Previously, when an end date was added to a Master Schedule or when a Master Schedule was deleted, a non-retrievable report was generated. It showed any day in the future to which the schedule had been distributed so the days could be reconciled. Once you navigated away from the report, it could not be recalled.

You can now reconcile the daily schedules that appear after the end date or deletion date of the Master Schedule, and the report can be recalled at your convenience instead of having to print it out or work the edits immediately.

Using F8/A2/A7, you can retrieve the Display Master End Date/Delete List.

Retrieve the report that printed after the End Date of 2/8/08 was added to provider IDX TEST’s Monday schedule.

Before describing the steps of the scenario, it is important to understand the concepts of the master schedule distribution and its relationship to a master schedule end date.

When a master schedule is initially entered in the system and filed, it is distributed according to its definition over a period of 465 days in the future if there is no end date specified or the end date is greater than 365 days in the future.

Thereafter, each day, the master schedule is distributed one more day, if appropriate.

For example, using the scenario above, when the December 1, 2007 Monday master schedule for provider TEST, IDX was originally filed, it did not have an end date. It was distributed to each Monday through December 1, 2008.

Each day thereafter, the system evaluated to see if the master schedule should be distributed to the next 365th day.

Once a week, every week after December 1st, 2007, the system distributes the master schedule to the next Monday.

Thus by January 15, 2008, the system had distributed the master schedule to each Monday through January 15, 2009.

On January 15, 2008, an end date of 2/08/08 was entered on the master schedule and the master schedule was filed.

The system will no longer distribute the master schedule out 365 days because the end date of 2/08/08 is less than 365 days in the future.

However, because the master schedule has already been distributed through January 15, 2009, there may be appointments already scheduled for dates after the new master schedule end date of 2/8/08.

These appointments are identified on the Master End Date/Delete List. A decision will have to be made for each appointment:

- to leave the appointment on the provider's schedule even though the provider does not want the master schedule on the day of the appointment
- to move the appointment to another provider's schedule
- to cancel and reschedule the appointment
1. Add an End Date of 2/8/08 was added to provider IDX TEST's Monday schedule.

The list of dates to which the Master Schedule was applied displays on the screen.

In Version 3.0

The list of dates to which the Master Schedule was applied displays on the screen.

The list was not retrievable.

Continued on Next Page
In Version 4.0

The list of dates to which the Master Schedule was applied displays on the screen.

The list shows both the date and day of the week.

The list is retrievable.

These are the steps to retrieve the list of dates to which the Master Schedule was applied.

1. Access F8/A2.

The Master Schedule Activities screen displays.

2. Select Activity 7, Display Master End Date/Delete List

The Display Master End Date/Delete List selection screen displays.
3. Enter the begin date of 2/8/08

The Master End Date/Delete List redisplay.
Overview

Previously, the system displayed a New Master Schedule screen that listed the dates in several columns from left to right without column headings as the Master Schedule was in the process of being distributed.

Now, once the distribution is complete, the system displays the new Master Schedule Distribution dates screen.

New Feature

Master Schedule Distribution Dates screen displays date and their corresponding day of the week in three columns with titles on the columns.

To view more dates than initially display on the screen, use the up and down arrows and the Page Up and Page Down keys.

In Version 3.0

The Distribute Master Schedules screen listed the dates to which the schedule was distributed as the schedule was being distributed.

In Version 4.0

The Master Schedule Distribution Dates screen displays after the distribution of the Master Schedule to all the dates is complete.

The system displays the dates and days of the week in three columns.
Previously the Conflict List did not provide all the information that was needed about conflicts to quickly and easily determine all the conflict reasons for a particular day and to see which days have appointments. Additionally, there was no easy way to edit a daily schedule from the Conflict List and there was no way to retrieve data from the Conflict List once the Discrepancy Report had deleted it.

Previously, the conflict list had the following characteristics:

▪ When you distributed a master schedule and there was a conflict, the Conflict column on the Master Schedule Distribution Conflicts screen displayed one conflict reason per daily schedule, for example, Previously Edited, or Scheduled Appointments. If there was more than one conflict, the system displayed the reason that was highest in the established hierarchy. If you wanted to find out if other conflicts existed as well, you had to investigate the daily schedule.

▪ The Master Schedules Distribution Conflicts screen did not display the number of existing appointments for each daily schedule.

▪ You could not edit the daily schedule from within the Master Distribution Conflicts screen. You could view the daily schedule, but to edit a daily, you had to access the Daily Schedules and Templates screen. Then you had to return to the Master Schedules Screen and access the Master Schedules Distribution Conflicts screen to resolve other conflicts.

▪ The Master Schedules Distribution Conflicts screen displayed conflicts for dates in the past. This was unnecessary information.

▪ Running the Master Schedule Discrepancy Report deleted the information from the Master Schedules Distribution Conflicts.

Several enhancements have been made concerning the conflict list:

▪ The Master Schedule Distribution Conflicts screen is now called the Master Schedule Conflict List screen.

▪ The type of conflict is indicated on the Master Schedule Conflict List (previously called the Master Schedule Distribution Conflicts screen). A new action, Legend, defines the conflict indicators.

▪ An Appts column has been added to the Master Schedule Conflict List screen. The column displays the number of existing appointments for each daily schedule.

▪ From the Master Schedule Conflict List screen you can access the Edit Daily Schedules and Templates screen.

▪ The Master Schedule Conflicts List does not list dates in the past
In Version 3.0

Master Schedule Distribution Conflicts List screen

- Screen name changed from Master Schedule Distribution Conflicts to Master Schedule Conflict List.
- Tran to Dates action code has been renamed Transfer.
- Total Appts field has been added to the header to indicate the number of appointments associated with the entire conflict list.
- Conflict Column - Describe the type of distribution conflicts:
  - A - Schedule Appointment - This daily schedule already has an appointment scheduled
  - C - Daily Schedule Crashed - This daily schedule has crashed.
  - E - Previously Edited - Someone edited this daily, either by hand or by transferring a template
  - I - Daily Schedule in Use - Someone is in the process of editing this daily or is scheduling an appointment in this daily schedule.
- L - Legends action code displays full descriptions of all conflict type indicators
- Appts Column - displays the number of existing appointments for each daily schedule.
- Edit Daily Action - allows you to edit a daily schedule without having to leave the Master Schedule Conflict List screen. After you edit a daily and file the changes, the system returns you to the exact place you were at when you clicked the Edit Daily button.

Master Schedule Conflict List screen

- In Version 4.0
- Total Appts - displays the total number of appointments of all dailies
- Conflict column indicates the type of conflict.
- E - Edit Daily action code
- L - Legend action code describes conflict (A,C,E or I)
- Transfer button (new name, same functionality)

Continued on Next Page
E - Edit Daily

Use this action code to edit a daily directly from the Master Schedule Conflict List. This allows you to edit a daily schedule without having to leave the Master Schedule Conflict List screen ad then access the Daily Schedules and Templates screen.

When you use this action code, the system displays the **Edit Daily Schedule** screen.

After you perform your edits, the system asks if you are sure you want to file this schedule.

After you edit a daily schedule and file changes, the system returns you to the exact place on the Master Schedule Conflict List screen. Therefore, you do not have to scroll down to find where you were.
### In Version 4.0

<table>
<thead>
<tr>
<th>L - Legend Action Code</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>L - Legend</strong> action code is selected, the following screen displays the description for all the letters that can appear in the Conflicts column.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Letter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Scheduled Appointments - This daily schedule already has an appointment scheduled.</td>
</tr>
<tr>
<td>C</td>
<td>Daily Schedule Crashed - This daily schedule has crashed.</td>
</tr>
<tr>
<td>E</td>
<td>Previously Edited - Someone edited this daily, either manually or by transferring a template.</td>
</tr>
<tr>
<td>I</td>
<td>Someone is in the process of editing this daily or is scheduling an appointment in this daily.</td>
</tr>
</tbody>
</table>