



Med Software LLC
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Resources in Patient Scheduler

User Instruction



A Resource is a scheduling tool that, among other things, allows easier tracking of office coverage responsibilities. Resources are first created as their own calendar. This “calendar” can then be applied to the schedules – when applied, the resulting “appointment” will not only be reflected in the schedule it was applied to, but it will also appear in the Resource calendar itself. One purpose of a Resource is to display the schedule of a particular function shared by different individuals – VOR’s for example. Using this example, a Resource (calendar) called VOR could be created – once the Resource is created it can be applied to other calendars when templating appointment slots. When templating an individual appointment slot you are given the option to select a Resource.

Appointment Template Created By: []

Appointment Type: []

Location: [] Duration: 30 Minute: []

Read Only Adjust Start Time: 0 []

Resource: []

Message: []

Cancel OK

When a Resource is applied in an appointment template a corresponding appointment will automatically appear in the Resource calendar as well. In the Resource calendar, for the given date and time, it will display the name of the calendar the Resource was applied to. For example, if the VOR Resource is scheduled in Dr. Smith’s calendar for 1/22/03, from 7am to 10am, the appointment will also appear in the VOR Resource calendar for that date and time.

The VOR Resource is applied to the appointment template

The selected calendar/schedule displays the templated slot with the Resource

The Resource calendar displays the corresponding calendar name containing the Resource

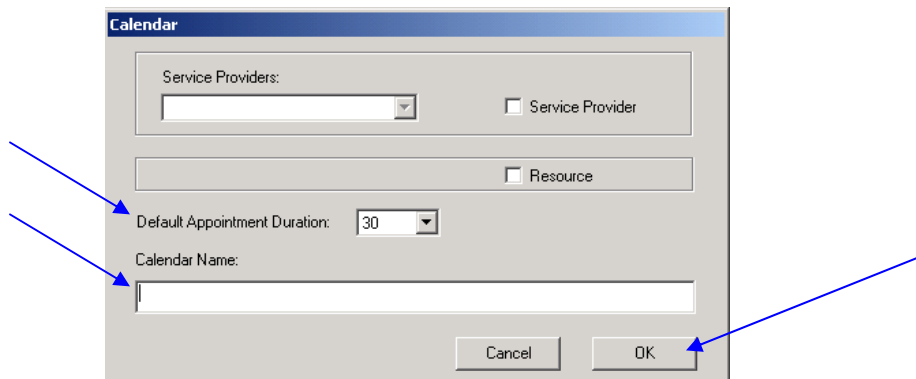
The screenshot shows an 'Appointment Template' dialog box with the following fields: Appointment Type (empty), Location: Morristown, Duration: 3.0 Hours, Read Only (checked), Adjust Start Time: 0, Resource: VOR, and Message: VOR. Below the dialog are two calendar views. The top view shows a yellow background with a red horizontal bar from 7:00 to 10:00 labeled '(Morristown) VOR'. The bottom view shows the same yellow background with a red horizontal bar from 7:00 to 10:00 labeled '07:00am-10:00am (Paul Bergh, M.D.)'. Blue dashed arrows point from the 'VOR' resource field in the dialog to the corresponding labels in the calendar views.

Resources allow you to check coverage in a particular area without having to search through each individual schedule. So if you are wondering who is covering retrievals on any given day, just look in the VOR Resource calendar instead of looking through each physician's schedule. The Resource tool can be applied to anything: an exam room, an instrument, a To Do list etc.

To create a Resource (calendar):

- 1 – if one does not already exist in your folder tree, create a new folder in the folder tree that will display all your Resource calendars – you could name it Resources, Office Coverage, or another meaningful name

2 – select the Resource folder, right click and select New Calendar from the pop up menu that appears. You can also access this by going to the main menu and selecting File – Calendars – New Calendar. The ‘Calendar’ form will appear.

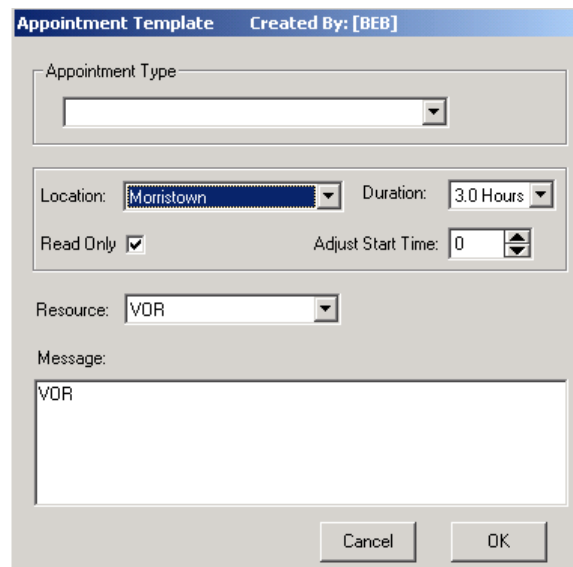


3 – check the Resource checkbox in the middle of the form, select a default appointment duration and enter a name for the calendar. Click OK. The calendar will now appear under your Resource folder in the folder tree.

To apply a Resource to a live schedule/calendar:

1 – select the desired calendar, date and time

2 – go into template mode and double click on the desired time slot. The Appointment Template form will appear just as if you were creating an individual appointment template.



3 – choose a location, appointment duration and if desired, check off Read Only

4 – choose the Resource to be applied from the Resource dropdown and click **OK**

5 – the Resource will now appear as a scheduled templated slot in the given schedule. This “appointment” will automatically appear in the corresponding Resource calendar.