ]
[ | | | | | | | | ]
...PATTERN OK FOR WEDNESDAYS INDEFINITELY? Y (Yes)
...HMMM, JUST A MOMENT PLEASE...
PATTERN FILED!

Availability has been cancelled previously. The day(s) has been overwritten
with the new availability. Would you like to see the day(s) that has been
affected? Yes// [ENTER] (Yes)
DEVICE: HOME// [ENTER]
```

Figure 19-59: Setting up clinic availability

## 20.0 Printing PCC+ Forms

If your site uses PCC+ in all or some of your clinics and you want to print the PCC+ forms during the check-in process using the Scheduling Package, you will need to check the following:

### Security Keys

All users printing PCC+ forms during check-in must have two security keys, **VENZPRT** and **VENZSCH**

### Clinic Setup

All clinics that you will be printing PCC+ forms for during check-in must be setup in the Scheduling Package to require a provider at check-in. Check your clinic profile for the clinics that use PCC+ and make sure the field “Require Provider” is set to yes. During the check-in process, a provider must be entered.

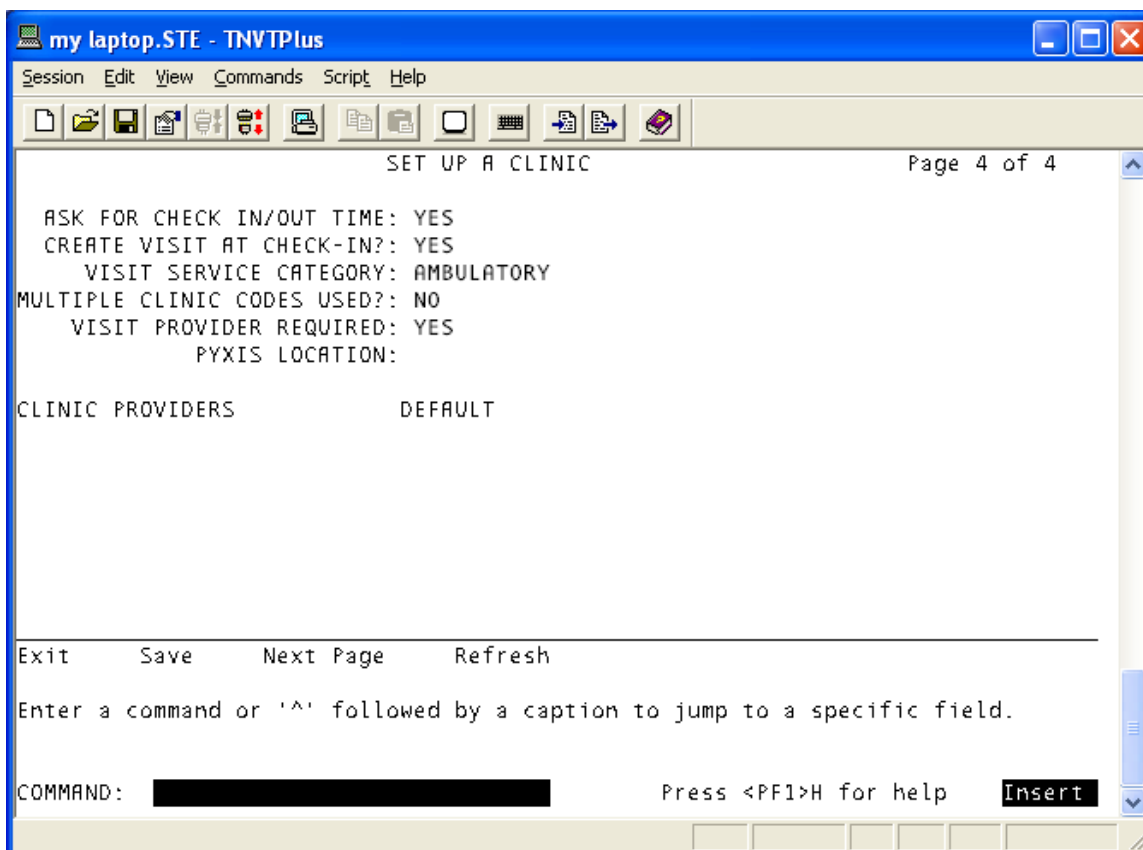


Figure 20-1: Setting up a clinic

### PCC+ Setup

In the setup of the clinic in PCC+ the field “DEPARTMENT (CLINIC STOP)” must match the field “CLINIC CODE” in the setup of the clinic in the Scheduling Package.

### Printing the PCC+ form during check-in

When checking in a patient, the user will be prompted for the **provider**, if they want a **PCC+ form or not**, and the name of the **PCC+ clinic**. In most cases, the PCC+ clinic name will appear as the default.

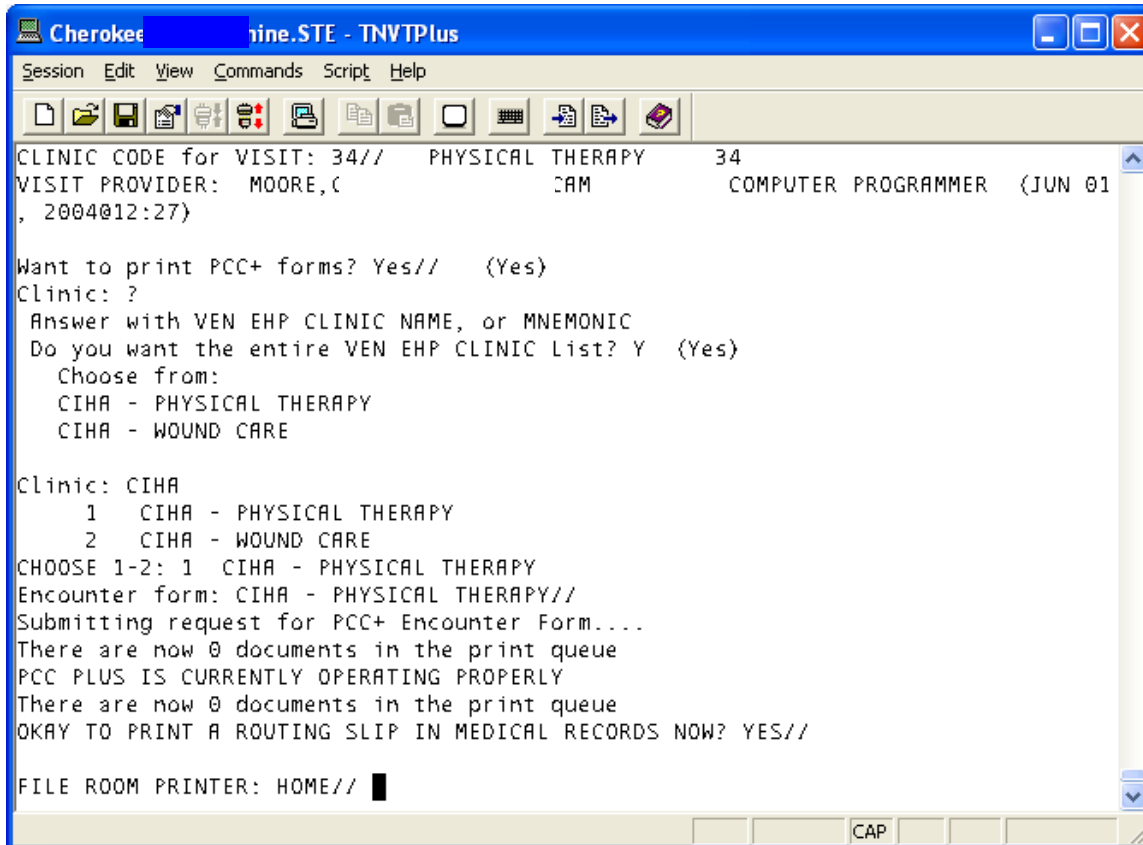


Figure 20-2: Printing the PCC+ form during check-in

## 21.0 Glossary

**ADC**

Average Daily Census

**ALOS**

Average Length of Stay

**AMIS**

Automated Management Information System

**Attending physician**

Supervising physician who is responsible for the care of the patient. Non-affiliated hospitals may choose not to use this field.

**Breakeven**

A day on which the actual cost of care equals the estimated day allocation.

**CDR**

Cost Distribution Report

**Collateral visit**

A visit by a non-veteran patient whose appointment is related to or associated with a service-connected patient's treatment.

**Consistency checker**

Provides a method of assuring the accuracy of data contained in a patient file.

**Copay Test**

A financial report used to determine if a patient may be exempted from pharmacy co-payments.

**DRG**

Diagnostic Related Group

**DXLS**

Diagnosis responsible for the major portion of a patient's stay.



**G&L**

Gains and Losses

**HINQ**

Hospital Inquiry

**Means Test**

A financial report used to determine if a patient may be required to make Co-payments for care.

**PAF**

Patient Assessment File

**PAI**

Patient Assessment Instrument

**Primary care physician**

The health care provider with primary responsibility for the direct care of the patient. This may be the resident or intern in a teaching facility or the staff physician in a non-affiliated hospital.

**Purge**

To get rid of, remove, or delete

**PTF**

Patient Treatment File

**Routing slip**

When printed for a specified date, it shows the current appointment time, clinic, location and stop code. It also shows future appointments.

**RUG**

Resource Utilization Group

**Security code**

A code assigned to each user identifying them specifically to the system and allowing them access to the functions/options assigned to them.

**Security key**

Used in conjunction with locked options or functions.

**Special survey**

An ongoing survey of care given to patients alleging Agent Orange or ionizing radiation exposure. Each visit by such a patient must receive special survey dispositioning which records whether treatment provided was related to that exposure. This data is used for congressional reporting purposes.

**Stop code**

A three-digit number corresponding to an additional stop/service a patient received in conjunction with a clinic visit. Stop code entries are used so that medical facilities may receive credit for the services rendered during a patient visit.

**Third party billings**

Billings where a party other than the patient is billed.

**Trim point**

The expected Length of Stay range based on the LOS distribution for each DRG category.

**VADATS**

Veterans Administration Data Transmission System

**WWU**

Weighted Work Unit

## 22.0 Appendix A: RPMS 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 Rules of Behavior 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 Rules of Behavior listed in the following sections are specific to RPMS.

### 22.1 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., PCC, Dental, Pharmacy).

#### 22.1.1 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 non-public 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 your 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 job or by divulging information to anyone not authorized to know that information.

## 22.1.2 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 function they perform such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS polices and procedures prior to interconnection to or transferring data from RPMS.

## 22.1.3 Accountability

### **RPMS Users Shall**

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Logout of the system whenever they leave the vicinity of their PC.
- 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.
- Shall abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and IT information processes.

#### 22.1.4 Confidentiality

##### **RPMS Users Shall**

- Be aware of the sensitivity of electronic and hardcopy information, and protect it accordingly.
- Store hardcopy 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 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.

#### 22.1.5 Integrity

##### **RPMS Users Shall**

- Protect your system 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 your manager's written permission and without scanning it for viruses first.

**22.1.6 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 5 successive failed login attempts within a specified time period (e.g., one hour).

**22.1.7 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 password immediately if password has been seen, guessed, or otherwise compromised; and report the compromise or suspected compromise to your ISSO.
- Keep user identifications (ID) 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 8 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.

### 22.1.8 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.

### 22.1.9 Reporting

#### **RPMS Users Shall**

- Contact and inform your ISSO that you have identified an IT security incident and you will 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

### 22.1.10 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 your screen after some period of inactivity.

### 22.1.11 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

### 22.1.12 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.

### 22.1.13 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 non-recovery of temporary files created in processing sensitive data, virus protection, intrusion detection, and provides 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) when ever 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.

## 22.2 RPMS Developers

#### **RPMS Developers Users 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.
- Shall not access live production systems without obtaining appropriate written access, shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Shall observe separation of duties policies and procedures to the fullest extent possible.

- Shall 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.
- Shall use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Shall follow industry best standards for systems they are assigned to develop or maintain; abide by all Department and Agency policies and procedures.
- Shall 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.
- Not release any sensitive agency or patient information.

## 22.3 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, 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 back up 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; abide by all Department and Agency policies and procedures.

### **Privileged RPMS Users Shall NOT**

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

## 23.0 Contact Information

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

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

**Fax:** (505) 248-4363

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

**Email:** [support@ihs.gov](mailto:support@ihs.gov)