

# Scheduling System

## USER GUIDE

April 22nd, 2011

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# About this Guide

## Purpose

The intent of this guide is to provide a guideline for the instruction of SCHEDULING Application. It will provide an idea to the user about recording new patient data or even retrieving reports based on existing data.

## Audience

The intended audience for this document includes but is not limited to the Practice front office, medical assistants responsible for the training, maintaining and scheduling patient records.

## Prerequisites

The expectation is that the users knowledge base should meet if not exceed the following:

- ☐ Basic understanding and navigation within a MS Windows environment with IE- version7 or higher
- ☐ Working knowledge of scheduling applications

# LOGIN TO SCHEDULER

- 1) Type <https://www.greenwaveps.com/gwehr/> in the address bar of Internet explorer browser.
- 2) Always click this button to have a compatibility view.

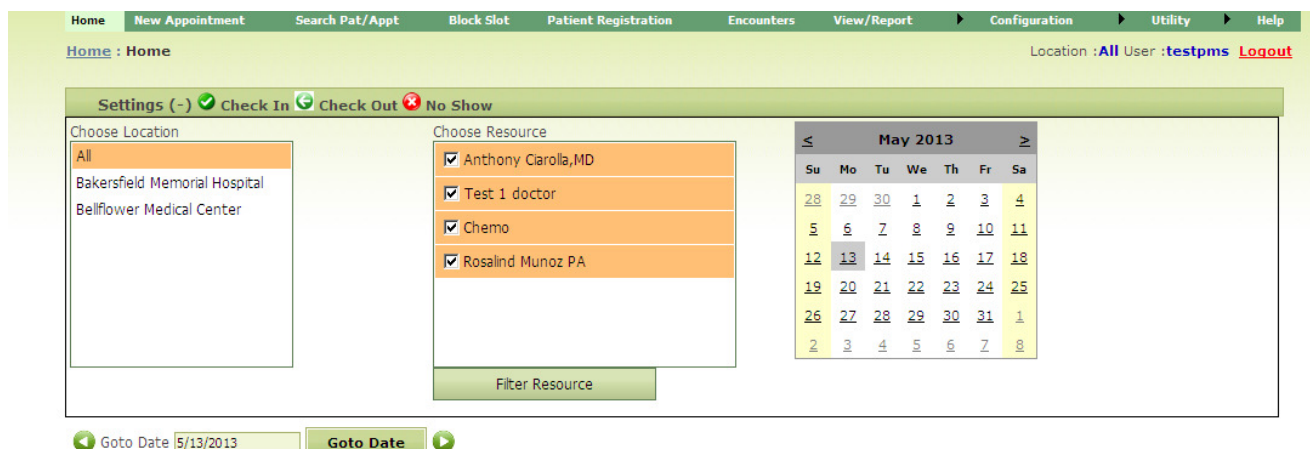


- 3) To access the Scheduler Application, every practice has its own User ID and Password.

## How to view the Scheduler?

This provides a summarized view of the Facility, Providers, and Resource & Appointment selected in the Settings Bar.

1. Once an appointment is set, the user can go to the **Schedule View** tab.
2. Click **Settings** **Settings (+)** to customize the Locations, Resources according to the preference of the user.



3 Change the date from

4. The user can also drag a scheduled appointment or a blocked slot to change the appointment time.

5. The tool tip enables to view the complete details of the appointment scheduled. (Hold the cursor on the appointment scheduled.)

**April 18 8:15 AM - 8:30 AM**  
 New Test  
 Blood Work  
**Status: Booked**  
 Home Phone: 8185476456  
 Cell Phone:  
 Appointment Notes:

[Home](#)
[New Appointment](#)
[Search Pat/Appt](#)
[Block Slot](#)
[Patient Registration](#)
[Encounters](#)
[View/Report](#)
[Configuration](#)
[Utility](#)
[Help](#)

Home : Home Location : All User : testpms [Logout](#)

Settings (+)
 ☒ Check In
 ☒ Check Out
 ☒ No Show

May 17, 2013				Day	Work Week	Week	Month
Anthony Carola, MD		Test 1 doctor		Chemo		Rosalind Munoz PA	
Friday, May 17		Friday, May 17		Friday, May 17		Friday, May 17	
8:00	test 5 / Chemo 45/Bakersfield Memorial Hospital	Esther		test 5 / Chemo 45/Bakersfield Memorial Hospital		Esther Cabanban / Chemo	
8:15							
8:30							
8:45							
9:00							
9:15							
9:30							
9:45							
10:00							
10:15							
10:30							
10:45							
11:00							
11:15							
11:30							
11:45							
12:00 PM							
12:15							
12:30							

Unblock  
 Add Appointment  
 Block Slot  
 Edit Appointment/Block  
 Check In  
 Check Out  
 No Show  
 Cancel  
 Encounter Entry  
 Edit Appt Notes  
 Superbill  
 Statement  
 Financial

7. Right click the on any given appointment to change the status of the scheduled appointment.

- Click **Unblock** to unblock a blocked slot
- Click **Add appointment** to schedule another appointment at that time.
- Click **Block Slot** to block a slot
- Click **Edit/Appointment/Block** to edit a scheduled appointment or a blocked slot.
- Click **Edit patient** to modify the demographics of the patient scheduled.

- Click **Check In**, **Check Out**, **No show**, **Cancel** to change the status of the appointment.(the following icons would be displayed once the status of the appointment is changed..)



May 13, 2013		
	Anthony Ciarolla,MD	Test 1
	Monday, May 13	Monday
8 00	x 1 /Chemo 45/Bellflower Medical Center	
15		
30		
45		
9 00		
15		
30		
45		
10 00		
15		
30		
45		
11 00		
15		
30		
45		
12 PM		
15		

- Click **Encounter Entry** to enter the ICD/ CPT codes along with the Modifier for the encounter.

Home		New Appointment		Search Pat/Appt		Block Slot		Patient Registration		Encounters		View/Report		Configuration		Utility		Help	
Location :All User :testpms Logout																			
DOS : 05/24/2013																			
Patient Details Name: a b DOB: Sex: Address: SSN: Phone 1: Phone 2:																			
CPT										ICD									
CPT Desc Search Clear No Data										ICD Desc Search Clear No Data									
Add Modifier: Select Select Select Select																			
Add DX: Select DX1 Select DX2 Select DX3 Select DX4 Select DX5 Select DX6																			
Add CPT																			
Added CPT										Added ICD									
No Added CPT										No Added ICD									

- Click **Edit Appointment Notes** to change the appointment notes.

Home New Appointment Search Pat/Appt Block Slot Patient Registration Encounters View/Report Configuration Utility Help

Location :All User :testpms Logout

### Edit Appointment Notes

Patient Name a b

Appt Date/Time 05/24/2013:08:30 AM - 09:15 AM

Facility Bakersfield Memorial Hospital

Doctor Anthony Ciarolla,MD

Appt Type Chemo 45

Notes

Make Encounter ☐

Save

Practice :Test

- Click on **Superbill, Statement and Financial** to generate the documents.
- .The user can also define the view according to **Day** or **Workweek** ,**Week** or **Month**

### Day View

Home New Appointment Search Pat/Appt Block Slot Patient Registration Encounters View/Report Configuration Utility Help

Home : Home Location :All User :testpms Logout

Settings (+) ☒ Check In ☒ Check Out ☒ No Show

Goto Date 5/13/2013 Goto Date

May 13, 2013 Day Work Week Week Month

Anthony Ciarolla,MD

Monday, May 13

8 00	x 1 /Chemo 45/Bellflower Medical Center
15	
30	
45	
9 00	
15	
30	
45	
10 00	
15	
30	
45	
11 00	
15	



## WorkWeek View

<a href="#">Home</a> <a href="#">New Appointment</a> <a href="#">Search Pat/Appt</a> <a href="#">Block Slot</a> <a href="#">Patient Registration</a> <a href="#">Encounters</a> <a href="#">View/Report</a> <a href="#">Configuration</a> <a href="#">Utility</a> <a href="#">Help</a>									
<a href="#">Home</a> : <a href="#">Home</a> <span style="float: right;">Location : <a href="#">All</a> User : <a href="#">testpms</a> <a href="#">Logout</a></span>									
<b>Settings (+)</b> <a href="#">Check In</a> <a href="#">Check Out</a> <a href="#">No Show</a>									
<a href="#">Goto Date</a> <input type="text" value="5/13/2013"/> <a href="#">Goto Date</a>									
<div> <div>13 – May 17, 2013</div> <div>Day Work Week Week Month</div> </div>									
<div> <div>Monday, May 13</div> <div>Tuesday, May 14</div> <div>Wednesday, May 15</div> <div>Thursday, May 16</div> <div>Friday, May 17</div> </div>									
<div> <div>8 00</div> <div>15</div> <div>30</div> <div>45</div> <div>9 00</div> <div>15</div> <div>30</div> <div>45</div> <div>10 00</div> <div>15</div> <div>30</div> <div>45</div> <div>11 00</div> <div>15</div> <div>30</div> <div>45</div> <div>12 PM</div> <div>15</div> <div>30</div> <div>45</div> <div>1 00</div> <div>15</div> </div>									
<div> <div> <a href="#">x 1</a> / Chemo 45/Bellflower Medical Center </div> <div> <a href="#">test 5</a> / Chemo 45/Bakersfield Memorial Hospital </div> <div> <a href="#">Esther</a> </div> <div> <a href="#">a b</a> / Chemo 45/Bakersfield Memorial Hospital </div> <div> <a href="#">mohana test</a> / Chemo </div> </div>									

## Week View

<a href="#">Home</a> <a href="#">New Appointment</a> <a href="#">Search Pat/Appt</a> <a href="#">Block Slot</a> <a href="#">Patient Registration</a> <a href="#">Encounters</a> <a href="#">View/Report</a> <a href="#">Configuration</a> <a href="#">Utility</a> <a href="#">Help</a>									
<a href="#">Home</a> : <a href="#">Home</a> <span style="float: right;">Location : <a href="#">All</a> User : <a href="#">testpms</a> <a href="#">Logout</a></span>									
<b>Settings (+)</b> <a href="#">Check In</a> <a href="#">Check Out</a> <a href="#">No Show</a>									
<a href="#">Goto Date</a> <input type="text" value="5/13/2013"/> <a href="#">Goto Date</a>									
<div> <div>13 – May 19, 2013</div> <div>Day Work Week Week Month</div> </div>									
<div> <div>Monday, May 13</div> <div>Tuesday, May 14</div> <div>Wednesday, May 15</div> <div>Thursday, May 16</div> <div>Friday, May 17</div> <div>Saturday, May 18</div> <div>Sunday, May 19</div> </div>									
<div> <div> <a href="#">x 1</a> / Chemo 45/Bellflower Medical Center </div> <div> <a href="#">test 5</a> / Chemo 45/Bakersfield Memorial Hospital </div> <div> <a href="#">Esther Cabanban</a> / Chemo 15/Bakersfield Memorial Hospital </div> <div> <a href="#">a b</a> / Chemo 45/Bakersfield Memorial Hospital </div> <div> <a href="#">mohana test</a> / Chemo 15/Bakersfield Memorial Hospital </div> <div> <a href="#">Esther Cabanban</a> / Chemo 15/Bakersfield Memorial Hospital </div> <div> <a href="#">a b</a> / Chemo 45/Bakersfield Memorial Hospital </div> </div>									

## MonthView

Home New Appointment Search Pat/Appt Block Slot Patient Registration Encounters View/Report Configuration Utility Help

Home : Home
Location : All User : testpms [Logout](#)

Settings (+) ✓ Check In ✓ Check Out ✗ No Show

Goto Date 5/13/2013 Goto Date

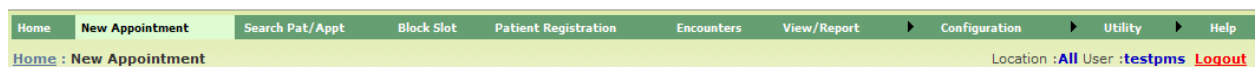
May – June, 2013						Day	Work Week	Week	Month
Anthony Carolla, MD									
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday/Sunday				
May 13	14	15	16	17	18				
<div style="background-color: #f4a460; padding: 2px; display: inline-block;">x 1</div> / Chemo 45/Bellflower Medical Center				<div style="background-color: #f4a460; padding: 2px; display: inline-block;">test 5</div> / Chemo 45/Bakersfield Memorial Hospital <div style="background-color: #d9e1f2; padding: 2px; display: inline-block;">Esther Cabanban</div> / Chemo 15/Bakersfield Memorial Hospital <div style="background-color: #f4a460; padding: 2px; display: inline-block;">a b</div> / Chemo 45/Bakersfield Memorial Hospital <a href="#">Show more</a>					
20	21	22	23	24	25				
			<div style="background-color: #f4a460; padding: 2px; display: inline-block;">x 1</div> / Chemo 45/Bellflower Medical Center	<div style="background-color: #f4a460; padding: 2px; display: inline-block;">a b</div> / Chemo 45/Bakersfield Memorial Hospital					
27	28	29	30	31	June 01				
				<div style="background-color: #f4a460; padding: 2px; display: inline-block;">test 5</div> / Chemo 45/Bakersfield Memorial Hospital <div style="background-color: #d9e1f2; padding: 2px; display: inline-block;">Esther Cabanban</div> / Chemo 15/Bakersfield Memorial Hospital					

## New Appointment

### How to SET a New APPOINTMENT from Scheduler View?

Once a new patient data is entered in the Scheduling system, an appointment can be made for that particular patient.

1. Click the tab **New Appointment**



2. Type the name of the patient in the **Select Patient** field and click search icon.
3. When the user selects the patient, the phone no: is displayed beside the name field.
4. All the insurances of the selected patient are displayed here.
5. The insurances which are not authorized will be displayed in red with the comment **Authorization Required**
6. If the insurance is authorized then the red remark will not appear.

### List of Appointments

7. Details of any appointment of the selected patient is displayed in the right side.

List of Appointments						
Date	Start	End	App Typ	Doctor	Facility	User
12/28/2011	10:15 AM	10:45 AM	Chemo 30	Anthony Ciarolla,MD	Bakersfield Memorial Hospital	test
12/27/2011	09:15 AM	09:45 AM	Chemo 30	Anthony Ciarolla,MD	Western Pacific Cancer Medical Group Inc	test

5. Fill in the relevant details to schedule an appointment

6. Click **Save** to save data.

Home New Appointment Search Pat./Appt Block Slot Patient Registration Encounters View/Report Configuration Utility Help

Home : New Appointment Location : All User : testpms Logout

**Appointment**

Select Patient

**Search Patient**

Last Name First Name DOB

Phone

Insurance(type few char)

*\*All dates should be in the format mm/dd/yyyy*

Search

**Appt Type \*** Select

**Date** 5/13/2013 (mm/dd/yyyy)

**Time \*** 01 : 00 PM

**Duration(Min.)** 30

**Facility** Select

**Doctor Appointment** ☒

**Doctor** Select

**Resource**

**Make Encounter** ☐

**Notes**

Recurrence

Save Discard

**List of Appointments**

**NB:** If an appointment is set at a **back date** then it can **only be cancelled and not edited**

## How to set a Recurrent Appointment?

### 1. Creating New Recurrence Appointment:

- While creating a new appointment, if you want to make a recurrence appointment, click on the **Recurrence** button at the bottom of the page after entering the common appointment related information.

**Appointment**

Select Patient: Test Last ,Test First TM Home Ph: (111) 111-1111

Primary-Aetna[7472]  
Secondary-Cigna HMO[7473]  
Tertiary-Blue Cross of California[7474]

**Appt Type \*** Chemo 30

Date: 5/13/2013 (mm/dd/yyyy)

**Time \*** 01:00 PM

Duration(Min.): 30

Facility: Bakersfield Memorial Hospital

Doctor Appointment: ☒

Doctor: Test 1 doctor

Resource: ☒ Chemo ☐ Rosalind Munoz PA

Make Encounter: ☐

Notes: Test

**Recurrence**

Save Discard

- A recurrence window will appear on clicking of **Recurrence** button

**Appointment Recurrence**

**Appointment Time**

Start: 5/13/2013

Duration: 30

**Recurrence Pattern**

☒ Daily ☐ Weekly

Every 1 day(s)

☒ Exclude Weekend

**Range Of Recurrence**

☒ End After: 1 occurrences

☐ End By:

Ok Cancel

**Appointment Recurrence**

**Appointment Time**

Start: 5/13/2013

Duration: 30

**Recurrence Pattern**

☐ Daily ☒ Weekly

Recur Every 1 Week(s) On:

☐ Sunday ☐ Tuesday ☒ Thursday ☐ Saturday

☐ Monday ☐ Wednesday ☐ Friday

**Range Of Recurrence**

☒ End After: 1 occurrences

☐ End By:

Ok Cancel

- There are **two “Recurrence Pattern”** options, **Daily** and **Weekly**.
- You can enter a specific interval days (for daily recurrence) or week (for weekly recurrence) between appointments. Enter that number of days(or weeks) in “**Every  day(s) ”** or “**Recur Every  Week(s) On: ”**
- For daily recurrence check the checkbox “**Exclude Weekend**” if you wish your appointments not to be scheduled on weekends.
- For weekly recurrence check the weekdays on which you wish your appointments to be scheduled.

- There are **two “Range Of Recurrence”** options. Either you can enter number of occurrences (i.e., number of appointments) or you can enter a specific date by which the recurrence appointments will be scheduled.

## 2. Editing Recurrence Appointment:

Right click on an appointment and click on **“Edit Appointment/Block”** link. That appointment will be shown in edit mode. Click on the **“Save this appointment only”** button to make changes to that particular appointment only.

### Appointment

Select Patient

Test Last,Test First

Primary-Aetna[7472]  
Secondary-Cigna HMO[7473]  
Tertiary-Blue Cross of California[7474]

Appt Type \*

Chemo 30

Date

5/13/2013 (mm/dd/yyyy)

Time \*

01:00 PM

Duration(Min.)

30

Facility

Bakersfield Memorial Hospital

Doctor Appointment

☒

Doctor

Test 1 doctor

Resource

☒ Chemo ☐ Rosalind Munoz PA

Make Encounter

☐

Notes

Test

Discard

Save this appointment only

Save all recurrence

- Click on the **“Save all recurrence”** button to make changes to all the appointments included in the recurrence series.
- Click **“Discard”** button to escape from the edit window without making any changes.

### 3. Cancelling Recurrence Appointment:

- Right click on an appointment and click on “Cancel” link.

**This is a recurring appointment. What do you want to do?**

Cancel this appointment only

Cancel all recurrence

Return

- Click on the “Cancel this appointment only” button to cancel that particular appointment only.
- Click on the “Cancel all recurrence” button to cancel all the appointments included in the recurrence series.
- Click on the “Return” button to back to home page without cancellation on appointment.

## Search Tab

Select **Search Pat/Appt** from the search Tab.

1. Click the **Select** option to view the appointments for the patient selected.
2. Click **Set appointment** to modify the appointment of the patient.
3. Click **Edit** to modify the patient demographics.

Home : Search Pat/Appt
Location : All User : testpms Logout

Last Name

Phone

Insurance(type few char)

First Name

Insurance Id

DOB

Search

\*All dates should be in the format mm/dd/yyyy

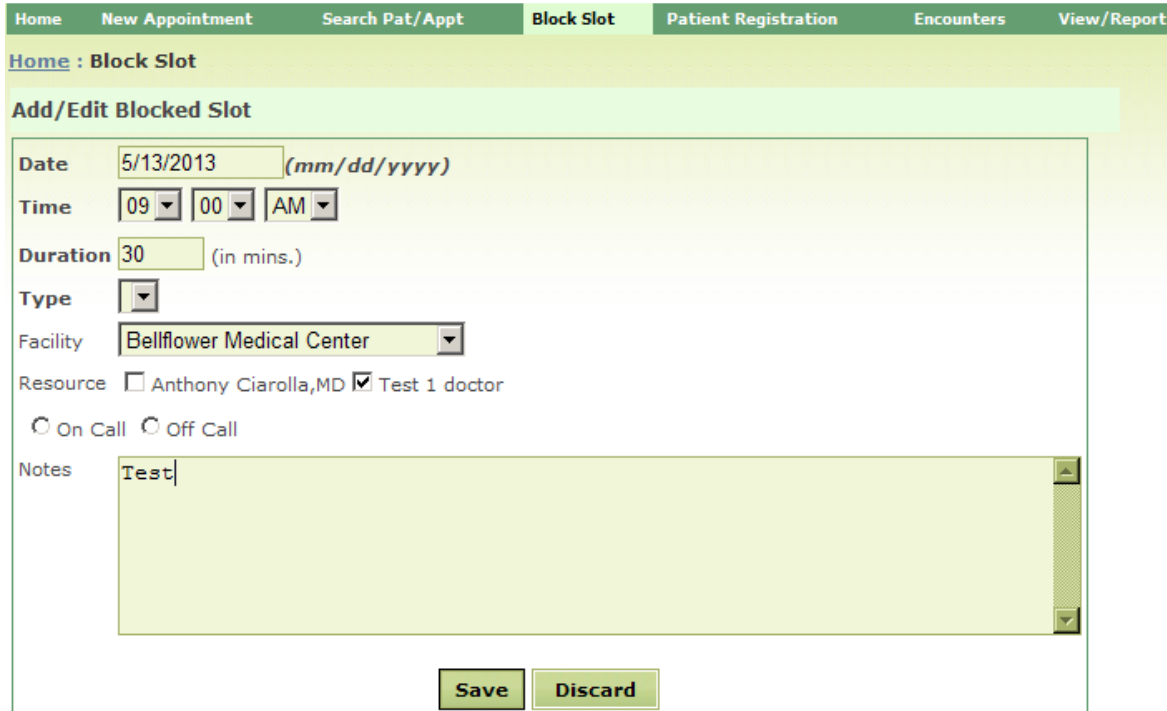
Export To Excel

Patient	DOB	Address	City	Zip	Phone			
test ,barun	01/01/1960	1, ABC Ave.	Glendale	78003	2345678901	<a href="#">Select</a>	<a href="#">Set Appt</a>	<a href="#">Edit</a>
test ,mohana						<a href="#">Select</a>	<a href="#">Set Appt</a>	<a href="#">Edit</a>
test ,mohana	10/11/1989	456, jkhgfd	hgfdsgfd	678953	(786) 765-4323	<a href="#">Select</a>	<a href="#">Set Appt</a>	<a href="#">Edit</a>
Test ,Stest K	09/10/1980					<a href="#">Select</a>	<a href="#">Set Appt</a>	<a href="#">Edit</a>
Test Last ,Test First TM	01/01/1945	Test Address 1	CT	11111	(111) 111-1111	<a href="#">Select</a>	<a href="#">Set Appt</a>	<a href="#">Edit</a>
test-tirtha ,test	01/01/1977	add	mmmmmm	99999	87877877787	<a href="#">Select</a>	<a href="#">Set Appt</a>	<a href="#">Edit</a>

## Block Slot

### How to Block & Unblock a Slot of time?

Click the Tab **Block slot**



Home New Appointment Search Pat/Appt **Block Slot** Patient Registration Encounters View/Report

Home : Block Slot

**Add/Edit Blocked Slot**

Date  (mm/dd/yyyy)

Time

Duration  (in mins.)

Type

Facility

Resource ☐ Anthony Ciarolla,MD ☒ Test 1 doctor

☐ On Call ☐ Off Call

Notes

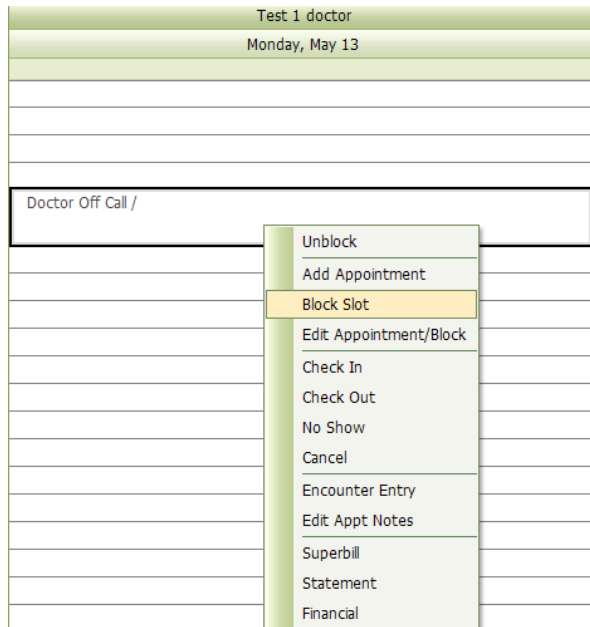
- 1) The user can modify the **Date**, **Time** and the **Duration** fields according to their requirement.
- 2) The user can modify the time **Duration** of block slot.
- 3) User can select the type of block timing from the dropdown list of **Type** field.
- 4) When the Facility is selected from the drop-down list, the **Resource** are displayed.
- 5) User can select the button of **On call** or **Off call** as per requirement.
- 6) Click  to block the slot and take you to the current date.



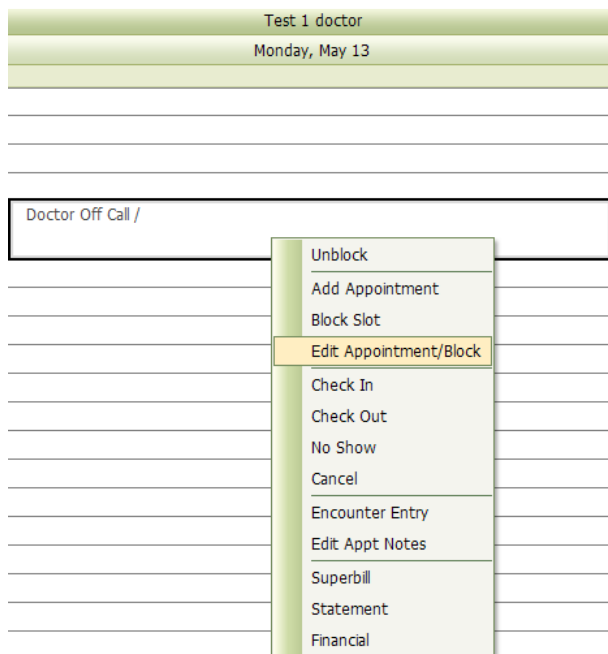
## To unblock/Edit a slot

If the user wants to **Unblock** the above appointment

- a) Right click on the Blocked slot and select the option '**unblock**'.



- b) Right click on the Blocked slot and select the option '**Edit Appointment/Block**'.



**Add/Edit Blocked Slot**

Date:  (mm/dd/yyyy)

Time:

Duration:  (in mins.)

Type:

Facility:

Resource: ☐ Anthony Ciarolla,MD ☒ Test 1 doctor

☐ On Call ☒ Off Call

Notes:

c) Make the relevant changes in the screen shot below and click the **save** option.

## Patient Registration

### How to make a new PATIENT REGISTRATION?

1. Click on **Patient Search** to search an existing patient.

1. key-in the mandatoty fields like Last Name, First Name,DOB & SSN to search the patient.

Home New Appointment Search Pat/ Appt Block Slot **Patient Registration** Encounters View/Report Configuration Utility Help

Home : Patient Registration Location : All User : testpms Logout

Patient Search

Last Name  First Name  DOB  SSN

2. Click on **Patient Registration** to key in the demographic details for registration.

3. Click **Save** to save data of the registered patient.
4. Click **Save and Create Appt** to register a patient and schedule an appointment.
5. Click **Clear** to register a another patient after saving the already keyed data.

**Patient Search**

**Patient Registration**

**Patient Registration**

Name: Last  First  Middle

DOB:  (mm/dd/yyyy)

Sex:  SSN:

Address:

State:  City:  Zip:

Phone 1:

Phone 2:

Doctor:

Facility:

Insurance:  **CLEAR**

Insurance Id:

Policy Group:

Financial Group:

Allocation set:

Billing Notes:

**Save** **Save and Create Appt** **Clear**

## Encounters

### How to create an encounter?

Home New Appointment Search Pat/ Appt Block Slot Patient Registration **Encounters** View/Report Configuration Utility Help

Home : Encounters Encounters Location : All User : testpms Logout

Search

DOS from: 5/1/2013 DOS to: 5/24/2013 Facility: Bakersfield Memorial Hospital Provider: Anthony Ciarolla, MD

Patient Last:  Patient First:

**Search**

\* Blue Line denotes Appointment doesn't have Encounters.

Encounter	Patient	DOB	Appt Date	Provider	Facility
<a href="#">Create</a>	Abalos Norie	07/23/1945	05/02/2013	Ciarolla,Anthony	Bakersfield Memorial Hospital
<a href="#">Create</a>	Abalos Norie	07/23/1945	05/01/2013	Ciarolla,Anthony	Bakersfield Memorial Hospital

To create an encounter for the appointments Click on **Encounters**

- Enter the Date of Service **DOS From &** Date of Service **DOS To**.
- Key in the **Facility** from the drop down option.
- Key in the **Provider**.
- Key in **Patient Last & First Name**
- Select **Search**
- Click on **Create** to create an encounter

Home   New Appointment   Search Pat/Appt   Block Slot   Patient Registration   Encounters   View/Report   Configuration   Utility   Help			
			Location : <b>All</b> User : <b>testpms</b> <a href="#">Logout</a>
<b>Patient Details</b>			DOS : 05/24/2013
Name:	ek test	DOB:	05-02-1985      Sex:      Female
Address:	abcd ghi ef 92010		
SSN:	Phone 1:	999-999-9999	Phone 2:      888-888-8888
<b>CPT</b>		<b>ICD</b>	
CPT	Desc	ICD	Desc
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>		<input type="button" value="Search"/> <input type="button" value="Clear"/>	
No Data		No Data	
Add Modifier: <input type="button" value="Select"/> <input type="button" value="Select"/> <input type="button" value="Select"/> <input type="button" value="Select"/>			
Add DX: <input type="button" value="Select DX1"/> <input type="button" value="Select DX2"/> <input type="button" value="Select DX3"/> <input type="button" value="Select DX4"/> <input type="button" value="Select DX5"/> <input type="button" value="Select DX6"/>			
<input type="button" value="Add CPT"/>			
<b>Added CPT</b>		<b>Added ICD</b>	
No Added CPT		No Added ICD	

## View Report

### How to generate Reports?



The screenshot shows the main navigation bar with the following tabs: Home, New Appointment, Search Pat/Appt, Block Slot, Patient Registration, Encounters, View/Report, Configuration, Utility, and Help. The View/Report menu is open, displaying the following options: View/Report Report, Tabular Report, Block Report, Encounter Details, Print Superbill, and Call Status. The main content area shows a date filter for May 16, 2013, and a list of appointments for Anthony Carolla, MD on Thursday, May 16. The time slots shown are 8:00 and 15:00.

#### 1) Appointment Report:

- Select Search **Appointment Report** from **View/Report** menu
- Key-in Facility, Resource & Appt Type from the respective drop-down list
- Also key –in the dates and click **Run Report**.



The screenshot shows the Appointment Report form with the following fields and options:

- Home : **View/Report : Appointment Report**
- Appointment Report**
- Facility :
- Resource :
- Appt Type:
- Pt Last:
- Pt First:
- From :
- To :
- ☐ Include Canceled Appointment
- Run Report**

- A report in PDF format appears.

4/5/2011

Appointment Report

Palmer, Dr Martin  
4/4/2011

SV

Start	End	Patient Name	Phone	Cell Phone	Patient Balance	
10:30 am	10:45 am					Booked
Appointment Type :		Notes : qqq				
Insurance :		Insurance ID:	Group Name:	Group No:	Copay:	Ded rem:
10:45 am	12:15 pm					Booked
Appointment Type :		Notes :				
Insurance :		Insurance ID:	Group Name:	Group No:	Copay:	Ded rem:

## 2) Tabular Report:

- Select Search **Tabular Report** from **View/Report** menu
- Key –in the dates and click **Search**.

Scheduler View Set Appointment Search Block Slot Patient Registration View/Report Configuration Profile Utility

Home : View/Report : Tabular Report Practice : Western Oncology User : tm1 Help? Logout

Start Date 4/18/2011 End Date 4/18/2011 Search

\*All dates should be in the format mm/dd/yyyy

List Of Appointments: Export To Excel Export To PDF

Patient	Pt. DOB	Provider	Date	Start	End	Appt Type	Facility	
Fert Test	4/19/2011	Ciarolla MD, Anthony, Provider	4/18/2011	8:00 AM	8:15 AM	Blood Work	Bakersfield	Go To Date
New Test	3/8/2011	Ciarolla MD, Anthony, Provider	4/18/2011	8:15 AM	8:30 AM	Blood Work	Bakersfield	Go To Date
New Test	3/8/2011	Ciarolla MD, Anthony, Provider	4/18/2011	9:00 AM	10:00 AM	Chemo 1 hr	Bakersfield	Go To Date
G M Rainey	11/18/1940	Ciarolla MD, Anthony, Provider	4/18/2011	9:00 AM	10:00 AM	Chemo 1 hr	Bakersfield	Go To Date
Donna Radford	2/7/1955	Ciarolla MD, Anthony, Provider	4/18/2011	9:00 AM	10:00 AM	Chemo 1 hr	Bakersfield	Go To Date

- All the appointments within the selected date range appears in the **List of Appointments** grid.
- Reports can be retrieved in either **Excel** or **PDF** format.

## 3) Block Report:

- Select Search **Block Report** from **View/Report** menu
- Key –in the dates and click **Search**.

Scheduler View Set Appointment Search Block Slot Patient Registration View/Report Configuration Profile Utility

Home : View/Report : Block Report Practice : Western Oncology User : tm1 Help? Logout

Start Date 4/18/2011 End Date 4/18/2011 Search

\*All dates should be in the format mm/dd/yyyy

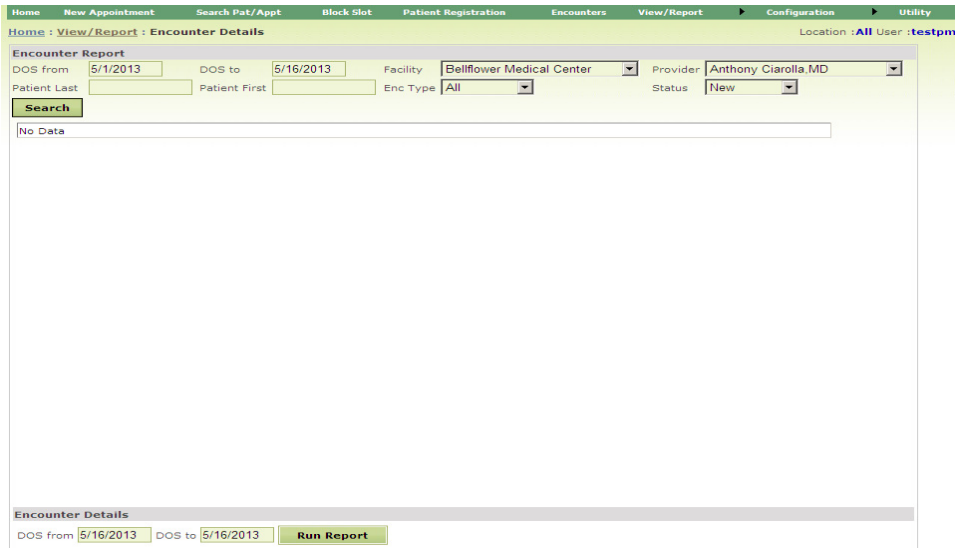
List Of Appointments: Unblock Export To Excel Export To PDF

<input type="checkbox"/>	Resource	Date	Start	End	Facility	
<input type="checkbox"/>	Ciarolla MD, Anthony, Provider,	4/18/2011	10:45 AM	10:55 AM	Bakersfield	Go To Date

- All the blocked slots within the selected date range appear in the **List of Appointments** grid.
- Click Unblock to unblock a block slot.
- Reports can be retrieved in either **Excel** or **PDF** format

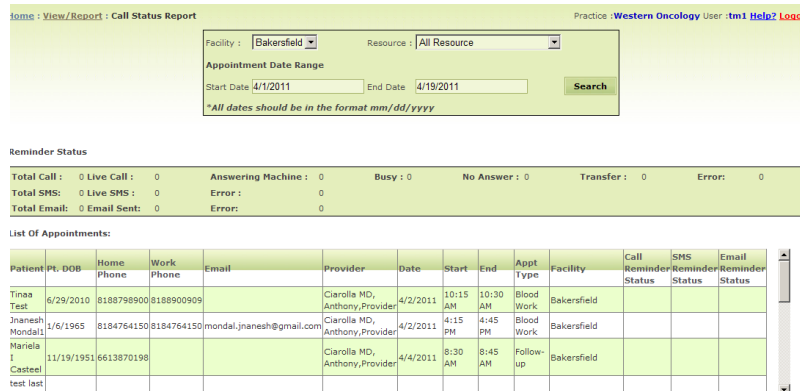
#### 4) Encounter report:

- Key-in the **DOS, Facility, Provider, Patient First & Last name, Encounter Type & Status** and click **Search**.



#### 5) Call Status Report:

- Select Call Status Report from **View/Report** menu
- Key-in any one of the information and the date range of the required report. Click



Reminder Status	
Total Call :	0 Live Call : 0
Total SMS :	0 Live SMS : 0
Total Email :	0 Email Sent: 0
Answering Machine :	0
Busy :	0
No Answer :	0
Transfer :	0
Error :	0

Search button.

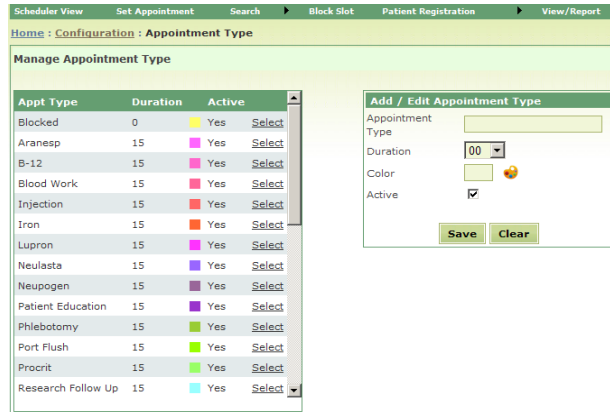
## Configuration

### How to change the CONFIGURATIONS?

This component provides an idea how to read a scheduler or how it can be adjusted according to the user. The important subdivisions:

- Appointment Type
- Time Settings

## 1) Appointment Type



Appt Type	Duration	Active	
Blocked	0	Yes	Select
Aranesp	15	Yes	Select
B-12	15	Yes	Select
Blood Work	15	Yes	Select
Injection	15	Yes	Select
Iron	15	Yes	Select
Lupron	15	Yes	Select
Neulasta	15	Yes	Select
Neupogen	15	Yes	Select
Patient Education	15	Yes	Select
Phlebotomy	15	Yes	Select
Port Flush	15	Yes	Select
Procrit	15	Yes	Select
Research Follow Up	15	Yes	Select

**Add / Edit Appointment Type**

Appointment Type:

Duration:

Color:

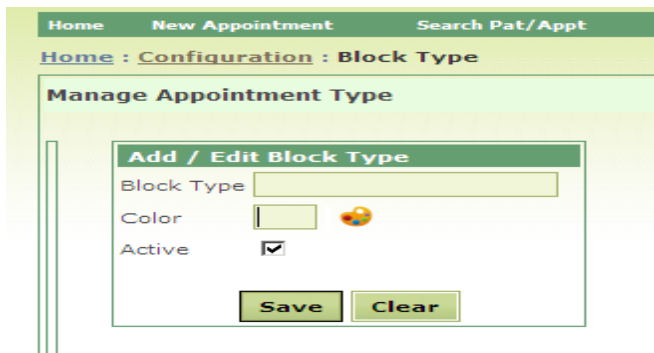
Active: ☒

**Save** **Clear**

- The user can change the configuration of appointment type in this window.
- On selecting any one of the appointments, the **Add / Edit Appt Type** gets populated.
- Here the user can change the duration time or even the color of the field.
- This will be subsequently reflected in the **Scheduler View**.

## 2) Block Type

- The user can change the configuration of block type in this window.
- Key in the **Block Type** and select the **Color**.
- This will be subsequently reflected in the **Scheduler View**.



**Add / Edit Block Type**

Block Type:

Color:

Active: ☒

**Save** **Clear**



### 3) Manage Resource

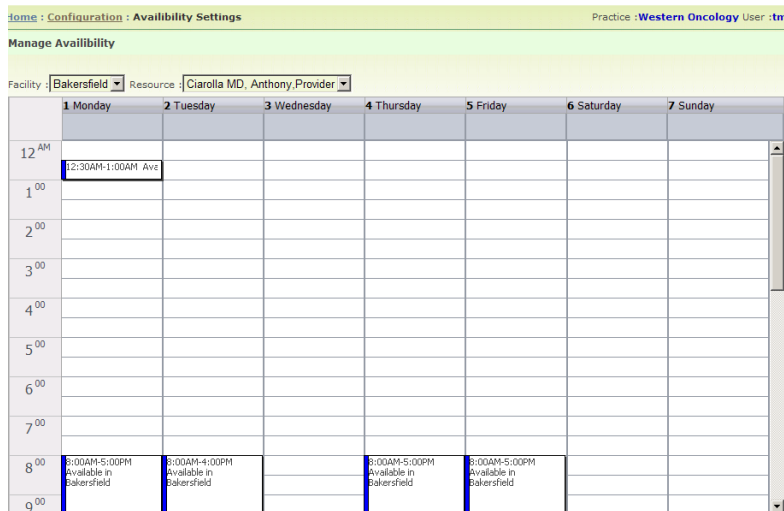


Resource	
Anthony Ciarolla, MD	<a href="#">Select</a>
Test 1 doctor	<a href="#">Select</a>
Chemo	<a href="#">Select</a>
Rosalind Munoz PA	<a href="#">Select</a>

**Map Resource-Facility**  
 Facility ☒ Bakersfield Memorial Hospital  
☒ Bellflower Medical Center

- The user can select the facility of Resource.
- On selecting any one of the Resource Type, the **Facility** gets selected.
- Here the user can change the facility of the Resource.
- This will be subsequently reflected in the **Scheduler View**.

### 4) Availability Settings



Home : Configuration : Availability Settings Practice : Western Oncology User : tm

Manage Availability

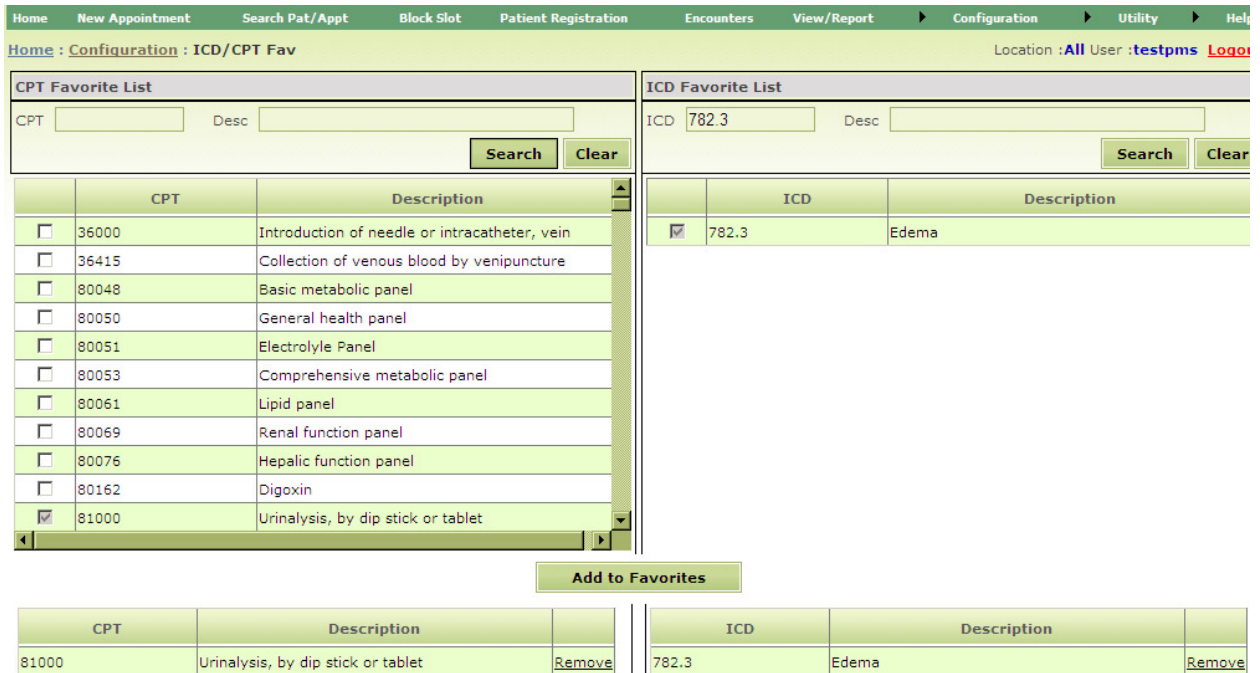
Facility : Bakersfield Resource : Ciarolla MD, Anthony, Provider

	1 Monday	2 Tuesday	3 Wednesday	4 Thursday	5 Friday	6 Saturday	7 Sunday
12 AM							
1 PM	12:30AM-1:00AM Avs						
2 PM							
3 PM							
4 PM							
5 PM							
6 PM							
7 PM							
8 PM	8:00AM-5:00PM Available in Bakersfield	8:00AM-4:00PM Available in Bakersfield		8:00AM-5:00PM Available in Bakersfield	8:00AM-5:00PM Available in Bakersfield		
9 PM							

- The user can change the **Availability setting** of a Resource
- Double click on the time slot to define the Availability status of a Resource.

## 05) ICD/CPT Favorite

- User can create a **list of favorite ICD & CPT code**.
- **Select** by Checking the ICD/ CPT code to be set as favorite.
- Click on **Add to Favorites**.



Home : Configuration : ICD/CPT Fav

Location : All User : testpms Login

**CPT Favorite List**

CPT  Desc

	CPT	Description
<input type="checkbox"/>	36000	Introduction of needle or intracatheter, vein
<input type="checkbox"/>	36415	Collection of venous blood by venipuncture
<input type="checkbox"/>	80048	Basic metabolic panel
<input type="checkbox"/>	80050	General health panel
<input type="checkbox"/>	80051	Electrolyte Panel
<input type="checkbox"/>	80053	Comprehensive metabolic panel
<input type="checkbox"/>	80061	Lipid panel
<input type="checkbox"/>	80069	Renal function panel
<input type="checkbox"/>	80076	Hepatic function panel
<input type="checkbox"/>	80162	Digoxin
<input checked="" type="checkbox"/>	81000	Urinalysis, by dip stick or tablet

**ICD Favorite List**

ICD  Desc


	ICD	Description
<input checked="" type="checkbox"/>	782.3	Edema

CPT	Description	
81000	Urinalysis, by dip stick or tablet	<input type="button" value="Remove"/>

ICD	Description	
782.3	Edema	<input type="button" value="Remove"/>

- The ICD/CPT codes will get listed in the Favorite section.

## Utility Menu



Home : Home

Location : All User : testpms Login

Settings (+) ☒ Check In ☒ Check Out ☒ No Show

Goto Date: 5/16/2013

## Change Password

- Click **Change Password** from the Profile Tab.

- Any user can use this component to change their passwords

### Change Password

Current Password

New Password

Retype Password

## Call Reminder

- Click **Set up** from Call Reminder.
- Key in the relevant details to set up the Call Reminder

### Call Reminder Message Setup

Template	Caller ID	Transfer #	Active	
Test Template 1	8185074732	8053410824	Yes	<a href="#" style="color: #00bcd4; text-decoration: none;">Select</a>

#### Add / Edit Message

Message Template Name

Greeting Message

Ending Message

Caller ID

☒ Enable Call Transfer

☒ Active  
Voice ☒ Male ☐ Female

☒ Send a Test Call to

☐ Send a Test SMS to

**Patient Confirmation IVR Options:**  
One for Yes  
Zero for No.

**Appointment Confirmation IVR Options:**  
One for Confirm.  
Zero for Cancel.  
Three for Repeat.  
Four For transfer the call to the representative.

- Click **E-mail Set up** from Call Reminder
- Enter the E-Mail Id, Disclaimer Message to add an e-mail.
- Click Save.

### Add / Edit

From Email Address :

Disclaimer Message :

No From Email is set. Please Add a From email.

- Click **Schedule calls** from Call Reminder.

## 2. Key in the **Start Date** and **End Date** to get the **List of Appointments**.

Home New Appointment Search Pat/ Appt Block Slot Patient Registration Encounters View/Report Configuration Utility Help

Home : Utility : Call Reminder : Schedule Calls Location : All Use

Appointment Date Range

Start Date 5/1/2013 End Date 5/16/2013 Search

\*All dates should be in the format mm/dd/yyyy

Change Password out

Call Reminder Setup

Schedule Calls Schedule

Make a Schedule for Reminder

Reminder Message Template Send a Test Call to Make Test Call

Call At: None Schedule Date & Time HH MM PST Make Schedule

List Of Appointments:

<input checked="" type="checkbox"/>	Patient	Pt. DOB	Home Ph.	Work Ph.	Email	Provider	Date	Start	End	Apt. Type	Facility	Call St.
<input checked="" type="checkbox"/>	x 1					Anthony Ciarolla	5/1/2013	8:00 AM	8:45 AM	Chemo 45	Bellflower Medical Center	
<input checked="" type="checkbox"/>	Anjum A Zaidi	10/16/1956	(661) 664-9201			Anthony Ciarolla	5/1/2013	10:15 AM	10:30 AM	Chemo 15	Bakersfield Memorial Hospital	
<input checked="" type="checkbox"/>	Frank Valadez	11/28/1950	(661) 428-5030	(661) 399-2799		Anthony Ciarolla	5/1/2013	1:00 PM	1:30 PM	Chemo 15	Bakersfield Memorial Hospital	
<input checked="" type="checkbox"/>	Elfrida Queen	4/29/1950	(661) 588-			Test doctor	5/1/2013	1:00 PM	1:30 PM	Chemo 30	Bakersfield Memorial	

3. Click the **Patient** to be selected from the list.

4. Key in all the details required to **Make a Schedule for Reminder**.

5. Click **Make Schedule/ Make Call**.