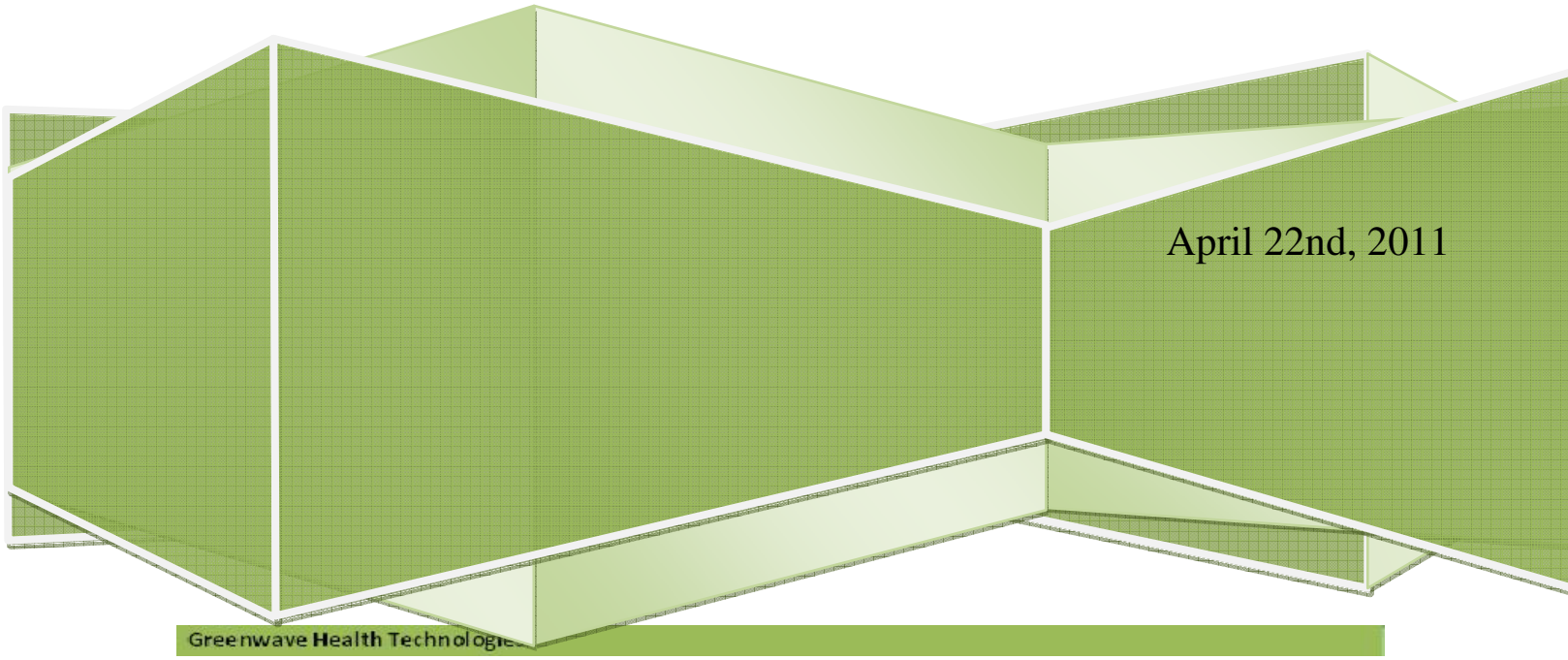
GreenWave
HEALTH TECHNOLOGIES

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.

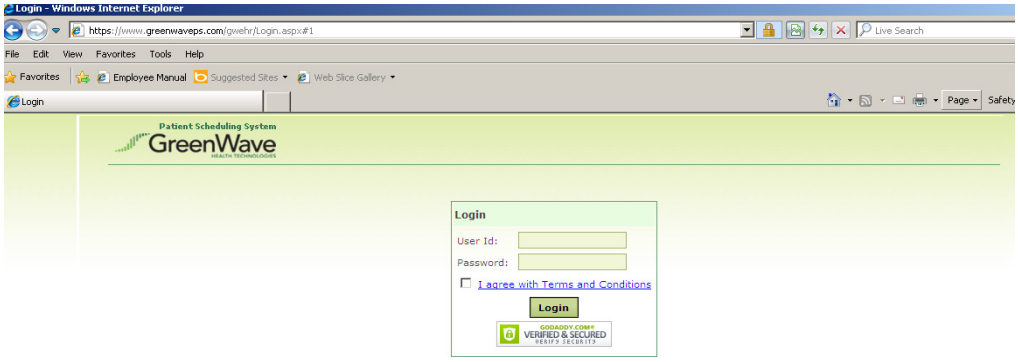
Prerequisites

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.

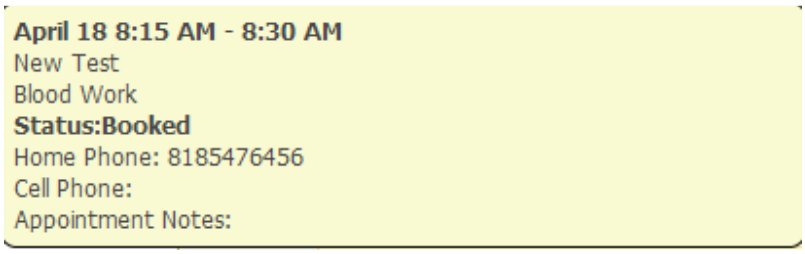
1. Once an appointment is set, the user can go to the **Schedule View** tab.

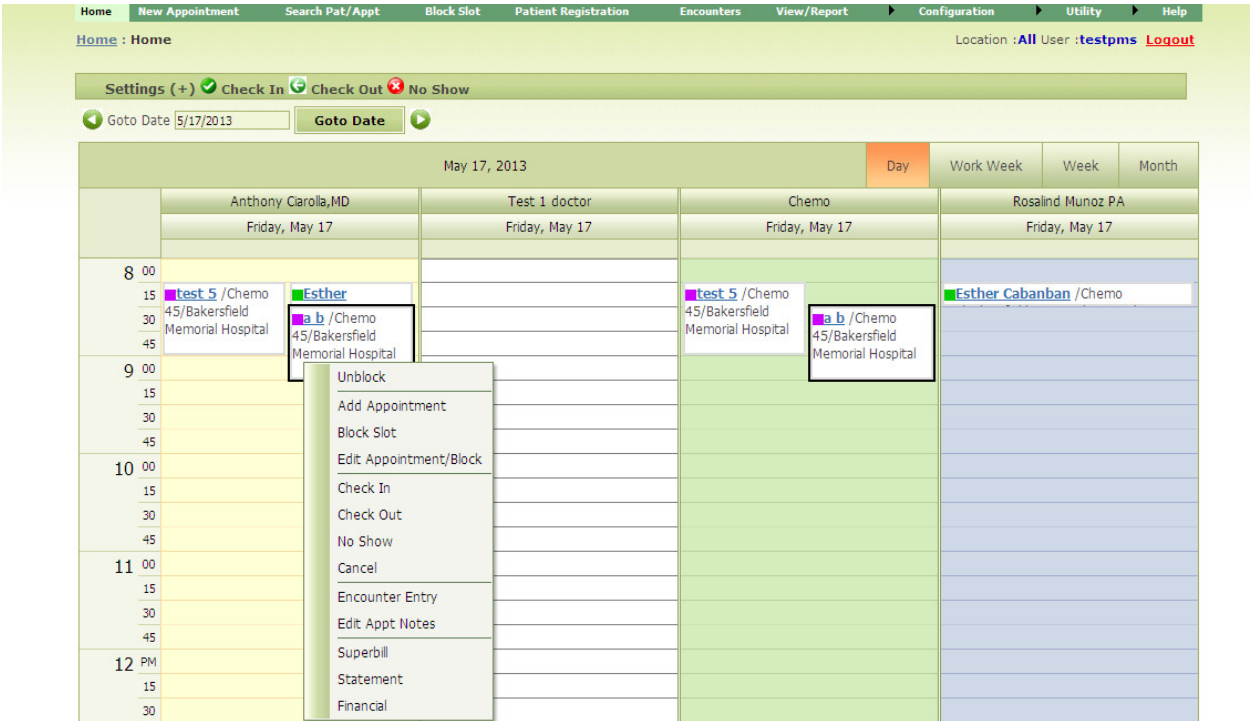
2. Click **Settings** Settings (+) to customize the Locations, Resources according to the preference of the user.

3Change 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 curser on the appointment scheduled.)

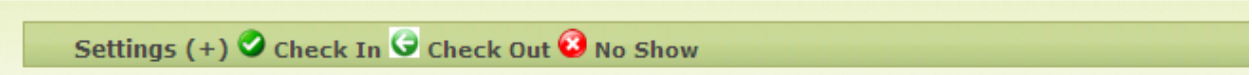


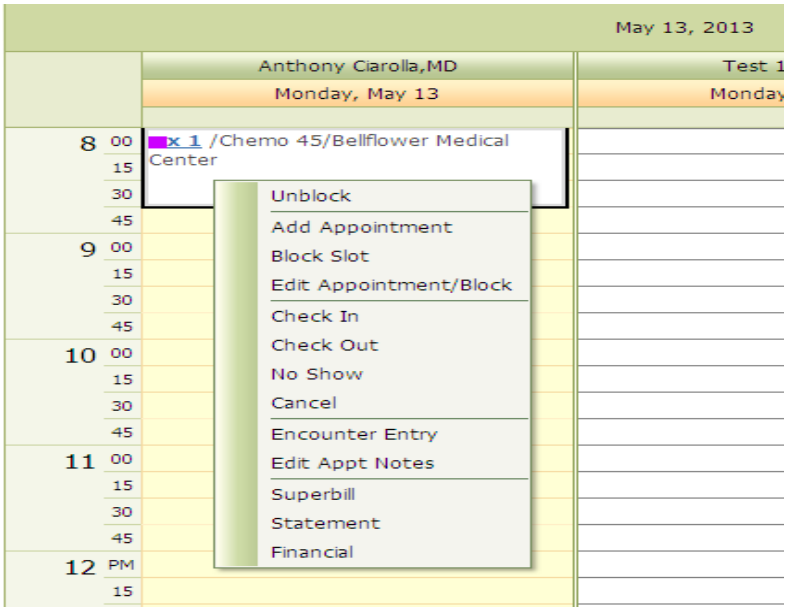


7. Right click the on any given appointment to change the status of the scheduled appointment.

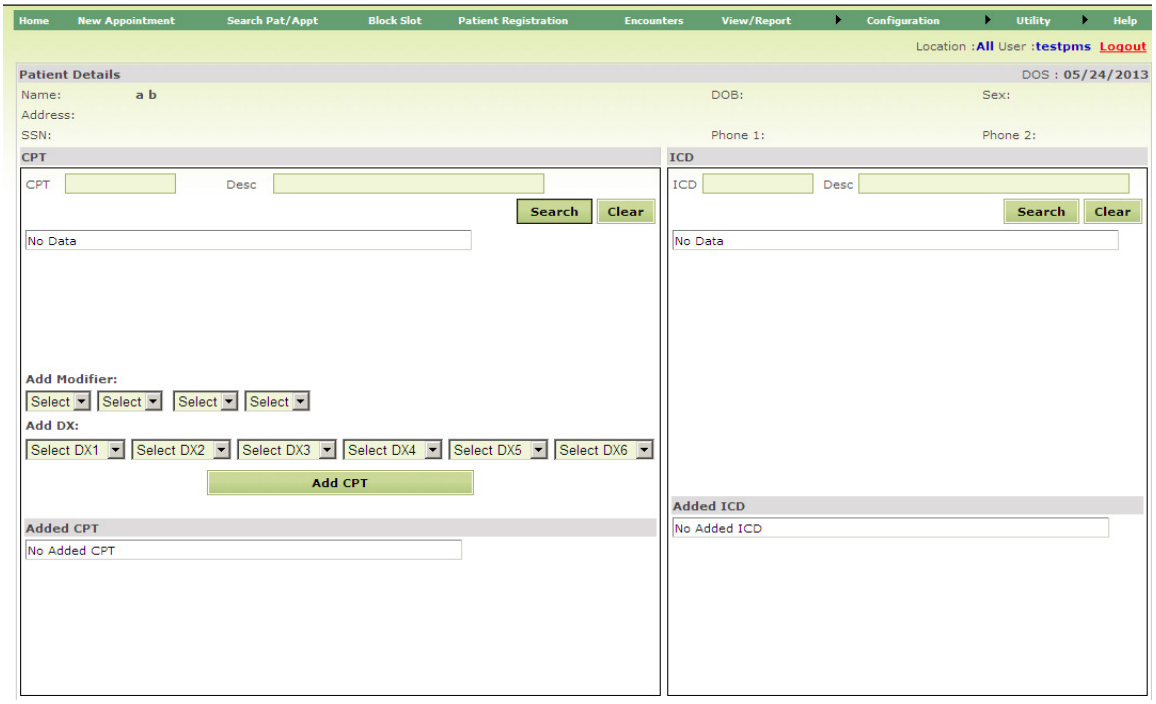
- Click **Unblock** to unblock a blocked slot
- Click **Add appointment** to schedule another appointment at that time.
- Click **Block Slot** to block a slot
- Click **Edit/Appointment/Block** to edit a scheduled appointment or a blocked slot.
- Click **Edit patient** to modify the demographics of the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

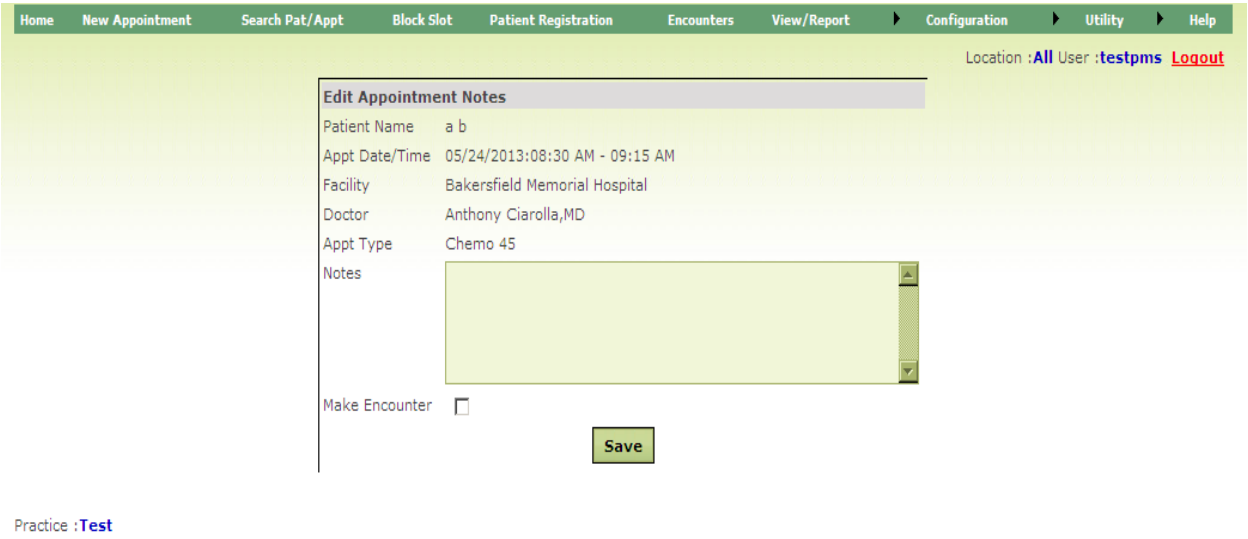




- Click **Encounter Entry** to enter the ICD/ CPT codes along with the Modifier for the encounter.



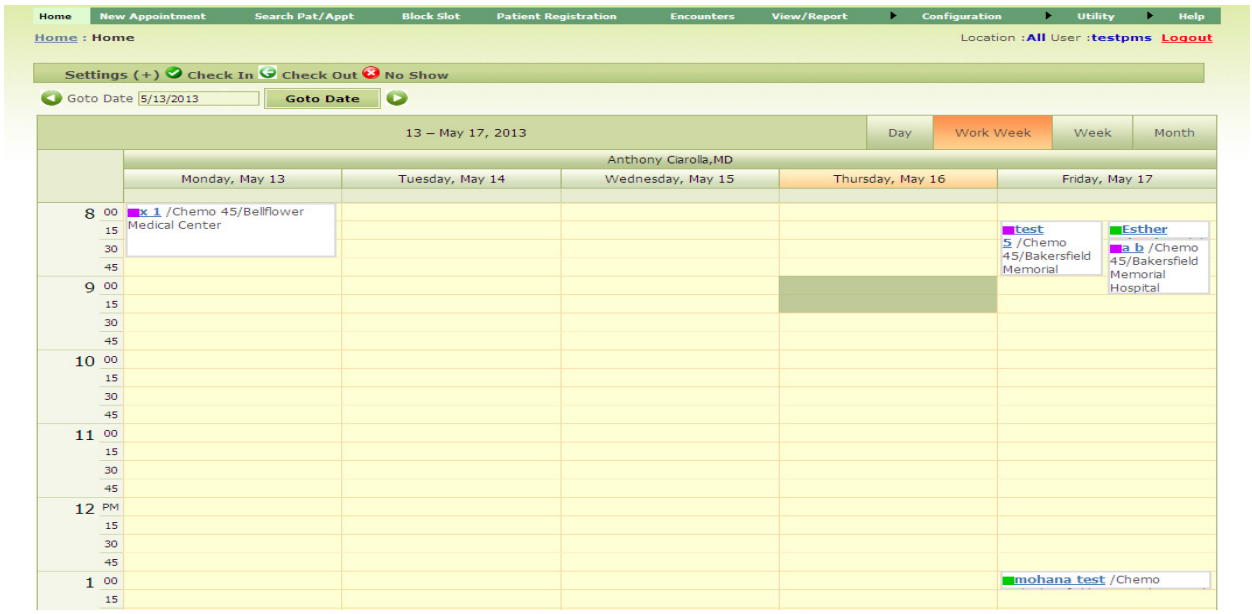
- Click **Edit Appointment Notes** to change the appointment notes.



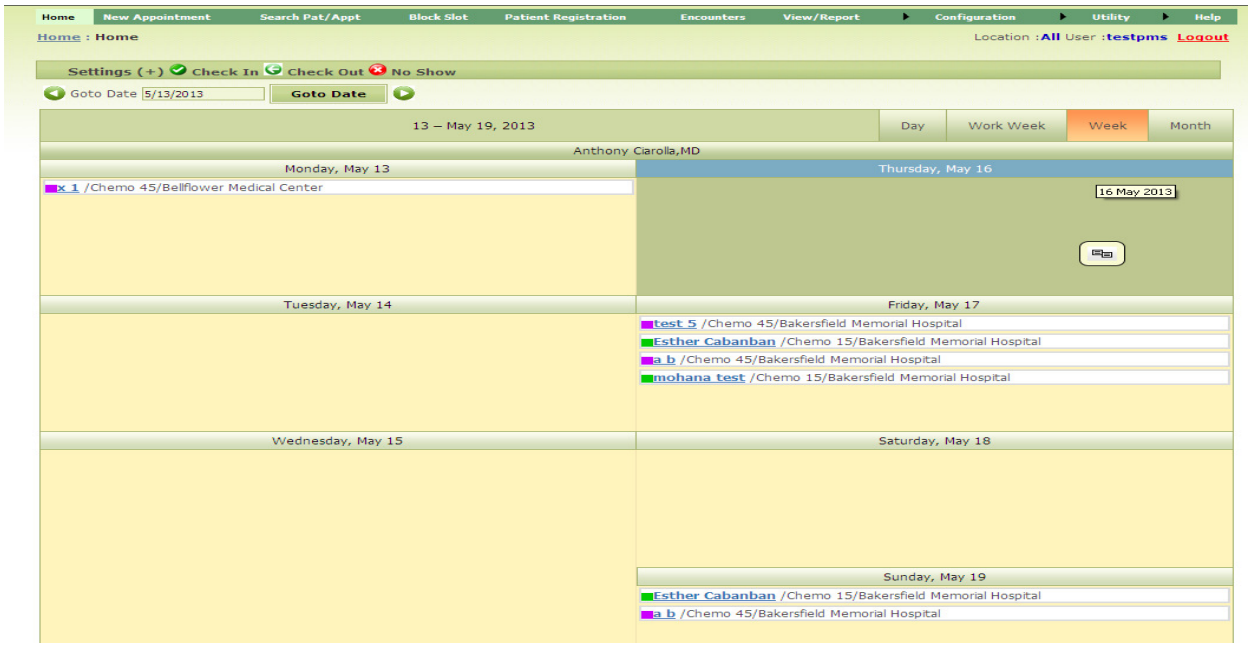
- Click on **Superbill, Statement and Financial** to generate the documents.
- .The user can also define the view according to **Day** or **Workweek** ,**Week** or **Month**

Day View

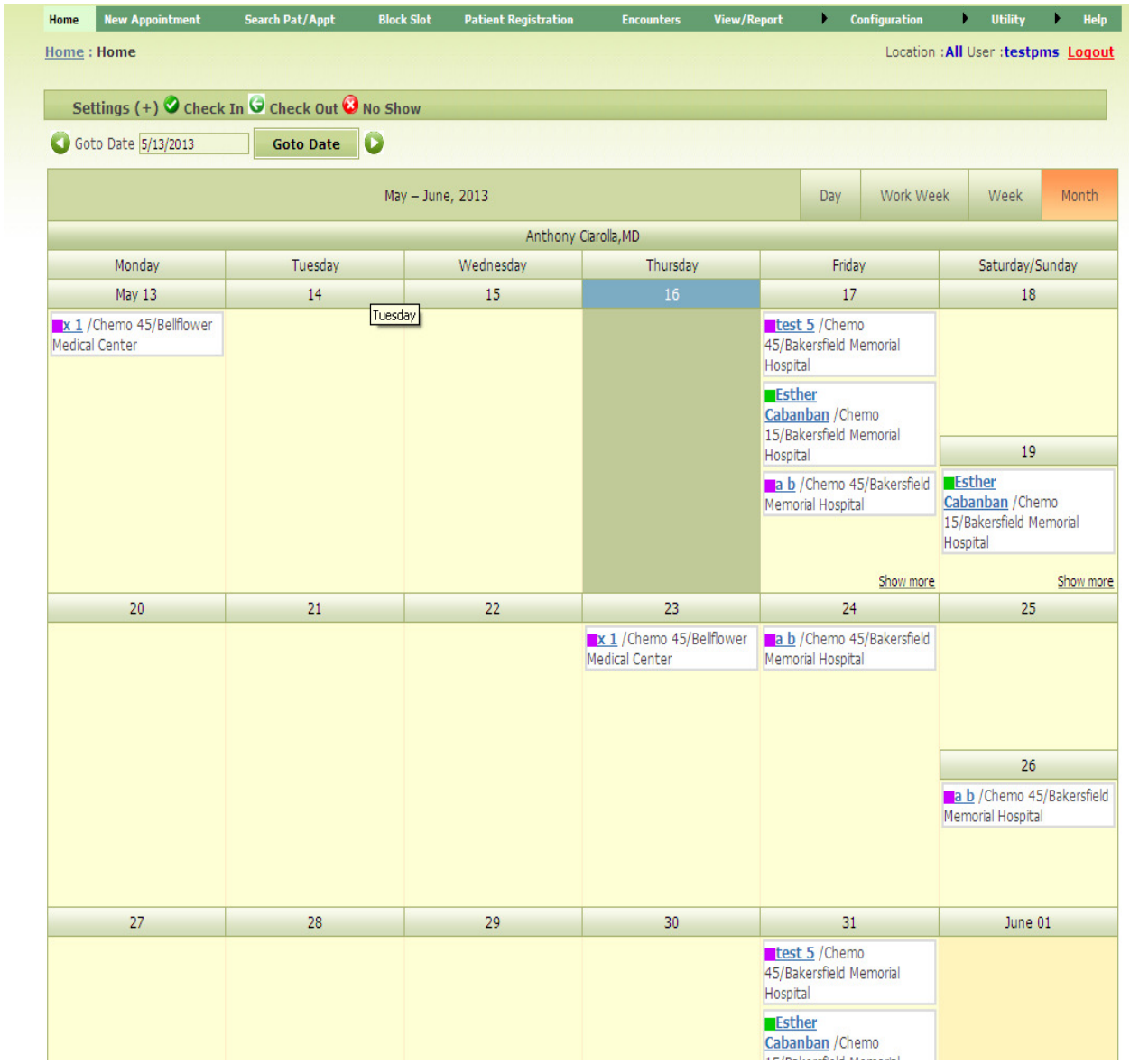
WorkWeek View



Week View



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 Ciarolla,MD
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday/Sunday
May 13
14
15
16
17
18
Tuesday
x 1 /Chemo 45/Bellflower Medical Center
test 5 /Chemo 45/Bakersfield Memorial Hospital
Esther Cabanban /Chemo 15/Bakersfield Memorial Hospital
a b /Chemo 45/Bakersfield Memorial Hospital
Show more
19
Esther Cabanban /Chemo 15/Bakersfield Memorial Hospital
Show more
20
21
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24
25
x 1 /Chemo 45/Bellflower Medical Center
a b /Chemo 45/Bakersfield Memorial Hospital
26
a b /Chemo 45/Bakersfield Memorial Hospital
27
28
29
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31
June 01
test 5 /Chemo 45/Bakersfield Memorial Hospital
Esther Cabanban /Chemo

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

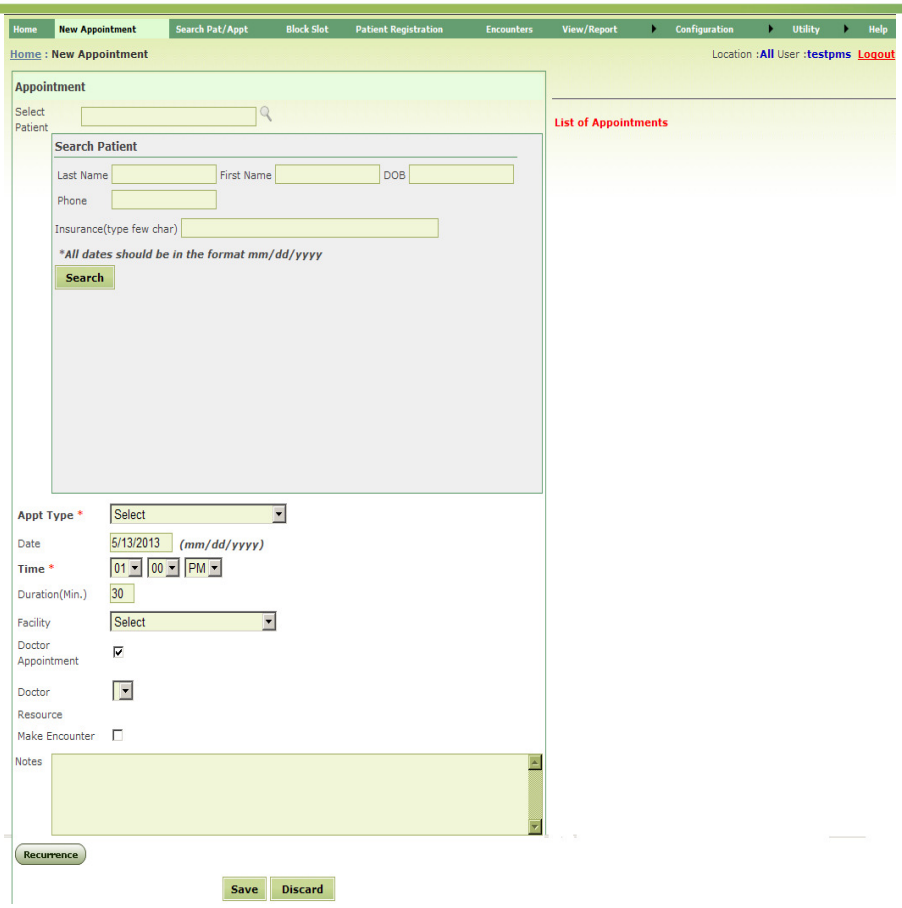
7. Details of any appointment of the selected patient is displayed in the right side.

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 to save data.



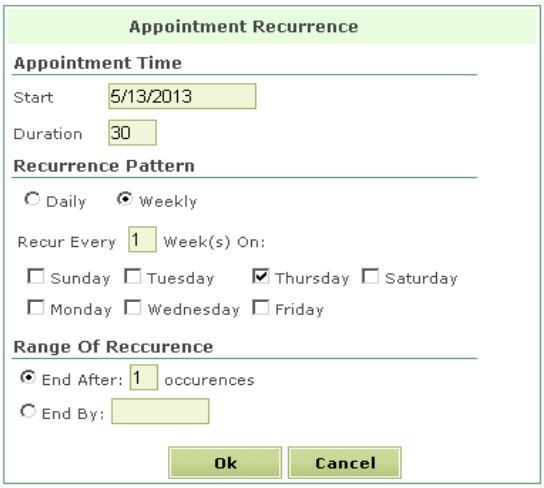
NB: *If an appointment is set at a* ***back date*** *then it can* ***only be cancelled*** *and* ***not edited***

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.

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

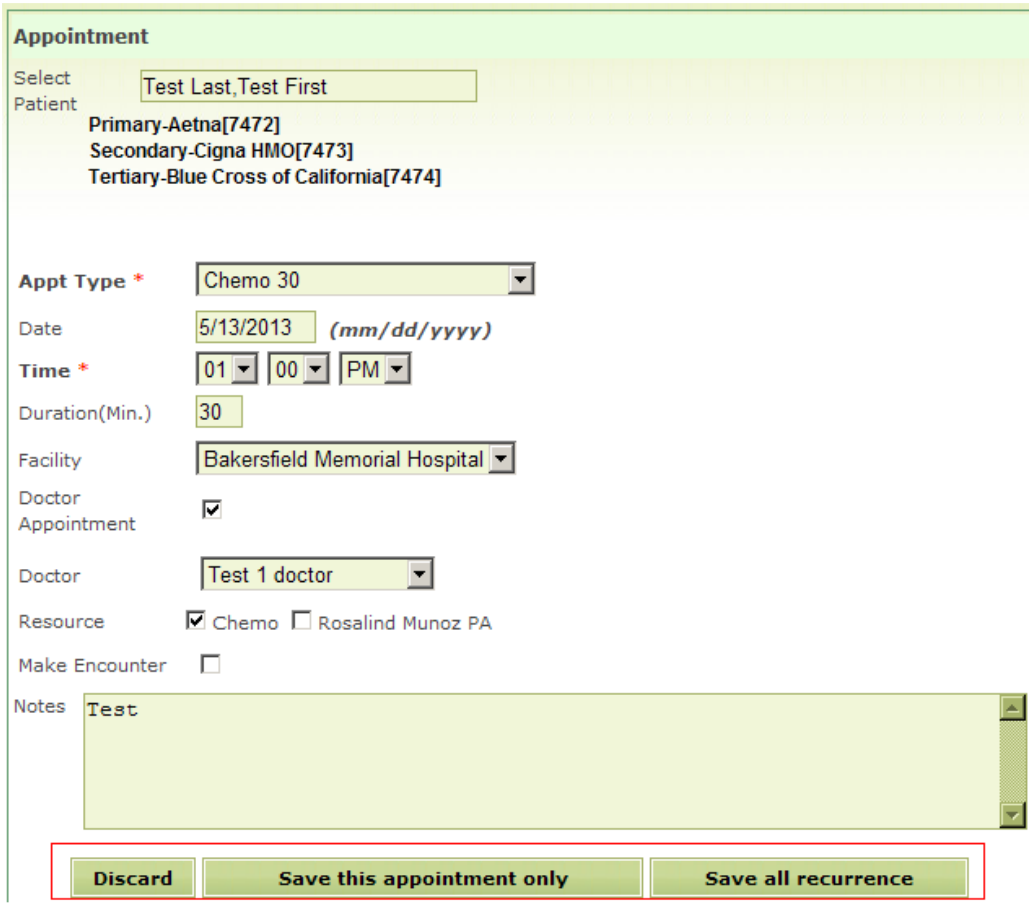


- There are **two "Recurrence Pattern"** options, **Daily** and **Weekly**.
- You can enter a specific interval days (for daily recurrence) or week (for weekly recurrence) between appointments. Enter that number of days(or weeks) in "**Every ☐ day(s) " or "Recur Every ☐ Week(s) On: "**
- For daily recurrence 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:

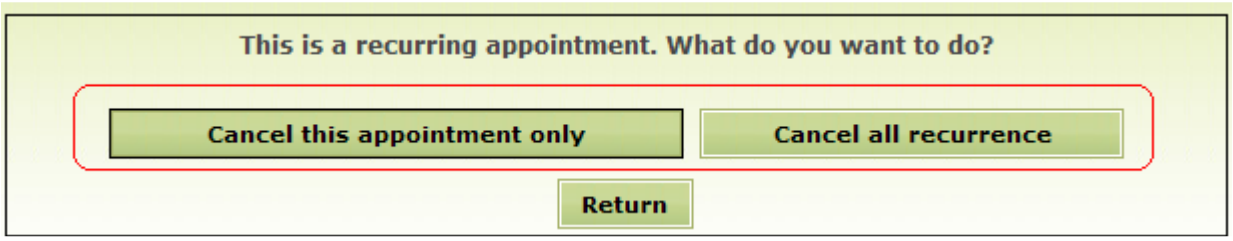
Right click on an appointment and click on **"Edit Appointment/Block"** link. That appointment will be shown in edit mode. Click on the **"Save this appointment only"** button to make changes to that particular appointment only.



- 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.



- 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

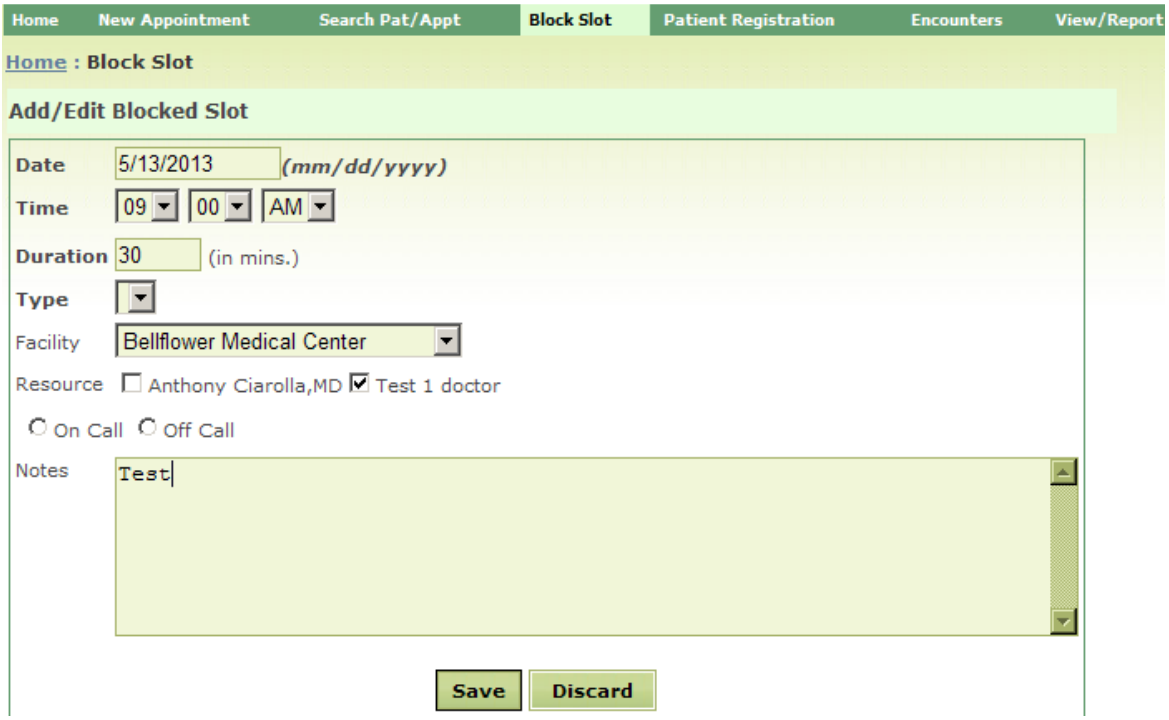
Select **Search Pat/Appt** from the search Tab.

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.

Block Slot

How to Block & Unblock a Slot of time?

Click the Tab **Block slot**



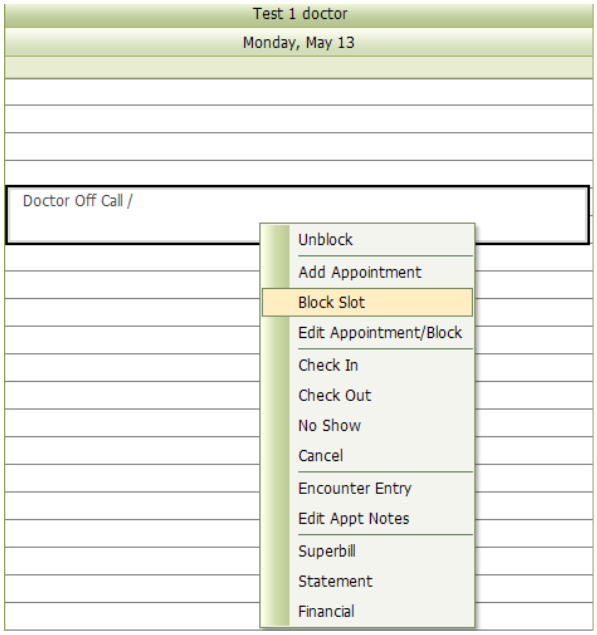
1) The user can modify the **Date**, **Time** and the **Duration** fields according to their requirement.
2) The user can modify the time **Duration** of block slot.
3) User can select the type of block timing from the dropdown list of **Type** field.
4) When the Facility is selected from the drop-down 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.

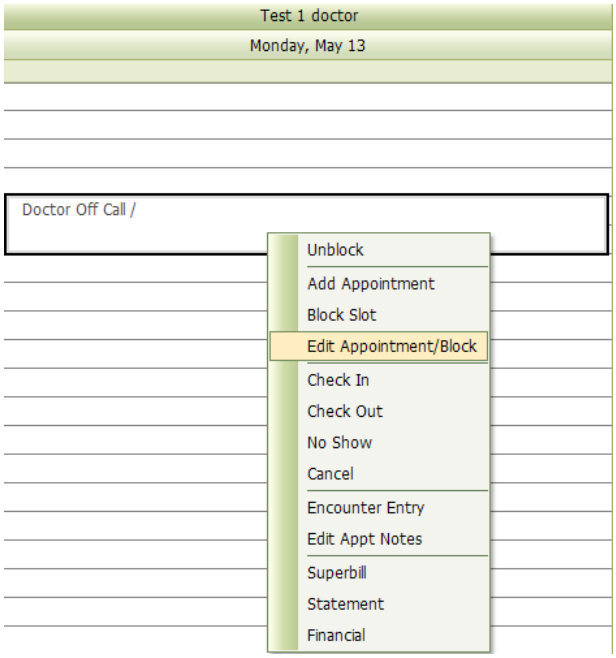
To unblock/Edit a slot

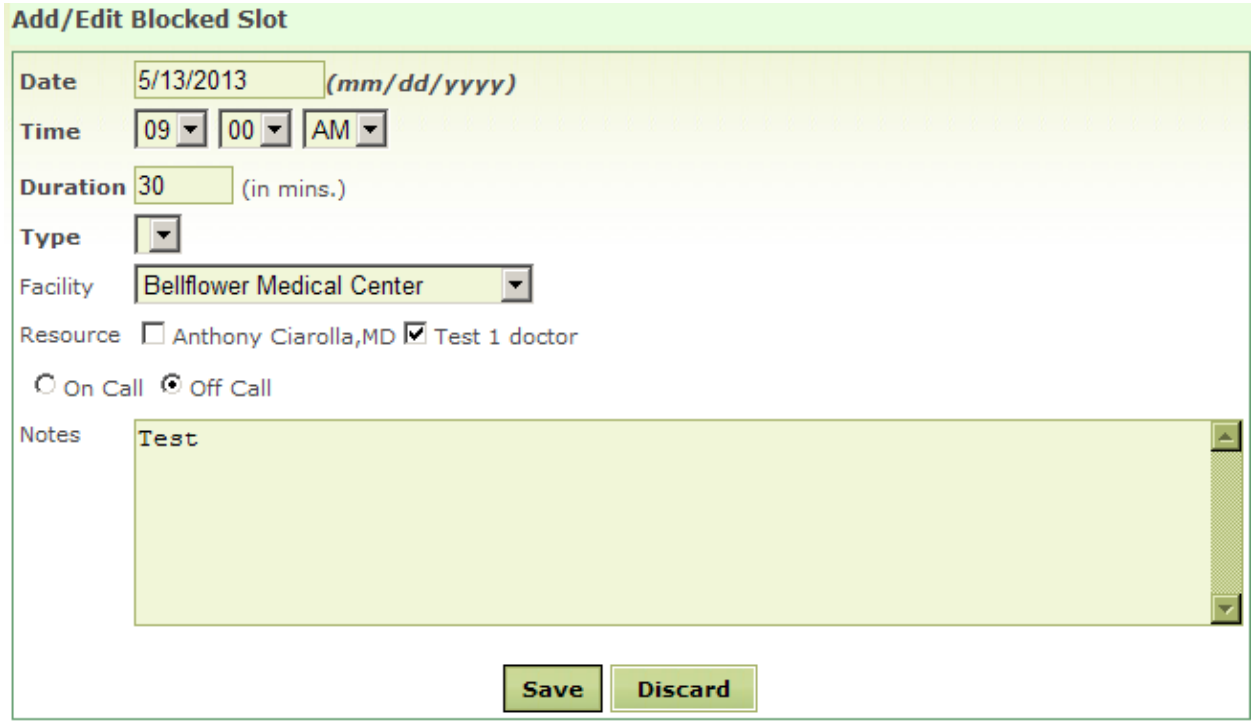
If the user wants to **Unblock** the above appointment

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**.'





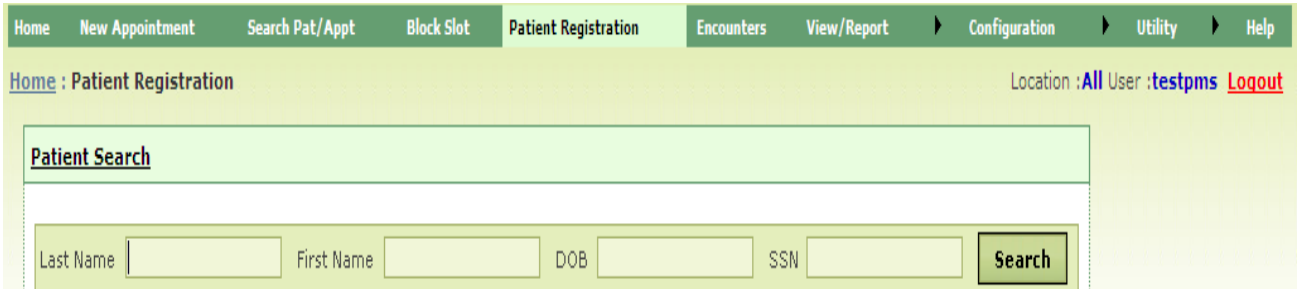
c) Make the relevant changes in the screen shot below and click the **save** option.

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.

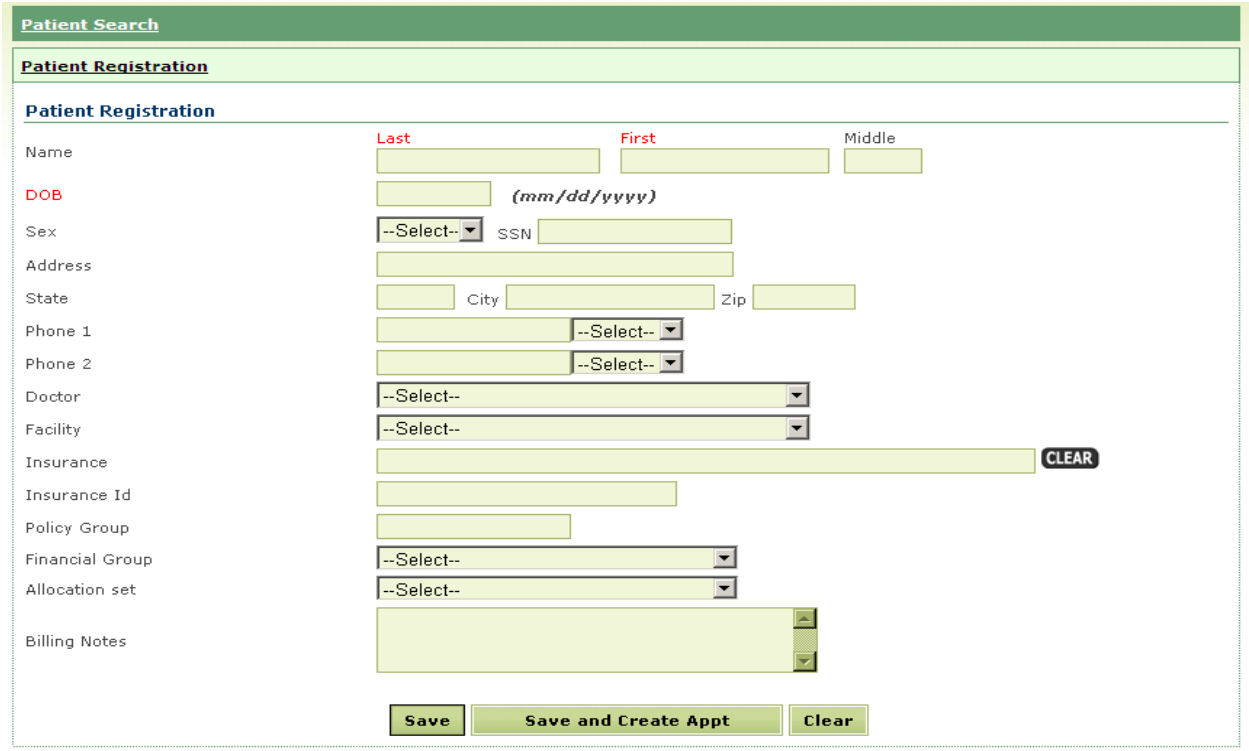


2. Click on **Patient Registration** to key in the demographic details for registration.

3.Click Save to save data of the registered patient.

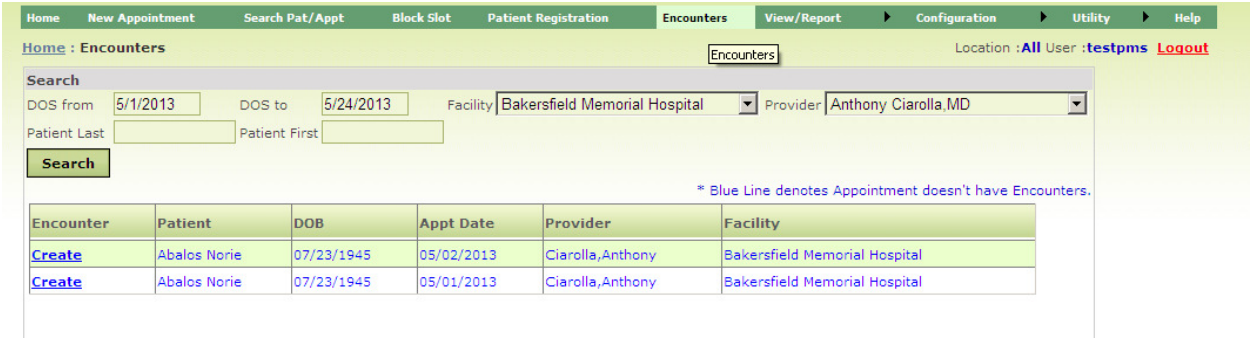
4.Click Save and Create Appt to register a patient and schedule an appointment.

5.Click Clear to register a another patient after saving the already keyed data.



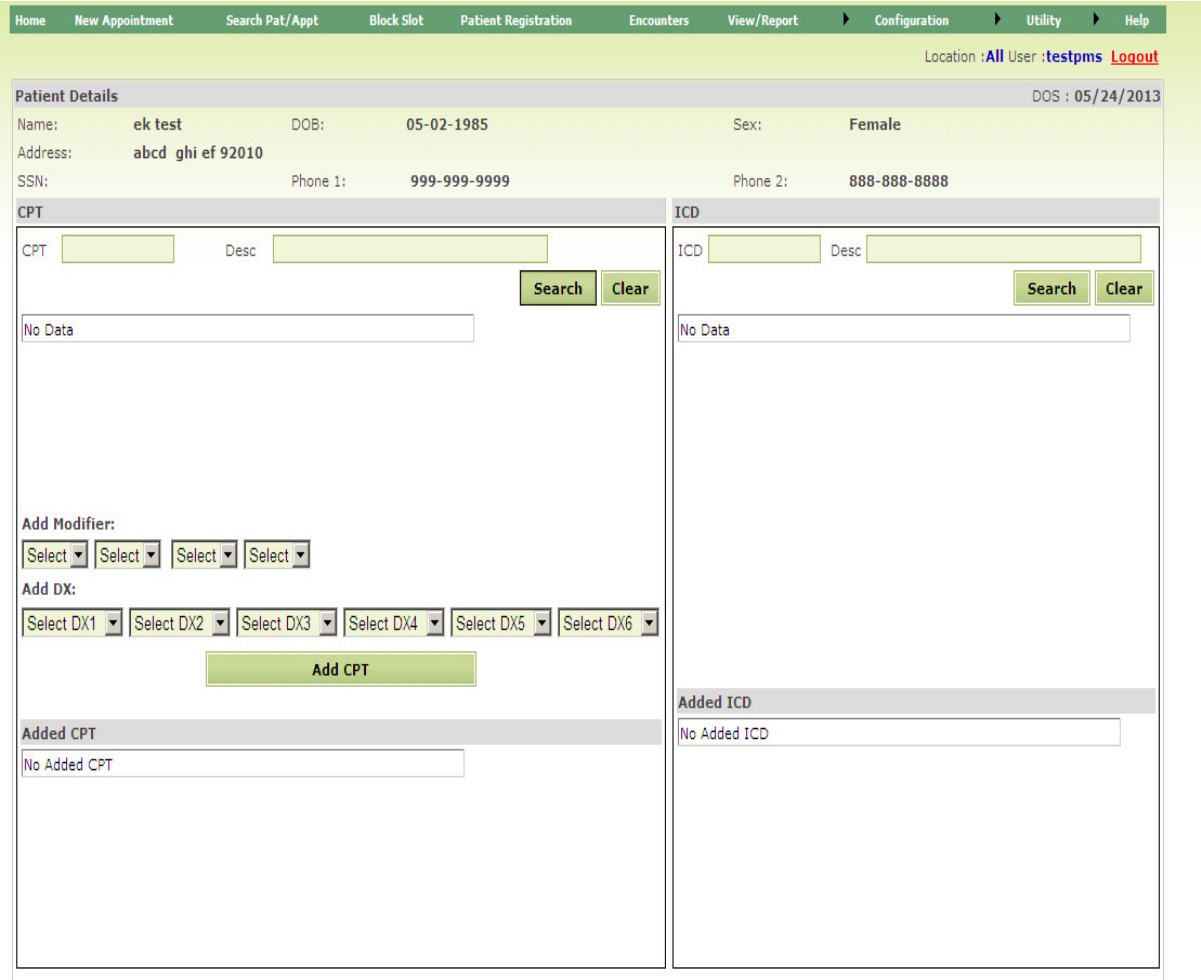
Encounters

How to create an encounter?



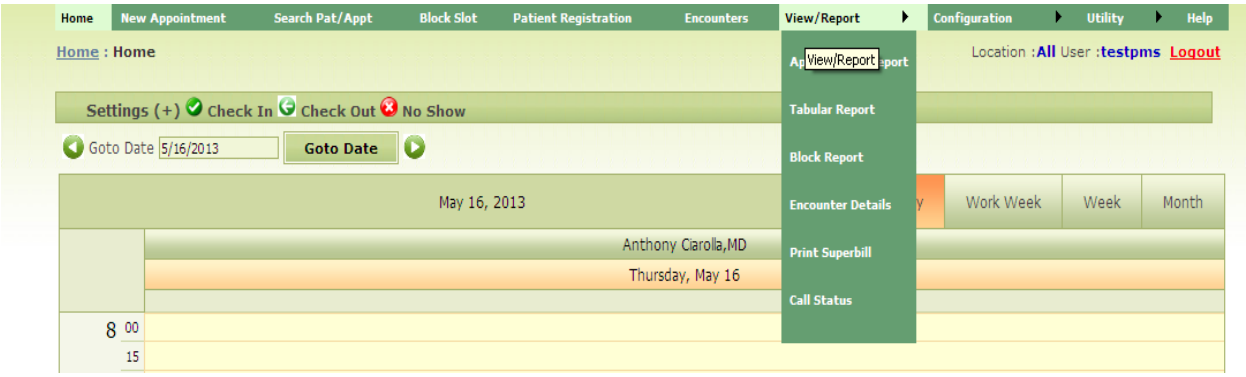
To create an encounter for the appointments Click on **Encounters**

- 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



View Report

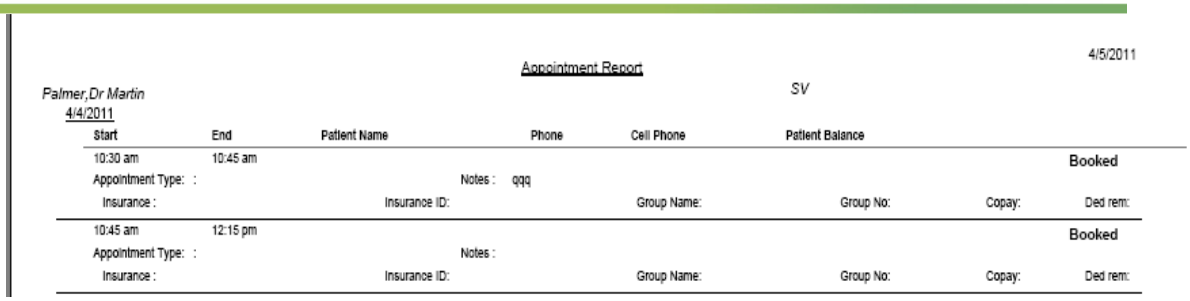
How to generate Reports?



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.**

- A report in PDF format appears.



4/5/2011

Appointment Report

Palmer,Dr Martin SV

4/4/2011

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:

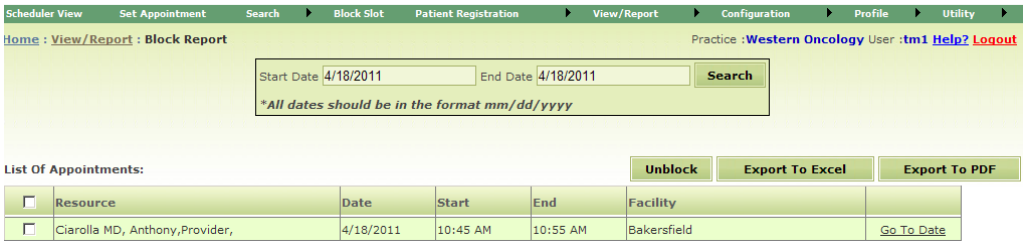
- Select Search **Tabular Report** from **View/Report** menu
- Key –in the dates and click **Search.**

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:

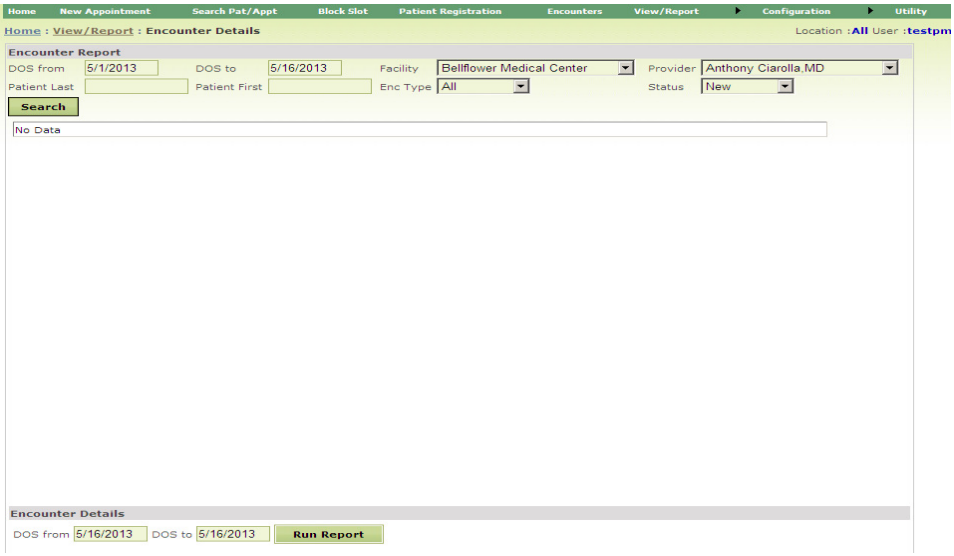
- Select Search **Block Report** from **View/Report** menu
- Key –in the dates and click **Search.**



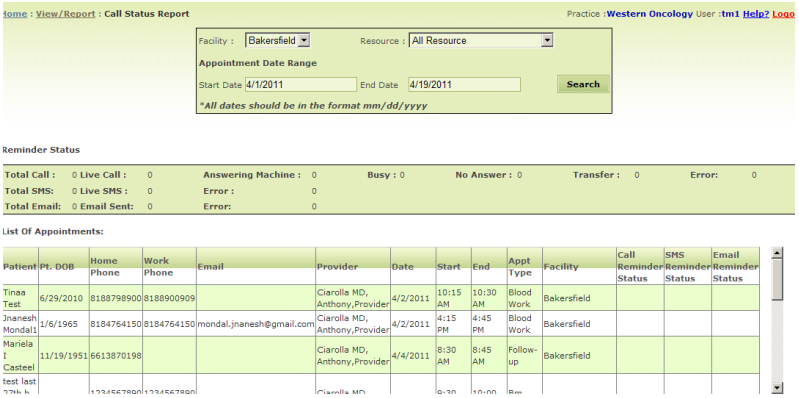
	Resource	Date	Start	End	Facility	
☐	Ciarolla MD, Anthony,Provider,	4/18/2011	10:45 AM	10:55 AM	Bakersfield	Go To Date

- 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 **Search** button.



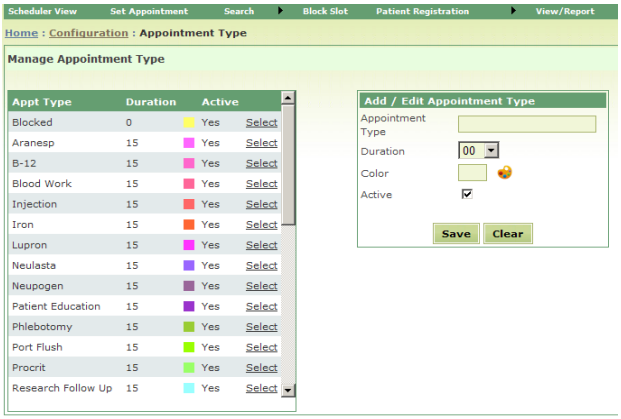
Configuration

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

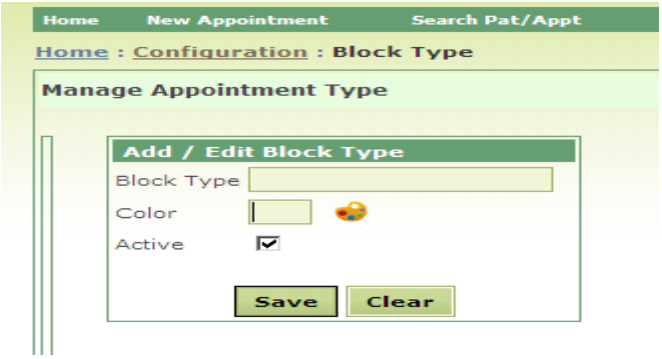
1) Appointment Type



- The user can change the configuration of appointment type in this window.
- On selecting any one of the appointments, the **Add / Edit Appoint 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

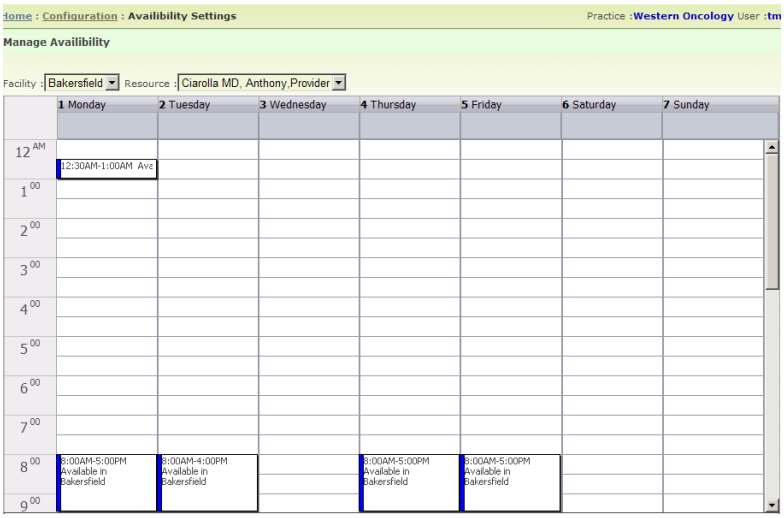
- The user can change the configuration of block type in this window.
- Key in the **Block Type** and select the **Color.**
- This will be subsequently reflected in the **Scheduler View.**



3) Manage Resource

- 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.**

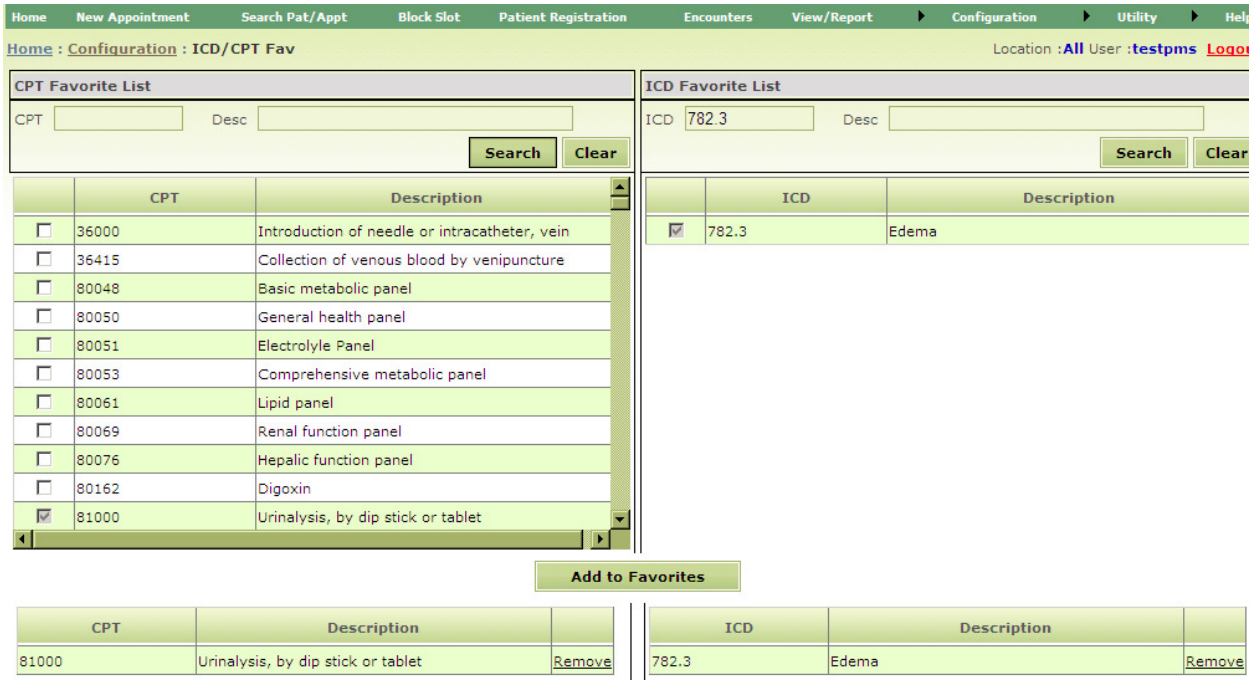
4) Availability Settings



- 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.**



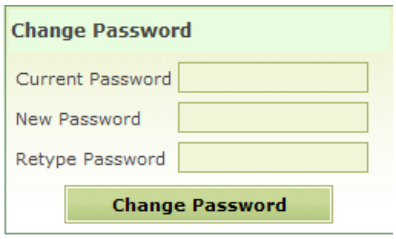
- The ICD/CPT codes will get listed in the Favorite section.

Utility Menu

Change Password

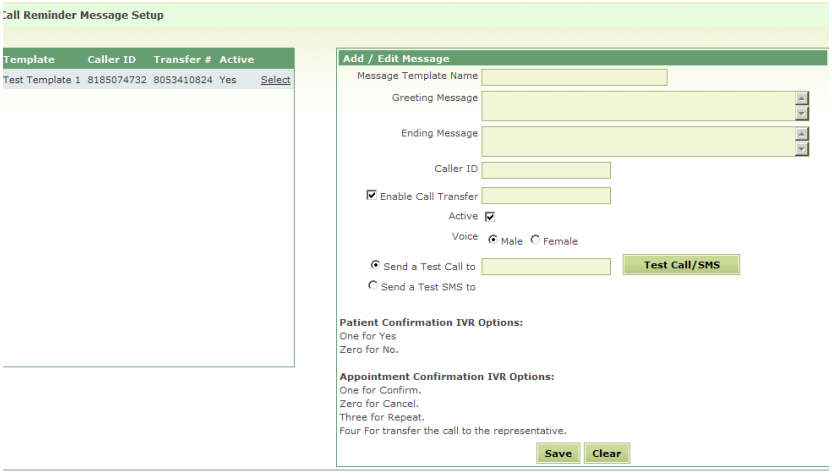
- Click **Change Password** from the Profile Tab.

- Any user can use this component to change their passwords

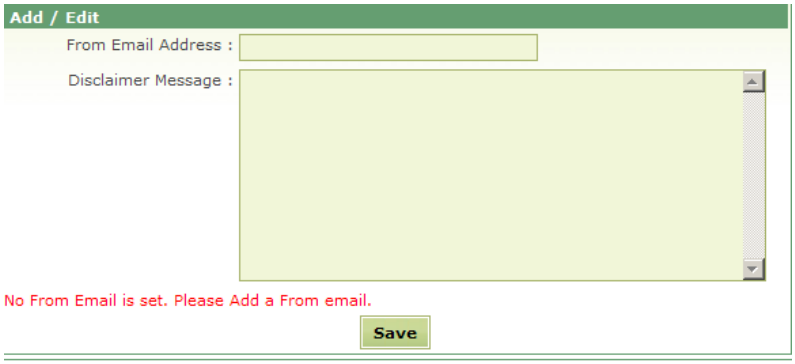


Call Reminder

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

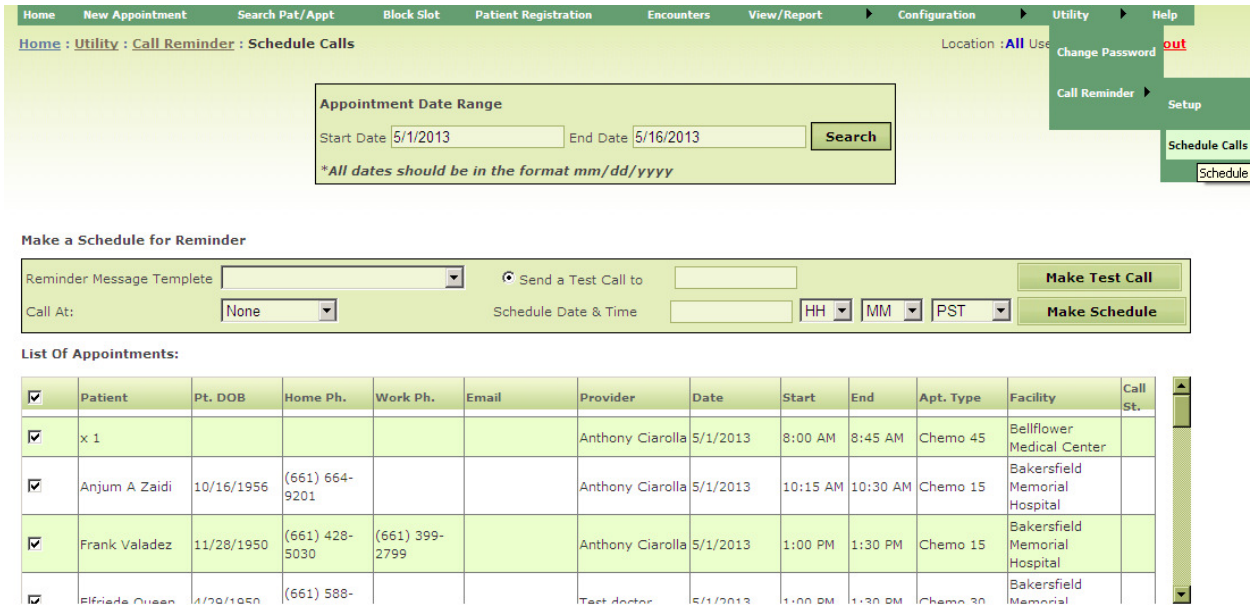


3. Click **E-mail Set up** from Call Reminder
4. Enter the E-Mail Id, Disclaimer Message to add an e-mail.
5. Click Save.



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

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



3. Click the **Patient** to be selected from the list.
4. Key in all the details required to **Make a Schedule for Reminder.**
5. Clik **Make Schedule/ Make Call**.