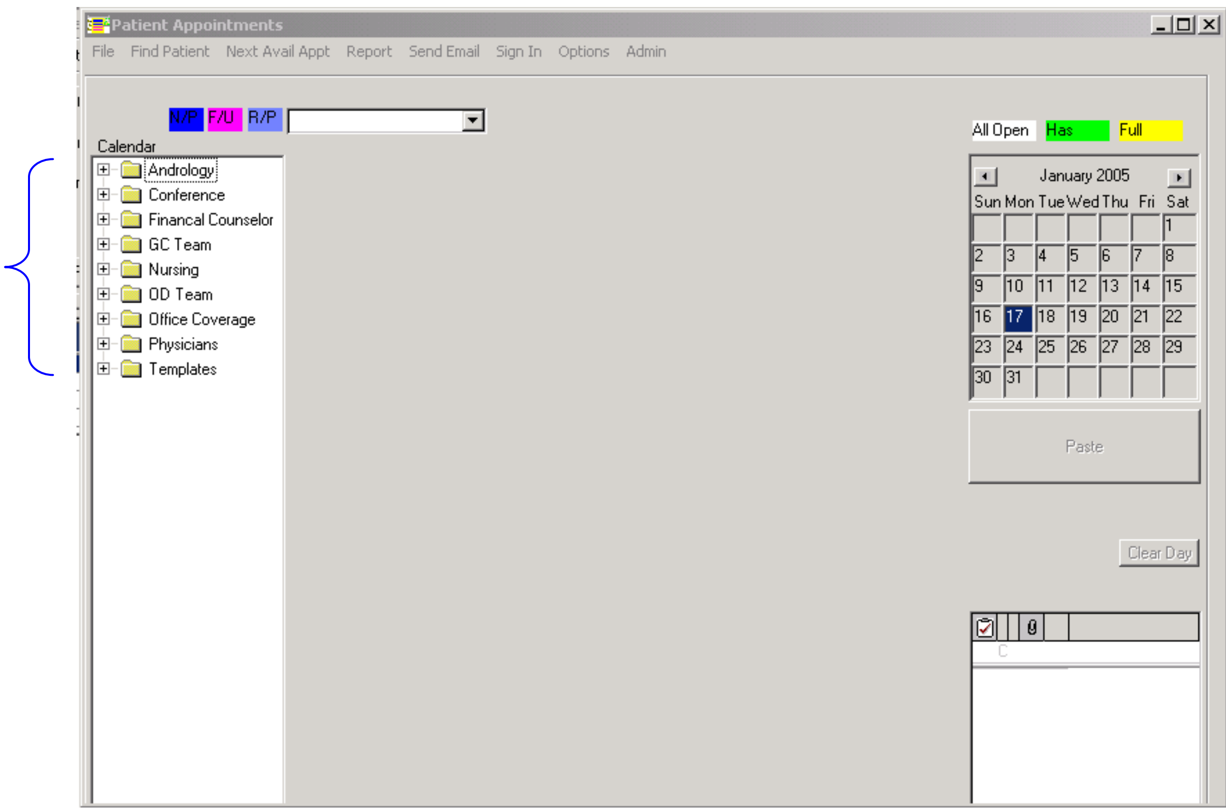
Med Software LLC Created: 5/17/2011 Version: 1 Page: 1 of 9	**Patient Scheduler** User Instruction	RESource

The Patient Scheduler in RESource allows you to set up calendars to template and schedule patient appointments, meetings, office coverage responsibility, etc. As calendars are created a RESource administrator is able to assign various permission levels to users depending on their needs. This allows you to control who can and cannot enter/delete appointments in any given calendar. Each user can then set up their personal folder tree to display only the folders and calendars needed.



Main Menu

The main menu consists of eight dropdown options. Some of the options will be discussed in more detail in the sections following the outline below.

- **File**

  New Folder – creates a new folder in your folder tree

New Template Folder – creates a new template folder

Delete Folder – deletes the selected folder

Save Day as Template – saves the selected day as a template that can be applied to other days/calendars

Calendars

Add Calendar – displays a list of pre-created calendars available to add to your folder tree

Apply Template – applies a pre-created template to a schedule

New Calendar – displays a form to create a new calendar

Remove Calendar – removes the selected calendar from your folder tree (but does not delete the calendar)

Calendar Properties – displays a window where you can select the default form of the calendar. Note that this must be set to Patient Appointment in order to schedule patients in templated slots.

Next Available

Next Avail Slot – displays a list of the next available appointment slots for the selected calendar

Add Template – displays a list of pre-created template calendars to add to your folder tree

New Template – create a new template calendar

Remove Template – removes a template calendar from your folder tree (but does not delete the calendar)

Protect Selection – make the selected entry/appt read-only. When an appointment is read-only, only the person who created it can remove it.

Export RESource Calendar to Outlook - exports the selected calendar to Outlook

Import Outlook Calendar – imports an Outlook calendar to RESource

- **Find Patient**

Find Next Appointment – displays a window to search for a patient's next appointment in the selected calendar (by name or phone number)

Find All Appointments – displays a window to search for all of a patient's appointments in the selected calendar (by name or phone number)

- **Next Avail Appt** – displays the next available appointment slot in the selected calendar
- **Report**

  Tabular – prints the calendar in a report-type format

  Image – prints up to 3 calendars in a screen-capture type format

- **Send Email** – displays a new e-mail form. If you have a patient appointment selected, the patient name will appear in the subject line of the e-mail.

- **Sign In** – when a patient appointment is selected in the schedule, select this to sign the patient in to the main Sign In screen

- **Options**

  Disable Open Day Indicator – when checked off, hides the All Open, Has Open and Full indicators above the date picker calendar

  Sync Siblings – when you have more than one copy of the scheduler open, this allows you to synchronize multiple Providers' schedules by the selected date

  Template Mode – allows you to put the calendar in Template Mode while leaving the Calendar Properties set to Patient Appointment

  Time Slot Increment – changes the time display along the left side of the schedule – the default is 30 minutes

- **Admin**

  Appointment Types – allows a RESource admin to create new appointment types (for templating) and to assign colors to new and existing types

  Permission Manager - where all user permissions are assigned to the calendars

Folder Tree

When opening the Scheduler for the first time there may be no folders (or calendars) listed in your folder tree. Each user has the ability to add and name folders, and to add calendars to these folders. Each user can set up their folder tree to best suit their needs.

To add a folder to the Folder Tree:

1 – go to **File** and select **New Folder**

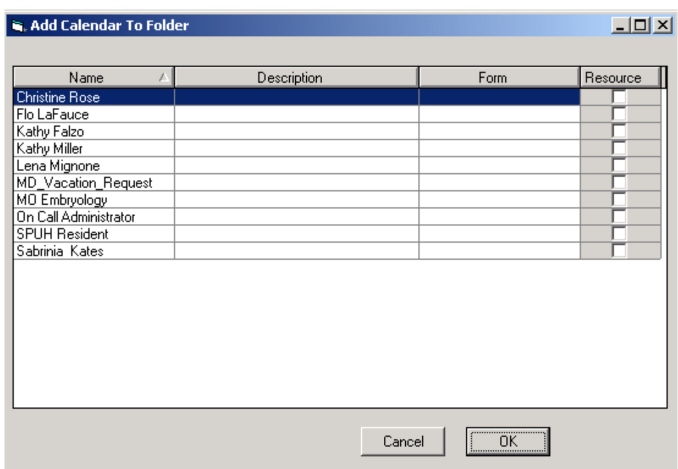
2 – enter the name for the folder when prompted and click **OK**

3 – the folder will now appear in your Folder Tree. Add as many folders as needed to organize the calendars you will be accessing (Physicians, Financial Coordinators, Conference Rooms, Office Coverage, etc.)

To add a calendar to a folder:

1 – select the folder you want to add the calendar to and right click - select Add Calendar. This option is also available by going to the main menu and selecting File – Calendars – Add Calendar.

2 – the **Add Calendar** to Folder window will appear – select the desired calendar and click **OK.** You can only add one calendar at a time.



4 – a (+) sign will now appear to the left of the selected folder – clicking on it will display the newly added calendar. To add more calendars to the folder repeat steps 1 through 3.

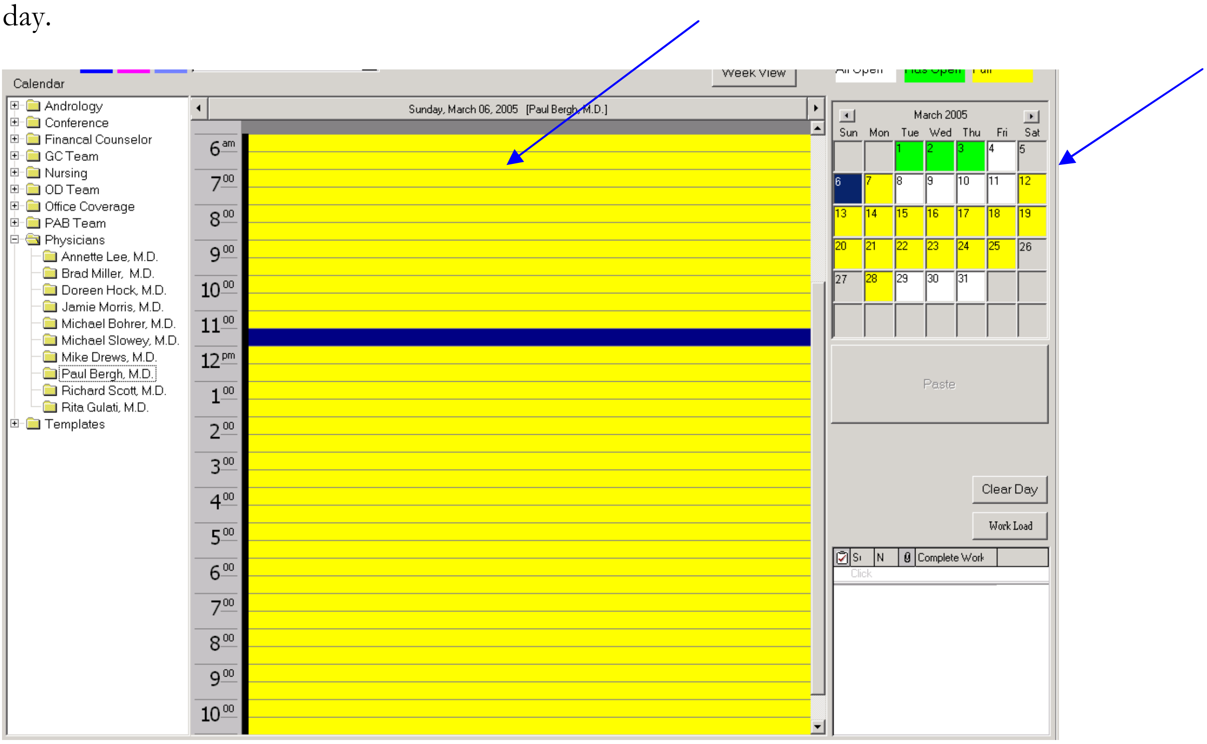
If you get an error message regarding permissions when selecting a calendar in the folder tree you should contact the RESource administrator for permissions.

Calendars and Scheduling

When you select a calendar within a folder, the corresponding schedule will appear with yellow background in the center window. The time, from 12am through 11pm, appears along the left side of the day's schedule, with a scroll bar along the right side. By default, the current day is displayed. To view a different day simply select the desired date from the date picker calendar that appears to the right of the schedule. The left and right arrows at the top of this calendar allow you to view previous and future months respectively. There are also color-coding indicators above the calendar:

White – all templated appointment slots for that date are open
Green – there are some appointment slots available
Yellow – all appointment slots have been filled

Any date that appears gray in the date picker calendar has no appointment slots templated for that day.



You can simply type text into a time slot on a calendar, but templating the slots for specific (appointment) purposes allows you some control over a schedule and also allows you to use the search tools available to find specific appointments/patients. Templates are explained further in the next section.

When using templated appointment slots, the different appointment types are color-coded. For example, New Patient appointments will appear with blue text and Follow Up appointments will appear with pink. New appointment types and color-coding can be added by a RESource administrator as needed.

Right clicking on a templated appointment slot will display a pop up menu with the following options:

Cut – removes the appointment with the ability to Paste it in another date/time or another provider's calendar. See "To Reschedule a patient appointment".

Copy – copies the appointment template with the ability to Paste it in another date/time or another provider's calendar.

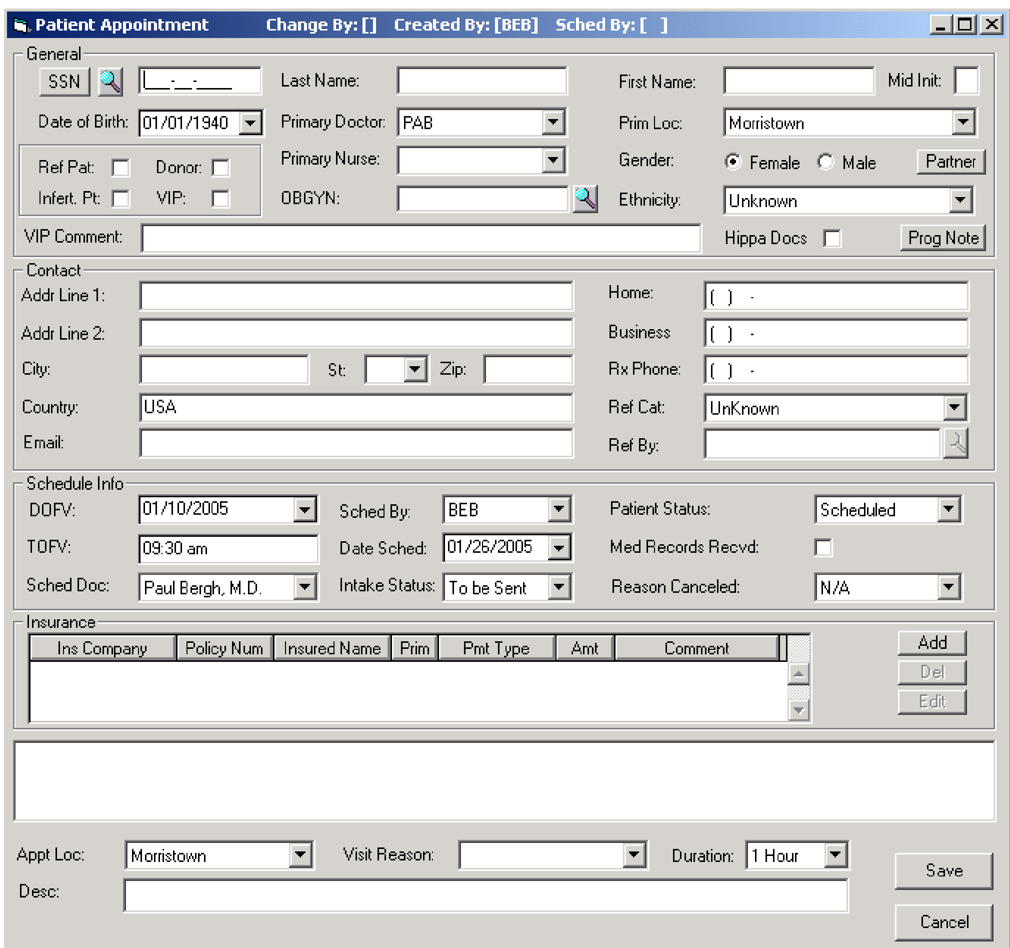
Paste – pastes a cut or copied appointment. If this option is not available you can use the Paste button instead – simply select the date and time where you want to paste the appointment and click the Paste button.

Edit Appointment – displays the Patient Appointment or Appointment Template window (depending on whether or not you are in template mode) where you can edit the appointment specifics. Double clicking on an appointment slot will also display the Patient Appointment or Appointment Template form.

Delete Appointment – deletes the selected appointment

To Schedule a New Patient in an appointment slot:

1 – select the desired appointment slot and double click – the Patient Appointment window will appear.



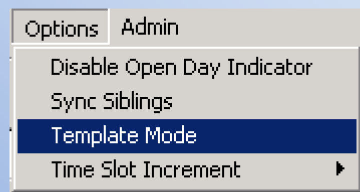
2 – you'll notice that all fields in the Schedule Info section are already completed according to the calendar, the date and the time of the templated slot - fill out all other fields with the patient's information.

Entering a patient that does not already exist in RESource (through the scheduler) will save the patient as a record in RESource - the Patient Appointment window mimics the Patient Details section within RESource and all information entered here will also appear there. Please refer to the Patient Services section for more information on the Patient Details window and/or for any questions on the fields in the Patient Appointment window.

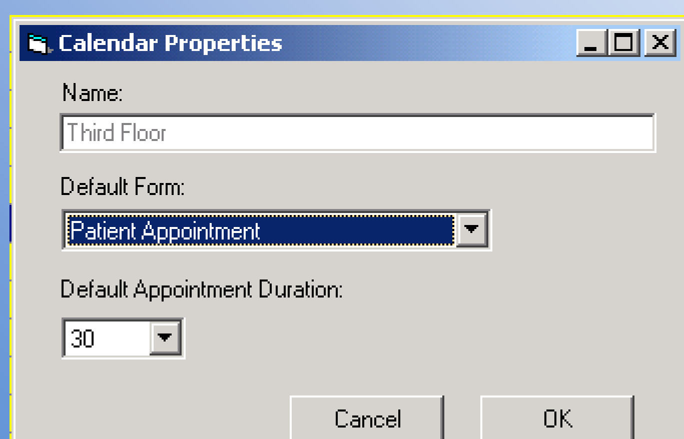
3 – click **Save**

If the Appointment Template form appears instead of the Patient Appointment window check two things:

1 – go to Options and make sure Template Mode is not checked off



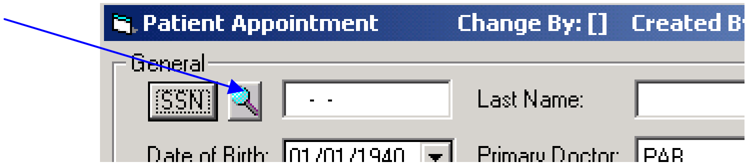
2 – go to File – Calendars – Calendar Properties – the Default Form should be Patient Appointment

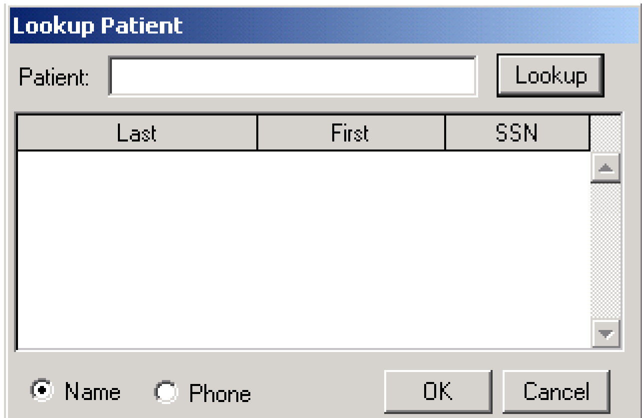


To Schedule an existing patient in an appointment slot:

1 – select the desired appointment slot and double click – the Patient Appointment window will appear.

2 – click the patient lookup button to search for a patient (blue arrow below)



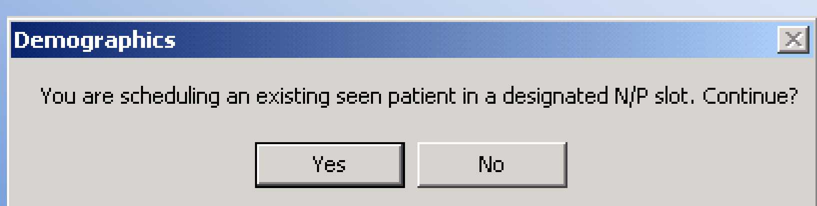


To search for a patient by last name select the **Name** option at the bottom of the form – to search by phone number, select Phone. Enter the patient's last name or phone number (or the first few letters/numbers) and click Lookup. Select the desired patient from the list that appears and click **OK.**

3 – the fields in the Patient Appointment window will fill in with the selected patient's information. Note that the Schedule Info section will now reflect the patient's New Patient appointment information – this is appropriate and should not be changed (it has no effect on the current appointment).

4 – click **Save**

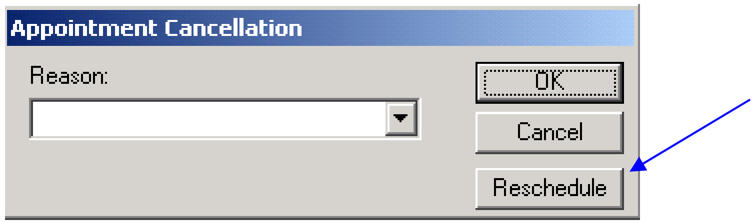
Existing patients should normally not be scheduled in slots designated/templated for N/P appointments – if you do proceed with scheduling an existing patient in a N/P slot you will receive a warning prompt:



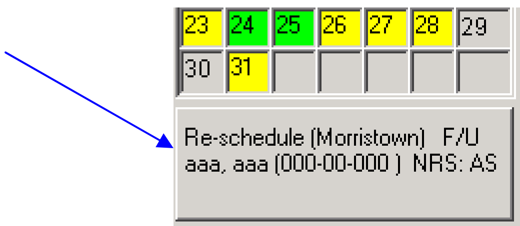
Choosing 'Yes' to the prompt will allow you to schedule the appointment and the system will change the given appointment template type to F/U (Follow Up) or R/P (Returning Patient). The patient qualifies for an RP appointment if she has not been signed in for 720 days – the system will calculate this and adjust the appointment type accordingly.

To Reschedule a patient appointment:

1 – select the scheduled appointment that is to be rescheduled and right click – select **Cut** from the menu that appears. The Appointment Cancellation prompt will appear.



2 – click the **Reschedule** button. The patient/appointment information will now appear in the Paste button (below the date picker calendar)



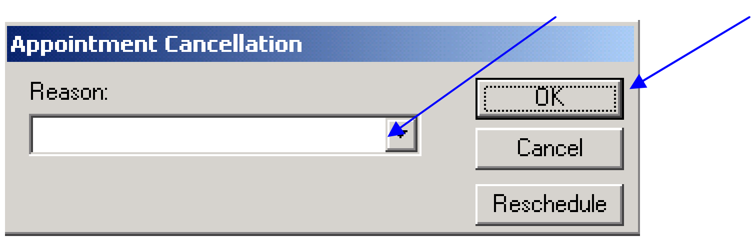
3 – go to the calendar, date and time you wish to move the appointment to and select the corresponding appointment template. A templated appointment slot must exist in order to reschedule the appointment there – if no template exists one must first be created. Templates are explained in the next section.

4 – click the **Paste** button (where the patient/appointment information is being stored). The appointment, with all the patient information, will now appear in the rescheduled appointment slot.

To Cancel a patient appointment:

1 – select the scheduled appointment that is to be cancelled and right click – select Cut from the menu that appears. The Appointment Cancellation prompt will appear.

2 – select a cancellation reason from the Reason dropdown and click **OK**



Clicking the **Cancel** button on the Appointment Cancellation prompt will cancel the current operation (and take you back to the scheduler); it will not cancel the appointment.