

Appointment Schedule Set-Up

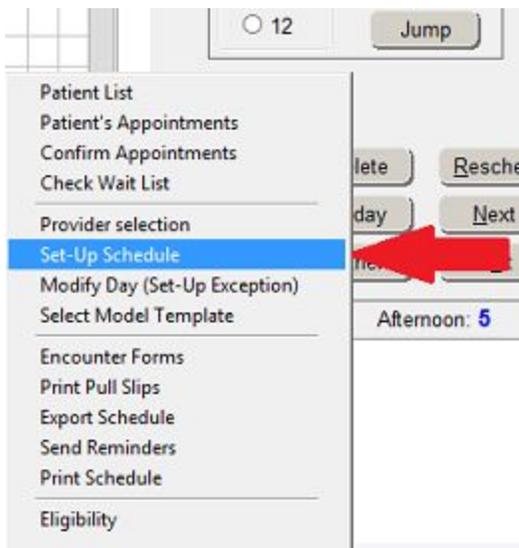
(Used to set-up default/routine schedules. If the schedule is NOT consistent for all days of the week, separate settings will be required in order to achieve a complete default schedule)

From Appointments, click on **Other**.

The screenshot displays a software interface for setting up appointment schedules. On the left, a table lists appointment slots with columns for 'Time' and 'Name'. The slots are color-coded: blue for 'WALK', yellow for 'UNA', grey for 'LUNCH', and pink for 'OFV'. The right-hand side features a date selection tool showing '2 February, 2017 Thursday' for 'Christine Borghi-Cavallaro, M'. Below this is a calendar for February 2017 with the 2nd highlighted. A control panel includes radio buttons for frequency (1, 2, 3, 6, 9, 12) and duration (Days, Weeks, Months, Years), with a 'Jump' button. At the bottom, a row of buttons includes 'Add', 'Delete', 'Resched', 'Previous', 'Today', 'Next', 'End', 'Other', and 'Egt'. The 'Other' button is circled in red. A status bar at the very bottom indicates 'Morning: 6' and 'Afternoon: 5'.

Time	Name
8:30	WALK
8:45	WALK
9:00am	WALK
9:15	WALK
9:30	WALK
9:45	WALK
10:00am	WALK
10:15	WALK
10:30	UNA
10:45	UNA
11:00am	UNA
11:15	UNA
11:30	UNA
11:45	UNA
12:00pm	LUNCH
12:15	LUNCH
12:30	LUNCH
12:45	LUNCH
1:00pm	OFV
1:15	OFV
1:30	OFV
1:45	OFV
2:00pm	OFV
2:15	OFV
2:30	OFV
2:45	OFV
3:00pm	OFV
3:15	OFV
3:30	OFV
3:45	OFV

Choose **Set-Up Schedule**



Enter **Description**, choose **Provider**, check the boxes on the left. Fill in dates in **Effective Period** field. *Make sure corresponding days of the week for the event are also checked. Save.*

A screenshot of the 'Schedule Information' dialog box. The 'Description' field is empty and circled in red. The 'Provider' dropdown is set to 'All Providers' and is also circled in red. There are four checkboxes: 'Use to set office hours for Week view' (checked), 'Use to set office hours for Office view' (checked), 'Do not use for Provider view' (unchecked), and 'Save schedule as a model' (unchecked). The 'Effective Period' section shows 'Period: from 02/02/17 thru 02/02/18'. Below this, the days of the week are listed with checkboxes: Monday (checked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (checked), Saturday (unchecked), and Sunday (unchecked). A red arrow points to the Sunday checkbox. The 'Weeks of Month' section has 'All' selected. The 'Weeks of Year' section has 'All' selected. The 'Office Hours' section shows 'from 9:00am thru 5:00pm'. The 'Notes' field is empty. At the bottom, the 'Save' button is circled in red. Other buttons include 'Cancel' and 'Duplicate'.

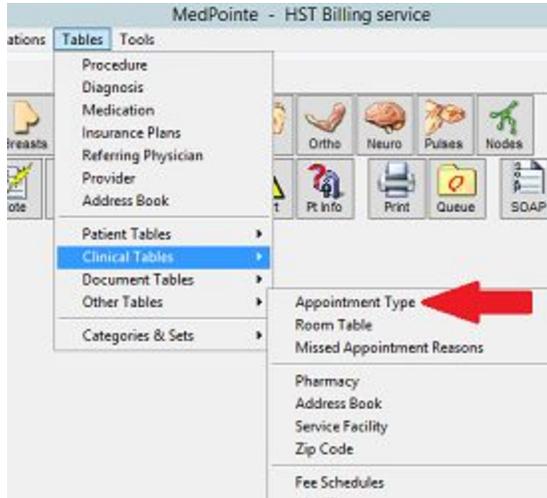
***Reminder:**Schedule 15

minutes beyond stated time. For example, an hour long appointment beginning at 4:00 pm, should be scheduled till 5:15 pm.

Time Blocks

Use Time Blocks to exclude time for an event already set up or search/create a new one.

Tables, Other Tables, Appointment Type



Search **Code** for type of appointment/block. Enter length of time. All entries under this code will be set for this amount of time. The shortest length of time chosen will become the default. Save.

The screenshot shows the 'Appointment Type Table' form. The 'Code' field is highlighted with a red circle and contains the value '7'. The 'Length (in minutes)' field is highlighted with a red box and is empty. The 'Save' button is also highlighted with a red circle. Other fields include Description, Appointment Type, Display Color Set, Regular Room, Visit Type, Recall Info, and Preventive Care.

Back on main Appointment screen, click on **Other, Set-Up Schedule** again. In the **Set-Up Records** window, double click on day you would like to modify. From the **Schedule Information** window, choose **Time Blocks, Add Item**.

Schedule Set-Up

Set-Up Records

Description	Provider	Days	From	Thru
CBC Mondays OFF	Christine Borghi-Cavallaro	M	01/01/04	05/31/17
CBC Thursdays	Christine Borghi-Cavallaro	R	09/04/03	08/30/17
CBC Tuesdays	Christine Borghi-Cavallaro	T		
CBC Wednesdays Walk-in	Christine Borghi-Cavallaro	W		
Default	All Providers	*MT		
JD Fridays Walk-in	Jerold Desimone, RPA	F		
JD Mondays	Jerold Desimone, RPA	M		
JD Thursdays	Jerold Desimone, RPA	R		
JD Tuesdays Even	Jerold Desimone, RPA	T		
JD Wednesdays	Jerold Desimone, RPA	W		
LB Mondays Walk-in	Laura J. Booth, MD	M		
LB Thursdays	Laura J. Booth, MD	R		
LB Tuesdays/Fridays OFF	Laura J. Booth, MD	TF		
LB Wednesdays	Laura J. Booth, MD	W		
Nurse Fridays 12/09	Nurse 1	F		
Nurse Mon/Wed/Thursdays	Nurse 1	MWF		
Nurse Tuesdays/Fridays	Nurse 1	TF		
Office/Week View	All Providers	*MT		
	All Providers	MTV		
CBC Fridays	Christine Borghi-Cavallaro	F		
Laura Booth June Vacation	Laura J. Booth, MD	MTV		

Schedule Information

Description: JD Thursdays

General **Time Blocks**

Slot Length: 5 min 10 min 15 min 20 min 30 min

Block Code For Open Slots: Schedule is split

Time	Code	Description
12:00pm 1:00pm	LUNCH	Closed For Lunch

Add Item **Delete Item**

Type	Description	From	Thru	Col #
LUNCH	Closed For Lunch	12:00pm	1:00pm	1

Allow appointments during this block

Save **Cancel** **Duplicate**

Add Type, Description and Time. If you wish to allow scheduling during the time block, **check** the box at the bottom. Save.

Schedule Information

Description: JD Tuesdays Even

General Time Blocks

Slot Length: 5 min 10 min 15 min 20 min 30 min

Block Code For Open Slots: Schedule is split

Time	Code	Description
12:00pm 1:00pm	LUNCH	Closed For Lunch
2:00pm 4:00pm	MTG	Meeting

Type	Description	From	Thru	Col #
MTG	Meeting	2:00pm	4:00pm	1

Allow appointments during this block!

The above are steps for setting up what the default schedule should look like. The following are steps for creating schedule exceptions for vacations, etc.

Appointment Exceptions

From Appointment screen, go to date you would like to change on the calendar. Click **Other**, choose **Modify Day**.

Description will prefill as exception with chosen provider and date. Enter dates in **Effective Period**. *Make sure corresponding days underneath are also checked*. If this is not done, the exception will not be correct in the system. Click applicable boxes. Save.

Schedule Information

Description: (Exception for CBC 08/17/17)

General | Time Blocks

Provider: Christine Borghi-Cavallaro, M.D.

Use to set office hours for Week view Do not use for Provider view
 Use to set office hours for Office view Save schedule as a model

Effective Period

Period: from 08/17/17 thru 08/17/17

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Weeks of Month: All 1st Only 2nd Only 3rd Only 4th Only 5th Only
Weeks of Year: All Odd Only Even Only

Office Hours: from 9:00am thru 5:00pm

Provider does not have office hours

Notes:

Save Cancel Duplicate

Christine Borghi-Cavallaro, M.D.

August 2017

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

1 Days
 2 Weeks
 3 Months
 6 Years
 9
 12

Jump

Add Delete Resched
Previous Today Next
Find Other Exit

Morning: 0 Afternoon: 0

Reminder: Please make sure any appointments already on the schedule have been moved before closing the schedule with an appointment exception. If you do not, the appointment will be hidden but still be there. Make sure schedule is clear first!

Check exceptions in Set-Up Records window. Exceptions are in yellow.