Admin Tab in Patient Scheduler

Admin Instruction

RESource

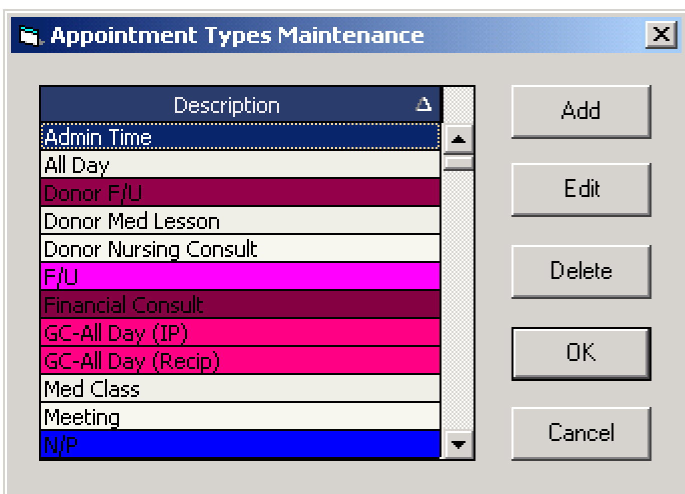
There are 3 ways to view calendars on the RE*Source* main toolbar:

- select Tools and scroll to Appointments
- click on the icon to display the 'Patient Appointments' window
- click the shortcut button F1 on the keyboard to display the 'Patient Appointments' window.

In the patient Appointments window, the top toolbar has an 'Admin' dropdown. There are two admin selections: Appointment Types and the Permission Manager.

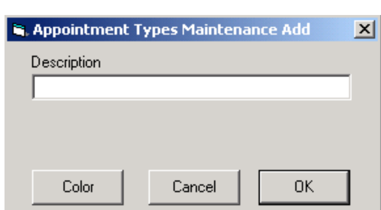
Appointment Types

The Appointment Types function allows the creation of new appointment types (for templating) and the assignment of colors (font color based on appointment type). Selecting Admin - Appointment Types from the main menu will display the Appointment Types Maintenance form and any types that currently exist in the database.



To add a new appointment type:

1 – click **Add**



2 – enter the name for the new type in the Description field

3 – if desired, click Color to assign a color to the appointment type. From the color palate that appears, select a color – to select a different shade of a displayed color, select it and then click Define Custom Colors to chose the shade variation. The color chosen will be the (font) color of the appointment text when it's templated in a schedule – if a color is not assigned the text will be black. Click **OK.**

4 – click **OK** again

To edit the color of an existing appointment type, select the type and click **Edit** - follow step 3 and 4 above.

To delete an appointment type, select the type and click **Delete** – note that you can only delete appointment types that have not already been used in a schedule.

Permission Manager

The Permission Manager is where permissions to all the calendars are defined. You have the ability to define the permission level for each user and calendar in. The available permission levels are:

None – the user has no permissions to the schedule

Read – the user has permission to view the schedule but not to make changes to it, including scheduling patients

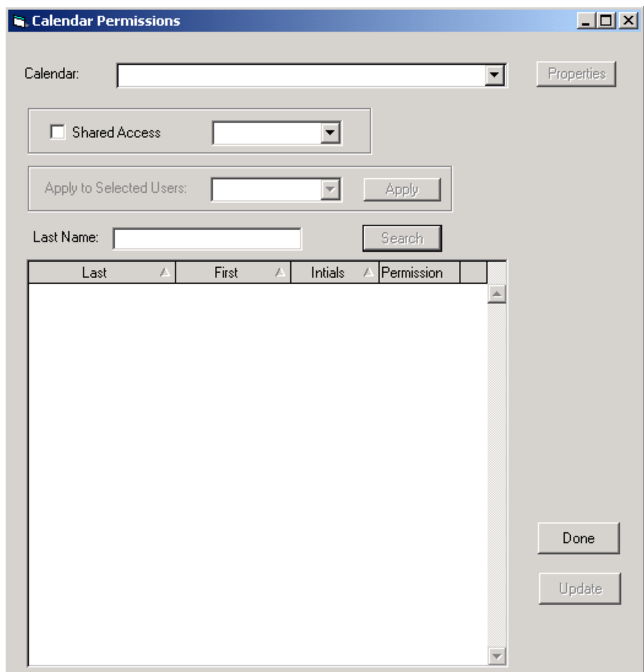
Write – the user has permission to schedule appointments in templated slots, make appointments read only, sign in from the scheduler, move appointments and edit appointments in the schedule, but cannot insert new/additional templated slots

Delete – the user has permission to add and remove templated slots and to use the Clear Day button

Wr/Delete - the user has all Write and Delete permissions

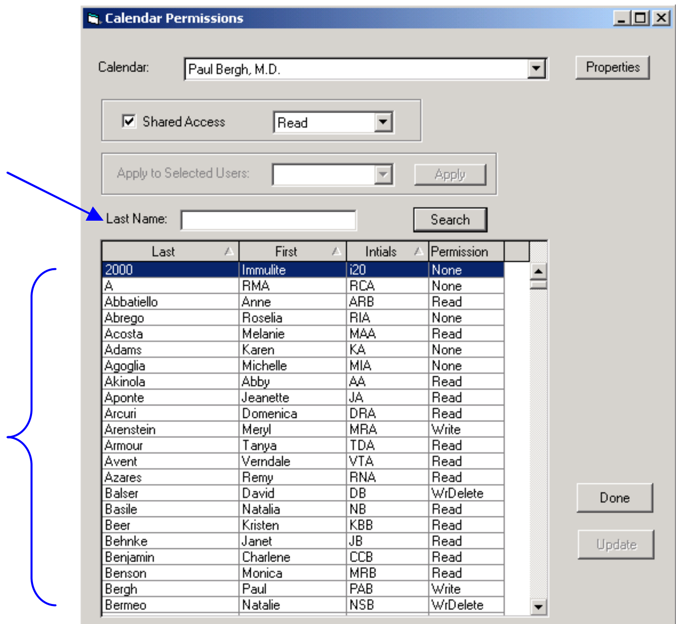
To assign permissions to a calendar:

1 – select Admin – Permission Manager from the main menu. The Calendar Permissions window will appear.

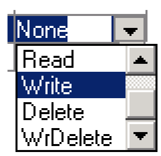


2 – select the calendar you want to assign permissions to from the Calendar dropdown

3 – select the user whose permissions you need to set from the user list that appears. You can search for a particular user by entering the last name (or first few letters of the last name) in the Last Name field and clicking Search.



4 – click on the Permission field for the user – a dropdown arrow will appear. Select the appropriate level for the user and click Update.



5 – repeat steps 2 - 4 for each user and calendar

If you want to assign a single permission level to all users for a given calendar, select the calendar, check off Shared Access, select a permission level from the corresponding dropdown and click Update. You may opt to use this feature to assign Read permissions to all uses for a particular calendar then go back and assign higher permissions to select individuals as needed.

Properties

The Properties button on the Calendar Permissions window works the same as if you selected Calendar Properties from the main menu.