CHAPTER 1

FlowCast Master Schedule
Training WEB 4.0
About this Manual

This Training Manual is written to give you a step-by-step guide for your classroom training and a handy reference for your daily work. The list of features in this manual helps you use it more effectively.

Objectives and Summaries - The manual contains class lesson objectives which provide you with the overall goals you will achieve by the end of the course. The manual contains a summary for your review at the end of each lesson.

Practice Sessions - Most modules end with a practice session to help you practice the skills you learned in the lesson. Your instructor will be available to assist you if you need it during the exercises.

Keys - References to keys are presented in bold brackets, for example, <Enter>. Key combinations are referred to in the following format <F7><P>, this would mean to press the F7 key, then press the P key.

Special terms - Important terms or ideas introduced for the first time are presented in bold italic enter. Thereafter, the word or phrase appears as normal text.

Special Symbols -

The manual provides symbols that have special meanings.

- This symbol points out a note of additional information for the user.

- This symbol calls your attention to a very important point, note, warning.

- This indicates a system short cut for a procedure or indicates options or terms supplied to the users as a reference aid.

- The computer icon indicates it is time an on-line exercise.

- This is the symbol that data is being pulled from or checking data in a dictionary or table.

- The hourglass icon denotes the end of a section or lesson.

- This symbol indicates to write down this information for reference.
Module 1 - Introduction to Web Master Schedules

Course Objectives

Upon completion, participants will be able to:

- Define a Master Schedule and a Daily Schedule.
- Define at least three components of the provider’s schedules.
- Explain the relationship between the Master Schedule and the Daily Schedules.
- Add and edit a provider’s Master Schedules.
- Identify three different types of time slots and when each is used.
- Explain the function of the Master schedules Recurrence.
- Distribute Master Schedules to create the Daily Schedules.
- Edit the provider’s Daily Schedule to reflect any necessary changes.
- Define what a Template is and when to use one.
- Create, edit and use Templates versus manually changing a schedule through edit Daily Schedules.
- List at least three rules for distributing Master Schedules.
- Know at least three rules for transferring Templates.
- Resolve any conflicts created when distributing a revised Master Schedule.
- Set up his/her providers’ Master Schedules(s) on GE IDX.
Master Schedule Concepts and Definitions

IDX Patient Scheduling application enables us to load our providers' schedules onto the system. The schedule consists of time slots in which a provider will see patients as well as time slots in which a provider will not be available to see patients.

Because providers' schedules are created and maintained on-line the need for manual re-creation is eliminated.

To schedule an appointment with a provider, that provider's schedule must be in the IDX system. The IDX Patient Scheduling application uses two types of schedules: Master Schedules and Daily Schedules.

The following are the major components of IDX Master Schedules:

Dictionaries

Scheduling dictionaries were set up for you to save time when making appointments and setting of your schedules.

Below are highlights of Scheduling dictionary features.

**Dict.331-Scheduling Locations** - This dictionary lists the locations that our providers schedule patients

**Dict.301-Scheduling Departments** - This dictionary, lists general information about a department and relates to those providers that belong to this department.

**Dict.302-Scheduling Providers** -- All of our scheduling providers are housed in this dictionary.

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. This data was compiled through various workgroup meetings, individual meetings departments, and the physician scheduling survey.
For Master Schedules, the following scheduling profile questions were necessary:

- Allow appointment 365 days in the future.
- Allow appointments 7 days in the past.
- Days of week for appointment search are M,TU,W,TH,F,SA.
- Default search option in F1 and F6 is First Available.
- Default answer to “Book into frozen slot?”: N.
- Number of days to retain appointments on bump list for automated purge is 60 days.
- Number of days to retain provider Daily Schedules is 365 days.
- Display number of appointments booked on dailies.
- Perform future visit type switch on slot with booked appointments.
- Determine future visit type switch allocation for slots with booked appointments by rounding down.

Appointment Types

- A appointment type is the kind of appointment, such as a new patient visit, 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 30 minutes for one provider and 60 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 GE 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.
- The Master Schedule consists of time slots in which a provider will be available to see patients as well as Time Slots in which a provider will not be available to see patients.
- The Time Slots are defined in the Master Schedule.
- When a provider sets up his/her schedule, there are certain requirements that the provider might have regarding the availability of his/her time.

For example the provider:

1. may want to see only a certain appointment type at a certain time of day;
2. might like to see various types of appointment during certain period of time; or
3. might need to schedule time for meetings etc. that do not involve patient appointment.

Master Schedules

- Master Schedules are schedules created to allow each provider to design his/her own schedule for each day of the week.
- 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.
- Master Schedules are a model from which Daily Schedules are created. Using a Master Schedule saves time because they enable you to create schedules for a period of time, (e.g., 365 days) thus eliminating the need to set up provider preferences on a daily basis.

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.

**Templates**
- Templates are a fast means of editing a Daily Schedule.
- You define a Template which is transferred to one or more Daily Schedules. The alterations in the Template are overlaid onto the schedule.
- Any sessions undefined in the Template are left unchanged in the Daily Schedule.

**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 Master Schedules**
- Reduce 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;
- Increase patient satisfaction;
- Reduce the training time for new staff who will not have to learn provider preferences; and
- Make it easier for scheduling appointments across departments or locations.
Master Schedule Process

FIGURE 1. Master Schedule Process
Step-By-Step Procedure To Maintain The Schedules:

The below list the standard steps that you would use in maintaining.

1. Create Original Master Schedule
2. Distribute Master Schedule
3. Book Appointments into daily schedules
4. Provider asks to have his/her master schedule changed
5. Edit Master Schedule (or) create a new one.
6. Distribute Schedule.

a) If after the master schedule is distributed there are conflicts, the Conflict List is displayed so that the conflicts can be reconciled. Or, the conflict list can be recalled at a later time by using the “Actions” button and selecting “Conflit list”.

7. Resolving Conflicts

a) View the master or daily schedule.

b) Remove dates with conflicts by using the Remove button.
   or

c) Select and transfer the master to days in conflict by using the Transfer button.
   or

d) Create a new template from the master or a master from a template.

Transfer template to individual days from the Conflict List.
Maintenance With Template
1. Create Template to reflect the changes you want to make per session.
2. Transfer the template
3. Print the Bump List
4. Call Patients to Reschedule

Maintenance with Editing Dallies
1. Edit the Daily Schedule
2. File the Revised Daily Schedule
3. Print the Bump List
4. Call Patients to Reschedule
**Master as the Model for the Daily**

A Master Schedule:

- Defines the Time Slots within the provider's Daily Schedule for a period of time;
- When distributed, creates the Daily Schedules. (Appointments are booked into the Daily Schedule, not the Master Schedule);
- 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;
- (For example, a provider may be working in the Kendall Office on Mondays, Wednesdays, and Fridays but, will be working at PAC on Tuesdays and Thursdays. In this situation, the provider would have two separate Master Schedules created.);
- Once created, is distributed to create the Daily Schedule. This process creates the Daily Schedules where appointments are booked.
Staffing to Build Master Schedules

Master Schedulers create and maintain providers' Master Schedules, Templates and changes to the Daily Schedule. These Master Schedules should reflect the documented and undocumented preferences of providers or practices which can be identified and automated to a certain degree.

The Master Schedulers will:

• Build and test the initial loading of his/her providers' Master Schedules;
• Be most familiar with the provider's preferences (e.g., “not more than 2 physical appointments in the morning session,” or “two new patient visits should not be booked back to back”);
• Test that the preferences have been set up within the schedule;
• Ensure security levels are accurate for maintaining the changes to the master and/or Daily Schedules; and
• Maintain Master Schedules, Templates, and changes to the Daily Schedules of the provider(s) assigned to him/her.
Accessing Master Schedules

To Access provider’s Master Schedule use the following steps:

**FIGURE 2.**

1. Click on the VTB (Vertical Tool Bar) **Sched Setup** option.
2. Click the HTB (Horizontal Tool Bar) **Master Schedules** Tab. The Master Schedules Screen displays, in this screen you can create a new master schedules, edit, or add and end date to an existing master schedule.
3. Enter the provider’s last name in the provider field for the schedule you are creating, Tab.

4. Enter the scheduling department of the provider whose schedule you are creating, Tab. (Note: if the provider has only one department this field will automatically populate. If there are multiple departments for this provider, you can click for a list). All of the provider’s existing master schedules will be displayed.
Overview of the buttons and options in the Master Schedules Screen

FIGURE 5. Add or Edit Master Schedule Screen

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>This button will update the screen.</td>
</tr>
<tr>
<td><img src="image" alt="New" /></td>
<td>Click here to create a new Master Schedule.</td>
</tr>
</tbody>
</table>
### TABLE 1. Master Schedules Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit</strong></td>
<td>Click here to edit an existing Master Schedule.</td>
</tr>
<tr>
<td><strong>Copy</strong></td>
<td>Click here to copy from the current provider to another provider.</td>
</tr>
<tr>
<td><strong>Distribute</strong></td>
<td>Click here to distribute a Master Schedule.</td>
</tr>
<tr>
<td><strong>Show Deleted</strong></td>
<td>Click here to show all the deleted Master Schedules for this provider, or to hide all the deleted Master Schedules for this provider.</td>
</tr>
<tr>
<td><strong>Hide Deleted</strong></td>
<td>Click here to:</td>
</tr>
<tr>
<td></td>
<td>1. Delete a Master Schedule</td>
</tr>
<tr>
<td></td>
<td>2. View Master Schedules only</td>
</tr>
<tr>
<td></td>
<td>3. Access the Conflict List</td>
</tr>
<tr>
<td></td>
<td>4. to Add an End Date/or view a Delete List</td>
</tr>
<tr>
<td></td>
<td>5. Create a Master Schedules from a template</td>
</tr>
</tbody>
</table>
Module 2 Add/Edit Master Schedules Getting Started

Before you create a master schedule, you need to answer the following:

1. If your provider works in several departments, you need to choose the department for the schedule you will be creating.
2. You also need to consider the date on which this new schedule will go into effect.
3. What are the days of the week that this schedule will be effective?
4. Is this schedule going to be for every week, every other week, every other month, etc.?
5. In what location will this provider see patients according to this schedule?
6. What are the provider hours and what type of appointments does the provider want to include in the schedule?

Creating a New Master Schedule

1. To begin, click the **New** button

The Master Schedules Criteria Screen displays:
FIGURE 6. Distribution Criteria Screen

The following page contains a table describing each field in the Distribution Criteria Screen.
### TABLE 2. Distribution Criteria Screen

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin Date</td>
<td>Enter the date when the Master Schedule goes into effect.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter the last day this schedule is in effect, if applicable</td>
</tr>
<tr>
<td></td>
<td><em>(Note: Most schedules will not have an end date due to most providers wanting to maintain a schedule for an indefinite period of time. Therefore, you can press &lt;TAB&gt; to leave this field blank and to continue the master schedule indefinitely.)</em></td>
</tr>
<tr>
<td>Day(s) of the week</td>
<td>Select the day(s) of the week for which this schedule is valid.</td>
</tr>
</tbody>
</table>
Once you have selected all the required fields press [OK] to continue to the **Define Sessions / Comments** screen.

### TABLE 2. Distribution Criteria Screen

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Recurrence W: M: | For Weekly recurrence you can select one of the following:  
                  - Every week  
                  - Every other week  
                  - Every [up to ten]week  
                  For monthly recurrence for the schedule. You can enter a combination of monthly recurrences.  
                  **Example**  
                  1st week of every month;  
                  2nd week of every month;  
                  3rd week of every month;  
                  4th week of every month;  
                  5th week of every month;  
                  *(Note: You cannot enter both a monthly and a weekly recurrence.)* |

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Defining Sessions and Comments

FIGURE 7. Define Sessions/Comments Screen

The Define Sessions / Comments screen allows you to specify what sessions the provider will be opening for that day schedule, the end time for each session, an schedule comment (note: this should be a comment that provides additional information about the schedule, for example, Dr Test Monday clinic at UMHC), and the end time for each. In addition, you can enter a free-text session comments in each session.

The following page contains a table describing each field in the Define Sessions / Comments screen.
Defining Sessions and Entering Comments continued..

TABLE 3.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM End</td>
<td>Enter the end time of the AM session (for example; 12:00N). <strong>Tab</strong> to continue.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the location for the AM session. <strong>Tab</strong> to continue.</td>
</tr>
<tr>
<td>PM End</td>
<td>Enter the end time of the PM session (for example; 5:00pm). <strong>Tab</strong> to continue.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the location for the PM session. <strong>Tab</strong> to continue.</td>
</tr>
<tr>
<td>Eve (for Evening)</td>
<td>There is no end time for the evening session, <strong>Tab</strong> to continue.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the location for the EVE session. <strong>Tab</strong> to continue.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter a comment which provides additional information about the schedule. <strong>Tab</strong> to continue,</td>
</tr>
<tr>
<td>Comments for the sessions</td>
<td>Enter a comment for each session as apprpiae. <strong>Tab</strong> to continue.</td>
</tr>
</tbody>
</table>

Once you entered the ending time and location and comments, click the button to continued.
**Time Slots**

A time slot is a period of time reserved for an appointment type.

There are three types of time slots on a providers' schedule: Regular, Superslot and Non-Clinic slot. Before creating a master schedule or template or editing a daily schedule you should be familiar with the types of slots.

1. Regular
2. Superslot
3. Non-Clinic Slot

**Regular Slot**

- Regular slots are individual time periods defined for a certain appointment type; they are usually filled by a patient needing that specific appointment type.
- You can create more than one regular slot for more than one appointment type at a time.
- You can define regular slots which overlap.
- You can enter or edit comments, up to 22 characters, for regular or for non-clinic slots.

**Superslot**

A superslot is a block of time in a schedule set aside to be available for one or more appointment type(s).

**There are four types of Superslot**

1. **ANY** - Superslot allow you to use special appointment types which you cannot use with regular slots. These appointment types automatically exist for all providers and departments, and do not need to be set up in your appointment types dictionaries.
Once you have defined a superslot as ANY, you cannot define any other appointment types in that superslot. This allows the scheduler to book any appointment type into these Superslots, provided the appointment type's duration fits into the time for that appointment e superslot.

2. **SPECIFIC** - This superslot indicates that the provider will see a set number of appointment types, but with a degree of flexibility. Can be used to create an “either/or” situation so that the duration of all of the appointment types assigned to the superslot exceeds the amount of time allocated for the superslot. This means that not all of the appointment types can be booked into the superslot, unless you over book. When an appointment type is booked into the superslot the system takes as many time intervals as necessary to accommodate the appointment type's duration. This forces an either/or condition, as the superslot cannot accommodate all of the appointment types for which it was defined.

To avoid “wasted” superslot time, the duration of the appointment type in a superslot should be a multiple of the interval time. The best interval to use is the smallest one that divides evenly into the duration of all appointment types that can be booked into the superslot.

3. **ANY** - You can create an exclusive *ANY superslot which accepts all appointment types except a particular type or types that you specify. Using an exclusive *ANY superslot is especially useful if you want a superslot to contain ten or more appointment types because it displays faster on the Summary Screen and reduces the need for scrolling, and speeds up filing time.

4. **WALK - INS** - This superslot specifies to accept walk-in (same day) appointments

A WLK is only found as available for the current day or for a date in the past. WLK can only be booked through the summary search option. WLK are automatically defined for all providers, they do not need to be added to a provider's list of valid appointment types.

**Non-clinic Slots**

Non-clinic Slots are time periods set aside when the provider does not see patients. Non-clinic slots are used for meetings, rounds, research, or can be used to set up vacation schedules. Lunch, vacation, meetings etc…. can be built into the schedule to identify time periods where the provider is “not available.” The system will not offer non-clinic appointment types to a scheduler when searching for an appointment.
Adding Regular, Non-clinic and Superslot

After adding the session and scheduler comments, users may add slots.

**FIGURE 8. Adding Regular, Non-clinic or Superslot screen**

Adding regular, Non-regular and Superslot screen

**TABLE 4. Edit Sessions Action Codes**

<table>
<thead>
<tr>
<th>This action...</th>
<th>Allows you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - Add/Edit Sessions</td>
<td>To Add or Edit a session to the scheduler, either AM, PM, or EVE.</td>
</tr>
<tr>
<td>C - Schedule Comments</td>
<td>To Add a comment to the schedule.</td>
</tr>
<tr>
<td>R - Add Regular Slots</td>
<td>To add a regular or non-clinic slot to the schedule.</td>
</tr>
<tr>
<td>S - Add Superslot</td>
<td>To add a superslot to the schedule.</td>
</tr>
</tbody>
</table>
Adding a Regular Slot (R)

After selecting <R> the following fields need to be populated for each regular or non-clinic slots (see table 9).

**FIGURE 9. Adding Regular Slots Screen**

![Adding Regular Slots Screen](image)

**TABLE 5. Regular Slots Fields**

<table>
<thead>
<tr>
<th>System Prompts</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session</td>
<td>Enter Session AM, PM, or EVE.</td>
</tr>
<tr>
<td>Time</td>
<td>Enter starting time only. Example; 8:00A or 1:00P</td>
</tr>
</tbody>
</table>
After entering the first regular slot, press to save this slot, you will see the just added slot, in the session selected (see figure 10), the screen fields will be blank, allowing you to add another regular or non-clinic slot.

**FIGURE 10. First slot added screen**
Continue until all applicable slots for that session are completed, press twice to finish with the session.

**Adding a Superslot (S)**

Super slots are used to define groups of appointment types that a provider is willing to see during a given time.

Selecting the add superslot action (S) will launch the superslot criteria screen (see figure 11).

**FIGURE 11. Superslot Criteria Screen**

The following page contains a table describing each field in the Add/Edit Superslot screen.
TABLE 6. Superslot Criteria Screen fields

<table>
<thead>
<tr>
<th>System Prompts</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session</td>
<td>Enter AM, PM or EVE. Tab</td>
</tr>
<tr>
<td>Start Time</td>
<td>Enter starting time</td>
</tr>
<tr>
<td>End Time</td>
<td>Enter the time the session ends. Tab</td>
</tr>
<tr>
<td>Interval</td>
<td>Enter the smallest period of time in which the provider will see patients. Tab</td>
</tr>
<tr>
<td>Repeat</td>
<td>Enter the number of patients the provider will see at one time. Tab</td>
</tr>
<tr>
<td>Types to Include</td>
<td>Enter “Any” or “Specific”. Note; this field always defaults to “Any”. Tab</td>
</tr>
<tr>
<td>Total Allocations</td>
<td>Displays the number of appointment types allocated.</td>
</tr>
</tbody>
</table>

Press OK once, to continue or twice to finish with this session.
Adding a Specific Superslot

An “Specific” superslot indicates that the provider will see a set number of appointment types but not all of the visit types can be booked into the superslot. When a appointment type is booked into the “Specific” superslot the system takes as many slots as necessary to accommodate the appointment type’s duration.

FIGURE 12. Specific Superslot Screen

Once you specify it is a “Specific” superslot, the screen will change allowing you to enter in the “Type” field (see figure 12), each appointment type applicable for this superslot.
The following table describes each field in the **Specific Superslot** screen.

**TABLE 7. Specific Superslot types fields**

<table>
<thead>
<tr>
<th>System Prompts</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sessions</td>
<td>Enter AM, PM or EVE. <strong>Tab</strong></td>
</tr>
<tr>
<td>Start Time</td>
<td>Enter starting time. <strong>Tab</strong></td>
</tr>
<tr>
<td>End Time</td>
<td>Enter the time the session ends. <strong>Tab</strong></td>
</tr>
<tr>
<td>Interval</td>
<td>Enter the smallest period of time in which the provider will see patients. <strong>Tab</strong></td>
</tr>
<tr>
<td>Repeat</td>
<td>Enter the number of patients the provider will see at one time. <strong>Tab</strong></td>
</tr>
<tr>
<td>Types to Include</td>
<td>Type Specific or click in the down arrow to select specific. <strong>Tab</strong></td>
</tr>
<tr>
<td>Type</td>
<td>Add or Edit the appointment type for this superslot. <strong>Tab</strong></td>
</tr>
<tr>
<td>Dur</td>
<td>Displays the duration of the appointment type only. <strong>Tab</strong></td>
</tr>
<tr>
<td>Alloc</td>
<td>Type the number of appointments allocated for this type. <strong>Tab</strong></td>
</tr>
</tbody>
</table>

Press **OK** once to continue or twice to finish with this session.
Exclusive Any Superslot

This is a superslot defined to accept all appointment types with the exception of one or more specified appointment types.

FIGURE 13. Exclusive Any Superslot screen

The following table describes each field in the Specific Superslot screen.

**TABLE 8. Exclusive Any Superslot criteria fields**

<table>
<thead>
<tr>
<th>System Prompt</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session</td>
<td>Add or Edit a session to the schedule, either AM, PM, or EVE. <strong>Tab</strong></td>
</tr>
<tr>
<td>Start Time</td>
<td>Add or Edit the start time for the superslot. <strong>Tab</strong></td>
</tr>
<tr>
<td>End Time</td>
<td>Add or Edit the end time for the superslot. <strong>Tab</strong></td>
</tr>
</tbody>
</table>
TABLE 8. Exclusive Any Superslot criteria fields

<table>
<thead>
<tr>
<th>System Prompt</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interval</td>
<td>Add or Edit interval, or number of minutes per slot, for the superslot. Tab</td>
</tr>
<tr>
<td>Repeat</td>
<td>Add or Edit the number of appointments per slot. Tab</td>
</tr>
<tr>
<td>Types to Include</td>
<td>Accept the default of “ANY”, Tab</td>
</tr>
<tr>
<td>Total Allocation</td>
<td>Displays the maximum number of appointments for this allocation base on the interval you entered. Tab</td>
</tr>
<tr>
<td>Walk - In:</td>
<td>Accept the default of “N”, Tab</td>
</tr>
<tr>
<td>Excluding</td>
<td>Enter the appointment types you wish to exclude from this superslot. Tab</td>
</tr>
</tbody>
</table>

Press OK once to continue or twice to finish with this session.

Walk-Ins Superslots

- A Walk-Ins is only found as available for the current day or for a date in the past.
- A Walk-Ins can only be booked through the Summary Search option; First Available Searches do not find Walk-In appointments.
- Walk-Ins are automatically defined for all providers, they do not need to be added to a provider's list of valid appointment types.
- Walk-Ins do not need to enter a duration. The system accepts any appointment type as long as the duration of the appointment type fits into the superslot.
FIGURE 14. Walk-In Superslot screen

The following table describes each field in the Superslot “Walk-Ins” screen.

**TABLE 9. Walk-In Criteria Screen**

<table>
<thead>
<tr>
<th>System Prompt</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session</td>
<td>Enter AM, PM, or EVE Tab</td>
</tr>
<tr>
<td>End Time</td>
<td>Enter the time the session ends. Tab</td>
</tr>
<tr>
<td>Interval</td>
<td>Enter the smallest period of time in which the provider will see patients. Tab</td>
</tr>
<tr>
<td>Repeat</td>
<td>Enter the number of patients the provider will see at one time. Tab</td>
</tr>
</tbody>
</table>
## TABLE 9. Walk-In Criteria Screen

<table>
<thead>
<tr>
<th>System Prompt</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Types to Include</td>
<td>Accept the default of “Any” Tab</td>
</tr>
<tr>
<td>Total Allocations</td>
<td>Displays the number of appointment types allocated. Tab</td>
</tr>
<tr>
<td>Walk-ins:</td>
<td>Click in the box ✔ to indicate the provider would see walk-ins in this session.</td>
</tr>
</tbody>
</table>

Press OK once to continue or twice to finish with this session.
**Non-Clinic Slot**

- Non-Clinic slots are times in which the schedule is reserved for non-patient time, such as meeting time, telephones calls, lunch time, etc.
- Non-Clinic slots are time periods set aside when the provider does not see patients.
- Lunch, vacation, meetings etc.... can be built into the schedule to identify time periods where the provider is “not available.”
- The system will not offer non-clinic visit types to a scheduler when searching for an appointment in “First Available”, however the scheduler can use “Summary Search” to display these slots.

**NOTE:** Non-clinic slot are entered the same way as a regular slot, select action code “R”, for the Regular screen

**FIGURE 15. Non-Clinic slot screen**
### TABLE 10. Non-Clinic slot criteria screen

<table>
<thead>
<tr>
<th>System Prompt</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session</td>
<td>Enter session AM, PM, or EVE. <strong>Tab</strong></td>
</tr>
<tr>
<td>Time</td>
<td>Enter starting time only. <strong>Tab</strong></td>
</tr>
<tr>
<td>Type</td>
<td>Click to select from the list of Non-clinic types. <strong>Tab</strong></td>
</tr>
<tr>
<td>Duration</td>
<td>Enter the duration of the non-clinic type. <strong>Tab</strong></td>
</tr>
<tr>
<td>Allocation</td>
<td>skip this field.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter comment for Non-clinic slot.</td>
</tr>
</tbody>
</table>

Press **OK** once to continue or twice to finish with this session.
Master Schedules Filing and Distributing

By distributing a Master Schedule you create Daily Schedules for each appropriate date.
You can distribute the Master Schedule by clicking “Yes” to distribute when you file the new master schedule or at a later time by clicking the “Distribute” button from the Master Schedule screen. Master Schedules distribute 365 days into the future.

You do not have to continuously distribute master schedules because every night after you distribute a master schedule, the system distributes the schedule one additional day into the future. The system does this automatically until it reaches either the end date specified in the schedule.

Distributing the Master Schedule. From the master schedules screen distribute the master using the following steps:

1. Upon completing the schedule click to file the Master schedule

FIGURE 16. Filing Master Schedules Yes or No?
3. System Prompts [Distribute?] Enter [Y] for yes, the system will now distribute the Master Schedule to create the Daily Schedules.

**FIGURE 17. Distributing Master Schedules Yes or No.**

---

Once the distribution is complete, the system displays the new Master Schedule Distribution Dates Screen.

**FIGURE 18. Master Schedules Distribution Dates**

This screen has two main sections (see next page).
1. The screen header displays information about the Master Schedules that was distributed. The information is about the provider and department as well as the master distribution criteria: begin date, days of the week and recurrence.

2. The body of the screen consists of six columns alternately labeled as Date and Days. Reading from left to right, you can see all of the dates to which the system distributed the master schedule and the system identifies the day of the week for each date.

Note: the Master Schedule Distribution Dates screen appears only once during the distributing process and it cannot be accessed again once you leave the screen. Because the screen cannot be retrieved, if you want to save the information on the screen, use the “Action” button print option to print the list.
Distributing the Master Schedule From the Distribute button.

If you want to distribute the master schedule at a later date, use the following steps:

1. Select Sched Setup in the Vertical Tool Bar (VTB).
2. Click with the mouse on the “Master Schedules” tab.
3. The following prompt will appear:

4. Always select No, if you want this done right away. If you select “Yes” the system will add this job to a list of task being held for automatic printing.
5. Once the distribution is complete, the system displays the new Master Schedule distribution dates screen (see figure #18 in page 39).
Module Summary

- The begin date is the date that the master schedule will go into effect.
- You can create different master schedules for either weekly or monthly schedule recurrence.
- There are three main types of slots to create in the master schedule:
  1. Regular
  2. Superslot
  3. Non Clinic
  - Regular slots can overlap each other
  - Superslots cannot overlap each other
  - Superslots are for a range of time
  - Superslots can indicate that the provider will see any visit type or limit the visit types he/she sees.
- Master schedules can reserve the times that the provider is unavailable to see patients using Non-clinic slots.
- To create the daily schedules, you need to distribute the master schedule at the system prompt or later from the Distribute button.
Practice Exercise

1. Can you change the Recurrence if you are editing a master schedule?

2. What is the difference between a master schedule and a daily schedule?

3. What are the three different types of time slots that may be included in a master schedule?

4. The provider's schedule has 9:00AM allocated for two physicals. What kind of time slot is this?

5. The provider's schedule has 8:00AM - 10:00AM allocated for two physicals, four sick visits and two follow-up visits. What type of time slot is this?

6. The provider's schedule has 3:00PM - 4:00PM allocated for any patient except new patient visits and physicals. What type of slot is this?

7. What does the asterisk symbol (*) stand for beneath each superslot?
Exercise

Using the following scenarios, create the master schedule for your assigned provider:

1. Your assigned provider is new to the Department of Training. He/She will be working on Monday, Wednesday, Friday from 8:00AM to 5:00PM.
2. **Begin date:** The first day of next month (use the calendar)
3. **End date:** Indefinite
4. **Recurrence:** This schedule will be for every week.
5. **Schedule Comment:** Create a comment for this schedule.
6. **Session Comment:** Create a comment indicating the provider does not like to have his/her schedule overbooked
7. Your provider would like to see one new patient (NPV) appointment at 8:00AM, one follow (FUV) up at 8:30AM, one follow-up at 8:45 AM and another new patient at 9:00AM. (Regular)
8. Your provider would like to see any combination of the following appointment: six Follow-Up (FUV), two Consultation (CON), one Physical (PHY) At the 9:30AM - 11:00AM slot. (Specific)
9. From 11:00AM until 12:00N, your provider will see only Post-Op (POV). However, he/she does not want to see any more than three patients scheduled in this time frame. (Specific)
10. Your provider likes to take lunch from 12 - 1:00 (in the PM session). set this up as a non-clinic slot using the out of office appointment type. Create in the provider's afternoon schedule. (Non-clinic)
11. After lunch, during the second half of the provider's day (PM Session), he/she will see any patients except Consultations (CON). (Exclusive Any Superslot)
12. Save, but do not distribute the schedule.

Congratulations!

*You have completed this module.*
FIGURE 19. Patient Scheduling Workflow

![Patient Scheduling Workflow Diagram]

- Register the Patient
  - Register a new patient through Mini Registration or edit registration data for an existing patient.

- Enter Appointment Criteria
  - Enter appointment criteria, i.e.: name of the patient’s provider, the desired date and time for an appointment.

- Determine Type of Appointment
  - Determine type of appointment the patient needs to schedule, i.e.: single appointment, ancillary appointment.

- Search for an Appointment(s)
  - The system searches for an appointment which matches the criteria that has been entered.

- Respond to Visit Data Form
  - Enter additional data regarding the appointment on the Visit Data Form (VDF).

- File Appointment/Visit Number Assigned
  - File the appointment and a visit number is assigned.
Enterprise Wide Appointment Scheduling

Schedule a New Appointment

• Appointment criteria refers to the information given to the scheduler by the patient which pertains to his/her appointment; for example, the name of the provider the patient would like to see, the time and day of the week the patient would like to see the provider.

• Criteria is collected from the patient and entered on the criteria screen (below). The criteria screen is where the scheduler enters information in order to schedule an appointment.

• This information enables the system to locate an appointment for the patient.

FIGURE 20. New Appointment Criteria Screen
Scheduling “Mini” Registration Screen

FIGURE 21. Mini registration Screen
Scheduling a new Appointment

TABLE 11. Scheduling prompts

<table>
<thead>
<tr>
<th>System Prompt:</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>Enter the name of the patient using the standard IDX format.</td>
</tr>
<tr>
<td><img src="image" alt="Alert" /></td>
<td>For today’s lesson, we will be adding new patients to the system, so click &lt;OK&gt; at the No Patients found. prompt.</td>
</tr>
<tr>
<td>In the Patient Selection Screen</td>
<td>Click the “Quick Reg” button, and register your first new patient.</td>
</tr>
<tr>
<td>In the Patient Services Screen</td>
<td>Click the “New Appointment” hyperlink.</td>
</tr>
<tr>
<td>TAB to the Provider: name field.</td>
<td>Enter the name of the provider for which you wish to schedule an appointment.</td>
</tr>
<tr>
<td>TAB to the Appt Type: field</td>
<td>Type the appt type or click in the to select from the list.</td>
</tr>
<tr>
<td>TAB to the From Date: field</td>
<td>Enter the date or click in the calendar button to select date.</td>
</tr>
<tr>
<td>TAB to the Location: field</td>
<td>Enter the location where the physician sees patients on the day you are searching.</td>
</tr>
<tr>
<td>TAB to the Search: field</td>
<td>For today’s lesson, you will be using the default of First Available.</td>
</tr>
</tbody>
</table>
Once the appointment criteria has been entered, click the **Next** button to search for a first available appointment.

**FIGURE 23. First Available appointment list.**
**Viewing Appointment Detail**

To display schedule details for the appointment date selected; click the **Show Detail** button.

**FIGURE 24. Show Detail screen**

Schedule Details allows you to see more information about the schedule date you selected. This information includes the following, as applicable.

1. Session details
2. Slot details
3. Number of appointments booked
4. Available slots
5. Schedule comments
6. Session comments
Module Summary

- Once the Master Schedule is distributed to the Daily Schedule, you can schedule patient appointments for that provider.
- The patient appointment criteria screen gives the system the preferences regarding when the patient would like to have an appointment and what type of appointment he/she needs.
- The appointment scheduling application uses the appointment type allocations to search for appointments.
- Once the appointment is made it can be viewed by selecting Appointment list or using Action Code A - Appointments, in the patient inquiry screen
- Viewing the detail of an appointment displays information such as the date and time the appointment is made, Arrival, bumped and/or rescheduled.
Practice Exercise

1. Register and Schedule five (5) new patients for your provider using your name as the last name and a fictitious first name. The appointments should match the following criteria:

   a) am, Monday appointment for a NPV, after the first of next month.

   b) pm, Wednesday appointment for FUV, after the first of next month.

   c) A physical any time any day, after the first of next month.

   d) A Consultation Friday morning, after the first of next month.

   e) A NPV any day after the 15th of next month.

2. Use this space to record the names of your patients:

   a) ___________________________________

   b) ___________________________________

   c) ___________________________________

   d) ___________________________________

   e) ___________________________________

3. Using the Appointment Action Code, look up the patient appointments you made above and record the visit number and appointment date in the following space:

   a) # ___________________________  Appointment Date: _______________________

   b) # ___________________________  Appointment Date: _______________________

   d) # ___________________________  Appointment Date: _______________________

   d) # ___________________________  Appointment Date: _______________________

   e) # ___________________________  Appointment Date: _______________________

   d) # ___________________________  Appointment Date: _______________________
Module 4 - Daily Schedules

Overview

A schedule, once created, can be changed!

There are situations when the provider will need to change a particular schedule for a specific day or for a range of days. In this next lesson, you will see the various ways in which the schedule can be modified.

For example, you may want to add a meeting into the provider's schedule. The meeting is a one time meeting and does not recur every week.

Some examples of edits that can be made at the daily level are:

• adding a new slot,
• changing an existing slot,
• deleting a slot, and
• editing fields in the header portion of the Daily Schedule.

Daily Schedules are the actual schedules used for booking patient appointments. Daily Schedules are produced from Master Schedules and are created when Master Schedules are distributed. Each Daily Schedule pertains to a particular provider, department, and date, and contains information for booked, as well as available, time slots for each day.

Daily Schedule Activities

• Daily Schedules Templates - to make permanent changes to Daily Schedules, including adding, changing, deleting, freezing, or thawing time slots.

Remember, only existing Daily Schedules can be edited. To create new Daily Schedules, you must first create and distribute a Master Schedule or distribute a Template to a blank day.
**Editing Days Slots with Appointments**

If you edit daily schedules, you can cause a booked appointment slot to become unavailable. For example, if you delete a time slot in which an appointment has been booked, or if you change a clinic slot to a non-clinic slot, the appointment would be effected.

When this happens, the system gives you the option of bumping the appointment. Bumping cancels the appointment due to a schedule conflict, and changes the appointment's status to BMP (bumped).

Each time you bump an appointment the system places it on the Bump List. After bumping appointments, you should access the Bump Lists using “Bump List” tab in the appointment manager option in the VTB to reschedule the patients appointments.

To display a provider schedule follow these steps;

1. In the Vertical Tool Bar (VTB) select “**Appt Manager**”.
2. In the Horizontal Tool Bar (HTB) select the “**Provider Schedules**” tab to display the provider schedules.

**FIGURE 25. Provider Schedules Screen**
Daily Schedules & Templates Tab

To access Daily Schedules follow the next steps:

1. Click on the VTB (Vertical Tool Bar) Sched Setup option.
2. Click the HTB (Horizontal Tool Bar) Daily Schedules Templates Tab. The Daily Schedules and template Screen displays the current month schedules.

The first screen of the Daily Schedules and Templates (see figure 26) contains fields where you identify the provider’s schedule you want to edit.

FIGURE 26. Edit Provider Daily Schedule

To edit a Daily Schedule:

1. Enter Provider Name, TAB
2. Enter Department if applicable, TAB.
The current month and list of templates for the provider displays (see figure #27 next page). Provider Daily Schedules and Templates.

To edit a daily schedule follow these steps:

1. Select the month/year by clicking the down arrows on the month and year fields at the top of the calendar, or the sides arrows located at the bottom of the calendar.
2. Next select each day in the calendar you need to edit with your mouse, the dates will appear in the right column marked “Selected” with a count of the totals days selected.
3. Click the button to continue to the “Edit Daily Schedule” screen (see figure #28). This screen contains the provider’s actual schedule with time slots and appointment types. it also contains actions codes that allows you to edit that day schedule.
FIGURE 27. Edit Daily Schedule Screen

The following are descriptions of each Action code.

TABLE 12. Edit Daily Schedule Action Codes

<table>
<thead>
<tr>
<th>This Action...</th>
<th>Allows you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>A- Add/Edit Sessions</td>
<td>Add/Edit a session to the daily schedule, either AM, PM, or EVE.</td>
</tr>
<tr>
<td>C- Schedule Comments</td>
<td>Add/Edit a comment to the Daily schedule.</td>
</tr>
<tr>
<td>D- Delete Slot(s)</td>
<td>Delete a slot from the Daily Schedule.</td>
</tr>
<tr>
<td>E- Edit Slot(s)</td>
<td>Edit the selected slot.</td>
</tr>
</tbody>
</table>
## TABLE 12. Edit Daily Schedule Action Codes

<table>
<thead>
<tr>
<th>This Action...</th>
<th>Allows you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>F- Freeze Slot(s)</td>
<td>Freeze a selected slot.</td>
</tr>
<tr>
<td>L- Select/Unselect Session</td>
<td>Select/Unselect all slots in a session.</td>
</tr>
<tr>
<td>R- Add Regular Slot</td>
<td>Add a regular or non-clinic slot.</td>
</tr>
<tr>
<td>S- Add Superslot</td>
<td>Add a Superslot.</td>
</tr>
<tr>
<td>T- Thaw Slot(s)</td>
<td>Thaw a selected frozen slot.</td>
</tr>
<tr>
<td>V- View Audit Trail</td>
<td>To view Audit Trail.</td>
</tr>
<tr>
<td>W- Switch Actions...</td>
<td>Setup appointment type switch or remove switch.</td>
</tr>
<tr>
<td>X- Expand/Contract</td>
<td>Expand or contract the schedule appointment information.</td>
</tr>
</tbody>
</table>
**Editing Daily Schedule**

Editing the Daily Schedules is similar to Master Schedules and Templates though there are a few additional prompts you may receive after filing the Daily Schedule.

**Entering Daily Schedule Detail**

Action codes allows you to add or edit time slots and appointment types.

**TABLE 13. Edit Daily Schedule Action Codes Description**

<table>
<thead>
<tr>
<th>To</th>
<th>Select this action code:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add or Edit Sessions times</td>
<td>Press &lt;A&gt;- Add/Edit sessions</td>
</tr>
<tr>
<td>To add or edit a schedule or session comment.</td>
<td>Press &lt;C&gt; and enter or edit comments</td>
</tr>
<tr>
<td>To delete a regular or a superslot (<em>This action code is only available after a slot or superslot is added to the schedule</em>).</td>
<td>Select the regular or superslot you want to delete, Press &lt;D&gt; Delete slots. The slot you selected will disappear from the session.</td>
</tr>
<tr>
<td>Edit a regular or a superslot (<em>This action code is only available after a slot or superslot is added to the schedule</em>).</td>
<td>Select the regular or superslot you want to edit, Press &lt;E&gt; Edit slot(s). The slot you selected will appear for edits.</td>
</tr>
<tr>
<td>To select or Unselect all slots in a session.</td>
<td>Press &lt;L&gt; to select or unselect all the slot in a session.</td>
</tr>
<tr>
<td>Freeze a time slot (<em>This action code is only available after a slot or superslot is added to the schedule</em>).</td>
<td>Select the slot you want to freeze, and press &lt;F&gt;.</td>
</tr>
</tbody>
</table>
TABLE 13. Edit Daily Schedule Action Codes Description

<table>
<thead>
<tr>
<th>To</th>
<th>Select this action code;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add are regular slot</td>
<td>Press &lt;R&gt; to add a regular slot. <strong>This action code is only available after a session is added to the schedule.</strong></td>
</tr>
<tr>
<td>Add a superslot.</td>
<td>Press &lt;S&gt; to add a superslot. <strong>This action code is only available after a session is added to the schedule.</strong></td>
</tr>
<tr>
<td>To thaw a previously frozen slot.</td>
<td>Select the frozen slot you want to thaw, and press &lt;T&gt;.</td>
</tr>
<tr>
<td>To View Audit trail</td>
<td>Press &lt;V&gt; to view Audit trail, on the daily schedule Audit Trail screen, select &lt;V&gt;View Audit trail transaction. (See figures 29 and 30)</td>
</tr>
<tr>
<td>To set up appointment type switch.</td>
<td>Press &lt;W&gt; and press &lt;S&gt; to set up an appt type switch or &lt;R&gt; to remove a previously appt type switch.</td>
</tr>
<tr>
<td>To expand or contract the schedule appointment information.</td>
<td>Press &lt;X&gt; to expand or contract scheduling appointment information.</td>
</tr>
</tbody>
</table>
FIGURE 28. Daily Schedule audit trail screen

FIGURE 29. Audit Trail Detail for Transaction Screen
**Editing Slots with Booked Appointments - Bump or Hold?**

When you edit a Daily Schedule slot with a booked appointment, the system prompt you if you want to bump the appointment or put the appointment on hold.

If you delete a time slot in which an appointment has been booked, or if you change a clinic slot to a non-clinic slot, the appointment would be effected.

If you want to keep the appointments you scheduled, you must replace the edited time slot with another time slot before filing the schedule (*this is an example of using the hold feature*). Every time you file the schedule you'll be asked again if you want to bump the appointments until you create a new time slot into which the “on hold” appointment can be booked.

The new slot must have the same begin time as the old slot in order for the appointments “on hold” to fit back into the schedule. Once you enter a new slot, the edit is applied to the schedule and you can file the schedule.

Each time you bump an appointment the system places it on the Bump List. After bumping appointments, you should either print the Bump List, so that you can contact the appropriate patients and reschedule his/her appointments.

**Example**

1. You may have a 10:00AM regular time slot that is booked and a 10:30AM and 11:00AM time slot, both of which are available.
2. The provider decides to change these three appointments into one superslot, from 10:00 to 11:30AM.
3. To do so, you first delete all three regular slots.
4. Deleting the 10:00 A.M time slot gives you the option to bump the booked appointment or to save it by placing it on hold.
5. If you place the appointment on hold, you can book it into the 10AM interval of the superslot after you create it. The system always tries to book existing appointments into the new time slots.
The Bump List

The “Bump List” 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 your facility for one of two reasons:

- The provider's schedule was edited, or a Template was transferred to a provider's schedule.
- This section introduces you to the features of the Bump List, the screens you will encounter, and how to access the Bump List.

TABLE 14. Accessing the Bump List

<table>
<thead>
<tr>
<th>System Prompt</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the Vertical Tool Bar:</td>
<td>Select “Appt Manager” option..</td>
</tr>
<tr>
<td>In the Horizontal Tool Bar.</td>
<td>Select the “Bump List” Tab.</td>
</tr>
<tr>
<td>Date Range</td>
<td>Select “Bump Date” or “Appointment Date”.</td>
</tr>
<tr>
<td>From Date: 01/18/2008</td>
<td>Enter the date range you want to display bumped appointment.</td>
</tr>
<tr>
<td>To Date: 04/11/2008</td>
<td></td>
</tr>
<tr>
<td>Selection Criteria</td>
<td>Select this option to see only those appointments bumped for a specific provider or department.</td>
</tr>
<tr>
<td>Selection Criteria</td>
<td>Select this option to see only those appointments bumped in a specific location.</td>
</tr>
<tr>
<td>Selection Criteria</td>
<td>Enter the department/providers number or name.</td>
</tr>
</tbody>
</table>
### TABLE 14. Accessing the Bump List

<table>
<thead>
<tr>
<th>System Prompt</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Include +" /></td>
<td>Click this button to include the providers to you wish to view the bump list (see figure 31).</td>
</tr>
<tr>
<td><img src="image" alt="Exclude +" /></td>
<td>If you need to remove a provider or department from the criteria list, select it and then click the “Remove” button.</td>
</tr>
<tr>
<td><img src="image" alt="Remove -" /></td>
<td>Click the “OK” button to continue.</td>
</tr>
</tbody>
</table>

### FIGURE 30. Bump List Selection Criteria screen

![Bump List Settings](image)
Bump List

When the bump list appears (see figure 32), you can reschedule appointments directly by selecting the bumped appointment, then click the Reschedule button.

FIGURE 31. Sample Bump List
The New Appointment screen with the Bumped appointment criteria will appear, select the reschedule date for this appointment and click the “Next” button to select the new date for this appointment.

**FIGURE 32. Appointment Criteria Screen**

![Appointment Criteria Screen]

**Important!** If this appointment has a referral attached, you need to verify that the expiration date for the referral is valid for the new reschedule date.
Module Summary

- A schedule, once created, can be changed!
- Editing that can occur at the Daily Schedule level are: adding a new slot, changing an existing slot, deleting a slot, and editing fields in the header portion of the Daily Schedule.
- Daily Schedules are the actual schedules used for booking patient appointments.
- Edit Daily Schedules makes permanent changes to Daily Schedules, including adding, changing, deleting, freezing, or thawing time slots.
- Each Daily Schedule pertains to a particular provider, department, and date, and contains information for booked, as well as available, time slots for each day.
- Only existing Daily Schedules can be edited.
- You can add time slots that do not exist to a Daily Schedules.
- You can add types of appointments to a daily scheduling to the superslot using the Action Code, S - Superslot.
- You can delete an entire session of a particular day, using the Action Code, D-delete.
- When you edit a Daily Schedule slot with a booked appointment, the system prompt you if you want to bump the appointment. If you want to keep the appointments you scheduled, you must replace the edited time slot with another time slot before filing the schedule.
- You can see the information about the appointments booked into a Daily Schedule, using the Action Code X-Expand/Contract of the Edit Daily Schedules screen.
Practice Exercise

1. Using the appointment date and time slot given to patient “e” in your last exercise, delete the entire time slot and replace it with a non-clinic conference call (use the meeting visit type). Bump the appointment(s) and reschedule from the on-line bump list. Record the new appointment date: ____________________.

2. Your assigned provider has asked you to make changes to the first Monday of next month. Perform the following tasks:
   
a) The provider wants to come in at 7:00AM to see two consultations (CON), one at 7:00AM and one at 7:30AM. Add these time slots to your schedule for that day with the comment “Per MD Request.” (Regular).

b) Change the number of follow-up visits (FUV) he/she has allocated in his/her 8:30AM and 8:45AM time slot to two. Use Action code E, Edit slot.

c) File these changes, click “OK” to save the revised daily schedule.

3. No appointments have been made in the 7:00AM time slot you added above, therefore, your provider has decided not to come in at 7:00 AM. Use Action code “D” to delete this slot. Perform this task and file the schedule.

4. Your assigned provider has asked to change his/her schedule for the first Wednesday of next month. Perform the following tasks:
   
a) Add a 7:00AM-8:00AM time slot to see either four follow-up visits (FUV,4) or one Physical (PHY,1). (Specific)

b) The provider also wants to add an evening session from 6:00 PM - 9:00 PM with a combination of a maximum of three new patient visits (NPV,3) or maximum eight follow up visits (FUV,8). He/She schedules one patient at a time (Specific)

c) The provider also decided not to exclude consultations (CON) in the PM session for this day, use the Action Code E-Edit .

d) The provider does not want you to overbook the 8:30AM time slot. Edit this time slot to include the comment “DO NOT OVERBOOK”.

e) File these changes to save the revised daily schedule. (go to next pg.)
Practice Exercise continue....

5. Your assigned provider has asked you to make changes to the first Friday of next month. Perform the following tasks:

   a) Delete the first time slot in the am session, using D - Delete Slot(s).

   b) He/She does not want lunch, and instead replace this slot with two consults.

   c) The provider wants to extend the clinic hours until 8:00PM, add an evening session beginning at 5:00PM and ending at 8:00PM the doctor will any type of appointments excepts Physicals.

   *File this change to save the revised daily schedule.*

   *Congratulations!*

   *You have completed this module.*
Module 5 - Templates

what is a Template/

• A template is a “reusable” schedule that can be applied to one or many daily schedules.
• Templates are recyclable; you may use them day after day, week after week, and month after month.
• Templates are an efficient and a quick method of editing many Daily Schedules.
• If the same change needs to be made to several Daily Schedules, you may create a Template which contains the change and transfer the Template to the selected days, rather than editing each Daily Schedule.
• Templates are composed of a group of time slots which differ in some way from the Daily Schedule.
• Templates are similar to Master Schedules in that they have provider, department, and location.
• Templates differ from the master in that they do not have days of week or cycle.
• A Template is composed of a group of time slots that differs in some way from the Daily Schedule to which the Template is applied.
• Any session which is not defined in the Template will be left unchanged in the Daily Schedule.
• A Template is overlaid onto an existing Daily Schedule.
• Templates can be copied from one provider to another provider.

The Template activities allow you to define templates that are used to make alterations in daily schedules.
When do I use a Template?

- Use a template when to block out several sessions/days that the provider cannot schedule patients.
- Use a template when changes need to be made to several Daily Schedules at one time. (A Template can be used to change several Daily Schedules.)
- Use a template as a fast and easy way to edit several Daily Schedules.
- If the same change needs to be made to a number of Daily Schedules, rather than editing each individual Daily Schedule, you can create a Template containing the change and transfer it to the selected days.
- Use Templates to set up vacation schedules for providers, or if the provider is working at multiple locations for a short period of time.
- Use Templates to create a Daily Schedule for a day that is not a usual clinic day for the provider.
- Use Templates to schedule regularly scheduled events that might be tied to a specific date.
- Use a make changes to days on the Master Schedule discrepancy report.
There are seven template activities.

<table>
<thead>
<tr>
<th>This Button/Option;</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Template</td>
<td>Create a new template.</td>
</tr>
<tr>
<td>Copy Template</td>
<td>Copy a template from one provider to another.</td>
</tr>
<tr>
<td>Transfer Template</td>
<td>Distribute a template to an existing daily schedule or a blank day.</td>
</tr>
<tr>
<td>Template</td>
<td>Edit, Delete, View or Create a template from a Master Schedule, click this button.</td>
</tr>
</tbody>
</table>

1. Edit: to edit an existing template.
2. Delete: to delete and existing template.
3. View: to view only existing template.
4. Create from Master: to create a template from an existing Master Schedule.
You use the “New Template” button to create a new template. There are three screens that you use when you work with templates.

1. New template description screen (See figure 34), in this screen you type the description/name of the template you are creating.

**FIGURE 33. New Template description screen**

![New Template description screen](image)

2. Define Sessions/Comments Screen (see figure 35), in this screen you will define what sessions the provider wants to open and comments.

**FIGURE 34. Define Sessions/Comments screen**

![Define Sessions/Comments screen](image)
• **New Template Schedule screen** (see figure 36), on this screen you can create the sessions and slots that will replace the actual daily you want to alter.

**FIGURE 35. New Template Schedule screen**
Creating a New Template

You use the **New Template** option button to create a new template. To create a new templates.

To access the **New Template** template option you follow the next step:

1. Click on the VTB (Vertical Tool Bar) **Sched Setup** option.
2. Click the HTB (Horizontal Tool Bar) **Daily Schedules Templates** Tab. The current month schedules Screen displays, and all the templates the provider has.
3. Click the **New Template** button, the New template description screen will display (see figure 33) type the description of the new template and click “OK”.
4. In the Define Sessions/Comment screen (see figure 34) enter the sessions, AM/PM enter any comments as necessary click the “OK” button.
5. In this screen create the Slots needed for the new template (refer to pages 22 thru 37 of this manual for instructions in adding slots to the new Template Schedules).
6. Click the “OK” button to save the new template.

**FIGURE 36. New Template Schedule screen**
UMMG will use Templates for setting up vacations for providers and when a provider works in another location for a short period of time. A Template may be applied to the Daily Schedules to reflect these changes.

An example for vacation is shown below:

- Vacation all day: Morning and afternoon and Evening sessions completely filled with VAC.
- Vacation AM only: Copy master and make morning session non-clinic slot of VAC
- Vacation PM only: Copy master and make afternoon session non-clinic slot of VAC
- Vacation EVE only: Copy master and make afternoon session non-clinic slot of VAC

**FIGURE 37. Vacation Template**
Edit Templates (From the Template button)

You use the Edit option from the template button, to edit existing templates. To access the Edit template option you follow the next step:

1. Click on the VTB (Vertical Tool Bar) Sched Setup option.
2. Click the HTB (Horizontal Tool Bar) DailySchedules Templates Tab. The current month schedules Screen displays, and all the templates the provider has.
3. Click the Show More button to expand the template list (see figure 38).
4. Select the template you want to edit and click the Template button.
5. Select Edit from the drop down list, the template you selected will be display.

FIGURE 38. Daily Schedule and Template screen

Note: The changes in the template are applied to the daily schedule, and any sessions that are not defined in the template are left unchanged in the daily schedule.
View Templates (From the Template button)

The viewTemplate on your terminal screen follow these steps:

1. Click on the VTB (Vertical Tool Bar) Sched Setup option.
2. Click the HTB (Horizontal Tool Bar) Daily Schedules Templates Tab. The current month schedules Screen displays, and all the templates the provider has.
3. Click the Show More button to expand the template list.
4. Select the template you want to edit and click the Template button.
5. Select View from the drop down list, the template you selected will display.

FIGURE 39. Daily Schedule and Template screen
Transfer Template

This activity allows you to transfer a template to a daily schedule and apply the contents of a template to one or more daily schedules. The affected daily schedule(s) are altered by the time slots in the templates. **If a session is not defined in a template, the corresponding session in the daily schedule is left unchanged.**

To transfer a Template to a daily schedule follow these steps:

1. Click on the VTB (Vertical Tool Bar) **Sched Setup** option.
2. Click the HTB (Horizontal Tool Bar) **Daily Schedules Templates Tab**. The current month schedules Screen displays.
3. Select the month of the daily schedule you want to transfer a template, by clicking the **Month** button.
4. Select the dailies **(the date will be highlighted in blue)** as you select they will appear in the right hand panel (see figure 40).

**FIGURE 40.**

5. Once you finish selecting the dailies,
6. Select the template you want to transfer to the dailies (see figure 40).
7. Click the **Transfer Template** button the **Transfer Template Review** Screen is display (see figure 41), if you need to view or remove any of the dates selected you can do it in this screen before continuing.
FIGURE 41. Transfer Template Review Screen

8. Click the button to continue, the following message will appear (see figure 42)

FIGURE 42. Update Appointment location screen

9. Click the [YES] button to update the appointment location:

10. The Template Transfer Recap screen will display (see figure 43).
After transferring a template to a daily schedule, the “Template Transfer Recap Screen” appears, it provides an overview of the transfer and it allows you to print a Bump list and view the daily that was transferred.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The date(s) affected by the template transfer.</td>
</tr>
<tr>
<td>Transferred</td>
<td>“Y” if the template was transferred to that daily, “N” if it could transfer the template to that daily</td>
</tr>
<tr>
<td>Appts</td>
<td>The number of appointments in that daily.</td>
</tr>
</tbody>
</table>
TABLE 16. Transfer Recap screen

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Bumped</td>
<td>The number of appointment affected by the template transfer in that daily.</td>
</tr>
<tr>
<td>Non Transfer Reason</td>
<td>If in the “Transferred” column you have “N” this column displays the reason.</td>
</tr>
</tbody>
</table>

Template Transfer Recap screen buttons

TABLE 17. Transfer Template Recap Screen Action Codes

<table>
<thead>
<tr>
<th>This button...</th>
<th>Allows you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Bump List</td>
<td>Print the bump list for this transfer.</td>
</tr>
<tr>
<td>View Detail</td>
<td>Allows you to view the daily schedule for the selected date in the grid.</td>
</tr>
<tr>
<td>Actions</td>
<td></td>
</tr>
</tbody>
</table>

TABLE 18. Transfer Template View Daily Action Code

<table>
<thead>
<tr>
<th>This action...</th>
<th>Allows you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>C-Schedule Comments</td>
<td>Displays any schedule comments.</td>
</tr>
<tr>
<td>V-View</td>
<td>Displays the changes made.</td>
</tr>
<tr>
<td>X-Expand/Contract</td>
<td>Expand/Contract the daily schedule audit trail grid.</td>
</tr>
</tbody>
</table>
Copy Template

This activity allows you to copy a template from one provider to another. This is helpful in that if several providers need the same template and those providers work in the same department and use the same visit types, you can copy the template from one provider to another rather than having to recreate the template for each provider individually.

FIGURE 44. Copying a Template screen

TABLE 19. Copying a Template screen fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Schedules and Templates</td>
<td>Enter your provider’s name. This is the provider from which you want to copy from</td>
</tr>
<tr>
<td>Templates</td>
<td>Select the Template to copy</td>
</tr>
</tbody>
</table>
**TABLE 19. Copying a Template screen fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Template</td>
<td>Click the Copy Template button</td>
</tr>
<tr>
<td>Display Template?</td>
<td>The default is &lt;N&gt; if you want to display the template enter &lt;Y&gt;.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> <em>It is recommended that you always display the template you want to transfer to avoid transferring an incorrect template.</em></td>
</tr>
<tr>
<td>Copy to <strong>Provider:</strong></td>
<td>Enter the Provider’s name, you want to copy to.</td>
</tr>
<tr>
<td></td>
<td>Yo may copy to multiple providers.</td>
</tr>
</tbody>
</table>

Click **<OK>** to save.
Delete Templates

The Delete Template activity allows you to delete Templates that you no longer need.

The following describes how to delete a Template in the Delete Templates activity.

**TABLE 20. Delete Template fields**

<table>
<thead>
<tr>
<th>Field:</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Templates Box:</td>
<td>Choose the Template you want to delete.</td>
</tr>
<tr>
<td>Templates :</td>
<td>Click on the Templates button</td>
</tr>
<tr>
<td>Ok to delete this Template?</td>
<td>Enter &lt;Y&gt; to delete this Template. Enter &lt;N&gt; to not delete the Template.</td>
</tr>
<tr>
<td>Are you sure you want to delete this Template #?</td>
<td>Enter &lt;Y&gt; at this prompt, and the system displays. <strong>...Deleted</strong> Enter &lt;N&gt; if you do not want to delete the Template.</td>
</tr>
</tbody>
</table>
Creating Template From Master

A template can be created from a provider's own master schedule or from another provider's master schedule as long as both providers are in the same department and use the same appointment types.

The benefit to doing this is the amount of time you would save when the template to be created differs only slightly from a master schedule.

Remember, templates are set up to apply specific days, that you can specify.

When the system creates a template from a master schedule, it names the new schedule “Copied from master.”

<table>
<thead>
<tr>
<th>System Prompt:</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Shed Setup on the VTB:</td>
<td>Select tab Daily Schedules Templates</td>
</tr>
<tr>
<td>Provider</td>
<td>Identify the provider whose Master Schedule is to be copied into a template.</td>
</tr>
<tr>
<td>Department:</td>
<td>If this provider is in only one department, the system automatically fills in this field.</td>
</tr>
<tr>
<td>Templates:</td>
<td>Select the Template button.</td>
</tr>
<tr>
<td>Create from Template</td>
<td>Select from the menu create from Template.</td>
</tr>
<tr>
<td>Master Schedule Screen:</td>
<td>Select the Master Schedule to copy then click OK button</td>
</tr>
<tr>
<td>Are you sure?</td>
<td>Enter &lt;Y&gt; to copy the master to the Template.</td>
</tr>
<tr>
<td></td>
<td>Enter &lt;N&gt; to avoid copying the master.</td>
</tr>
</tbody>
</table>
Transferring Templates to the past

You can only transfer templates to dates in the past for which you can schedule appointments; this is controlled by UMMG’s response to the Scheduling Profile questions. We chose 7 days to Allow appointments in the past.

Transferring templates to the future

You can transfer templates to dates in the future for which schedules exist; templates do not create new daily schedules. The creation of daily schedules is controlled by:

- The number of days in the future that schedules exist for the group - 365 for UMMG
- The number of days in the future that exists for the Scheduling Departments if it was modified by department.
Changing schedule location

If you change a schedule's location by transferring a template, the system gives you the option of updating the locations of all the appointments already booked into the schedule.

Overwriting comments

When you transfer a template, any template comments (schedule comment, session comments, and slot comments) overwrite any daily schedule comments; however, if you do not enter a template comment, the system retains the daily schedule comment.

Effect on superslots

If you overlay a superslot with a regular slot, the system deletes the entire superslot, and any appointments for which there are not corresponding slots in the template are bumped. Superslots cannot be split up.

When you transfer a template the system:

1. checks the time of the slots in the daily schedule against the time of the slots in the template.
2. If there is a template slot at a certain time but no slot in the daily schedule at that time, the template slot is placed in the new daily schedule.
3. If there is a daily slot but no template slot at that same time, the system does one of the following:

   a) If all of the daily slot falls outside the template, and the slot's session does not exist in the template, the slot is preserved as is. There must be no overlap of the daily slot and the template for the slot to be preserved.

   b) If the slot falls outside the template but the session the slot is in does exist for the template, the daily slot is deleted and the system bumps the appointment in this slot.

The below graphics gives examples of these two situations.
On the other hand, if the template overlaps the appointment slot in the daily schedule, the system deletes the entire slot from the daily and tries to fit appointments into the overlapping time. For example:

**FIGURE 46. Example B Graphic**

<table>
<thead>
<tr>
<th>Daily Schedule</th>
<th>Template</th>
<th>New Daily Schedule</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>9-10AM slot in session 1</td>
<td>session 1's first slot is 11:30AM</td>
<td>session 1's first slot is 11:30AM</td>
<td>9-10AM slot deleted, all appointments bumped</td>
</tr>
</tbody>
</table>

If there is a regular slot at the same time in both the template and in the daily schedule, the system checks the slot's duration and appointment type:

- If the two slots have the same duration and same appointment type, all of the appointments in the daily schedule are transferred to the new daily schedule, regardless of the appointment type or duration.
- If the two regular slots do not have the same appointment type, the system checks the slots' duration. If the duration of the appointment is shorter than the duration of the slot in the template, then the appointment is booked into the slot. If, on the other hand, the duration of the appointment is longer, then the duration of the slot in the template, the appointment is bumped.
The system checks for similarities in the appointment type as well as the appointment type duration. This is important when there is more than one slot in the template for a particular time.

**Transferring to Days with Duration Overrides**

An override occurs when the scheduler booked the appointment for an extended period of time so that it takes up its own slot, plus the next subsequent slot. Likewise, a duration override can be used to shorten the amount of time that is typically used for a appointment type.

When you transfer a template the system treats this appointment as being booked in the first slot only.

Also with this example, the appointment was booked into a regular slot. This will not work if the appointment was booked into a superslot. When a template that has regular slots to a day with superslots, then the template overrides the appointments and bumps them all.

**Superslots in Dailies and Templates**

If the daily schedule and template both contain superslots, the system compares the intervals of the daily schedule and the template:

- If the template contains a superslot with an interval that matches the interval in the daily's superslot, the system preserves the existing appointment, if it fits into the new superslot.
- If there is no matching interval in the template for the existing appointment, the appointment is bumped.
Overview

- Templates are an efficient and a quick method of editing many Daily Schedules.
- Templates are composed of a group of time slots which differ in some way from the Daily Schedule.
- Any session which is not defined in the Template will be left unchanged in the Daily Schedule.
- Templates are recyclable; you may use them day after day, week after week, and month after month.
- A Template is composed of a group of time slots that differs in some way from the Daily Schedule to which the Template is applied. A Template is overlaid onto an existing Daily Schedule.
- A Template may be created that includes any change to be made to the Daily Schedule and this Template may be transferred to several Daily Schedules at one time.
- Using Templates is a fast way of editing Daily Schedules.
- Templates are useful for setting up vacation schedules for providers, or if the provider is working at multiple locations for a short period of time.
- Templates are also useful for regularly scheduled events that might be tied to a specific date.
- **New Template** creates a new Template or **Edit Daily** an existing one.
- Transfer Template transfers, applies, a Template to a Daily Schedule.
- Copy Template copies a Template from one provider to another, within the same department.
- Delete Template deletes a Template that is no longer needed.
- Create Template from master creates a Template from a Master Schedule.
Practice Exercise

1. Your assigned provider will be taking vacation the last week of next month. He/she has asked you to make the appropriate changes to her schedule so that no appointments are booked.

   a) Create a vacation template for your provider

   b) Distribute to the days that the provider will be on vacation. (This requires you to use both Transfer Template and Transfer Template to Blank Day)

2. Your assigned provider sometimes needs to be out of the office/clinic in the afternoon. Create a Template that would be used to block afternoon sessions. Use the out of office appointment type.

3. If a template is transferred to a provider's daily schedule that has patient appointments booked, what will happen to those booked appointments?

4. Your provider sometimes opens a clinic on Saturdays. When the Saturday clinic is open, he/she likes to see only FUV and PHY from 9 - 12 Noon. Set up a Template that would reflect the above preferences.

5. There are times when your provider opens a Tuesday AM clinic. When this happens, his/her preferences are the same as those set up for his/her regular Monday, Wednesday, Friday clinic days.

   a) Create a template from the master schedule (F8/A1/A4/A6)

   b) Edit the template you just created so that you remove any PM and Evening Session activity. (Remember, the provider wants AM appointments only, so the PM and evening sessions need to be blank). Save this Template.

Congratulations!

You have completed this module.
**Master Schedule Maintenance**

There are many tasks to complete in the course of maintaining a schedule. Some of which are:

- Copying Master schedules, to create similar schedules for different providers.
- Accessing the Master Schedule Conflict List after redistributing an edited Master schedule, to reconcile the conflicts.
- Adding an End Date to an existing master schedule.
- Deleting Master Schedules that you no longer use.
- How to access the Bump list, to reschedule patients.
The Copy Master Schedules copies master schedules between providers.

You can copy a master schedule if both providers are in the same department, and use the same visit types.

You can also copy a master schedule for the same provider.

This activity is useful for creating similar schedules for different providers. Once a schedule has been copied using this activity, you can edit it with the Edit Master Schedule.

**FIGURE 47. Copy Master Schedule screen**

To Copy a Master Schedule, Select the Master Schedules tab.

**TABLE 22. Copy Master Schedules Fields Descriptions**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider:</td>
<td>Select the Provider in which to copy Master Schedules</td>
</tr>
<tr>
<td>Department:</td>
<td>Enter the department from which you wish to copy.</td>
</tr>
<tr>
<td>Master Schedule:</td>
<td>Select the Master Schedule to copy.</td>
</tr>
</tbody>
</table>
TABLE 22. Copy Master Schedules Fields Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy button:</td>
<td>Select the Copy button on the bottom of screen</td>
</tr>
<tr>
<td>Copy to provider:</td>
<td>Enter the provider for which you wish to copy the schedule to.</td>
</tr>
<tr>
<td>Department:</td>
<td>Enter the department of the provider for which you want to copy the schedule to.</td>
</tr>
<tr>
<td>Begin date:</td>
<td>Enter the date you want to this schedule to go into effect.</td>
</tr>
<tr>
<td>End Date:</td>
<td>Enter the last day this schedule is in effect, if applicable.</td>
</tr>
<tr>
<td>Day (s) of week:</td>
<td>Check off the box of the days you want the master schedule to apply to.</td>
</tr>
<tr>
<td>Recurrence:</td>
<td>Enter a weekly or monthly recurrence. <em>(see page 19, of this manual for instructions)</em></td>
</tr>
<tr>
<td></td>
<td>Click &lt;OK&gt; to save.</td>
</tr>
</tbody>
</table>
Master Schedule Conflict List”

If after the master schedule is distributed there are conflicts, the Conflict List is displayed so that the conflicts can be reconciled. Or, the conflict list can be recalled at a later time using the Conflict List.

Resolving Conflicts

- If conflicts occur when distributing the master schedule, the conflicts screen will appear at the end of the distribution process
- Resolve now or later (Function 8/Activity 2/Activity 6)
- Conflicts are days for which the master schedules was not distributed
- Conflicts may be created for the following reasons:
  Previous daily schedule was edited, has appointments or was in use during the distribution process.

The following can be done from the distribution conflict form:

- View the master or daily schedule
- Select and transfer the master to the day(s) in conflict
- Remove dates with conflicts
- Print conflict list using and choosing.

If a daily schedule has appointments and has been edited, editing takes precedence over appointments and the conflict reason will reflect that
Following is a description of each column in the screen.

**TABLE 23. Conflict List Screen Columns**

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Displays the date in conflict</td>
</tr>
<tr>
<td>Day</td>
<td>Displays the day in conflict</td>
</tr>
<tr>
<td>Conflict</td>
<td>Displays the type of conflict</td>
</tr>
<tr>
<td>Daily Schedule Comment</td>
<td>Displays any comments from the daily schedule</td>
</tr>
</tbody>
</table>
Master Schedule Conflict List Action Codes.

**TABLE 24. Conflict List Action Codes**

<table>
<thead>
<tr>
<th>This Action...</th>
<th>Allows you to...</th>
</tr>
</thead>
</table>
| R-Remove       | Remove the selected conflicts after it has been resolved.  
**Note:** Conflicts for dates in the past should be removed from the conflict list using the Remove action. |
| T-Transfer to Dates | Transfer the new edits to the selected date.  
**Note:** This action may Bump Patients. |
| V-View         | View the daily. |

When you access the Display Conflict list activity, the Provider lookup includes only those providers with conflict lists.

If a master schedule is redistributed before the conflict list is resolved, new conflicts are added to the conflict list for the schedule. If a date is still in conflict, the conflicts from the previous distribution may automatically be removed from the conflict list, if the schedule successfully distributes to those dates during the new distribution.
Adding an End Date to an Existing Master Schedule”

Previously, the user was not able to add an end date to a master schedule that had been created without a specified end date. Therefore, when master schedules were deleted from the system, a report had to be used to locate the daily schedules that existed from that master schedule prior to deletion.

End dates can now be added to master schedules without a previously specified end date, making it easier for the user to stop the master schedule distribution and reconcile any daily schedules past the new end date.

FIGURE 49. Add an end date screen

To add an end date to an open-ended master schedule: Select the Master Schedule then and select action code <Y>-Add End Date action code and do not press <Enter>.

On the Add End Date subform, specify a new End Date for the master schedule. The end date is the last date the master schedule is effective.
TABLE 25. Add an End Date field descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>Displays the provider for the master schedule.</td>
</tr>
<tr>
<td>Department</td>
<td>Displays the department for the master schedules.</td>
</tr>
<tr>
<td>Begin Date</td>
<td>Displays the begin date for the master schedule.</td>
</tr>
<tr>
<td>End Date</td>
<td>Allows you to enter an end date for the master schedule.</td>
</tr>
<tr>
<td>Day(s)</td>
<td>Displays the day(s) of the master schedule.</td>
</tr>
<tr>
<td>Recurrence</td>
<td>Displays the weekly or monthly recurrence for the master schedule.</td>
</tr>
</tbody>
</table>

Adding an end date to an open-ended master schedule makes it easy for you to stop the master schedule distribution and reconcile any daily schedules past the new end date.
"Add End Date Master Daily Evaluation Screen"

The Master End Date/Delete List screen provides information about the daily schedules that exist past the new end date.

If there are daily schedules affected by the new end date then the Master End Date/Delete List screen will displayed.

**FIGURE 50. Master End Date/Delete List screen**
Following is a description of each field..

### TABLE 26. Master Daily Evaluation Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>Displays the provider for the master schedule.</td>
</tr>
<tr>
<td>Department</td>
<td>Displays the department for the master schedule.</td>
</tr>
<tr>
<td>Begin Date</td>
<td>Displays the begin date for the master schedule.</td>
</tr>
<tr>
<td>End Date</td>
<td>Displays the new end date for the master schedule.</td>
</tr>
<tr>
<td>Day(s)</td>
<td>Displays the day(s) of the master schedule.</td>
</tr>
<tr>
<td>Recurrence</td>
<td>Displays the weekly or monthly recurrence for the master schedule.</td>
</tr>
<tr>
<td>Daily Schedules Evaluated</td>
<td>Displays the total number of schedules evaluated.</td>
</tr>
<tr>
<td>Daily Schedules Affected</td>
<td>Displays the number of schedule affected of those evaluated.</td>
</tr>
<tr>
<td>Total Appointments</td>
<td>Displays the total number of appointments on the schedules affected.</td>
</tr>
<tr>
<td>Evaluation Grid</td>
<td>Displays a list of days that are affected by the new master end date.</td>
</tr>
</tbody>
</table>
Following is a description of each column in the grid.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Displays the date of the daily schedule affected.</td>
</tr>
<tr>
<td>Appointment</td>
<td>Displays the appointments on the affected schedule.</td>
</tr>
<tr>
<td>Comment</td>
<td>Displays the reason why the schedule is affected. Comments also show if another master schedule can be distributed to the date.</td>
</tr>
</tbody>
</table>
Delete Master Schedules

You use the Delete Master Schedules activity (F8/A2/A2) to delete master schedules that you no longer use.

![Warning Symbol] When you delete a master schedule, the daily schedules that were created when that master schedule was distributed are not deleted.

FIGURE 51. Delete Master Schedule Screen

Use the following steps to delete a master schedule through the Delete Master Schedule.
TABLE 28. Delete Master Schedule Fields

<table>
<thead>
<tr>
<th>System Prompt:</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider:</td>
<td>Identify the provider whose Master Schedule you want to delete.</td>
</tr>
<tr>
<td>Department:</td>
<td>Enter the provider’s department.</td>
</tr>
<tr>
<td>Begin Date:</td>
<td>Select the Master Schedule to delete</td>
</tr>
<tr>
<td></td>
<td>Click &lt;OK&gt; to continue.</td>
</tr>
</tbody>
</table>

The System will display a dialog box verifying if this the correct schedule you want to delete, with the provider’s name, department, date of the schedule and the recurrence.

Enter <N> to avoid deleting the schedule.

Enter <Y> to delete the Master Schedule.

When you delete a Master Schedule, the system displays a “Master Schedule Deleted” message.
Master Schedule Distribution Rules

Conflict with daily schedule

If you distribute a master schedule and the system finds that a daily schedule already exists for one or more of the dates, the system does one of the following:

- If there are no appointments on the existing daily schedule and the daily schedule has not been edited, the system creates a new daily schedule for that day.
- If there are appointments on the existing schedule or if the existing schedule has been or is being edited, the system leaves the original daily schedule as it is. This is noted in the “Master Schedule Conflict List”, see page 95.

When you distribute the master schedule it is not distributed to days that already have appointments or days that have been edited. The Master Schedule Conflict List will list the days to which the master schedule was not distributed.

Each master schedule pertains to particular days of the week and cycles. When the master is distributed, the daily schedules will be created according to the dates, cycles and days of the week that you have specified.

When distributing master schedules, be aware of the following rules/hierarchy that the system follows:

- Monthly cycles overlay weekly cycles
- Higher cycle numbers overlay lower cycle numbers
- Few days overlay several days
- Distant future overlays near future

Masters will be distributed from the begin date until the end date or to the length specified in the profile question or in Dictionary 301. A master will not distribute to a daily which had appointments already booked or if the daily has been edited (this includes template transfers). Master schedules are distributed in night jobs every night. This process attaches one more daily onto the end of possible days to schedule into.
Storing master schedules on the system -- You may keep multiple master schedules for a provider and/or resource stored on the system. It is not recommended that more than fifteen master schedules be kept on the system for any single provider or resource. Having an excessive number of master schedules on file can cause database errors and interfere with the proper distribution of master schedules into daily schedules during Night Jobs.
Rule: Monthly Cycles Overlay Weekly Cycles

If there are two master schedules:

1. One for Monday through Friday on a weekly cycle (W=1)
2. One for only the second Monday of the month (M=2).

When the schedules are distributed, the Mondays only schedule overlays the Monday through Friday schedule for the second Monday of each month.

Schedule 1

Provider: Doolittle MD, Spencer

Department: Medicine - Internal Medicine

Begin date: 01/1/06

Day(s) of the week: M, TU, W, TH, F:

Cycle: W:1 M:

Schedule 2

Provider: Doolittle MD, Spencer

Department: Medicine - Internal Medicine

Begin date: 01/02/06 End date:

Day(s) of the week: M

Cycle: W: M:2
Rule: Higher Cycle Numbers Overlay Lower Cycle Numbers

For example, two master schedules are set up for Tuesdays:

1. one with a weekly cycle (W=1)
2. one with an every other week cycle (W=2)

When the schedules are distributed, the W=2 schedule overlays the W=1 schedule for every other Tuesday.

Schedule 1

Provider: Doolittle MD, Spencer

Department: Medicine - Internal Medicine

Begin Date: 01/01/206

Day(s) of the week: TU

    Cycle: W:1 M:

Schedule 2

Provider: Doolittle MD, Spencer

Department: Medicine - Internal Medicine

Begin Date: 01/01/06

Day(s) of the week: TU

    Cycle: W:2 M:

If there are two schedules, one for W=2 and the other for W=3, then on week 6, both schedules would intersect and the system would need to determine which schedule to use. The W=3 schedule would overlay the W=2 schedule because it is higher cycle number.
Rule: Fewer Days Overlay Several Days

For example, a master schedule is set up for Monday, Tuesday and Wednesday, and another is set up for Wednesday only. The system first distributes the Monday through Wednesday schedule. When the Wednesday only schedule is distributed it overlays the Monday through Wednesday schedule for Wednesdays.

Schedule 1 (M, TU, W):

Provider: Doolittle MD, Spencer

Department: Medicine - Internal Medicine

Begin Date: 01/01/06 End Date:

Day(s) of the week: M, TU, W

Cycle: W:1 M:

Schedule 2 (Wednesday Only):

Provider: Doolittle MD, Spencer

Department: Medicine - Internal Medicine

Begin Date: 01/01/06 End Date:

Day(s) of the week: W

Cycle: W:1 M:

If one schedule is set up for M, TU, W and another is set up for W only, the system first distributes the Monday-Wednesday schedule.

When the Wednesday only schedule is distributed, it overlays the M-W schedule on Wednesdays. However, this will not work if it violates one of the other rules (i.e. W=2 Master Schedule for Mondays will not override a W=3 Master Schedule for M, W, F).
Rule: Distant Future Overlays Near Future

For example, two Monday master schedules are set up, one with a begin date of 5/1/06, and another with a begin date of 5/25/06. The system first distributes the 5/1/06 schedule. When the 5/25/06 is distributed, it overlays the Monday schedule after 5/25/06.

Schedule 1

Provider: Doolittle MD, Spencer
Department: Medicine - Internal Medicine
Begin Date: 06/1/06 End Date: 0
Day(s) of the week: TU
Cycle: W:1 M:

Schedule 2

Provider: Doolittle MD, Spencer
Department: Medicine - Internal Medicine
Begin Date: 06/25/06 End Date:
Day(s) of the week: TU
Cycle: W:1 M:

If all of the above conditions are equal between two schedules, then the more recent begin date will override an older begin date.
Master Schedules Reports

To manage your providers master schedules, IDX provides a printed report to review the schedule and maintain system integrity. It is:

Master Schedules Reports (Sched Reports)

FIGURE 52. Report Processing Screen

Master Schedules prints a copy master schedule stored on the system.

TABLE 29. Report Processing System Prompts

<table>
<thead>
<tr>
<th>System Prompts:</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include All Department?</td>
<td>Enter <strong>checkbox</strong> for yes and <strong>leave blank</strong> for no. If you enter, N, the system will prompt you for the departments you wish to print.</td>
</tr>
<tr>
<td>Include all providers for department?</td>
<td>Enter <strong>checkbox</strong> for yes and <strong>leave blank</strong> for no. If you enter, N, the system will prompt you for the provider's you wish to print.</td>
</tr>
</tbody>
</table>
TABLE 29. Report Processing System Prompts

<table>
<thead>
<tr>
<th>System Prompts</th>
<th>Your Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include all locations?</td>
<td>Enter check box for yes and leave blank for no. If you enter, N, the system will prompt you for which providers you wish to print for.</td>
</tr>
<tr>
<td>Include all sessions?</td>
<td>Enter check box for yes and leave blank for no. If you enter, N, the system will prompt you for which sessions you wish to print for.</td>
</tr>
<tr>
<td>Number of copies?</td>
<td>Enter the number of copies you wish to print.</td>
</tr>
<tr>
<td>All Effective dates?</td>
<td>This bottom form allows you to decide if you want to include all master schedule effective dates or not. Enter &lt;Y&gt;, the cursor returns to the Print Criteria screen. Enter &lt;N&gt;, the Effective Dates selection screen appears.</td>
</tr>
<tr>
<td>Job Queue?</td>
<td>Enter &lt;N&gt; to print now.</td>
</tr>
<tr>
<td>Include all departments?</td>
<td>Click &lt;OK&gt; to run this report.</td>
</tr>
<tr>
<td>Device:</td>
<td>Enter the printer name that you will be printing to.</td>
</tr>
</tbody>
</table>

Select Activity: you are now ready to access another activity.

Include all providers for department? Enter Y for yes or N for no. If you enter, N, the system will prompt you for the provider's you wish to print.
Rules for Transferring Templates

Overview

Template transfers can bump appointments if the template conflicts with the slots on the daily schedule it is overlaying.

Transferring templates to the past

You can only transfer templates to dates in the past for which you can schedule appointments; this is controlled by UMMG’s response to the Scheduling Profile questions. We chose 7 days to allow appointments in the past.

Transferring templates to the future

You can transfer templates to dates in the future for which schedules exist; templates do not create new daily schedules. The creation of daily schedules is controlled by:

- The number of days in the future that schedules exist for the group - 365 for UMMG
- The number of days in the future that exist for the Scheduling Departments if it was modified by department.
Changing schedule location

If you change a schedule's location by transferring a template, the system gives you the option of updating the locations of all the appointments already booked into the schedule.

Overwriting comments

When you transfer a template, any template comments (schedule comment, session comments, and slot comments) overwrite any daily schedule comments; however, if you do not enter a template comment, the system retains the daily schedule comment.

You can only transfer a template to a day when a daily schedule exists; if the day does not have a daily schedule, use Distribute Template to Blank Day activity (F8/A1/A4/A7).

Effect on superslots

If you overlay a superslot with a regular slot, the system deletes the entire superslot, and any appointments for which there are not corresponding slots in the template are bumped. Superslots cannot be split up.

When you transfer a template the system:

1. Checks the time of the slots in the daily schedule against the time of the slots in the template.
2. If there is a template slot at a certain time but no slot in the daily schedule for that time, the template slot is placed in the new daily schedule.
3. If there is a daily slot but no template slot for that same time, the system does one of the following:
a) If all of the daily slots fall outside the template, and the slot's session does not exist in the template, the slot is preserved as is. There must be no overlap of the daily slot and the template for the slot to be preserved.

b) If the slot falls outside the template but the session the slot is in does exist for the template, the daily slot is deleted and the system bumps the appointment in this slot.

4. If there is a regular slot at the same time in both the template and the daily schedule, the system checks the slot's duration and visit type:

- If the two slots have the same duration and same visit type, all of the appointments in the daily schedule are transferred to the new daily schedule, regardless of the appointment's visit type or duration.

- If the two regular slots do not have the same visit type, the system checks the slots' duration. If the duration of the appointment is shorter than the duration of the slot in the template, then the appointment is booked into the slot. If, on the other hand, the duration of the appointment is longer, then the duration of the slot in the template, the appointment is bumped.

The system checks for similarities in the visit type as well as the visit type duration. This is important when there is more than one slot in the template for a particular time.

**Transferring to Days with Duration Overrides**

An override occurs when the scheduler booked the appointment for an extended period of time so that it takes up its own slot, plus the next subsequent slot. Likewise, a duration override can be used to shorten the amount of time that is typically used for a visit type.

When you transfer a template, the system treats the “override” appointment as being booked in the first slot only.

Also with this example, the appointment was booked into a regular slot. This will not work if the appointment was booked into a superslot. When a template that has regular slots to a day with superslots, then the template overrides the appointments and bumps them all.
Superslots in Dailies and Templates

If the daily schedule and template both contain superslots, the system compares the intervals of the daily schedule and the template:

- If the template contains a superslot with an interval that matches the interval in the daily's superslot, the system preserves the existing appointment, if it fits into the new superslot.
- If there is no matching interval in the template for the existing appointment, the appointment is bumped.

Rule -- If one slot is a regular slot and the other is a superslot, (regardless of whether they're in the daily or the template) and they are both the same time, the system will try to fit any appointments based solely on duration. If the appointment time matches, then the appointment is preserved, if not the appointment is bumped.
**Update Appointment Location**

This activity Edit Daily button allows you to change the location of appointments for a specific department and/or provider.

You use this activity to change the locations of appointments to match a scheduling location that has already been changed.

- Select the Master Schedule tab
- Select the Schedule to edit location
- Click on the Edit button.
- Select the Add/Edit Session
- Change location, click OK
- Click OK to save Changes
- Are you sure you want to file this schedule? NO=>
- Distribute Schedule

If location of daily schedule does not match location of template, would you like to update location in all booked appointments? Yes =>
Module Summary

- Master Schedules do not change Daily Schedules with appointments already booked into them.
- Scheduling comments appear when you display Master Schedules.
- When you copy you can change days and locations of a Master Schedule.
- You can edit the session detail when you copy Master Schedules.
Practice Exercise

1. Copy your schedule to yourself, but for every 1st Thursday of the month beginning the first of next month.
2. Print the original schedule and the schedule you just created.
3. Copy your schedule to yourself, but for Every 4th Tuesday of the month beginning the first day of next month.
4. Delete the schedule you created in exercise number 3.

Congratulations!

You have completed this module.