Appointment Scheduling
Objectives

Upon completion, participants will be able to:

- Define IDX’s Patient Scheduling;
- Explain the two different types of Registration;
- Describe the flow of Scheduling “Mini” Registration;
- Explain what an Appointment Type is and provide some examples;
- Schedule an appointment using at least two search options;
- XS Hospital Scheduling Action Code Process
- XX Hospital Scheduling Arrival Action Code Process
- Schedule an appointment into a non-clinic slot;
- Overbook a time slot in a provider’s schedule;
- Add comments to a provider’s schedule;
- Add time to the provider’s scheduler;
- Explain the purpose of the Appointment Data Form and know how to complete it;
- Know how to schedule cyclical appointments;
- Know two ways to link patient appointments and schedule linked appointments;
- Schedule a walk-in (same day) appointment;
- ER Appointment
- Schedule a reminder appointment;
- View patient appointments and provider schedules;
- Edit patient appointments;
- Reschedule patients from the bump list;
- Cancel and/or reschedule patient appointments;
- Arrive and/or No-Show patient appointments; and
- Custom Arrival Process
- Print daily scheduling reports.
**What is IDX Patient Scheduling?**

The Patient Scheduling application enables the scheduler to enter appointments for patients.
Patient Scheduling Workflow

- **Register The Patient**: Register a new patient through the mini Registration then perform a full registration. Data for existing patients can be updated.
- **Enter Appointment Criteria**: Enter appointment criteria, i.e., name of the patient’s provider, the provider, the desired date and time of appointment.
- **Determine Type Pf Appointment**: Determine type of appointment the patient needs to schedule, i.e., single appointment, ancillary appointment.
- **Search for an Appointment**: The system searches for an appointment which matches the criteria that has been entered.
- **Respond to the ADF**: Enter additional data regarding the appointment on the Appointment Data Form (ADF).
- **Enter Appointment Criteria**: File Appointment and Appointment Number is assigned.
 Concepts and Definitions

The IDX Patient Scheduling application enables us to load our providers’ scheduling preferences into the system. In order to schedule an appointment with a provider, the Master Scheduler has to have loaded that provider’s schedule into the IDX system.

Patient appointments are booked into the provider’s Daily Schedules.

The following are the major components of the IDX Scheduling Application:

Dictionaries

Dictionaries are the building blocks of the IDX system that store and organize information the system uses to process data and produce reports. Dictionaries store data that would otherwise have to be reentered frequently into the system.

Scheduling Profile

The Scheduling Profile is a series of questions that UMMG needed to answer with the IDX Scheduling installation. Our responses enabled or disabled certain features on our system, and determined the default values for several prompts.

For Appointment Scheduling, the following scheduling profile questions were necessary:

- Allow appointment 365 days in the future.
- Allow appointment 7 days in the past.
- Allow multiple appointments to start on different dates.
- Time range (around preferred time) to select a cyclical appt is 60 minutes.
- Default appointment search option is “First Available.”
- Display the appointment location in first available search.
- Enable cancel/no-show display in criteria screen.
- Display patient appointment status summary when scheduling an appointment.
- Default “NO” to "Display patient's appointments?" in F11.
- Enable conflict checking.
- Enable cancellation reasons dictionary and comment with the reason being required.
• Do not display cancellation comment or reason in F2.
• The default answer to the Reschedule: prompt is YES.
• Number of days to retain appointments on bump list for automated purge is 30 days.
• Prompt for wait list if appointment is after 30 days.
• Retain provider daily schedules for 365 days.
• Appts wirh a PEN status will automatically be changed to a NOS status 8 days after the appointment date.

Appointment Types

An Appointment type is the kind of appointment, such as a new patient Appointment, physical, surgery, etc. that each provider has to see patients. Each provider has his or her own Appointment types.

Appointment types have a long name (i.e., Consultation), a short name or mnemonic (i.e., CON) and a number (i.e., 3).

Appointment Type durations have been customized for the individual providers. This allows the scheduler to search for a CON that may be 15 minutes for one provider and 20 minutes for another provider.

The duration of a Appointment type can be changed when the appointment is made to allow for individual patient needs.

There are many standardized Appointment types that allow for faster learning across departments.

To allow a certain degree of standardization and cross scheduling, the IDX design team tried to keep a manageable number of Appointment types for the schedulers.

Time Slots

A time slot is a period of time reserved for a Appointment type and were defined in the Master Schedule. The providers’ schedules consists of time slots in which he/she will be available to see patients as well as time slots in which a provider will not be available to see patients.
When a provider sets up his/her schedule, there are certain requirements that the provider might have regarding the availability of his/her time that have been built into the master schedules, therefore the daily schedules as well. Master Schedules are created to allow each provider to design his/her own schedule for each day of the week. The Master Schedulers have set these up.

The Master Schedule designates Time Slots as available or non-available for patient appointments. The Master Schedule is the pattern after which Daily Schedules are created.

**Daily Schedules**

When Master Schedules are distributed, the system creates Daily Schedules. Because the Daily Schedule was created from the master, it takes into account the provider’s different types of Time Slots that are required.

Daily Schedules are the provider’s schedules used for booking appointments. Based on Master Schedules, Daily Schedules display all patient appointments or an individual day.

**Sessions**

A session is a period of time used to group appointments. Most providers use a morning session, an afternoon session, and/or an evening session for each day. (AM/PM/EVE)

**Benefits of Patient Appointment Scheduling**

**Patient Appointment Scheduling:**

- reduces the burden on staff needing to memorize provider preferences and relying on manual processes in order to select an appointment time for a patient, that meets the provider’s needs and workflow preferences;
- increases patient satisfaction;
- reduces the training time for new staff who will not have to learn provider preferences; and
• makes it easier for scheduling appointments across departments or locations.

The Relationship between Master and Daily Schedules

A Master Schedule:

• defined the Time Slots within the provider’s schedule for a period of time and is the basis for the Daily Schedules and allows each provider to design his/her own schedule for each day of the week;
• allows a provider to have several different schedules for each department or clinic; once created, is distributed to create the Daily Schedule. This process creates the Daily Schedules where appointments are booked.

What results from creating a Master Schedule? ...

Daily Schedules

<table>
<thead>
<tr>
<th>AM Session</th>
<th>PM Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Type</td>
</tr>
<tr>
<td>8:00</td>
<td>NPV</td>
</tr>
<tr>
<td>9:00</td>
<td>FUV</td>
</tr>
<tr>
<td>9:30</td>
<td>FUV</td>
</tr>
<tr>
<td>10:00</td>
<td>NPV</td>
</tr>
<tr>
<td>11:00</td>
<td>FUV</td>
</tr>
<tr>
<td>11:30</td>
<td>FUV</td>
</tr>
</tbody>
</table>

Below is an example of the relationship between Master Schedules and Daily Schedules.

• The diagram below shows Dr. Rodriguez’s Master Schedule created for Mondays, Wednesdays, and Fridays, from January 1, 1998 to May 31, 1998.
• Beneath the Master Schedule are his individual Daily Schedules, created when the Master Schedule is distributed.
Appointments are booked into these, the Daily Schedules.

THE MASTER SCHEDULE

Dr. Rodriguez
Monday, Wednesday, Friday

The Master Schedulers within each Scheduling Department creates the Daily Schedules.
**Module Summary**

- To schedule an appointment with a provider, a Master Scheduler created that provider’s schedule.
- Master Schedules are a model from which Daily Schedules are created.
- Master Schedules defines the time slots within the provider’s Daily Schedule used to book appointments. They also allow each provider to design his/her own schedule for each of his/her clinics and allow a provider to have different schedules for different clinics.
- Appointment Scheduling uses both dictionaries and Appointment types that were set up for the Enterprise and the individual Scheduling Departments.
Practice Exercise

1. Why are Appointment types important to scheduling an appointment?

2. What are some examples of Appointment types?

3. Which came first. . . the Master Schedule or the Daily Schedule?

4. Do you book appointments into the Daily Schedule? Yes No
Registration Activities

Registration is the process by which patients are added to the IDX patient database.

When a patient is registered, an account is created for that patient and appointments may be scheduled.

Only registered patients may be given an appointment.

There are two types of registration that may be used to register a patient into the IDX system:

1. **Mini Registration (also known as Scheduling Registration)** - contains less information than the full registration form. This form allows the scheduler to collect just the most essential information that is needed in order to schedule an appointment.

2. **Full Registration** - enables a user to enter demographic, guarantor, general comments and FSC information.

All Mini registration data collected for Scheduling Registration defaults into Full Registration, thus eliminating the need for duplicate data entry.
**Full Registration**

Full Registration enables a user to enter demographic, guarantor, general comments and FSC information.
Scheduling “Mini” Registration

What is Mini Registration?

Mini registration is specific to the Patient Scheduling application and is used for the scheduler to collect enough registration information in order to schedule an appointment. The patient must then be fully registered after the appointment is scheduled.

Why Use Mini Registration?

The scheduler is usually the first contact for a patient and it is the schedulers’ duty to make sure that the patients get their appointments scheduled in a timely fashion. However, once the patient accepts the appointment, that patient must be fully registered with all demographic and insurance information.
Can I Edit Mini Registration Data?

- Yes, once mini-registration data is entered, it can be edited.
- As a matter of fact, once a patient has been registered on the system, there may be times when this information needs to be changed.
- Editing mini registration information enables you to change the data that is currently in the registration database.
- IDX will display the mini registration screen with the completed fields.
- You may also edit Full Registration from appointment scheduling using either Function 14, Registration or Function 1, Action Code R.
**System Prompt:**  
**Your Response:**

<table>
<thead>
<tr>
<th>Select Function:</th>
<th>Access the Appointment Scheduling (F1)</th>
</tr>
</thead>
</table>
| **Patient:**    | Identify the patient using one of the standard name lookups  
Or enter a new patient in the system.  
Press <Enter> |
| **[No Matches]>** | Enter Y to register a new patient.  
Enter N to return to the **Patient:** prompt to either try another patient lookup, or look up another patient.  
Press <Enter> |
| **Register New Patient?** | This message appears if there was a patient found in the database, that matches the patient lookup criteria you entered.  
Enter Y if the displayed patient is correct, then Press <Enter>.  
Enter N if the displayed patient is not correct to return to the **Patient:** prompt to either try another patient lookup, or look up another patient. |
| **Is this the one Y=>?**  
(Press <RETURN> to continue) | This message appears if there were more than one patient found in the database matching the patient lookup criteria you entered. Enter the number of the correct patient you are looking for, or Press <Enter> to view more patients that match your criteria. |
|---------------------------------|--------------------------------------------------------------------------------------------------|
| **Edit registration data? NO=>** | Enter **Y** to edit the patient’s registration data. Enter **N** to not edit the patient’s registration data.  
Press <Enter>  
- Notice that Patient Registration Comments appear above this prompt. The system displays five lines of comments at a time.  
- The default has been set to NO, to allow you to bypass the registration screen and go directly to the criteria screen to schedule an appointment. |

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*University of Miami: Clinical Enterprise Technologies*
**Select: 1) Reg only, 2) FSCs only 3) Case only 4) All:**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Prompts you for patient demographic information.</td>
</tr>
<tr>
<td>2</td>
<td>Prompts you for patient insurance information.</td>
</tr>
<tr>
<td>3</td>
<td>Prompts you for patient case information.</td>
</tr>
<tr>
<td>4</td>
<td>Prompts you demographic, insurance &amp; case information.</td>
</tr>
</tbody>
</table>

Enter the number for the type of information that you want to add for this new patient. Number combinations may be used. For example, if the patient needs to be registered and FSC’ed type 1,2 at the system prompt.

- The Mini Registration has been customized to meet the Enterprise’s scheduling registration needs.
- Unlike Full Registration, which allows you several screens to work with, Mini Registration consists of only one screen.

This appears when you register a *new* patient through (F1), Schedule an Appointment to determine the type of information that you want to add for this new patient.

This prompt determines the type of registration information the system will display.
**Mini Registration Screen**

**What is the difference between Permanent and Local address?**

- **Permanent Address** – This address is the location the patient can be contacted for correspondence for the majority of the year. In other words, it indicates the address the patient resides when not at the local address. This may be domestic or international.

- **Local Address** -- The local address in this system is the address within the United States that the patient can be reached if different from the permanent.

<table>
<thead>
<tr>
<th><strong>System Prompt:</strong></th>
<th><strong>Your Response:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong></td>
<td>Enter the name of the patient using the standard IDX name format: LASTNAME,FIRSTNAME</td>
</tr>
<tr>
<td><strong>AKA:</strong></td>
<td>Enter the name the patient may be “also know as.”</td>
</tr>
<tr>
<td><strong>SSN:</strong></td>
<td>Enter the patient's 9-digit social security number. If you do not know the Social Security number use the following numbers: Babies: 111111111 Unknown: 000000000 Foreign Patients:999999999</td>
</tr>
</tbody>
</table>
| **DOB:** | Enter the date of birth for the patient.  
| | • You must use a date delimiter to separate  
| | the month, day and year. (/ , - ).  
| **Age:** | This field automatically calculates when  
| | the date of birth is entered.  
| **Sex:** | Enter the sex of the patient. The following  
| | are valid options in this field:  
| | 'M'ale,  
| | 'F'emale,  
| | 'I'ndeterminate.  
| **Perm Add 1:** | Enter the first line of the patient’s address.  
| | This is a free text field so you can enter  
| | information in any format up 30  
| | Characters.  
| | • You do not need to add punctuation to the street  
| | addresses. For instance, 2121 SW 36 TERR is  
| | correct.  
| **Perm Add 2:** | Enter the patient’s second address line  
| | such as an apartment number, suite  
| | number, or building number.  
| | • This also can be up to 30 characters long.  

<table>
<thead>
<tr>
<th>Perm Add 3:</th>
<th>Enter the third line of the patient’s address. This is most typically used for foreign patient addresses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perm Zip:</td>
<td>Enter the 5-digit U.S. zip code of the patient.</td>
</tr>
<tr>
<td></td>
<td>• Notice the City and State automatically appears when you enter the zip code.</td>
</tr>
<tr>
<td></td>
<td><em>Verify the City and State with the patient.</em></td>
</tr>
<tr>
<td></td>
<td>If the city is not correct, you may override the city by using your up &lt;↑&gt; arrow on your keyboard.</td>
</tr>
<tr>
<td>Perm CitySt:</td>
<td>Enter the patient’s city and state with no spaces.</td>
</tr>
<tr>
<td></td>
<td>• This defaults when you enter the zip, but can be accessed to change using your up/down arrow keys.</td>
</tr>
<tr>
<td></td>
<td>• To override the two letter format for a foreign city, place an asterisk before the city (e.g., *TORONTO,ONTARIO)</td>
</tr>
<tr>
<td>Perm Home Telephone:</td>
<td>Enter the patient’s domestic permanent home telephone number including area code.</td>
</tr>
<tr>
<td>Country:</td>
<td>Enter the country for the permanent address.</td>
</tr>
</tbody>
</table>
Foreign Zip: Enter the postal code for the patient’s mailing address outside the United States.
- This is free text field.

Telephone: Enter the patient’s foreign telephone number.
This field is a free text numerical field up to 15 digits.

Local Addr 1:
1. If the patient’s local address is the same as the permanent, then press <Enter> to go forward to the Employer Telephone: field.
2. If the patient’s local address is different from their permanent, enter the first line of the patient’s local address.
- This is a free text field so you can enter information in any format up 30 Characters.

Local Addr 2: Enter the patient’s second address line such as an apartment number, suite number, or building number.
- This also can be up to 30 characters long.
| **Local Zip:** | Enter the 5-digit U.S. zip code of the patient.  
Notice the City and State automatically appears when you enter the zip code.  
*Verify the City and State with the patient.*  
If the city is not correct, you may override the city by using your up <↓ ↑> arrow on your keyboard. |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| **Local CitySt:** | Enter the patient’s city and state with no spaces.  
- This field will default when you have entered the zip, but can be accessed to change by using your up and down arrow keys. |
| **Required Field** | Enter the telephone number of the patient at this address using a 10-digit phone number (including area code).  
- You do not need to use the hyphens. |
| **DayTel:** | |
| **EveTel:** | |
| **OtherTel:** | Enter the 10-digit patient's work phone number plus Extention. |
| **Telephone:** | |
| **Ext:** | Enter the extension of the patient's work telephone.  
- This is a numeric field, so use numbers only. |
<table>
<thead>
<tr>
<th><strong>Email Address:</strong></th>
<th>Enter the Email address for this patient. This is an optional field.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scheduling Comment:</strong></td>
<td>Enter up to 62-characters free text comment for this patient.</td>
</tr>
</tbody>
</table>
| **PCP:** | Enter patient's primary care physician.  
- It is easiest to type the provider’s last name or the partial last name then press <Enter>. |
| **Name:** | When your cursor returns to the name prompt, press <F10> to file this mini registration. |
| **Registration Document:** | Identify the registration document that you want to print.  
- You may print a facesheet that is a summary of the patient’s registration information by pressing <F>.  
If you do not want to print a Registration Document press <F10>. |
| **Print a Registration Label/Facesheet?** | Enter <Y> to print a registration label/facesheet.  
Enter <N> to not print a registration label/facesheet. |
<table>
<thead>
<tr>
<th><strong>Print immediately?</strong>&lt;br&gt;YES=&gt;</th>
<th>Press <code>&lt;Enter&gt;</code>, to print the facesheet now.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Device:</strong></td>
<td>Enter the name of the printer to send the document.</td>
</tr>
<tr>
<td><strong>Right Margin ##=&gt;</strong></td>
<td>Press <code>&lt;Enter&gt;</code> to accept the default.</td>
</tr>
<tr>
<td><strong>Date: MM/DD/YY=&gt;</strong></td>
<td>Press <code>&lt;Enter&gt;</code> to accept the default.</td>
</tr>
<tr>
<td><strong>Registration Document:</strong></td>
<td>Press <code>&lt;F10&gt;</code></td>
</tr>
<tr>
<td><strong>Provider:</strong></td>
<td>Continue entering the appointment criteria for this patient’s desired appointment.</td>
</tr>
</tbody>
</table>
Module Summary

- There are two types of registrations in IDX. The first is Full Registration and the second is Mini-Registration, also known as “Scheduling” registration.
- All information captured in scheduling registration will default into the full registration so that duplicate data entry is not necessary.
- When scheduling an appointment the registration that is accessed by the scheduler is called scheduling registration.
- Schedulers can also edit scheduling information when they access existing patient accounts.
- There are required fields on the mini-registration screen.
- There are many ways to look up a patient so that you do not create a duplicate account.
- Patients must be registered prior to being given an appointment.
- Mini Registration information carries over to the Full Registration screen so you do not need to enter the data again.
Practice Exercise

1. What are the two types of registrations used to register a patient on IDX? What is the difference(s) between them?

2. Your instructor will provide you with three patients to register using Scheduling registration.
   • You will be using these patients in subsequent exercises so be sure to enter the data as it was given to you.

3. How do you recall the last patient you were working with?

4. If you could not figure out how to spell a patient’s name, how could you perform a lookup without asking the patient to spell his/her name?
Single Appointments (F1)

The Patient Scheduling application enables schedulers to schedule many types of appointments.

When you schedule an appointment for one patient, this is referred to as a single appointment. This is the most commonly scheduled appointment. This module describes how to schedule a single appointment and also describes other features that can be used when scheduling a single appointment.

You may schedule single appointments using any of the following search options:

- First Available Searches and First Available Detail Searches
- Summary Searches
- Quick Summary Searches

Appointment Criteria

To schedule an appointment, IDX asks you for the appointment criteria.

Appointment criteria is the information given to the scheduler by the patient pertaining to their desired appointment. Once the appointment criteria is entered, the system can search for available appointments by locating appointments in the provider’s schedule which match the information entered on the criteria screen.

- Criteria is collected from the patient and entered on the criteria screen (below). The criteria screen is where the scheduler enter information in order to schedule an appointment.
- This information enables the system to locate an appointment for the patient.
**First Available Search (F1)**

Once the appointment criteria has been entered, the scheduler will have the system search for an appointment on the system which exactly matches the appointment criteria.

Appointment History - The system tracks all scheduled appointments for a patient. The appointment status summary notifies the scheduler of the appointment history for a patient.

<table>
<thead>
<tr>
<th>System Prompt:</th>
<th>Your Response:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select Function:</strong></td>
<td>Access Function 1, Scheduling an Appointment (F1)</td>
</tr>
<tr>
<td><strong>Patient:</strong></td>
<td>Enter the name of the patient who wants to schedule an appointment, using the standard IDX name format.</td>
</tr>
</tbody>
</table>
**Provider:** Enter the name of the provider for which you wish to schedule an appointment.

Press <?> to list the valid providers.

- You can enter his/her name, mnemonic or number.
- This entry is a lookup into the Scheduling Providers Dictionary (302).
- There are times when a message may appear when you select a provider; this message is called a provider *pre-scheduling message*. This message is used when a provider wants the scheduler to convey important information to the patient when an appointment is being scheduled with him or her.
**Department:**

Enter the name of the department for which the patient wishes to schedule an appointment.

Press `<?>` to list the valid departments for the selected provider.

- If the provider belongs to only one department, then the system defaults to that department.

- A provider may work in more than one department, therefore make sure you schedule the appointment in the correct department. The department will get filled in automatically if the provider works in only one department.

- There are times when a departmental prescheduling message for the patient may appear when you select a department.
| Appointment Type: | Enter the type of Appointment for which you are making the appointment. (You can enter the name, mnemonic or number of the Appointment type.) To display the list of available Appointment types enter a `<?>` for a list.  

- If the patient is an HMO patient, a Copay / Referral window may appear. The referral and/or Copay can be entered when the appointment is being booked.  
- Appointment types define the type of appointments a patient can schedule with a provider. Every provider is set up with at least one schedule; this schedule is made up of Appointment types which patient’s can schedule with this provider.  
- There are times when a Appointment type pre-scheduling message appears when you select a Appointment type. The messages displays information to tell the patient. |
| **From Date:** | Enter the date from which the patient would like to schedule his/her appointment. This is the date that the system will begin searching for an available appointment.  
- When the system searches for an appointment, it uses this date as the first date to start looking for an appointment in the provider’s schedule.  
Use the standard IDX date format  
- The system defaults to tomorrow’s date.  
The date you enter has some restrictions. You will not be allowed to schedule an appointment farther than 365 days in the future |
**APE/DOW:** Enter the time and date preference of the patient. If the patient has no preference, you can skip this by pressing `<Enter>` and accepting the default of SU,M,TU,W,TH, F, and SA.

APE = AM, PM, Evening
DOW = Day of Week

**Examples:**

- To specify more than one session, separate each with a comma: `A,P`  
- To specify more than one day of the week, separate each with a comma: `M,W,F`  
- To specify more than one session and days of the week separate each with a comma and the session and day of the week with a slash: `A,P/M,TU,F`  
- To specify multiple APE/DOW entries, use a semicolon: `A/M;W;P/TH,F`
| Location: | Enter the location the patient wishes to make the appointment. Entering a location assures you that only available appointments for the selected location are displayed. This field looks up to the Scheduling Locations Dictionary (331). |
Search Option: Once the appointment criterion is entered IDX searches for an appointment.

The criteria enables the system to locate an appointment in the provider’s schedule, which matches the information, entered on the criteria screen. The Patient Scheduling Application uses search options to locate available appointments.

There are three different types of searches:

First Available (FI), Summary (SU) or Quick Summary (QU).

A First Available search, searches the provider’s schedule for appointments that match the patient appointment criteria. This search option is the fastest way to search for an appointment.

Press <F10> to search for the first available appointment.
**Appointment?**

Enter the appointment number for the appointment that you want or press `<Enter>` to display the next 5 available appointments, then enter the number of the appointment you wish to select.

The system displays the first appointment it finds in the provider’s schedule which exactly matches the patient’s appointment criteria and display it in the message area of the criteria screen.

The system displays the date, the day of the week, the time and the location of the appointment.

To go back to see previous or see future appointments, use the commands **F** for forward and **B** for backwards.

When you find the appointment the patients wants, enter the number, and then press `<Enter>`.
**First Available Screen**

<table>
<thead>
<tr>
<th>Schedule an Appointment</th>
<th>IUSAC.ONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient: AAA, NEJIA</td>
<td>Unmg #: 07/30/1971</td>
</tr>
<tr>
<td>Provider: ALFonso MD, EDUARDO</td>
<td>Addr: 1150 SW 147 AVE</td>
</tr>
<tr>
<td>Department: Ophthalmology</td>
<td>City, St: MIAMI, FL</td>
</tr>
<tr>
<td>C/T/D:</td>
<td>Pt Status:</td>
</tr>
<tr>
<td>Visit Type: NPV 15</td>
<td>FSC1:</td>
</tr>
<tr>
<td>From Date: 04/24/2003</td>
<td>FSC2:</td>
</tr>
<tr>
<td>APE/DOW: SU, M, TU, W, TH, F, SA</td>
<td>FSC3:</td>
</tr>
<tr>
<td>Location:</td>
<td>Unmg MCA PCP:</td>
</tr>
</tbody>
</table>

Search Option: 21 First Available Summary Quick Summary Reminder

F7Q-Quit F7P-Page F10-OK <Shift>F4-Major <Shift>F5-Help <Shift>F3-More keys
Appointment Data Form (ADF)

Once an appointment has been selected, the system branches to another screen referred to as the Appointment Data Form.

- The Appointment Data Form (ADF) enables the scheduler to capture additional appointment information for the patient. For example, if a provider referred a patient, we want to collect this information when scheduling the appointment.

<table>
<thead>
<tr>
<th>System Prompt:</th>
<th>Your Response:</th>
</tr>
</thead>
<tbody>
<tr>
<td>New to UMMG?</td>
<td>Enter &lt;Y&gt; if this patient has never been seen by a UM provider. Enter &lt;N&gt; if this patient has been previously seen by a UM provider.</td>
</tr>
</tbody>
</table>
| **Alt Ins Coverage:** | If this appointment will be covered by another insurance such as Worker’s Compensation, Self Pay, ect.  
- Enter <Y> if another insurance will pay  
- Enter <N> if the FSC will pay |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ALT INS:</strong></td>
<td>Press &lt;?&gt; to list all alternate insurances</td>
</tr>
<tr>
<td><strong>Prim Lang:</strong></td>
<td>Press &lt;?&gt; to list all primary languages</td>
</tr>
<tr>
<td><strong>ApptContact #:</strong></td>
<td>Enter the patient’s contact number if it is different than the home, or work number. You may use the “?” to access the DayTel:, EveTel: and OtherTel:. You may use the @D for DayTel: or the @E for the EveTel: or the @O for the OtherTel.</td>
</tr>
<tr>
<td><strong>Reason for Appointment:</strong></td>
<td>This is a free text field, which describes why the patient is coming in for a Appointment.</td>
</tr>
</tbody>
</table>
| Referring Physician: | Enter the name of the Referring Physician for this Appointment.  
This is a dictionary lookup.  
- Note that you will not be required to enter the provider’s UPIN number if the provider is in the dictionary. |
|-----------------------------------------------|
| Referring Physician Ftxt: | If the referring physician is not in the dictionary, then enter his/her name as free text.  
- Another screen displays for you to enter the referring physician information. |
| Referring Agency: | Enter the name of the agency that referred this patient. |
| Comment: | Enter a comment that pertains to the patient’s appointment.  
- If your comment is too long to fit press the `<Page Down>` key to access additional comment lines.  
An example of a comment may be ‘Using xyz Transportation for this Appointment.’. |
| **Insurance:** | Enter the patient’s insurance. This is a free text entry to use if the patient has not been assigned a Financial Status yet.  
This does not replace adding a FSC for the patient. |
|-----------------|-------------------------------------------------------------------------------------------------|
| **Send Notification to pt?:** | Enter <Y> to send the patient an appointment confirmation letter.  
Enter <N> to not send the patient an appointment confirmation letter.  
This is a required Field. |
| **Send In Spanish?:** | Enter <Y> to send patient appointment correspondence in Spanish. |
| **All cyclical appt on one letter?:** | Enter <Y> to have all cyclical appointment confirmations printed on one letter.  
Enter <N> to have cyclical appointments confirmations printed on different letters. |
| **Appt Confirmed?:** | Enter `<Y>` if this appointment has been confirmed. By editing appointments
- Leave this field blank if the appointment has not yet been confirmed.
- This is used by Physician Referral Office (PRO) in order to determine if the appointment was confirmed
|
| **UMMG Referral #:** | Enter the UMMG generated referral number for this Appointment.
Enter `<?>` to lookup a referral entered in Open Referrals
|
| **Missing Referral Reason:** | Enter the reason that this patient does not have an authorization.
|
| **Auth #:** | Enter the plan generated authorization number for this Appointment.
If the patient does not have the referral on IDX, then enter the number in this field
|
| **Copay** | Enter the copayment amount for this appointment
|
| **Case#:** | Enter the single negotiation case number |
Referring Physician Field in the Appointment Data Form

In order to capture and track referrals to our health system, the Referring Physician Field in the Appointment Data Form is a required field.
Scenario 1:

The doctor that referred the patient is in the Referring Physician dictionary, follow the steps listed below: In the ‘Ref Phys’ field, type the referring physician’s last name and select the appropriate doctor from the dictionary.

![Appointment Data Form]

Scenario 2

The doctor that referred the patient is not in the Referring Physician dictionary, follow the steps listed below: In the ‘Ref Phys’ field, enter REF PHY NOT FOUND.

![Appointment Data Form]
In the ‘Ref Phys Ftxt’ field, free text the doctor’s name. In an effort to keep the data standardized please use the following format when free texting the doctor’s name: Last name MD, First name.

The system will then route you to the Referring Physician Free textscreen. All the fields in this screen must be populated.
Please Note: If the Referring Physician is not in the dictionary, you need to complete a Referring Physician (Provider) Dictionary #123 Maintenance Form and email it to mailto:idxupre@med.miami.edu. The form can be obtained online at http://cet.med.miami.edu/x96.xml.

Scenario 3
If the patient was self referred, select the Self Referred option from the Ref Phys: prompt
Appointment (for Hospital Scheduling only)

When a hospital physician orders an ancillary test, the scheduler must link that physician on the ancillary appointment’s referring physician ADF field. This ensures that the ancillary and physician Appointments are combined onto one bill for that date of service.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Appointment</th>
<th>ADF Referring Physician field</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Patient sees PCP, Dr. Jones</td>
<td>Appointment with Dr. Jones</td>
<td>No referring needed</td>
</tr>
<tr>
<td>B Dr. Jones refers patient to Dr. Smiddy</td>
<td>Appointment with Dr. Smiddy</td>
<td>Dr. Jones</td>
</tr>
<tr>
<td>C Dr. Smiddy wants patient to have an ancillary test</td>
<td>Ancillary appointment</td>
<td>Dr. Smiddy</td>
</tr>
</tbody>
</table>

The table below indicates the step by step instructions on how to book a physician and ancillary linked appointment.
### TABLE 2. Step by step booking a physician and ancillary linked appointment

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
</table>
| Enter appointment criteria screen for physician and ancillary test on the  | • Access Scheduling and select **Function 1 Schedule an Appointment**  
| same day                                                                   | • Press the **Page Down** key to access the multiple column screen  
|                                                                             | • Notice you have three columns. Begin entering the information for the first appointment on column A  

![Image of appointment scheduling interface](image-url)
<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>At the <strong>Patient</strong> prompt, enter the patient name using the standard IDX name lookup options and press <strong>ENTER</strong></td>
<td></td>
</tr>
<tr>
<td>Once you enter the name, the MRN will be populated automatically</td>
<td></td>
</tr>
<tr>
<td>At the <strong>Provider</strong> prompt, enter the name of the physician.</td>
<td></td>
</tr>
<tr>
<td><em>If you are scheduling the ancillary test first, then enter the name of the ancillary test.</em> <em>(i.e. VF Faculty-MIA for ABLEH)</em></td>
<td></td>
</tr>
<tr>
<td>Press <strong>Enter</strong> to move to the next field</td>
<td></td>
</tr>
<tr>
<td>At the <strong>Appointment Type</strong> prompt, enter the appropriate Appointment type. Type a ? to view a list. Once selected, press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
<tr>
<td>At the <strong>From Date</strong> prompt, enter the date when the patient is scheduling the appointment. Use the “T” to indicate Today. If the appointment will occur in the future, use the letter “T” followed by the “+” and number of days when you want to start searching for an appointment. Press <strong>Enter</strong> to move to the next field. <em>(i.e. T+10)</em></td>
<td></td>
</tr>
<tr>
<td>At the <strong>APE/DOW</strong> prompt, you may enter any session and day preference. If the patient does not have any preference, then press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
<tr>
<td>At the <strong>Location</strong> prompt, you may select a location for the appointment. You can press <strong>Enter</strong> since it the schedules are defined with locations.</td>
<td></td>
</tr>
<tr>
<td>At the <strong>Search Option</strong> prompt, the system defaults to FI (First Available). It will provide you the first available appointment for the specified provider and date. Press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
</tbody>
</table>

# Table 2. Step by step booking a physician and ancillary linked appointment

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<td></td>
</tr>
<tr>
<td>Press <strong>Enter</strong> to move to the next field</td>
<td></td>
</tr>
<tr>
<td><strong>At the Appointment Type</strong> prompt, enter the appropriate Appointment type. Type a ? to view a list. Once selected, press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
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<td></td>
</tr>
<tr>
<td><strong>At the APE/DOW</strong> prompt, you may enter any session and day preference. If the patient does not have any preference, then press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
<tr>
<td><strong>At the Location</strong> prompt, you may select a location for the appointment. You can press <strong>Enter</strong> since it the schedules are defined with locations.</td>
<td></td>
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<tr>
<td><strong>At the Search Option</strong> prompt, the system defaults to FI (First Available). It will provide you the first available appointment for the specified provider and date. Press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
</tbody>
</table>
You are now at **Column B** schedule. The appointment to be linked to Column A.

- At the **Patient** prompt, you can type “R” to recall the last patient since you are scheduling for the same patient. Press **Enter** to move to the next field.

- At the **Provider** prompt, enter the physician name. If you are scheduling the ancillary test, then enter the name (i.e. VF-Faculty MIA). Press **Enter** to move to the next field.

- At the **Appointment Type** prompt, enter the appropriate Appointment type. Type a ? to get a list to choose one. Press **Enter** to move to the next field.

- If the patient’s insurance is an HMO and requires an authorization, a referral screen is displayed. If one is not available, then you must create one or enter a *Missing Referral Reason*. Use the Policy & Procedures discussed in Open Referral, and your Open Referral training manual for guidance. Press **F10** to continue to the next step.

- At this point you will be at column C. Press **F10** to proceed to begin searching for the appointment.

### TABLE 2. Step by step booking a physician and ancillary linked appointment

<table>
<thead>
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<tr>
<td>You are now at <strong>Column B</strong> schedule. The appointment to be linked to Column A.</td>
<td></td>
</tr>
<tr>
<td>- At the <strong>Patient</strong> prompt, you can type “R” to recall the last patient since you are scheduling for the same patient. Press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
<tr>
<td>- At the <strong>Provider</strong> prompt, enter the physician name. If you are scheduling the ancillary test, then enter the name (i.e. VF-Faculty MIA). Press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
<tr>
<td>- At the <strong>Appointment Type</strong> prompt, enter the appropriate Appointment type. Type a ? to get a list to choose one. Press <strong>Enter</strong> to move to the next field.</td>
<td></td>
</tr>
<tr>
<td>- If the patient’s insurance is an HMO and requires an authorization, a referral screen is displayed. If one is not available, then you must create one or enter a <em>Missing Referral Reason</em>. Use the Policy &amp; Procedures discussed in Open Referral, and your Open Referral training manual for guidance. Press <strong>F10</strong> to continue to the next step.</td>
<td></td>
</tr>
<tr>
<td>- At this point you will be at column C. Press <strong>F10</strong> to proceed to begin searching for the appointment.</td>
<td></td>
</tr>
</tbody>
</table>
TABLE 2. Step by step booking a physician and ancillary linked appointment

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
</table>

- Since First Available search was selected, the system will prompt you to choose a time for Appointment A and a time for Appointment B. The screen will display five (5) appointment choices for each column.

Note: You must pay close attention to the selections since both appointments need to occur on the same day and relatively close in time.

- At the Appointment A prompt, type the number that corresponds for the appointment date and time you wish to select. If both appointments do not coincide, press Enter to see more choices where the date, time and location match, press Enter. Notice the appointment for column A stays highlighted.

- At the Appointment B prompt, type the number that corresponds for the appointment date and time you wish to select. Press Enter to continue.
<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule an Appointment</td>
<td>LUSAC.LNK</td>
</tr>
<tr>
<td><strong>Patient:</strong> TEST, ANA*</td>
<td>TEST, ANA*</td>
</tr>
<tr>
<td><strong>MRN:</strong> 8846947</td>
<td>8846947</td>
</tr>
<tr>
<td><strong>Provider:</strong> VF, FACULTY-MIA</td>
<td>BUDENZ MD, DONALD L</td>
</tr>
<tr>
<td><strong>Department:</strong> VISUAL FIELDS</td>
<td>OPHTHALMOLOGY</td>
</tr>
<tr>
<td><strong>Visit Type:</strong> FUV S</td>
<td>FUV S</td>
</tr>
<tr>
<td><strong>From Date:</strong> 02/12/2004</td>
<td></td>
</tr>
<tr>
<td><strong>APE/DOW:</strong> SU, M, TU, W, TH, F, SA</td>
<td>1 SAS2.A</td>
</tr>
</tbody>
</table>

TABLE 2. Step by step booking a physician and ancillary linked appointment
Enter information on the ADF for Appointment A

- The first ADF will be for the appointment on column A.
- At **New to UMMG?** prompt, enter Y or N. If the patient is New to UMMG then answer Y otherwise N.
- At the **Alt Ins Coverage?** prompt, enter Y if the patient’s appointment will be paid by an alternate method other than health insurance. Enter N if the appointment will be paid using health insurance.
- At the **Alt Ins** prompt, enter a ? to get the choice for alternate insurance. If you answered N to the Alt Ins Coverage question, you will not be prompted to this field.
- At the **Prim Lang** prompt, enter the patient’s primary language.
- At the **Appt Contact#** prompt, enter a phone number where the patient can be reached. This field is formatted for a phone number.
- At the **Reason for Appointment** prompt, enter a reason why the patient is scheduling this appointment. This is a free-text field.
- At the **Referring Phys.** If this is the ADF for the ancillary appointment, enter the physician who ordered the test. This is a required field.
- At the **Send Notif to Pt** prompt, enter the Y if the patient wants to be notified about this appointment. Otherwise enter N.
- Press **F10** to save the information on the ADF.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
</table>
| Enter information on the ADF for Appointment A | - The first ADF will be for the appointment on column A.  
- At **New to UMMG?** prompt, enter Y or N. If the patient is New to UMMG then answer Y otherwise N.  
- At the **Alt Ins Coverage?** prompt, enter Y if the patient’s appointment will be paid by an alternate method other than health insurance. Enter N if the appointment will be paid using health insurance.  
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- At the **Prim Lang** prompt, enter the patient’s primary language.  
- At the **Appt Contact#** prompt, enter a phone number where the patient can be reached. This field is formatted for a phone number.  
- At the **Reason for Appointment** prompt, enter a reason why the patient is scheduling this appointment. This is a free-text field.  
- At the **Referring Phys.** If this is the ADF for the ancillary appointment, enter the physician who ordered the test. This is a required field.  
- At the **Send Notif to Pt** prompt, enter the Y if the patient wants to be notified about this appointment. Otherwise enter N.  
- Press **F10** to save the information on the ADF. |
TABLE 2. Step by step booking a physician and ancillary linked appointment

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Re-Cap screen for Appointment A</td>
<td>The appointment re-cap screen is displayed with the information entered on the ADF. Press Enter to continue.</td>
</tr>
<tr>
<td>VM/HPA Visit creation for Appointment A</td>
<td>If the appointment is within 14 days, the system will take you through the process of creating a Appointment. You will see Registration, Plans, Hold Bills and Demand Form. Press F10 at each screen. Press Enter to continue.</td>
</tr>
</tbody>
</table>
TABLE 2. Step by step booking a physician and ancillary linked appointment

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter information on the ADF for Appointment B</td>
<td>• The second ADF will be for the appointment on column B.</td>
</tr>
<tr>
<td></td>
<td>• At New to UMMG? prompt, enter Y or N. If the patient is New to UMMG then answer Y otherwise N.</td>
</tr>
<tr>
<td></td>
<td>• At the Alt Ins Coverage? prompt, enter Y if the patient’s appointment will be paid by an alternate method other than health insurance. Enter N if the appointment will be paid using health insurance.</td>
</tr>
<tr>
<td></td>
<td>• At the Alt Ins prompt, enter a ? to get the choice for alternate insurance. If you answered N to the Alt Ins Coverage question, you will not be prompted to this field.</td>
</tr>
<tr>
<td></td>
<td>• At the Prim Lang prompt, enter the patient’s primary language.</td>
</tr>
<tr>
<td></td>
<td>• At the Appt Contact# prompt, enter a phone number where the patient can be reached. This field is formatted for a phone number.</td>
</tr>
<tr>
<td></td>
<td>• At the Reason for Appointment prompt, enter a reason why the patient is scheduling this appointment. This is a free-text field.</td>
</tr>
<tr>
<td></td>
<td>• At the Referring Phys. If this is the ADF for the ancillary appointment, enter the physician who ordered the test. This is a required field.</td>
</tr>
<tr>
<td></td>
<td>• At the Send Notif to Pt prompt, enter the Y if the patient wants to be notified about this appointment. Otherwise enter N.</td>
</tr>
<tr>
<td></td>
<td>• Press F10 to save the information on the ADF</td>
</tr>
<tr>
<td>Appointment Re-Cap screen for Appointment B</td>
<td>• The appointment re-cap screen is displayed with the information entered on the ADF. Press Enter to continue.</td>
</tr>
</tbody>
</table>
TABLE 2. Step by step booking a physician and ancillary linked appointment

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<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VM/HPA Visit creation for Appointment B</td>
<td>If the appointment is within 14 days, then the system will take you through the process of creating an Appointment. You will see Registration, Plans, Hold Bills and Demand Form. Press F10 at each screen.</td>
</tr>
<tr>
<td>The system to take you back to the Schedule an Appointment screen</td>
<td></td>
</tr>
</tbody>
</table>
**Appointment Re-Cap Screen**

When you Press `<F10>` to exit the Appointment Data Form, you are brought to the appointment re-cap screen.

![Appointment Re-Cap Screen Image](image)

- **Appointment for:** AAA, MEJIA
- **MRN:**
- **Date:** THURSDAY, 24 Apr 2003
- **Provider:** ER PHYSICIAN
- **Type:** NPV/15 min
- **Time:** 01:30AM
- **Department:** ABLEH EMERGENCY RN
- **Location:** AB EMERGENCY

Visit Data Questions:
1. **Contact #:** WK3052433665
2. **Reason for Visit:** IRRITATION ON THE LEFT EYE
3. **Send Notif to Pt?:** N
9. **Missing Referral Reason:** NO REFERRAL NEEDED
16. **Send in Spanish:** N
18. **All appts on 1 ltr?:** Y

Ok to file the appointment? YES=>
<table>
<thead>
<tr>
<th>System Prompt:</th>
<th>Your Response:</th>
</tr>
</thead>
</table>
| Ok to file the appointment? YES=> | This prompt enables the scheduler to file the appointment and take an appointment slot in the provider’s schedule.  
  - Press `<Enter>` to accept this default of Yes, and file the patient’s appointment.  
  - Press `<N>` if you do not want to file this appointment. |

| Appointment#: ###_ | When you file the appointment, the system assigns a Appointment number to the appointment.  
The Appointment number is used in Billing and Accounts Receivables (BAR) during charge entry; the Appointment number can be used to default appointment information. |

| Messages | Provider, Department, and Appointment Type Post-Scheduling Message may appear after you file the appointment. The post scheduling messages are used when a provider and/or clinic want the scheduler to convey information to the patient after an appointment has been filed. |
For appointments scheduled for hospital Appointments and the appointment date is within the next 14 day, a Visit will be created in VM/HPA as soon as the appointment is filed <F10>.

Appointment Re-Cap Screen and VM Action Codes

If the appointment is not for a hospital Appointment or if the appointment is for a date more than 14 days in the future (even if it is a hospital Appointment), these screens will not display.

The end result of the special screens is that a VM/HPA Visit will be created automatically by the Sched Link.

XS is the Pre-Admit through the Sched Link Action Code Process that is automatically executed.

<table>
<thead>
<tr>
<th>Action Code</th>
<th>Definition</th>
<th>What To Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>RE</td>
<td>Registration</td>
<td>Verify the patient’s demographic data</td>
</tr>
<tr>
<td>IV</td>
<td>Assign Plans to the Visit</td>
<td>The system will automatically assign the Plans based on the Registration FSCs or Alternate Insurance if it is indicated in the ADF.</td>
</tr>
<tr>
<td>HB</td>
<td>Hold Bill</td>
<td>Work all the Hold Bills that you can.</td>
</tr>
<tr>
<td>DF</td>
<td>Demand Form</td>
<td>Select appropriate forms to be printed.</td>
</tr>
</tbody>
</table>

Patient: This prompt enables the scheduler to return to the criteria screen so you can schedule another appointment.
Category / Team / Department Searches

Use this type of search when a new patient calls for an appointment and does not want to see a specific provider, but just needs an appointment within a scheduling department.

System Prompt: Access Function 1, Scheduling an Appointment (F1)
| **Patient:** | Enter the name of the patient who wants to schedule an appointment, using the standard IDX format. |
| **Provider:** | Press `<Enter>` to bypass this prompt. |
| **Department:** | Enter the name of the department for which the patient wishes to schedule an appointment. Press `<?>` to list the valid scheduling departments.  
- This field is a lookup into the Scheduling Departments Dictionary. This dictionary describes the medical specialties within a department; for example, Pedi Associates. There are times when a message may appear when you select a department; this message is called a department pre-scheduling message. The department pre-scheduling message is used when a scheduling department wants the scheduler to convey information to the patient being scheduled. |
C/T/D: Enter a **<D>** to search for a provider within a department.

Enter **<C>** to search for a provider within a certain category.

- When the system performs a department search, available appointments are displayed in time order and then alphabetically by the provider name.

Continue to complete the appointment criteria screen and proceed as you would with a regular appointment.
First Available Detail Search

A detail search allows you to view the provider’s schedule while scheduling the appointment.

- A first available detail search enables the scheduler to view the provider’s schedule prior to scheduling an appointment.
- A first available detail search enables the scheduler to obtain more information about the provider’s schedule before booking the appointment into a session.
- A first available detail search enables the scheduler to perform other tasks while scheduling an appointment.
- First Available Detail enables you to:
  - Schedule an appointment into a time slot that is not an exact match; for example, you can schedule a New Patient Appointment appointment in a time slot defined for a Consultation.
  - Schedule an appointment into a non-clinic slot.
  - Overbook by scheduling an appointment into a time slot that is already full.
  - Overbooking on IDX means exceeding the allocation that was entered in the provider’s master schedule. For example, the provider schedule is set up so two New Patient Appointments can be scheduled at 9:00 a.m. the scheduler overbooks when he/she schedules more than two at this time.
  - Add time to the provider’s schedule.
**System Prompt:**

**Select Function:**
Access Function 1, Scheduling an Appointment (F1).
Enter the criteria as explained in the earlier lesson.
| Search Option:          | Press `<F10>` to search for the first available appointment.  
|                       | *Remember*, searching for an appointment enables the system to locate an appointment in the schedule which matches the information entered on the criteria screen. |
| Appointment?           | You may either view the detail for the first appointment “1)” or press `<Enter>` to display the next five appointments.  
|                       | You can display appointment detail by entering a command at the Appointment?: prompt.  
|                       | You enter D# (the sequence number of the appointment.) |
| Display detail for which session? | Here is where you specify the session for which to view appointment detail.  
|                       | ² You can enter A or 1 to see the detail of the morning session of the provider’s schedule.  
|                       | ² Enter P or 2 to see the detail of the afternoon session of the provider’s schedule.  
<p>|                       | ² Enter E or 3 to see the detail of the evening session of the provider’s schedule. |</p>
<table>
<thead>
<tr>
<th>Overbook Slot?</th>
<th>Enter Y to overbook the slot that you selected. Enter N to not overbook the slot and return to the detail screen to select another time slot option.</th>
</tr>
</thead>
</table>

The system displays the first available appointment that exactly matches the Appointment type on the criteria screen.

Use your up arrow to scroll up until the time slot that you wish to book the appointment is highlighted.

- To choose a time slot from First Available Detail, you move the highlighted bar with the up and down arrow keys to the time slot you want to schedule and Press <Enter> to select the appointment time.

- Notice how the system displays a diamond next to the selected appointment. This lets you know you have selected the time slot.

Press <F10> and the system will display the Appointment Data Form for you to continue to schedule the appointment.
## First Available Detail Screen

<table>
<thead>
<tr>
<th><strong>System Display:</strong></th>
<th><strong>Definition:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time</strong></td>
<td>Lists the time the appointment slot begins.</td>
</tr>
<tr>
<td><strong>Typ</strong></td>
<td>Lists the Appointment types booked into the time slot.</td>
</tr>
<tr>
<td></td>
<td>“XXX” appears in the <strong>Typ</strong> column if the appointment time was added to the schedule.</td>
</tr>
<tr>
<td><strong>Dur</strong></td>
<td>Lists the duration, or length of the time slot of the Appointment type booked into this time slot.</td>
</tr>
<tr>
<td><strong>Bk</strong></td>
<td>List the number of appointments currently booked into this time slot.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Bk</strong> column contains a tilde (~) if there are more patients booked into this slot than the slot is set up to hold.</td>
</tr>
</tbody>
</table>
| **Av** | List the number of slots that are still available to be booked for appointments.  
- If this slot is highlighted, it means it is an exact match of the Appointment type entered on the criteria screen.  
A hyphen (-) appears before the patient name in this column indicating that there are no more available appointment in these time slot. |
| **Name, MRN, Age, Telephone** | This list information regarding the patient booked into each time slot. |
First Available Detail Action Codes

Action codes are a one-letter codes that appear at the bottom of screens. Action codes appear in a menu in the message area of the screen and vary by IDX applications, functions and activities.

<table>
<thead>
<tr>
<th>Action Code:</th>
<th>Definition:</th>
</tr>
</thead>
</table>
| E - Add, Edit Commentx | Adds a comment to a provider’s schedule while you are scheduling an appointment. Select the time slot you wish to edit by using your up and down arrow keys, then press <E> to add/edit the time slot comments. You can enter up to 22 character of free text or edit an existing comment by typing over it, or you can delete it by press <F1>.  
- This comment will appear whenever you display the session containing this time slot. When you are finished editing the comments, press <F10>. |
<p>| O – View Resources    | Displays the resources for the Appointment types.                            |</p>
<table>
<thead>
<tr>
<th>R - Registration</th>
<th>Press <code>&lt;R&gt;</code> to select the Registration action code.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Prompt</strong></td>
<td><strong>Your response:</strong></td>
</tr>
<tr>
<td>Select: 1) Reg only, 2) FSCs only, 3) Case only, 4) All:</td>
<td>Select the areas of registration you wish to edit, then press <code>&lt;Enter&gt;</code>. When you have finished making the changes in registration, Press <code>&lt;F10&gt;</code> to file the changes and return to the First Available Detail Screen.</td>
</tr>
<tr>
<td>Select: 1) Reg only, 2) FSCs only, 3) Case only, 4) All:</td>
<td>Select the areas of registration you wish to edit, then press &lt;Enter&gt;. When you have finished making the changes in registration, Press &lt;F10&gt; to file the changes and return to the First Available Detail Screen.</td>
</tr>
</tbody>
</table>
**X - Add Time**  

Allows you to add time to the provider’s schedule while scheduling an appointment.

Enter the time you wish the appointment to begin, Press <Enter> then Press <F10>

The system will display the message **Time slot XX:XX added** and then display the prompt

**Non-clinic comment for slot just added:** Enter a free-text comment describing the time slot that was just added.

- When you use this action code, you are creating a time slot that does not currently exist in the provider’s schedule, not overbooking a time slot. When you use add time on the fly, the system checks the following:

  Duplicate Slot: if there is another slot at the same time then the “**Duplicate Slot**” message will display and the time will not be added

  Overlapping Slot: if there is an existing slot that overlaps the requested time the “**Overlapping Slot**” message will displays and the slot is not added

  Time Slot is in Next Session: if the time already exists in the next session, the “**Time Slot in next session**” will display.

  Time is Later than the Session: if the time is later than the current session end time then the system will display “**Extend session end time? NO =>**.”
Summary Searches (SU)

The Summary Search option enables you to view a provider’s schedule before selecting a time slot for an appointment.

- Remember, we viewed the provider’s schedule when we scheduled an appointment using First Available Detail. First Available Detail displays one session where as a Summary Search will display three sessions.
- Summary search has some options that do not exist in First Available Detail.

Use a Summary Search to:

- Schedule an appointment.
- Display the next session of a provider’s schedule.
- Change the session of the provider’s schedule from the Summary screen.
- See more than one session of a provider’s schedule.
- Overbook a provider’s schedule.

System Prompt:  Your Response:
Select Function:  Access function 1, Schedule an Appointment.
Patient:  Enter the criteria for the appointment as you did in first available.
**Search Option:** Enter **SU** to have the system perform a Summary Search.

Press **<F10>** to search for the first available appointment.

Once the appointment criterion has been entered, the system searches for an appointment.

---

**Summary Search Screen**

![Summary Search Screen](image)

**<Tab>** Moves you to the next session, then back to the first session.
<↑> and <↓>  Moves you to the different time slots in the session

Arrow Keys

<Enter>    Selects a time slot that you wish to book an appointment

A diamond is displayed next to selected appointments

◆

<F10>  Moves forward to the Appointment Data Form to continue.

Action / Action Code: /

A – Appointments  This action code branches to the patient appointment screen to view the patient’s existing appointments.

B – Back  This action codes goes back to see the previous three sessions back until the date you entered at the From Date:

• Use this code when you about to select an available time, but the patient asks if there is another appointment available on another date and session.

D - Detail Summary  This code resembles the First Available Detail Screen.
**E - Add, Edit Comment**

This action adds a comment to the provider’s time slot that will appear whenever you display the time slot’s session.

Select the time you wish to edit by using your up and down arrow keys, then press <E> to add/edit the time slot comments. You may enter up to 22 characters of free text.

When you are finished editing the comments, press <F10>, and continue to make the patient appointment.

**N - Next**

Displays the next three sessions of the provider schedule that match the appointment criteria.

**R - Registration**

Press <R> to select the Registration action code. **Select: 1) Reg only, 2)FSCs only, 3)Case only, 4)All 1=>**

Select the areas of registration you wish to edit, then press <Enter>.

When you have finished making the changes in registration, Press <F10> to file the changes and return to the Summary Screen.
S - Change Date, Session

This action code displays another date or session. Your black selector bar must be in the session that you wish to change.

Press <F10> to redisplay the action codes.

New Date, Session: Enter the new date and session you want the system to display in the following format: MM/DD/YY_S followed by the session initial (A, P, E). (Ex., 6/3/98SA)

O- Resources

This action code displays any resources attached to the appointment such as Radiology.

X – Add Time

This action code allows you to add time to the provider’s schedule that does not currently exist. This is different from overbooking a time slot.

Enter the time you wish the appointment to begin, the Press <Enter>, then press <F10>. 
**Time slot XX:XX added**  
This message appears when the slot has been added.

**Non-clinic comment for slot just added:**
Enter a free text comment describing the time slot that was added to the provider’s schedule.

**Duplicate Slot:**
This message appears if there is another slot at the same time. If this message appears, the slot will not be added.
- Overbook the slot instead

**Overlapping Slot**
This message appears if there is an existing slot that overlaps the requested time.
The time will not be added.
- Overbook the slot instead.

**Time Slot in next session**
This message appears if the time slot is in the next session, in other words, the time already exists in the next session so move to the next session.  
**Extend session end time? NO =>.**
This message appears if the time slot that you wish to add will be beyond the original session time.
Enter Y if you do want to extend the session time.
Quick Summary Search (QU)

The Quick Summary Search option also enables you to view a provider’s schedule before selecting a time slot for an appointment.

We will see that we can do all of the things we did using First Available Detail when using a Summary Search.

Use Quick Summary to:

- Schedule an appointment
- Display the next session of a provider’s schedule
- Change the session of the provider’s schedule from the Summary screen.
System Prompt: Select Function: Your Response:
Access function 1, Schedule an Appointment.

Patient: Enter the criteria for the appointment as you did in first available.

Search Option: Enter QU to have the system perform a Quick Summary.

Press <F10> to search for the first available appointment.

Once the appointment criterion has been entered, the system searches for an appointment.
Quick Summary Screen

<table>
<thead>
<tr>
<th>Action Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - Appointments</td>
<td>View patient appointments.</td>
</tr>
<tr>
<td>B - Back</td>
<td>Displays the previous three sessions back until the date you entered at the From Date: prompt.</td>
</tr>
<tr>
<td>D - Detail Summary</td>
<td>This code resembles the First Available Detail Screen.</td>
</tr>
<tr>
<td></td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>N - Next</td>
<td>Display the next three sessions of the provider’s schedule.</td>
</tr>
<tr>
<td>O - Resources</td>
<td>Displays the resources for the time slot.</td>
</tr>
<tr>
<td>R - Registration</td>
<td>Press &lt;R&gt; to select the Registration action code.</td>
</tr>
<tr>
<td>S - Change Date, Session</td>
<td>Displays another date or session of the active session box.</td>
</tr>
<tr>
<td>X – Add Time</td>
<td>This action code allows you to add time to the provider’s schedule that does not currently exist in the provider’s schedule. Again, this is different from overbooking. Enter the time you wish the appointment to begin, the Press &lt;Enter&gt;, then press &lt;F10&gt;.</td>
</tr>
</tbody>
</table>
Module Summary

- The Appointment criteria is the information that is entered when scheduling an appointment to find an appropriate time for our patient Appointment.
- The first available search shows the scheduler summary level information about the first available appointment.
- If a scheduler wants to view more information regarding the first available dates, use D# (sequence number) to view more detail about the provider’s schedule.
- When searching for an appointment the scheduler can search by specific provider or by scheduling department.
- The Appointment Data Form holds Appointment specific information about this patient’s particular Appointment. This data stays with the Appointment for the life of the Appointment.
- The appointment recap screen allows the scheduler to re-cap the appointment with the patient to confirm that all information was recorded correctly.
- All of the First Available Detail action codes are Summary Search action codes.
- The difference between First Available Detail and Summary Search is that in Summary you are viewing three sessions of the provider’s schedule at one time and have access to more action codes.
- The Summary Search option enables you to view a provider’s schedule before selecting a time slot for an appointment.
- Summary search has additional action codes not available in First Available Detail screen.
- You can use Summary Search to schedule an appointment, display the next session of a provider’s schedule, and overbook.
- Use Summary Search to view more than one session of a provider’s schedule at a time.
**Practice Exercise**

1) What is appointment criteria?

2) What does the Search Option field in the appointment criteria screen mean?

3) What type of search do you perform if a patient telephones to make an appointment and wants you to find the first appointment available for Dr. Jones?

4) What type of messages appear at the bottom of your screen when you access a provider, department, and Appointment type?

6) What is the default date that appears at the From Date: prompt.

7) What is the default options that appear at the APE/DOW: prompt.

8) Do you need to complete the Location: prompt?

9) What is the default option at the Search Option: field?

10) What is the significance of the ‘OK to file the appointment’ prompt?

11) What is the significance of the messages that display after you file the appointment?

12) How would the system interpret the following if they were entered at the APE/DOW: prompts?
i) A/M

ii) P/TU

iii) A,P/M,TU,W

iv) A,P/M,W;E/TU,TH

13) Listed below is a copy of a provider’s morning session when you perform a First Available Detail.

![Appointment Schedule]

a) Which time slot(s) does the provider have available?

b) Which time slot(s) have Appointment types which exceed the duration of the time slot?
c) Which time slot has been overbooked?

d) Which time slot(s) is a non-clinic time slot?
There will be times after an appointment has been scheduled that changes may need to be made or a patient may contact the clinic to obtain information about their appointment.

Once the appointment has been filed, there are many activities within the Patient Scheduling Application that enable you to perform appointment maintenance tasks as well as view appointment information for a patient.

Most of the appointment maintenance tasks can be performed using Function 1 (Schedule an Appointment). This aids the scheduler in performing his/her job in a timely fashion. Thus, by accessing Function 1, the scheduler can, in addition to scheduling appointments, perform the following appointment maintenance tasks.
You can access the Patient Appointments Function from several places within the application:

- Criteria screen
- Summary screen
- Function 2 (Patient Appointments)

Examples of necessary changes:

- View appointment information.
- Filter the appointments the system displays.
- Cancel a single appointment.
- Reschedule a single, linked or resource appointment.
- Edit appointment information by adding a comment.
- Link appointments for the same patient and for different patients.
• Change an appointment provider and/or Appointment type without cancelling or rescheduling the original appointment.

• Move appointments from one patient to another without canceling or rescheduling the original appointment(s).

• Arrive appointments.

**System Prompt:**
**Select Function:** Access Function 1, Scheduling an Appointment (F1)

**Patient:** Enter the name of the patient who wants to schedule an appointment, using the standard IDX format on page 7 of this manual.

**Provider:** Press <F9> to view the action codes, then press <A> to view this patient’s appointments.
• The Patient Appointments screen displays all of the patient’s appointments in reverse chronological order.
• The appointment lists includes all primary appointments and resource appointments.
• This list does not display any linked resources or linked ancillary appointments; these can be viewed by using the appropriate action codes.
• An asterisk (*) will display for any appointment which has any combination of linked appointments or resources attached.
• Since the UMMG uses the BAR and MCA, applications, an “i” will display before the date of any appointment that has integrated links.

**Description:**

**Field:**

‘I’ The appointment has integrated links, such as a referral, copay, or invoice.

‘W’ The appointment has a waitlist entry associated with it.

**Date** Displays the date the appointment is scheduled to occur.

**Day** Displays the day of the week of the appointment.

**Time** Displays the time of the appointment.
<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEN</td>
<td>Pending - an upcoming appointment; an appointment yet to be seen by the provider. Pending appointments will display as PEN. All appointments scheduled for tomorrow and beyond will have a status of PEN. Appointments left on PEN status will automatically change NOS 8 days after the appointment date.</td>
</tr>
<tr>
<td>ARR</td>
<td>Arrived - an appointment which has occurred; the patient arrived as scheduled and was seen by the provider. Arrived appointments will display as ARR. All walk-in appointments automatically get a status of ARR</td>
</tr>
<tr>
<td>CAN</td>
<td>Cancelled - an appointment that was called off by the patient. Cancelled appointments will display as CAN.</td>
</tr>
<tr>
<td>BMP</td>
<td>Bumped - an appointment that was called of by the provider. Bumped appointment will display as BMP.</td>
</tr>
<tr>
<td>NOS</td>
<td>No Show - an appointment was not cancelled or bumped, but the patient failed to show. No-show appointments will display as NOS.</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>RSC</td>
<td><strong>Rescheduled</strong> - an appointment that was cancelled and another was made in its place. Rescheduled appointments will display as RSC.</td>
</tr>
<tr>
<td>REM</td>
<td><strong>Reminder</strong> - information for a future appointment that is stored by the system. Reminder appointments display as REM.</td>
</tr>
</tbody>
</table>

**Typ**
Displays the Appointment type for the appointment.

**Prov/Resource**
Displays the appointment’s provider or resource.

**Dept.**
The department for the appointment.

**Loc**
Displays the location of the appointment.

**Dur**
Displays the length of time allocated for the appointment.

**Appointment #**
Displays the IDX generated Appointment number. This is a unique Appointment number the system assigns to the appointment once the appointment has been filed.

**Action Codes**
The bottom section of the screen displays tasks you can perform on the appointments that are displayed on the screen.

- 
- 
### Appointment Screen Action Codes

<table>
<thead>
<tr>
<th>Action Code:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>A–Arrive (Appointments)</td>
<td>Arrive indicates that the patient has arrived for an appointment and was seen by a provider.</td>
</tr>
<tr>
<td>B–Noshow</td>
<td>Marks any appointments where the patient did not show for such appointment.</td>
</tr>
<tr>
<td>C–Cancel (Appointments)</td>
<td>Cancels any pending (PEN), rescheduled (RSC), or reminder (REM) appointment. See page 101 for more details</td>
</tr>
<tr>
<td>D–View Detail</td>
<td>• This action code allows you to see more information about the appointment that you select.</td>
</tr>
</tbody>
</table>
E–Edit (Appointments)  Action code E-Edit (appointments) allows you to edit information about a scheduled appointment. You use this action code to edit information about primary appointments (both linked and stand-alone) and resource appointments.

You can edit the following elements of an appointment:

- Status,
- Location,
- Cancellation reason, if any,
- Cancellation comment, if any, and
- Fields the Appointment Data Form.

F–Guided Filter  This action code allows you to manipulate the list of appointments displayed on the Patient Appointments screen so you can display appointments that match a certain set of criteria. See page 109 for details.

For example, you may want to use action code F-Guided Filter to search for and display only pending appointments for this patient.
H–Reset  Updates the list of appointments shown so that you do not need to press `<F7><Q>` and reenter.

Once you have used the Guided Filter, there may be times when the patient asks you a question about an appointment that is not displaying on the screen, press `<H>` so that the system will redraw the screen and display all of the patient’s appointments.

K–View Links  Displays appointments linked to the one selected from the list of appointments. See page 111 for more details.

L–Link Appointments  This action code allows you to link together appointments that have been filed independently. You can create links:

- For *the same patient*: you can link one appointment to one or two other appointments.
- *For different patients*: you can link one patient’s appointment to one or two other patient’s appointments.
- You can only link pending, arrived, no-show, or rescheduled appointments. You can link a maximum of 2 primary appointments to another Primary appointment.
Access the Patient Appointments screen, select all of the appointments that you want to link. Press <L>.

Press <F10> to link the selected appointments for the patient.

Access the Patient Appointments screen. Select the appointment(s) to which you want to link. Press <L>.

**Link to patient:** identify the patient who has the appointment(s) to which you want to link. Press <F10>.

The system displays the new patient’s list of appointments. Select the appointment(s) to which you want to link.

The Link to patient: prompt repeats as long as you have not exceeded the maximum number of appointments to link. Press <F10> when you are finished.
M–Move

This action allows you to move a patient’s appointment to another patient without canceling or rescheduling the appointment.

This is most useful when:

- Duplicate patient accounts exist and you want to consolidate the patient’s appointments into one account.
- You have scheduled an appointment with the wrong patient and need to move the appointment to the correct patient.

When you move an appointment, the appointment’s criteria does not change. The appointment retains its original department, provider, date, time, Appointment type, status, and location. In addition, the appointment retains its original Appointment number as assigned by the system.

- You can move appointments with a past, present, or future appointment date.
All appointment links, whether primary, resource, or cyclical, are retained when the primary appointment is moved. All linked wait list entries are retained when the primary appointment is moved.

- If the patient ID is the same, then the linked appointments are moved as well. If the patient ID is different, the linked appointments are not moved, but the links are retained.

- If the original appointment had an attached referral, the pending count decrements by 1 for appointments with a pending status and the total count of appointments for the referral decrements by 1 for all appointment statuses.

- If the original appointment had an attached missing referral reason, this reason is removed. If the original appointment had an attached authorization number, this value is removed.

**M-Merge Appt/Inv** – Use this action code if you want to Consolidate accounts and move all appointments and invoices From one patient’s account to another.

**N-Individual Appointments** – Use this action code to move one or more appointments from one patient’s account to another.
N–Change Provider

This action code lets you change the provider for an already scheduled appointment. You may also use this feature to change the Appointment type of an appointment, if necessary.

This action code is most useful when:

- the primary appointment has been scheduled with the wrong provider and you need to change the provider for the appointment.
- medical or diagnostic reasons require the patient to see a different provider from the one with whom he or she was previously scheduled to see.
**O–View Resources**
Displays resources that are attached to an appointment (if any).

- An asterisk appears after the status of an appointment that has attached resources, ancillaries, or other linked appointments.

The Action Codes area displays a set of action codes depending on what other information exist for the appointment. Any combination of the following action codes may appear: Action Code D – View Detail; Action Code K - View Links; Action Code V – View ADF

**P–Patient Inquiry**
Allows to access the Patient Inquiry Function (F49) where you inquire across three applications (Scheduling, BAR, and MCA).

**R–Registration**
Enter or edit full patient registration information, financial status class (FSC) information, and/or case information.

**U–Unlink/Link Invoices**
Unlinks or links invoices to the selected appointment.
| V–View ADF | Displays the appointment’s Appointment Data Form that is associated with the patient’s appointment.  
| | • The Appointment Data Form in an inquiry mode and cannot be edited. Use action code E to edit the ADF. |
| Y–Add/Edit Referrals | Adds a referral to an appointment, or edit an existing referral. |
| Z–Appointment Actions | For those hospital Appointments, it allows to see the associated Visits created in VM by the SchedLink. |
C- Cancel

Canceling a patient’s appointment opens the appointment time slot for a new appointment.

You can only cancel appointments that have a status of:

- Pending (PEN),
- Reschedule (RSC), or
- Reminder (REM).

You will not be allowed to cancel appointments in the past further than 7 days.

There are two places on the system where you can use the cancel action code:
System Checking due to Action Code C

- If the appointment chosen to cancel or reschedule is linked to another primary appointment and the user chooses to cancel or reschedule the appointment, the system will display the linked appointment(s) giving the user the option to cancel or reschedule them. If you choose to reschedule the first appointment then choose to also cancel the second appointment, you must reschedule the second appointment as well.

- If the appointment chosen to cancel is linked to a resource appointment with priority 1 resources only, those resources will automatically cancel or reschedule when you cancel or reschedule the primary appointment.

- If the appointment chosen to cancel is linked to a resource with a priority 2 resource(s), the system will give you the option of making the priority 2’s stand-alone resource appointments.

- If the appointment chosen to cancel is a stand-alone resource appointment the user is allowed to cancel the appointment, but is not prompted to reschedule.

- If the appointment chosen to cancel is a hospital appointment which is linked to a visit in VM, you will need to cancel the visit in VM in order to truly cancel the appointment.

Cancel Or Reschedule

There may be times when a patient decides to cancel his/her appointment but does not want to reschedule because he/she is not sure when he/she will be able to come in for the appointment.

To cancel a primary appointment, you access the Patient Appointments screen, select the appointments you want to cancel, then select Action Code C.
System Prompt:

Your Response:

When the appointment(s) you want to cancel is highlighted, press <C> to Cancel the appointment(s).

The system will display the following prompts in the message area of the screen.

Cancellation Reason:

This is where you enter the reason why the patient cancelled his/her appointment.

- The cancellation reason must be a valid entry from the Cancellation Reasons Dictionary. Type a <?> for a list.
Cancellation Comment:
Enter a free text comment to further describe why the patient has cancelled his/her appointment, the Press <Enter>.

An example, may be “Out of town”

Reschedule?:

YES

Press <F10> to accept the default of YES and continue to reschedule the appointment like you would a new appointment.

or

Type NO, the Press <F10> to just cancel the appointment without rescheduling it.

• Notice that when you return to the Patient Appointment Screen the status of the original appointment has changed.

Cancel the original appointment?

YES=>

When you have searched for a new appointment, completed the ADF, and are on the appointment recap screen, the system prompts you to cancel the original appointment.
Are you sure?
YES=>

This is one last chance to reverse the cancellation. Press <Enter> to accept the default and cancel the original appointment.

Type <No> if you do not want to cancel the original appointment. The system will return you to the Patient Appointments screen.

- The original appointment will have a status of CAN, but there is no reference to the rescheduled appointment. Here is another place where the Reset action code comes into play. Sometimes the changes you make to an appointment are not automatically updated. Pressing the <H> action code updates the patient’s appointments.

Press <H> and the rescheduled appointment will display. It will be the appointment with the status of RSC.

- Remember when you learned about viewing appointment detail when you cancel an appointment. If you view detail of a rescheduled appointment, the system will display the rescheduled information.
**Rescheduling and Canceling Linked Appointments**

When you have appointments that are linked and you want to reschedule both of them, the system works the same as it does as demonstrated above, but it prompts you to see if you really want to cancel the linked appointment.

Problems arise when you want to reschedule one appointment and cancel the other without rescheduling. The reason being when you cancel the first appointment, the system displays the second appointment, but there is no action code to enable you to reschedule.

In order to cancel and reschedule the first appointment and cancel the second, you need to break the link. To do this, you select the appointment to cancel and cancel it. Once you break the link, you can reschedule the other appointment.

**More Information About the Cancellation**

Once you cancel an appointment and return to the Patient Appointments screen, the system automatically changes the appointment’s status.

You can display further information regarding the cancellation such as when the appointment was cancelled or who cancelled it or the reason it was cancelled by using the action code D.
D - View Detail

View Detail allows you to see more information about the appointment or appointments that you select. This information includes any of the following, as applicable;

**Pending Appointments**
- The date and time the appointment was scheduled, and the initials of the user who made the appointment.
- Other forms letter information, if form letters were printed.

**Arrived Appointments**
- The date and time the appointment arrived and the initials of whom arrived the appointment.
**Wait Listed Appointments**
- The date and time when the appointment was made and the wait list comment.

**Bumped Appointments**
- The date and time the appointment was bumped and the user initials of who bumped it.

**Cancelled / Rescheduled Appointments**
- The date and time the appointment was rescheduled, the user initials of who rescheduled it, the provider and department the appointment was rescheduled from and where the appointment was cancelled.
- The date and time the appointment was cancelled, who cancelled it, the reason, and the comment (if any) and where the appointment was rescheduled.

**Reminder Appointments**
- Any preferences entered when the reminder was scheduled.
- The date and time a reminder letter was printed (if any) and the initials of the user who printed the letter.
**F - Guided Filter**

Guided Filter allows you to manipulate the list of appointments displayed on the Patient Appointment Screen so you can display appointments that match a certain set of criteria. For example, you may want to search for and display only pending appointments for this patient.

You can search for a patient’s appointment by one of the following or a combination of any listed below;

- Department
- Provider
- Date
- Location
- Status

Normally, the Patient Appointment Screen lists a patient’s primary appointments and stand alone resource appointments. It does not list resources that are linked to primary appointments. However, you can use the guided filter to display these resources by entering the ancillary or resource department at the Dept prompt on the Guided Filter Screen shown below.
Filter:
Dept: Identify the name of the department to see specific appointments for that department.

Prov: Identify the provider to see appointments for that provider only.

Date: Specify a date to see an appointment for that date only.

Loc: Identify the location to see appointments for a specific location.

Status: Identify a status to see appointments with a specific status.
**K - View Links**

View Links displays any primary appointment linked to the appointment you select.

An asterisk (*) appears after the status of any appointment that has linked appointments, linked ancillaries, or attached resources.

For example, appointments whose status is PEN* or ARR* have some sort of attached or linked appointments.

The K – View Links action code displays the View Links screen that is shown below. This screen is a display only screen and cannot be edited.
Module Summary

- The Criteria Screen action codes allow you to access other areas of the system and return to the Criteria Screen without going through the main function menu.
- The action code A takes you to the Patient Appointments Function (F2).
- There is only one place to access the bump list, which is Function 1, Action code B.
- An appointment summary displays a brief list of the number and status of appointments recorded for this patient.
- You may inquire about other patient activities using the Patient Inquiry action code P.
- You may also access patient registration form Function 1, using the Registration action code. This action will allows you to enter or edit patient registration information and financial status class information.
- You may also access Open Referral from Function 1, Schedule an Appointment.
- A bumped appointment is different from a cancelled appointment in that a bumped appointment is one that either the provider or the group initiated.
**Practice Exercise**

1. When a patient telephones your clinic to find out the time of his/her new patient Appointment (NPV) what function(s) can you use to access this information?

2. How would I know if this appointment was linked to another appointment?

3. How can I see who referred this patient to this provider?
   a) Where is this information captured?

4. Can I view who made the appointment?
   a) What action code do you use?

5. Can I filter out all of the appointments on the screen so that I only see my provider’s?
   a) What action code do you use?

6. Can I see when the appointment was made from the appointment screen?
   a) What action code do you use?

7. My patient tells me that twice the same provider bumped her. How can I verify this?

8. My provider tells me that a patient has cancelled 3 times with him/her, how can I verify this?
Criteria Screen Action Codes

The Criteria Screen action codes allow you to access other areas of the system and return to the Criteria Screen without going through the main function menu.

<table>
<thead>
<tr>
<th>Action Code:</th>
<th>Description:</th>
<th>Access</th>
<th>Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>B – Bump List</td>
<td>This action code allows you to access appointments that appear on the Bump List and to reschedule those appointments. The Bump List contains information about patients whose appointments were cancelled by our facility because either the provider’s schedule was edited, or a template was transferred to a provider’s schedule. <strong>Bumped versus Cancelled Status</strong> An appointment with a bumped status, BMP, is different from a cancelled appointment, CAN. Cancelled (CAN) appointments are those cancelled by the patient; Bumped (BMP) appointments are those cancelled by the provider.</td>
<td>1st?</td>
<td>N</td>
</tr>
<tr>
<td>Code</td>
<td>Function</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>J</td>
<td>Demand Forms</td>
<td>Takes you to the Demand Forms Function (F52) where you can print certain forms. Demand Forms allows you to print forms that are normally prepared in conjunction with a patient appointment. This is useful when a form is needed for some purpose other than a patient appointment, such as when an original form was damaged or misplaced and a replacement is needed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ex. Arrival labels or Encounter forms</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>Patient Inquiry</td>
<td>Takes you to the Patient Inquiry Function (F49) where you can perform inquiries across other IDX applications</td>
<td></td>
</tr>
<tr>
<td>S</td>
<td>Provider Schedules</td>
<td>This action code allows you to display information about a provider’s schedule. This is especially useful if you want to quickly view a provider’s schedule on-line without leaving the Criteria Screen. This action code brings you to the same screen you use in the Display Schedules Function (F4).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• On the Display Provider Schedules Screen you enter information specifying the provider and the date of the schedule you want to view. See page for more information.</td>
<td></td>
</tr>
</tbody>
</table>
### W – Wait List
This action code allows you to examine entries on the Wait List and transfer information about an entry from the Wait List to the Criteria Screen so you can schedule that entry into a time slot.

- You use the Wait List to keep track of patients who want to be notified if the time slot of a particular Appointment type becomes available.

Time slots become available if another patient cancels an appointment, or if a provider’s schedule is edited and more time is added to that schedule. See page 154 for more details.

### Y – Referral Add / Edit
Allows you to add or edit referrals, with integration to BAR and/or MCA.

### A – Appointments
Takes you to the Patient Appointments Function (F2), otherwise known as the Patient Appointments Screen. On this screen you can:

- arrive appointments,
- cancel appointments,
- edit appointments,
- display a patient’s existing appointments, and
- display detailed information about a patient’s appointments.

### G – Display Balances
This action code allows you to see the patient’s financial activity by FSC.
<table>
<thead>
<tr>
<th>Action Code</th>
<th>Description</th>
</tr>
</thead>
</table>
| M – Appointment Status Summary | Displays a brief list of the number and status of appointments recorded for this patient. This lists the number of appointments this patient has of each status.  
- To use this action code, you must have identified a patient and the cursor must not be at the Patient prompt. | Y |
| N – Walk-in Appts. | This action code allows you to make and arrive walk-in appointments for today. You schedule walk-in appointments when a patient arrives at your clinic and is seen by a provider that same day.  
- IDX does not allow you to schedule walk-in appointments for a date in the future; you can only schedule walk-ins for the current day, or for a date in the past.  
- A walk in appointment automatically receives the status of arrived (ARR). | Y |
| R – Registration | Allows you to enter or edit patient registration information and financial status class information. | Y |
| T- Options | Allows you to set default setting for the Appointment Criteria Screen. | N |
**B - Bump List (F1/Action Code B)**

This action code allows you to access appointments that appear on the **Bump List** to reschedule those appointments. The Bump List contains information about patients whose appointments were cancelled by the provider or department.

**System Prompt:**
**Select Function:** Access the patient appointment criteria screen. (F1/Action Code B)

**Order by Appointment Date or Bumped Date:**
This field allows you to choose to display the bumped appointments by the date the appointments were bumped or by the date the bumped appointments were scheduled for.
- The easiest way is to select the bumped date.
| From Date: | Enter the date you want to display bumped appointments from.  
|           | • If you do not remember the bumped date or the appointment date, type a `<?>` to view the days with bumped or non-rescheduled appointments. |
| Through Date: | Enter the date you want to display bumped appointments through. |
| Include all Departments? | Enter `N` to see only those appointments bumped in a specific department. |
| Which Department? | Enter your department name |
| Include all Providers? | Enter `N` to see only those appointments bumped for specific providers. |
| Include Provider: | Enter the providers for whom you wish to view the bump list.  
| | When you have entered the last provider you wish to view, press `<Enter>`. |
| Include all Locations? | Enter `N` to see only those appointments bumped in a specific location.  
| | • To be sure you display all bumped appointments you recommend saying Yes to this prompt. |
| | Press `<F10>` to run this report. |
When the bump list appears, you can reschedule appointments directly by selecting the bumped appointment, with the selector bar, then using Action Code S, reschedule.

**Action Code:**

- **C – Expand / Contract**
  Expands the bump list to display the patients’ UMMG number, date of birth, and phone numbers.

- **D – View Detail**
  Views the detail behind the selected appointment.

- **H – Reset**
  Refreshes the screen to redisplay any changes.

- **I-View Ancillaries**
  Display any ancillaries attached to the selected appointment.
<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>K – View Links</td>
<td>Displays any linked appointments attached to the selected appointment.</td>
</tr>
<tr>
<td>N – Notes</td>
<td>Allows you to enter a note for this bumped appointment.</td>
</tr>
<tr>
<td>O – View Resources</td>
<td>Displays the resources attached to the selected appointment.</td>
</tr>
<tr>
<td>P – Patient Inquiry</td>
<td>Access the patient inquiry function.</td>
</tr>
<tr>
<td>S – Reschedule</td>
<td>Reschedules the selected patient.</td>
</tr>
<tr>
<td>T – Print</td>
<td>Prints the current bump list.</td>
</tr>
<tr>
<td>U-Delete</td>
<td>Deletes appointment from the bump list and allows you to enter a comment.</td>
</tr>
<tr>
<td>V – View ADF</td>
<td>Displays the Appointment Data Form for the selected appointment.</td>
</tr>
</tbody>
</table>
## S - Provider’s Schedules (Function 4)

**System Prompt:**
Select Function: Access Function 4, Display Schedules

or

Access the patient appointment criteria screen. (F1/Action Code S)

**Provider:** Enter the provider name for which you wish to display.

**Department:** Enter the department for the provider for whom you wish to display.
- If the provider is only in one department, this will default in.

---

### Display Provider Schedules

<table>
<thead>
<tr>
<th>Time</th>
<th>Typ</th>
<th>Dur</th>
<th>Bk</th>
<th>Av</th>
<th>Name</th>
<th>MRN</th>
<th>Age</th>
<th>Telephones</th>
</tr>
</thead>
<tbody>
<tr>
<td>0100A</td>
<td>NPV</td>
<td>15</td>
<td>1</td>
<td></td>
<td>TEST,ANA</td>
<td>08000009</td>
<td>31</td>
<td>16 Booked</td>
</tr>
<tr>
<td>0230</td>
<td>NPV</td>
<td>15</td>
<td>1</td>
<td></td>
<td>TEST,ANA</td>
<td>08000009</td>
<td>31</td>
<td>16 Booked</td>
</tr>
<tr>
<td>0330</td>
<td>NPV</td>
<td>15</td>
<td>1</td>
<td></td>
<td>AAA,MEJIA</td>
<td>08000057</td>
<td>31</td>
<td>16 Booked</td>
</tr>
<tr>
<td>0400A</td>
<td>NPV</td>
<td>15</td>
<td>1</td>
<td></td>
<td>AAA,MEJIA</td>
<td>08000057</td>
<td>31</td>
<td>16 Booked</td>
</tr>
</tbody>
</table>

**Provider:** ER PHYSICIAN

**Department:** ABLEH EMERGENCY RM

**Date:** 04/24/2003

**Day:** THURSDAY
Date: Enter the day that you wish to display using the IDX standard date format.

View: Enter B to scroll Back in the same day.
Enter F to scroll Forward in the same day.

Which session for detail Enter AM, PM or EVE to display the detail of the schedule such as the patient names, scheduling comments etc…

To exit this activity use press <F10>
Module Summary

- When daily schedules with booked appointments are edited, the bumped appointments are placed on the bump list.
- The bumped date is the date that the appointments were bumped off of a particular day. The appointment date is the date that was edited.
- The action code A takes you to the patient appointments function.
- Rescheduling patients that were bumped, requires you to access the bump list.
- The appointment status summary displays a brief list of the number and status’s recorded for this patient across the entire enterprise.
- The action code N allows you to book walk in appointments from function 1.
- Should you need to access other information about the patient, you can use the action code P, to access Patient Inquiry. Patient Inquiry inquires across other IDX applications.
- To enter or edit full patient registration information and financial status class information you may use the action code R.
- When the provider or you needs to look at a provider’s schedule, action code S displays a provider’s daily patient schedule.
- If you need to examine the patients that have been entered on the wait list, you may use action code W from the criteria screen.
- Open Referrals can be accessed from Function 1 using Y – Referral Add / Edit to add or edit referrals, with integration to BAR and/or MCA.
• Practice Exercises

1) When are appointments placed on the bump list?
2) What is the difference between the bumped date and the appointment date?
3) What is the appointment status summary?
4) Can walk in appointments be booked for days in the past?
5) What action code can I use to view the patient’s detailed financial status information?
6) If a provider needs to view his / her schedule, what are the two ways of doing this?
7) Your instructor will provide hands-on exercises for you to practice.
Other Appointment Types (F1)

The Patient Scheduling Application enables you to schedule many other types of appointments other than just single appointments. So far we have concentrated on scheduling a single appointment, but there may be times when you need to schedule other types of appointments for your patients.

Other Appointment Types Include:

- Linked Appointments
- Cyclical Appointments
- Walk-in Appointments
- Reminder Appointments

Linked Appointments (F1)

- A linked appointment enables you to combine two or more appointments as a unit for one patient or more than one patient.
- Scheduling a linked appointment is faster than scheduling two single appointments.
- A linked appointment requires you enter appointment criteria for more than one appointment on the criteria screen (up to three) at the same time.
- This is similar to scheduling a single appointment but the system will try to locate available appointments for all of the entered appointment criteria at the same time.
- The linked appointment criteria screen is called the three-column criteria screen. This screen is similar to the one column criteria screen, but there is room to enter appointment criteria for up to three appointments at one time.
- You access the three-column from the one-column screen and vice versa by pressing the <Page Down> key and the <Page Up>.

**System Prompt:**

**Select Function:**
Access Function 1, Scheduling an Appointment (F1)

**Patient:**
Press the <Page Down> key to access the linked appointment criteria screen.

Enter the name of the first patient who wants to schedule an appointment, using the standard IDX format on page

Continue to enter the appointment criteria as you did earlier.

**Search Option:**
Press <Enter> to continue to column B.
Patient: When your cursor appears that the patient prompt under column B and C, enter the new criteria for another patient or Type the letter <R> to work with the same patient.

Press <F10> to search for the first appointment.

Appointment A? IDX will display available appointments in the message area of the criteria screen for all appointments at the same time. Press <Enter> to display the next group of appointments.

- When you schedule a linked appointment, the system displays two or three groups of five appointments at a time.
- Before you select an available appointment in column A, you want to make sure that the appointment you want to select in Column B is displaying on the screen. Once you select the first appointment (A), you can no longer scroll columns B or C.
To scroll backwards and forwards using the commands F and B you must also let the system know which column of appointments you want to scroll through.

Enter **FB** to scroll forward the appointments in column B.

Enter **FA** to scroll forward the appointments in column A.

Enter **BB** to scroll back the appointments in column B.

Enter **BA** to scroll back the appointments in column A.

When both appointments you want to schedule are displaying, you can select the appointments.

**Appointment B?** Enter the sequence number of the appointment you want to schedule for your second appointment then Press **<Enter>**.

The system will display the Appointment Data Form for each of the appointments you scheduled.

**Appointment Data Form** Complete the Appointment Data Form for each Appointment, one at a time then press **<F10>**.

- When you have filed one ADF, the next ADF displays until all linked appointments have their ADFs completed.
Moving from Three Column to One Column

Let’s say that you are scheduling an appointment using the three-column criteria screen and when you have finished entering appointment criteria for your patients, your patient, say, that the he/she does not need to make the second appointment after all.

Follow these steps to return to the one column criteria screen:

After you enter appointment criteria on the three-column screen in columns -B- and -C- the system will deny this move and display the message “Delete columns B and C before paging back to single appointment screen”

Clear the appointment criteria can be cleared from the three-column by pressing the <F7><C> when in the column that you want to clear.
Cyclical Appointments (F1)

Cyclical appointments are a series of appointments with the same provider, same department, and same Appointment type that are scheduled for different days.

Cyclical appointments are scheduled similarly to single appointments, however; the system searches for and files the entire set of appointments at one time.

Appointments filed as cyclical appointments are a group of single appointments and should not be confused with linked appointments.

System Prompt:
Select Function: Access Function 1, Scheduling an Appointment (F1)
Patient: Enter the name of the patient who wants to schedule an appointment, using the standard IDX format.

Provider: Enter the name of the provider for which you wish to schedule the cyclical appointment.

Press <?> to list the valid providers.

- You can enter his/her name, mnemonic or number.

Department: Enter the name of the department for which the patient wishes to schedule the cyclical appointment.

Press <?> to list the valid departments for the chosen provider.

- If the provider belongs to only one department, then the system defaults to that department.
**Appointment Type:** Enter the type of Appointment for which you are making the cyclical appointment. (You can enter the name, mnemonic or number of the Appointment type.)

To display the list of available Appointment types enter a “?” for a list. Notice the information that is displaying from the dictionary; the short name, the number, the long name and the duration of each Appointment type.

- Appointment types are unique to each provider.

**From Date:** Enter the <C> followed by the date from which the patient would like to schedule his/her first cyclical appointment. This is the date that the system will begin searching for an available appointment.

- The system defaults in today’s date plus one day.

**Preferred appointment time:** Enter the time of day most convenient for the patient to come in for the appointment.

- Use the standard IDX time format to enter the time.
**End date for cycling:** Enter the date of the last cyclical appointment needed by the patient.
- Use the standard IDX date format to enter the date.

**Frequency:** Enter the interval with which appointments will be booked: on a daily, weekly or monthly basis.

The table below describes the valid formats for this prompt:

<table>
<thead>
<tr>
<th>Definition</th>
<th>Symbol</th>
</tr>
</thead>
<tbody>
<tr>
<td>every day</td>
<td>1D</td>
</tr>
<tr>
<td>every other day</td>
<td>2D</td>
</tr>
<tr>
<td>every third day... and so on</td>
<td>3D</td>
</tr>
<tr>
<td>every week</td>
<td>1W</td>
</tr>
<tr>
<td>every other week</td>
<td>2W</td>
</tr>
<tr>
<td>every third week</td>
<td>3W</td>
</tr>
<tr>
<td>every fourth week</td>
<td>4W</td>
</tr>
<tr>
<td>every fifth week</td>
<td>5W</td>
</tr>
<tr>
<td>the first week of every month</td>
<td>1M</td>
</tr>
<tr>
<td>the second week of every month</td>
<td>2M</td>
</tr>
<tr>
<td>the third week of every month</td>
<td>3M</td>
</tr>
<tr>
<td>the fourth week of every month</td>
<td>4M</td>
</tr>
<tr>
<td>the fifth week of every month</td>
<td>5M</td>
</tr>
</tbody>
</table>
Number of appointments per interval: Enter the number of times per frequency the patient needs an appointment.

- For example, if you enter 2W at the Frequency: prompt and 2 at the Number of appointments per interval: prompt, the system would translate it to mean the patient needs two appointments every other week.

Preferred day of week for each appt: Enter the day (or days) of the week when the patient wants to schedule the appointments.

- The number of days you enter must match the number of times per interval you specified.

Press <F10> to file the appointment information and to have the system begin search for available appointments.

Time: HH:MMAM / End date: MMM DD YYYY / Frequency: 1W / Days: XX

Is appointment at HH:MMAM on MONDAY, MM/DD/YY OK? YES⇒
The system will display the first appointment it finds which matches the criteria which was entered. If the system can not find an available appointment, it will display the summary screen.

Press <Enter> to accept the appointments as they scroll.

Press N if the appointment is not satisfactory and you want IDX to search for another.

The system will then display the second appointment it finds.

The system will then display the third appointment it finds and so on… until all appointments are found, then the system will display the Appointment Data Form proceeded by the appointment recap and display the prompt to file the appointment.
Walk In Appointments (F1, Action Code N or F6)

- When a patient walks into a clinic and needs an appointment for the same day, it is referred to as a walk-in appointment.
- Walk in appointments are automatically arrived. This means that the status of a walk-in is ARR.
- Scheduling a walk-in appointment enables you to create an appointment for a patient that had no previous appointments scheduled, but will be seen today.
- Walk-in appointments may only be scheduled for the present date or a date in the past (for catch-up purposes).
- Walk-in appointments can be scheduled either by using the action code on the criteria screen or by using Function 6.
- Notice that that the Walk-in Appointment screen looks identical to the criteria screen. The only difference in scheduling a walk-in appointment as opposed to a single appointment is what happens at the From Date: prompt.
- Enter appointment criteria for a walk-in appointment the same way you enter appointment criteria for a single appointment.
**Appointment Arrival For Hospital Visit Admit**

When arriving appointments in Sched, if the appointment is for a hospital Visit, special screens will display.

The end result of the special screens is that a VM/HPA Visit will be admitted in VM/HPA automatically.

XX is the Admit process through the Sched Link Action Code Process.

### TABLE 4. XX- Admit through the Sched Link Action Code Process

<table>
<thead>
<tr>
<th>Action Code</th>
<th>Definition</th>
<th>What to do</th>
</tr>
</thead>
<tbody>
<tr>
<td>RE</td>
<td>Registration</td>
<td>Verify the patient’s demographic data</td>
</tr>
<tr>
<td>EV</td>
<td>Edit Visit</td>
<td>If necessary, make changes to the visit. Ex. Attending Physician or add Alternate Insurance Coverage.</td>
</tr>
<tr>
<td>IV</td>
<td>Insurance Verification</td>
<td>Verify that the correct plans are on the Visit</td>
</tr>
</tbody>
</table>
| MS          | Medicare Survey     | • If the patient has Medicare, ask the Medicare Survey questions  
• If the patient does not have Medicare, the system will tell you that the patient does not have Medicare and it will ask you if you want to process the survey anyway. Answer NO to this question. |
| NA          | Notes A             | Enter any Visit specific notes here. If none, press F10.                                                                               |
| HB          | Hold Bill           | Work all the Hold Bills that you can.                                                                                                   |
| DF          | Demand Form         | Select the appropriate form(s) that need to be printed.                                                                               |
**System Prompt:**

**Select Function:** Access Function 1, Scheduling an Appointment (F1)

**Patient:** Enter the name of the patient who wants to schedule an appointment, using the standard IDX format.

**Provider:** Enter the name of the provider for which you wish to schedule the walk-in appointment.

Press <?> to list the valid providers.
- You can enter his/her name, mnemonic or number.
Department: Enter the name of the department for which the you are scheduling the walk-in appointment.

Press <?> to list the valid departments for your provider.

- If the provider belongs to only one department, then the system defaults to that department.

Appointment Type: Enter the type of Appointment for which you are making the appointment. (You can enter the name, mnemonic or number of the Appointment type.)

To display the list of available Appointment types enter a “?” for a list. Notice the information that is displaying from the dictionary; the short name, the number, the long name and the duration of each Appointment type.

- Appointment types are unique to each provider.

From Date: The system defaults the From Date: and APE/DOW: fields because walk-in appointments have to be scheduled for the present day.

APE/DOW: The S in front of the date indicates a specific day search. Meaning that the system will only look for available appointments for that date.
**Location:** Enter the location you need the appointment or Press `<Enter>` to bypass this field.

**Search Option:** Press `<F10>` to search for the appointment.

Select an appointment and press `<F10>` then respond to the Appointment Data Form.

File the appointment and return to the criteria screen.
Reminder Appointments (F1)

- If an appointment needs to be scheduled beyond 180 days, you may use a reminder appointment.
- When the month/year of the appointment approaches, a reminder letter may be prepared and sent to the patient, informing him/her to call the office to schedule the appointment.
- Reminder appointments can be scheduled using Function 1 (Schedule an Appointment).
- When you access the Reminder screen, the appointment information that was entered on the criteria screen defaults to the Reminder Appointments screen.

- You enter appointment criteria the same way you would enter appointment criteria for a single appointment.
<table>
<thead>
<tr>
<th><strong>System Prompt:</strong></th>
<th><strong>Your Response:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Function:</td>
<td>Access Function 1, Scheduling an Appointment</td>
</tr>
</tbody>
</table>

**Patient:** Enter the name of the patient who wants to schedule an appointment, using the standard IDX format.

**Provider:** Enter the name of the provider for which you wish to schedule the reminder appointment.

Press <?> to list the valid providers.
- You can enter his/her name, mnemonic or number.

**Department:** Enter the name of the department for which the patient wishes to schedule the reminder appointment.

Press <?> to list the valid departments for your provider.
- If the provider belongs to only one department, then the system defaults to that department.
Appointment Type: Enter the type of Appointment for which you are making the appointment. (You can enter the name, mnemonic or number of the Appointment type.)

To display the list of available Appointment types enter a “?” for a list. Notice the information that is displaying from the dictionary; the short name, the number, the long name and the duration of each Appointment type.

- Appointment types are unique to each provider.

From Date: Enter the desired date of the appointment.

To schedule a reminder appointment, the from date must be outside of the range of days that the provider currently has a daily schedule for.

APE/DOW: Enter the time and date preference of the patient. If the patient has no preference, you can skip this by pressing <Enter> and accepting the default of M,TU,W,TH, and F.

APE = AM, PM, Evening

DOW = Day of Week

Location: Enter the location you need the reminder appointment or Press <Enter> to bypass this field.
<table>
<thead>
<tr>
<th><strong>Search Option:</strong></th>
<th>Type <code>&lt;RE&gt;</code> to add a reminder appointment.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient:</strong></td>
<td>This is the name of the patient who scheduled the appointment. The name defaults from the criteria screen.</td>
</tr>
<tr>
<td><strong>Provider:</strong></td>
<td>This is the name of the provider the patient wants to schedule the appointment. The provider’s name defaults from the criteria screen.</td>
</tr>
<tr>
<td><strong>Department:</strong></td>
<td>This is the name of the department that the patient wants to schedule the appointment. The department defaults from the criteria screen.</td>
</tr>
<tr>
<td><strong>Appointment Type:</strong></td>
<td>This is the Appointment type the patient wants to schedule. The Appointment type defaults from the criteria screen.</td>
</tr>
<tr>
<td><strong>Month/Year for appointment to be schedules:</strong></td>
<td>This is the date the patient wants to schedule their appointment. The date defaults from the criteria screen.</td>
</tr>
<tr>
<td><strong>Preferred date in:</strong></td>
<td>This is day of the month the patient wants to schedule their appointment. The day defaults from the criteria screen.</td>
</tr>
</tbody>
</table>
Other preferences information: This is where you enter any free text information that pertains to the appointment.
- An example would be ‘Prefers morning appointments’,

Press <F10> to complete the Appointment Data Form and continue to file the appointment as usual.

Do you wish to file this appointment reminder? YES=>

Press <Enter> to accept the default.
Module Summary

- IDX allows you to schedule 5 different types of appointments. You may schedule a single appointment, linked appointments, cyclical appointments, walk-in appointments and reminder appointments.

- A linked appointment enables you to combine two or more appointments as a unit for one patient or more than one patient and is faster than scheduling two single appointments.

- A linked appointment requires you enter appointment criteria for more than one appointment on the criteria screen (up to three) at the same time. Linked appointments can be accessed through the three-column criteria screen. You access the three-column from the one-column screen and vice versa by pressing the `<Page Down>` key and the `<Page Up>`.

- Cyclical appointments are a series of appointments with the same provider, same department, and same Appointment type that are scheduled for different days.

- Appointments filed as cyclical appointments are a group of single appointments and should not be confused with linked appointments.

- Walk-in appointments reflect appointments given to patients that walk into a clinic and need an appointment for the same day.

- Walk-in appointments may only be scheduled for the present date or a date in the past (for catch-up purposes).

- If an appointment needs to be scheduled beyond 180 days, you may use a reminder appointment. When the month/year of the appointment approaches, a reminder letter may be prepared and sent to the patient, informing him/her to call the office to schedule the appointment.

- When you access the Reminder screen from Function 1, the appointment information that was entered on the criteria screen defaults to the Reminder Appointments screen.
**Practice Exercise**

1. When scheduling linked appointments, how do you access the 3-column screen from the patient appointment criteria screen?

2. Why may it be important to schedule linked appointments with little gap between each of them?

3. If a patient needs to come in every week starting three weeks from this Wednesday, what type of appointment would this be?

4. What makes a walk-in appointment different from an appointment booked via Function 1?

5. Can walk-in appointments be made in the past?

6. A patient needs to be scheduled for a follow up in one year, can you book this appointment using First Available search?
Fast Enter Arrivals/No-shows (F18)

This function allows you to change the status of a group of appointments to arrived or no-show.

Maintaining changes in appointment status ensures that your reports and statistics are always accurate; it also gives schedulers the ability to access important information about the patient’s arrival history.

Arrived vs. no-show status -- Changing an appointment’s status to ARR records that the patient arrived for the appointment and was seen by the provider. Changing the status to no-show records that the patient did not show up for a scheduled appointment.

Function 18 vs. Function 2 -- Function 18 differs from using Function 2 in that Function 18 allows you to enter a group of arrivals or no-shows for a specific provider or department, rather than entering arrivals or no-shows by individual patient (through Function 2).
Rules

- You can only arrive or no-show appointments on the present date or seven days in the past.
- You cannot change the status of future appointments to “ARR” or “NOS.”
- You can arrive or no-show appointments for a specific provider or for all the providers in a department.
- You can arrive or no-show stand-alone appointments for resource departments.
- If you arrive or no-show an appointment that is linked to one or two other primary appointments, the system does not automatically change the status of those other appointments as well. You must arrive or no-show other linked primary appointments separately. Remember, an asterisk “*” appears next to the status of any appointment that has other appointments linked or attached to it, for example, PEN*.
- After 8 days of the appointment date, the system will automatically no show any appointments left on pending status, so it is important that all applicable appointments are arrived in a timely manner.

System Prompt: Select Function:
Access Function 18 Fast Arrivals/No-Shows.

Provider: Enter the provider’s name.

Or

Press <Enter> without entering anything to arrive or no-show appointments for an entire scheduling department, such as Pedi Associates.
**Department:** Enter the scheduling department name to arrive or no-show.

**Date:** Enter the date for which you want to arrive or no-show appointments.
- Notice the day of the week for the date you specify appears at the Day prompt

**Order by:** Enter one of the following to order the arrival list:
- **P** to order the list alphabetically by patient name, or
- **T** to order the list chronologically by appointment time.

**Session:** Enter the session that you wish to display:
- **A** or **1** to display appointments for the morning session.
- **P** or **2** to display appointments for the afternoon session.
- **E** or **3** to display appointments for the evening session.

Press `<F10>` to view the list of appointments appears.

Select all of the appointments which you want to arrive or no-show then press one of the following:
- `<A>` to arrive the appointments or
- `<N>` to no-show the appointments.
Fast Edit Arrivals Action Codes

<table>
<thead>
<tr>
<th>Action Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A – Arrive</td>
<td>Indicates that the patient has arrived for an appointment and was seen by a provider.</td>
</tr>
<tr>
<td>D – View Detail</td>
<td>Views detailed information about an appointment.</td>
</tr>
<tr>
<td>G – Display Arrival Times</td>
<td>Display the time of arrived appointments on this screen.</td>
</tr>
<tr>
<td>K – View Links</td>
<td>Displays any primary appointments that are linked to a primary appointment.</td>
</tr>
<tr>
<td>N – No-Show</td>
<td>Indicates that the patient did not show up for the appointment.</td>
</tr>
<tr>
<td>O – View Resources</td>
<td>Displays any resources that are attached to an appointment.</td>
</tr>
<tr>
<td>U – Undo</td>
<td>Undoes your work within the current work session and changes the status of the appointments back to its original status.</td>
</tr>
<tr>
<td>V – View ADF</td>
<td>Views the appointment’s Appointment Data Form.</td>
</tr>
</tbody>
</table>
**Module Summary**

- The Fast Arrivals/No Show function allows you to change the status of a group of appointments to arrived or no-show.
- This is a very important function in that it ensures our statistics and reports are always accurate.
- An arrived status records that the patient arrived for the appointment and was seen by the provider.
- A No-Show status records that the patient did not show up for a scheduled appointment.
- **Both Function 18 and Function 2 arrive patients.** But, Function 18 differs from using Function 2 in that Function 18 allows you to enter a *group* of arrivals or no-shows for a specific provider or department, rather than entering arrivals or no-shows by individual patient.
- You can only arrive or no-show appointments on the present date or seven days in the past.
- If you arrive or no-show an *appointment that is linked* to one or two other primary appointments, the system does not automatically change the status of those other appointments as well. You must arrive or no-show other linked primary appointments separately.
Wait List

The Wait List is used to maintain a list of patients who want to be notified if the time slot of a particular Appointment type becomes available. Time slots become available if another patient cancels an appointment, or if a provider’s schedule is edited so that time is made available in that schedule.

From the Wait List, you can perform the following activities:

- view additional information about the wait list appointments,
- edit an appointment,
- update the list of wait list appointments,
- print the list of wait list appointments,
- delete an appointment, and
- view the Appointment Data Form for an appointment.
You can access the Wait List from:

- Function 1, Scheduling an Appointment (Action code W)
- Function 6, Walk In Appointments (Action code W), and
- Function 16, Wait List (add to, edit, print, and delete from the Wait List)

Types of entries on the Wait List

**Linked entry** – where the patient has a scheduled appointment, but wants to be notified if an earlier appointment becomes available. The existing appointment is linked to an appointment on the Wait List. Linked entries on the Wait List have a time and a Appointment number.

**Stand-alone entry** – where the patient does not have a scheduled appointment, but is waiting for the first available appointment. Patients do not have to have scheduled appointments before being added to the Wait List. Stand-alone entries on the Wait List do not have a time or a Appointment number.

**System Prompt:**
Add Appointment to the Wait List? No = >

**Your Response:**
Enter <Y> to add this patient to the wait list for an earlier appointment.

Press <Enter> to accept the default of No.

- The appointment that you add to the Wait List is linked to the primary appointment you scheduled.

- If a scheduled appointment is linked to an entry on the Wait List, the system displays a “w” to the left of the already scheduled appointment’s date.
When are entries deleted from the Wait List?

Wait list entries that are linked to primary appointments are automatically deleted when the primary appointment date has passed.

Stand-alone Wait List entries are assigned a date by the scheduler after which they are automatically deleted from the system. You may manually delete entries from the Wait List by using the Delete from Wait List activity (F16/A4) or by using the U-Delete action code.

Canceling appointments and the Wait List

Whenever you cancel an appointment the system automatically checks the Wait List to see if there are any entries that match the criteria of the newly freed slot. If there are any matching appointments, the system displays a message reminding the scheduler to check the Wait List:

[Please check your Wait List. There is a patient waiting for a New Patient Appointment with Spencer MD, James, in Dermatology at UMHC/SCCC.]

If there is more than one appointment waiting for the same appointment criteria that was placed on the Wait List on the same day, the system displays information about the patient whose last name comes first alphabetically. Otherwise, the system shows information about the entry that was placed on the wait list first.

When you cancel a primary appointment that is linked to an entry on the Wait List, the system displays a prompt asking if you also want to delete the Wait List entry.
Wait Listed Appointments Attached to Cancelled or Bumped Appointments

- Wait List entries cannot be linked to a cancelled or bumped primary appointment, so it becomes a stand-alone entry on the Wait List.
- When you edit or print the Wait List, the system displays **CX** in the Time column to indicate that the Wait List entry was linked to a primary appointment, but that the primary appointment now has a status of CAN for cancelled.
- Likewise, the system displays **BP** in the Time column to indicate that the Wait List entry was linked to a primary appointment that was bumped.

Adding a Wait List Entry

You can add entries to the Wait List using either:

- Add to Wait List activity (F16/A1), or
- A-Add action code which appears after you have selected the W-Wait List action code in Function 1, Scheduling an Appointment or Function 6, Walk In Appointments.
- You can also add entries to the Wait List by scheduling appointments far in the future in Function 1. For these appointments, the system displays a prompt asking if you want to add the appointment to the Wait List. Far future appointments added to the Wait List are automatically linked to their primary appointment.
The appointments you add to the Wait List must be for the current day, or for a date in the future.

**System Prompt:**

**Select Function:**
Access Add to Wait List using Function 1, action code W, or Function 16, Activity 1.

**Patient:**
Enter the name of the patient for whom you are adding a wait list entry.
Place Existing Appointment on Wait List?

Enter <N> if you do not wish to place the existing appointment on the wait list.

Enter <Y> to place the existing appointment on the wait list.

- The system displays a list of pending and rescheduled appointments in the future for the specified patient. Select the appointment that you want to add to the Wait List. Press <F10> to save your selection and return to the Add Wait List Appointment screen.

Provider:
Enter a provider for this wait list entry.

Department:
Enter the department for this wait list entry.

Location:
Enter the location for this wait list entry.

Appointment Type:
Enter the Appointment type for this wait list appointment.

Date to Delete:
Enter the date on which you wish this wait list appointment to be deleted, or removed from the list.

Wait List Comment:
Enter up to a 30-character comment for this wait list entry.

Press <F10> to add this appointment to the wait list.
Wait List Action Codes

There are several action codes on the Wait List. The action codes that appear depend on how you accessed the Wait List. The following sections describe the Wait List action codes and when they will appear on the Wait List.

<table>
<thead>
<tr>
<th>Action Code:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>A – Add</td>
<td>Lets you add an appointment to the wait list.</td>
</tr>
<tr>
<td>C – Expand Contract</td>
<td>Lets you expand or contract the information displayed for the appointments on the wait list.</td>
</tr>
<tr>
<td>D – View Detail</td>
<td>Displays the View Detail Screen.</td>
</tr>
<tr>
<td>E – Edit</td>
<td>Allows you to edit an entry on the Wait List.</td>
</tr>
<tr>
<td>H – Reset</td>
<td>Lets you reset the list of appointments on the wait list to ensure that the list is current.</td>
</tr>
<tr>
<td>K – View Links</td>
<td>Lets you display information about linked primary appointments, if any, for an appointment on the Wait List.</td>
</tr>
</tbody>
</table>
N – Notes Displays a word processing screen that you can use to enter information about an appointment on the Wait List.

- For example, a scheduler may want to enter a message indicating that the provider wants this patient to get the first physical that becomes available.

O – View Resources Allows you to display the resources that are linked to the wait listed appointment.

P – Patient Inquiry Function 49, Patient Inquiry and the P-Patient Inquiry action code allow you to access information about a patient from the IDX applications.

S – Schedule Schedules an appointment from the wait list.

T – Print Lets you print the Wait List that appears on the screen.

U – Delete Deletes the selected appointment from the Wait List.

V – View ADF Displays the Appointment Data Form for the selected appointment.


**Edit Wait List Entry**

You can edit entries on the Wait List using either:

- Edit Wait List activity (F16/A2), or
- E-Edit action code which appears after you have selected the W-Wait List action code in Scheduling an Appointment (F1) or Walk In Appointments (F6).

- You can attach an entry to an appointment, make an entry on the Wait List stand-alone, or attach an entry on the Wait List to a different appointment.

**System Prompt:**

**Select Function:**

Access Add to Wait List using Function 1, action code W, or Function 16, Activity 1.

**Include all Departments?**
Enter <N> to include a specific department

**Include Department:**
Enter a valid Department from the Department Dictionary.

**Include all Providers for Department?**
Enter <Y> to add this patient to all providers’ wait list.
Enter <N> to add this patient to specific providers wait list.

**Include Provider:**
Enter the specific provider’s name.

When you have entered the last provider press <Enter>.
Include all Location? Enter <N> to see only those appointments for a specific location.

Patient Name: Enter the name of the patient for whom you wish to edit the wait list.

- If you want to see a Wait List for all patients, do not enter a name at the Patient: prompt.

Press <F10> to view the wait list.

Put another appointment onto the wait list instead?

Remove this appointment's link from the wait list? This prompt appears only if you answered N to the Put another appointment on the wait list instead? prompt.

Replacement option -- Before allowing you to edit an entry, the system gives you the option of replacing this entry, which is similar to adding to the Wait List, or replacing an entry using the Edit Wait List activity. For example, if you have an entry in the second position of the Wait List, and you use this activity to replace it with another appointment, the original Wait List entry is deleted and the new entry assumes the second position on the Wait List.

For stand-alone entries you can edit all of the fields on this screen. For linked entries, you can edit only the Wait List Comment field.
Printing the Wait List

You can print the Wait List using either the:

- Print Wait List activity (F16/A3), or
- T-Print action code which appears after you have selected the W-Wait List action code in Function 1, Scheduling an Appointment or Function 6, Walk In Appointments.

You can print the Wait List by Department / Provider or Patient:

- The department/provider list shows all entries on the Wait List for a specific department and provider(s).
- The patient list shows all entries on the Wait List for a selected patient. When you display the Wait List by Patient and if you display information for all providers and all departments, the system includes those entries that were made with providers or departments that have been deactivated or deleted from the system.

For each entry on the Wait List, the system prints the:

- date after which the entry will be deleted from the list,
- department and provider (this appears only if you are printing the Wait List by Department/Provider); *ANY* appears in the Provider column if this patient will take an appointment with any provider in a department,
- appointment time,
- Appointment type, date the entry was added to the list,
- desired location, and
- wait list comments.
- If an appointment is linked to a primary appointment, the time of the primary appointment is displayed in the Time column. If an entry is linked to a primary appointment that has been bumped, the list indicates this by displaying **BP** in the Time column. If an entry is linked to a
mary appointment that was cancelled, **CX** is displayed in the time column; this is now a stand-alone entry.

**System Prompt:**

**Select Function:**
Access Add to Wait List using Function 1, action code W, or Function 16, Activity 1.

**Include all Departments?**
Enter <N> to include a specific department

**Include Department:**
Enter a valid Department from the Department Dictionary.

**Include all Providers for Department?**
Enter <Y> to include all providers for the department.
Enter <N> to include specific providers for the department.

**Include Provider:**
Enter the specific provider’s name.
When you have entered the last provider press <Enter>.

**Include all Location?**
Enter <N> to enter a specific location
| **Patient Name:** | Enter the name of the patient for whom you wish to print the wait list.

- If you want to print the Wait List for all patients, do not enter a name at the **Patient:** prompt.

Press `<F10>` to view the wait list.

Press the action code `<T>` to print the wait list. |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Device:</strong></td>
<td>Enter the name of the printer that you wish to print to print the Wait List to.</td>
</tr>
</tbody>
</table>
Delete Wait List Entry

You can delete an entry from the Wait List using either:

- The Delete Wait List Entry Activity (F16/a4), or

System Prompt: Select Function: Your Response:
Access Add to Wait List using Function 1, action code W, or Function 16, Activity 1.

Include all Departments? Enter <N> to include a specific department

Include Department: Enter a valid Department from the Department Dictionary.

Include all Providers for Department? Enter <Y> to include all providers for the department.
Enter <N> to include specific providers for the department.

Include Provider: Enter the specific provider’s name.
When you have entered the last provider press <Enter>.

Include all Location? Enter <N> to enter a specific location
**Patient Name:** Enter the name of the patient for whom you wish to edit the wait list entry.
- If you want to see a Wait List for all patients, do not enter a name at the **Patient:** prompt.

Press <F10> to view the wait list.

Press the action code <U> to delete the wait-listed appointment.

**Reason for Deletion:** Enter the reason that you are deleting the entry.

Press <F10> to exit the bottom form.

Press <F10> again to exit the wait list screen.
Module Summary

- The Wait List is used to maintain a list of patients who want to be notified if the time slot of a particular Appointment type becomes available.

- From the Wait List, you can add an appointment, view additional information about the appointments, view detailed information about a selected appointment, edit an appointment, and update the list of appointments.

- There are many ways to access the Wait List, Function 1, Scheduling an Appointment (Action code W), Function 6, Walk In Appointments (Action code W), and Function 16, Wait List (add to, edit, print, and delete from the Wait List).

- There are two types of entries on a wait list: a linked entry and a stand-alone entry.

- If a scheduled appointment linked to an entry on the Wait List, the system displays a “w” to the left of the already scheduled appointment’s date.

- Whenever you cancel an appointment the system automatically checks the Wait List to see if there are any entries that match the criteria of the newly freed slot. If there are any matching appointments, the system displays a message reminding the scheduler to check the Wait List.
Display Multiple Provider Schedules (F17)

System Prompt:
Select Function: Access Function 17, Display Multiple Providers Schedules

Provider: Enter the provider name for which you wish to display.
- You may view up to three provider’s schedules.
Department: Enter the department for the provider for whom you wish to display.
- If the provider is only in one department, this will default.

Date: Enter the day that you wish to display using the IDX standard date format.

Scroll: Enter any of the following commands:
B to scroll Back in the same day.
F to scroll Forward in the same day.
A or 1 to view the morning session.
P or 2 to view the afternoon session.
E or 3 to view the evening session.
N to view the next day when at least one of the providers has a schedule on that day.
M to view the next day that all providers have a scheduled session.

To exit this activity use press <F7> <Q>.
**Reporting (F7)**

The Scheduling application includes two kinds of Daily Reports:

**Standard Daily Reports** - Standard Daily Reports are developed by IDX and cannot be edited or altered. They are the basic set of Daily reports delivered with the Scheduling application.

**Custom Daily Reports** - Custom Daily Reports are daily reports that were created to better serve the specialized needs of the enterprise.

Function 7, Reports, Activity 2, Daily Report Processing, Activity 2, Custom Daily Reports is the activity that you will be printing daily reports from.

The screen below will appear as follows:
There are additional reports that you will see listed in addition to the reports defined below. You may print those reports on an as needed basis.

**How to Print**

**System Prompt:**

**Function:**

<table>
<thead>
<tr>
<th>Your Response:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Function 1, Activity 2, Activity 2.</td>
</tr>
</tbody>
</table>

1. Use your arrow keys to highlight the report(s) that you want to print.
   
   Press **<Enter>** to select the report.

   - You will notice a diamond next to the reports that you have selected.
   - Press the action code T, (T-Print) to continue to the print criteria screen.
**MIA Alpha and Time Reception List**

The Reception Lists are useful for quickly locating patient appointment information when a patient arrives for an appointment. The receptionist can quickly access important appointment information to assist in the arrival of patients.

**Fields on these Reports**

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>DOB</th>
<th>UMMG#</th>
<th>Time</th>
<th>Appointment Type &amp; Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pt Status</td>
<td>Contact #</td>
<td>Reason For Appointment</td>
<td>Authorization #</td>
<td>Copay</td>
</tr>
<tr>
<td>FSC1</td>
<td>Referring MD</td>
<td>Referring MD Phone</td>
<td>ADF Insurance Field</td>
<td>ADF Comment Fields (all three)</td>
</tr>
</tbody>
</table>

**Sort Options**

Department or Provider

Location

Patient Name or Time of Appointment
**MIA Appointment Verification List**

This report can be used to contact the patients prior to their appointments to remind or confirm their scheduled Appointment. The report can be sorted by Scheduling Department and/or provider.

**Fields on this Report**

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>DOB</th>
<th>UMMG#</th>
<th>Appt Date</th>
<th>Home Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Number</td>
<td>Contact Number from ADF</td>
<td>Confirmed?</td>
<td>Statement Balance</td>
<td>FSC1</td>
</tr>
<tr>
<td>Group #</td>
<td>Member #</td>
<td>Insurance Phone #</td>
<td>Authorization #</td>
<td>Referral #</td>
</tr>
<tr>
<td>Copay</td>
<td>Missing Referral Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MIA Insurance Verification

This report can be used as a worksheet when contacting the insurance carrier to verify patient coverage.

Fields on this Report

<table>
<thead>
<tr>
<th>Provider Name</th>
<th>Provider Number</th>
<th>Provider Phone</th>
<th>Appointment Date</th>
<th>Scheduling Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Time</td>
<td>Patient Name</td>
<td>UMMG #</td>
<td>DOB</td>
<td>SSN</td>
</tr>
<tr>
<td>Insurance Name</td>
<td>Insurance Address</td>
<td>Insurance Phone</td>
<td>Policy Number</td>
<td>Group Number</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Copay</td>
<td>Deductible</td>
<td>Out of Pocket</td>
<td>Diagnosis</td>
</tr>
<tr>
<td>Verify by:</td>
<td>Procedure:</td>
<td>Time and Date of Procedure</td>
<td>Comments:</td>
<td></td>
</tr>
</tbody>
</table>
**MIA Missing Charge List**

The Missing Charge List Report contains all kept appointments (ARR) that *do not* have corresponding charges entered in the IDX Billing and Accounts Receivable System (BAR). This report helps BAR data entry personnel to eliminate lost revenue by immediately identifying “lost” charges.

To identify missing charges, the system checks the service date, billing provider, and billing area, billing location or division, against the appointment date, scheduling provider, and scheduling department to see if a charge was entered.

**Fields on this Report**

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>UMMG #</th>
<th>DOB</th>
<th>Appointment Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Appointment Status</td>
<td>Location</td>
<td>Billing Provider</td>
<td>Appointment Number</td>
</tr>
</tbody>
</table>
MIA Provider Daily Schedules

This is the report that you will produce to give to your providers so that they can see their schedule for a particular date.

Fields on this Report

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>UMMG #</th>
<th>DOB</th>
<th>Appointment Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Type</td>
<td>Home Phone</td>
<td>Work Phone</td>
<td>Contact Number</td>
<td>FSC</td>
</tr>
<tr>
<td>Referring MD</td>
<td>Referring MD Phone</td>
<td>Patient Status</td>
<td>Reason For Appointment</td>
<td>All ADF Scheduling Comments</td>
</tr>
</tbody>
</table>

MIA Past Pending Report

The Past Pending/Rescheduled Report contains information about patients whose appointment dates have passed and whose appointments have a status of pending or rescheduled.

Fields on this Report

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>UMMG #</th>
<th>DOB</th>
<th>Appointment Date</th>
<th>Appointment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>Department</td>
<td>Location</td>
<td>Appointment Status</td>
<td>Appointment Number</td>
</tr>
</tbody>
</table>
Facesheets

A facesheet is a summary of the patient’s registration information that you can use as a cover page for your patient’s folder.

The goals of the Facesheet is to:

- provide uniform group registration documents;
- provide on-line registration documents; and
- provide clear and concise forms to our patients.

This form includes the patient’s demographic and insurance data. This also provides a printout of the most important patient registration information to be verified upon a patient’s arrival at UMMG.

<table>
<thead>
<tr>
<th>System Prompt:</th>
<th>Your Response:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Document:</td>
<td>Enter &lt;?&gt; to view a list of the available documents.</td>
</tr>
<tr>
<td>Registration Document:</td>
<td>Type the name of the registration document you wish to print.</td>
</tr>
<tr>
<td></td>
<td>• You can type the first few letters of the document to save time.</td>
</tr>
<tr>
<td>Is this correct?</td>
<td>Enter &lt;Y&gt; for yes.</td>
</tr>
<tr>
<td></td>
<td>Enter &lt;N&gt; for no.</td>
</tr>
<tr>
<td>Print a registration Label/</td>
<td>Enter &lt;Y&gt; for yes.</td>
</tr>
<tr>
<td>Facesheet?</td>
<td>Enter &lt;N&gt; for no.</td>
</tr>
</tbody>
</table>
Print immediately? NO=> Enter <Y> to print now.

Enter <N> to print later.

Device: Enter the name of the printer you want to print the registration document from.

Right Margin: ##=> Press <Enter> to accept the default.

Date: DD/MM/YY => Press <Enter> to print on the specified date.

Or

Enter a new date that you wish to print using the standard IDX date format.

Registration Document: The cursor returns to this prompt in the case that you want to print another registration document.

If you do not want to print anything else, Press <Enter> to continue.
Appendix
# Patient Lookup Options

<table>
<thead>
<tr>
<th>Lookup</th>
<th>Format</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient’s Full Name</td>
<td>Last Name, First Name</td>
<td>DEERING, JOHN</td>
</tr>
<tr>
<td>Patient’s Last Name</td>
<td>Last Name</td>
<td>DEERING</td>
</tr>
<tr>
<td>Partial Name</td>
<td>First few letters of the patients first and last name</td>
<td>DE, JO</td>
</tr>
<tr>
<td>Partial Name,;DOB</td>
<td>First few letters of the patient’s last name, followed by a comma &lt;&gt;, then a semicolon &lt;;&gt;, then the patient’s date of birth. (The date of birth must be in standard IDX date format.)</td>
<td>DE, JO; 2.14.65</td>
</tr>
<tr>
<td>Partial Name;YOB</td>
<td>First few letters of the patient’s last name, first few letters of the patient’s first name, a semicolon and the year of birth</td>
<td>DE, JO; 65</td>
</tr>
<tr>
<td>Partial Name;DOB;Sex</td>
<td>First few letters of the patient’s last name, first few letters of the patient’s first name, a semicolon and the year of birth, semicolon, and sex</td>
<td>DE, JO; 65; M</td>
</tr>
<tr>
<td>Partial Name;;Sex</td>
<td>First few letters of the patient’s last name, first few letters of the patient’s first name, two semicolons, and sex</td>
<td>DE, JO; M</td>
</tr>
<tr>
<td>Claim Number</td>
<td>C followed by the patient’s claim number</td>
<td>C1089</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Social Security</td>
<td>S followed by the patient’s social security number</td>
<td>S456-87-5236</td>
</tr>
<tr>
<td></td>
<td>• The hyphens are not necessary</td>
<td></td>
</tr>
<tr>
<td>UMMG Account Number</td>
<td>&lt;M&gt; followed by the patients account number</td>
<td>M0002332</td>
</tr>
<tr>
<td></td>
<td>&lt;.&gt; followed by the patient’s account number</td>
<td>.0002332</td>
</tr>
<tr>
<td>Alias</td>
<td>The name entered at the AKA prompt</td>
<td>DEERING,JACK</td>
</tr>
<tr>
<td>Soundex</td>
<td>First few letters of the patients first and last name followed by a ?</td>
<td>DEA,J?</td>
</tr>
<tr>
<td>Recall last displayed</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>patient</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Hospital Number</td>
<td>&lt;A&gt; followed by an the hospital’s first initial, then the hospital number.</td>
<td>AJ333333</td>
</tr>
<tr>
<td>Insurance Certificate Number</td>
<td>&lt;W&gt; followed by the patient’s insurance certificate number.</td>
<td>W45789785601</td>
</tr>
<tr>
<td>Guarantor Name</td>
<td>&lt;@&gt; followed by the last name,first name of the guarantor.</td>
<td>@DEERING,MARY</td>
</tr>
</tbody>
</table>
## Entering Dates

<table>
<thead>
<tr>
<th>Ways to Enter the Date</th>
<th>Symbol</th>
<th>Definition/Example</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>MM/DD/YY</td>
<td>02/01/96</td>
</tr>
<tr>
<td></td>
<td>MM/D/YY</td>
<td>02/1/96</td>
</tr>
<tr>
<td></td>
<td>MM-DD.YY</td>
<td>02.01.96</td>
</tr>
<tr>
<td></td>
<td>MM-DD-YY</td>
<td>02-01-96</td>
</tr>
<tr>
<td></td>
<td>T</td>
<td>Today’s date</td>
</tr>
<tr>
<td></td>
<td>T-N</td>
<td>Where N is a number of days in the past</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Example: T-7 = today minus 7 days</td>
</tr>
<tr>
<td></td>
<td>T+N</td>
<td>Where N is number of days in the future</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Example: T+7 = today plus 7 days</td>
</tr>
</tbody>
</table>
# Entering Times

<table>
<thead>
<tr>
<th>Ways to Enter the Time</th>
<th>Symbol</th>
<th>Definition/Example</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>HH:MMAM</td>
<td>8:00AM</td>
</tr>
<tr>
<td></td>
<td>HHAM</td>
<td>8AM</td>
</tr>
<tr>
<td></td>
<td>HH:MMPM</td>
<td>3:00PM</td>
</tr>
<tr>
<td></td>
<td>HHPM</td>
<td>6PM</td>
</tr>
<tr>
<td></td>
<td>Military Time</td>
<td>1300</td>
</tr>
</tbody>
</table>