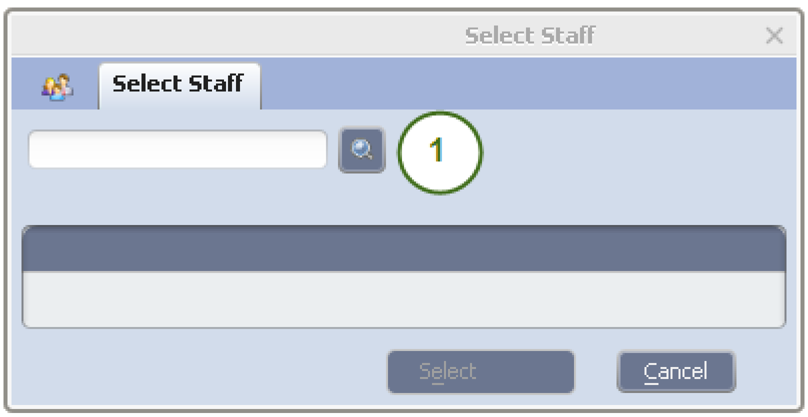
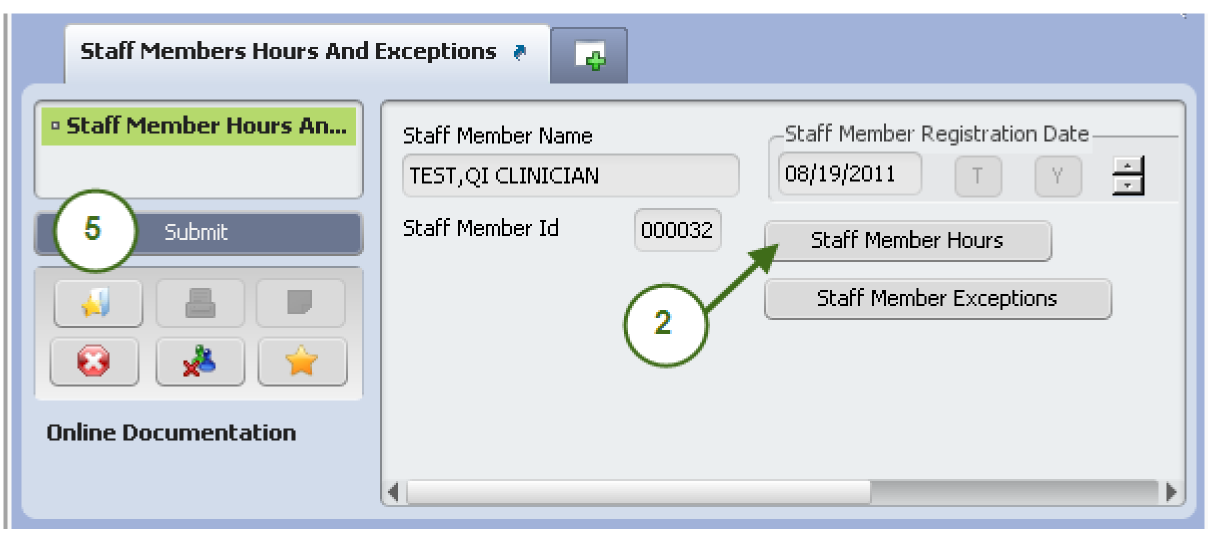
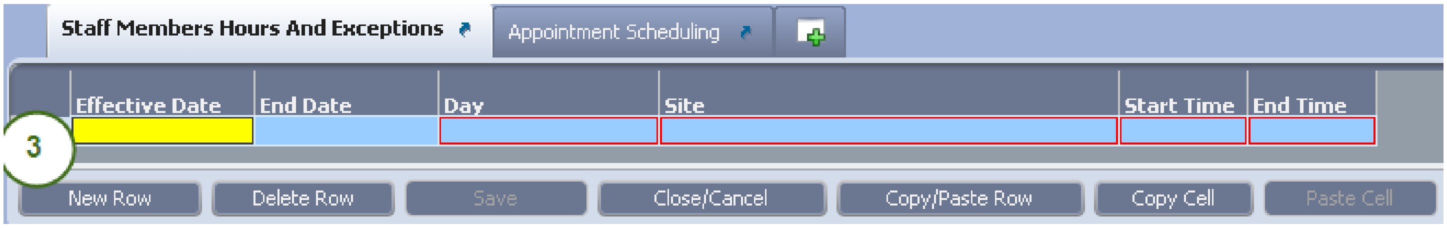
CHAPTER 13 – SCHEDULING CALENDAR

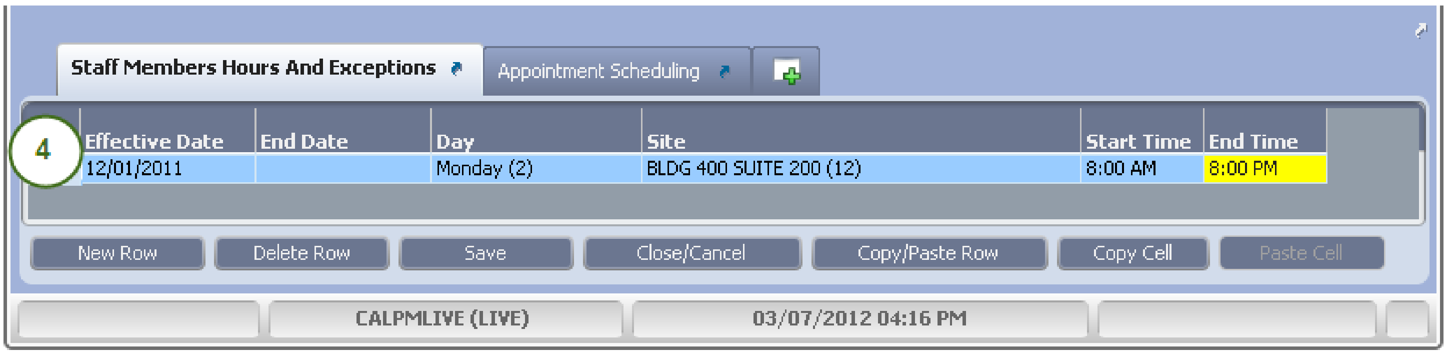
STAFF MEMBERS HOURS AND EXCEPTIONS

LOCATION	PM → Appointment Scheduling → Staff Members Hours and Exceptions
PURPOSE	You will need to enter information here before you can begin scheduling appointments in your scheduling calendar.
RULES	• You will need to make one entry individually for each day of the week.
STEPS	1. Enter the staff name or staff number and click select. 2. Click on Staff Member Hours 3. Click on New Row (this will display a row in the grid above for you to enter the information directly in the fields. 4. Enter Effective Date, see notes for Day and Site, Start time and End time. To add additional days repeat the process. **NOTE:** Do not enter and end date. When you enter the time, enter AM and PM at the end. Once you have completed this process click Save at the bottom of the screen. You will be taken to the first screen. 5. Submit your entry









Note:

Days of the week are numbered in the following method

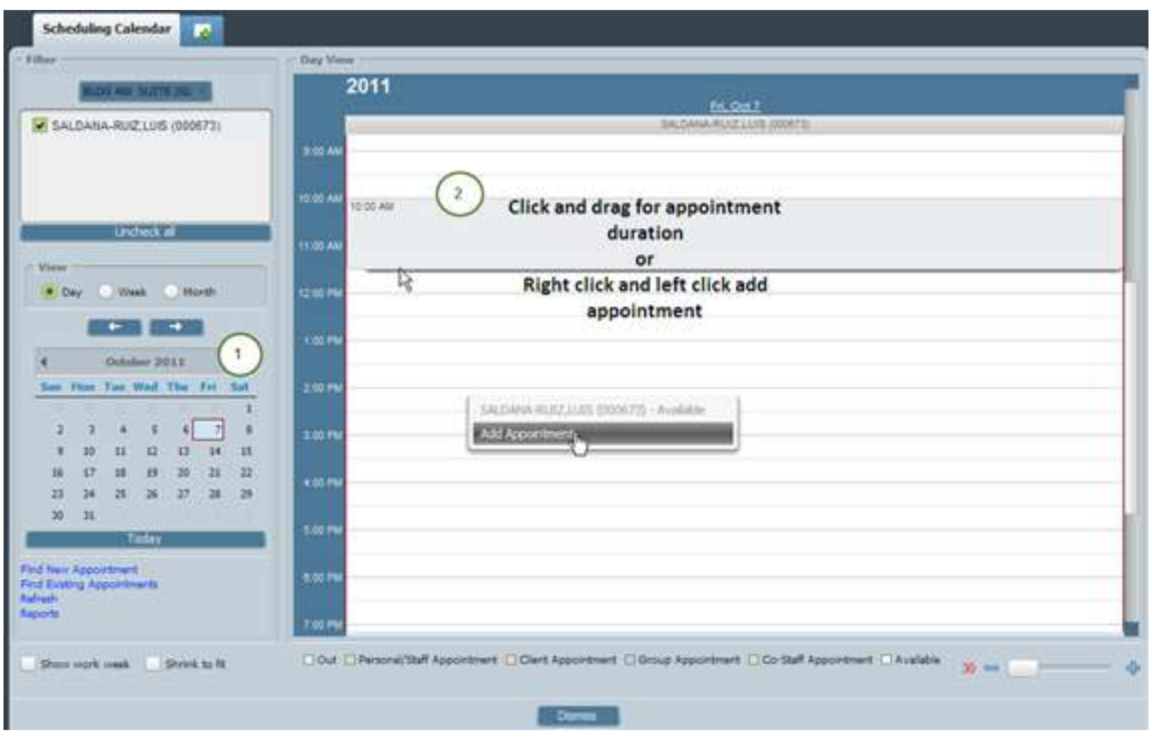
(2) Monday
(3) Tuesday
(4) Wednesday
(5) Thursday
(6) Friday

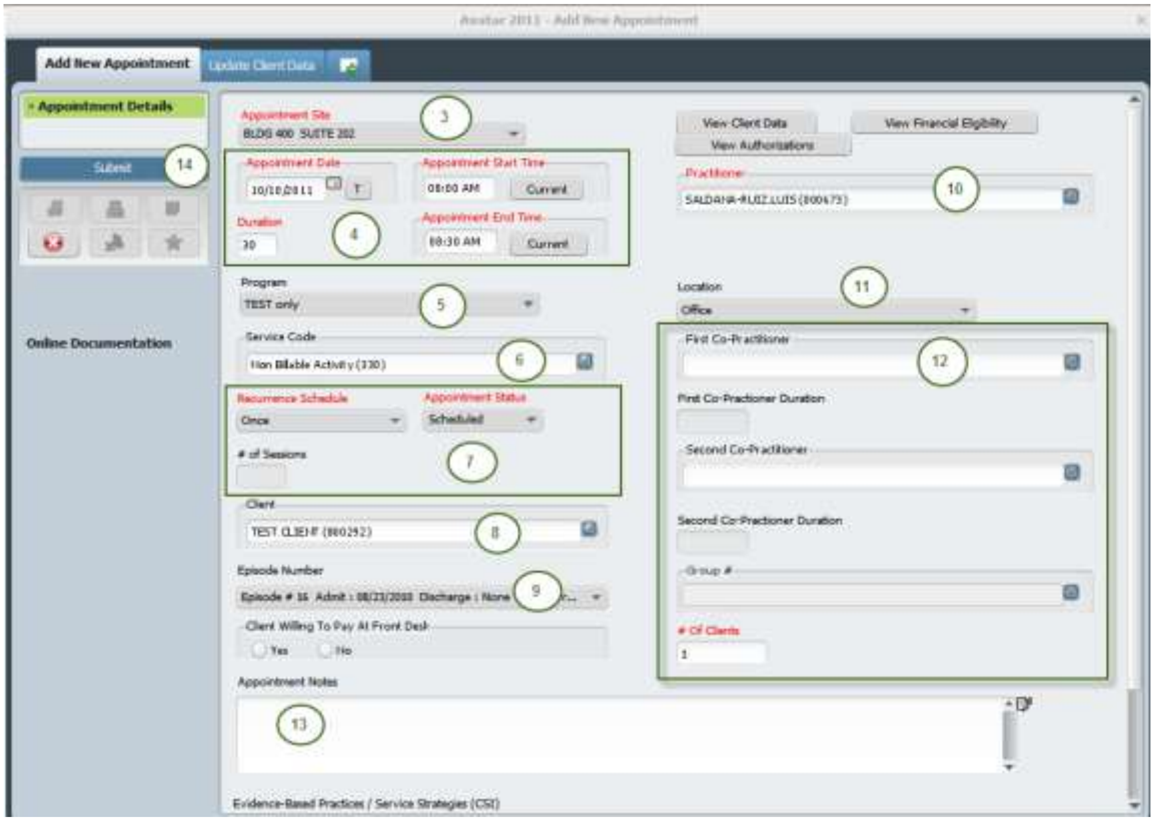
Sites are numbered in the following method:

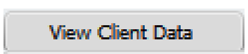
1 BLANCO 951
2 BLANCO 957
3 CAYUGA ADP
4 COASTAL REGION OFFICE
5 GARDEN ROAD CHILDREN'S
6 AOD
7 MCSTART CHILDREN'S
8 KING CITY
9 MCHOME/MARTINEZ HALL
10 BLDG 400 SUITE 202
11 QUAD 105
12 BLDG 400 SUITE 200
13 QUAD 210-B
14 QUALITY ASSURANCE
20 CHILDRENS BEHAVIORAL HEALTH - OLYMPIA
21 INTERIM
22 DOOR TO HOPE

SCHEDULING CALENDAR

LOCATION	PM→ Appointment Scheduling→ Scheduling Calendar
PURPOSE	This form is used to schedule appointments
RULES	• You must add a new row to enter information into the grid
STEPS	1. Click on the date you wish to schedule the appointment 2. Click and drag from appointment start time to end time or Right click and left click add appointment 3. Appointment site will default to the location you set up in the Staff Member Hours and Exceptions or you can pick from the drop down box 4. Enter appointment data (date, start time, end time and duration) 5. Select the program from the drop down box (the program the client is opened to) 6. Enter the service code or name (example 301 or linkage) 7. If the appointment will be a reoccurring appointment enter the details in this section 8. Enter the client number or name 9. Choose the episode/program from the drop down box 10. Practitioner should auto default 11. Choose the location where the service took place 12. If co practitioners were present enter their name/staff number in this section as well as their duration 13. Enter any appointment notes (example who called to schedule the appointment) 14. Submit/save the appointment



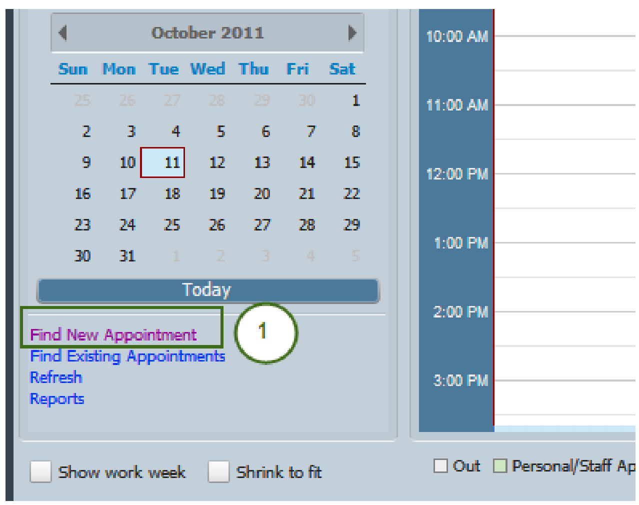


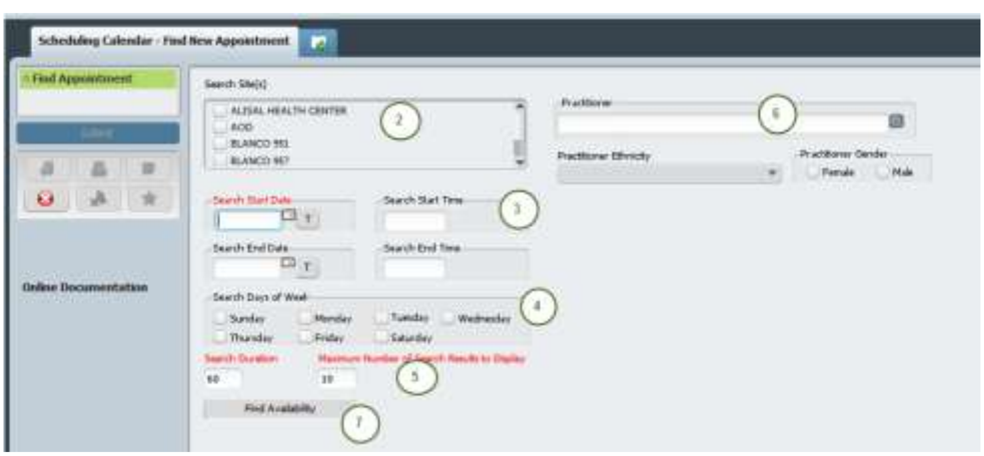


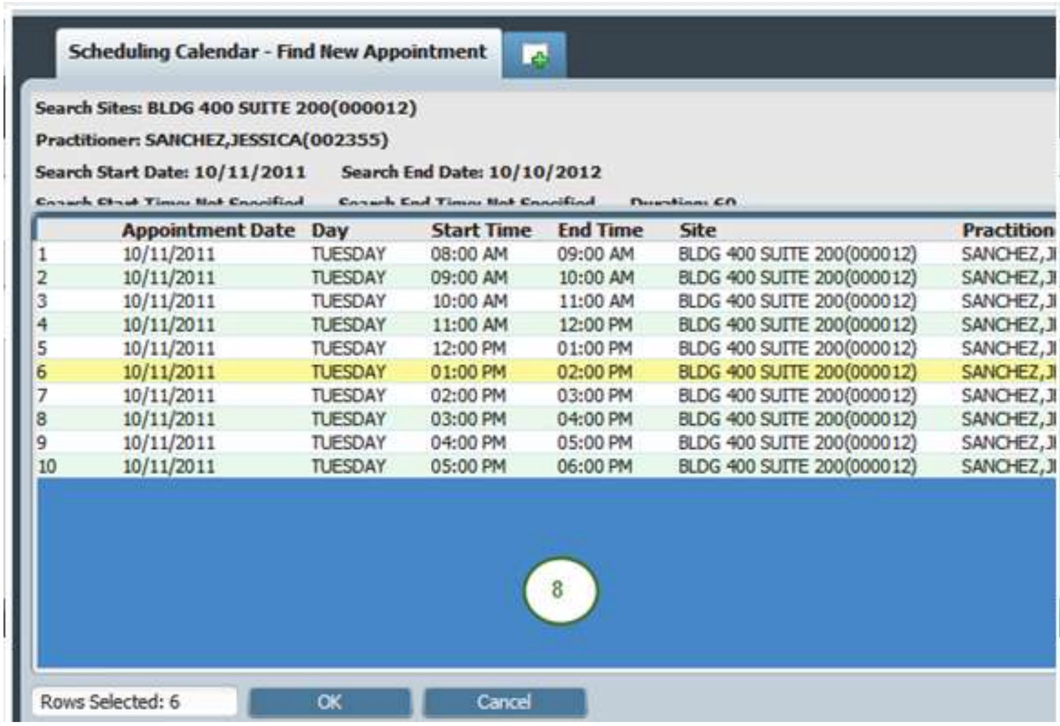
This button will open a new tab and open up the “Update Client Data” form

HOW TO FIND AN AVAILABLE APPOINTMENT SLOT

LOCATION	PM → Appointment Scheduling→ Scheduling Calendar
PURPOSE	This option is used for a detailed search for a new appointment
RULES	•
STEPS	1. Click on the "Find New Appointment" text 2. Select the Site where to search 3. Enter the search dates 4. Select the days of the week to search for 5. Enter the duration of the appointment in minutes (example. I need to search for a time slot of 1hr 30min I would enter 90 minutes) 6. Enter the practitioner for which you are searching for availability 7. Click on find availability and a list of available time slots will be generated 8. Click on the time slot you wish to schedule and click okay. This will take you to the scheduling calendar (see scheduling calendar-appointments for details on scheduling an appointment)



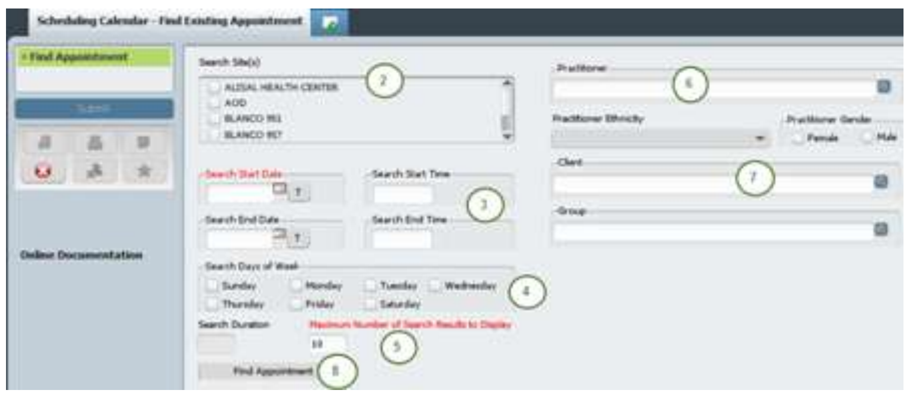


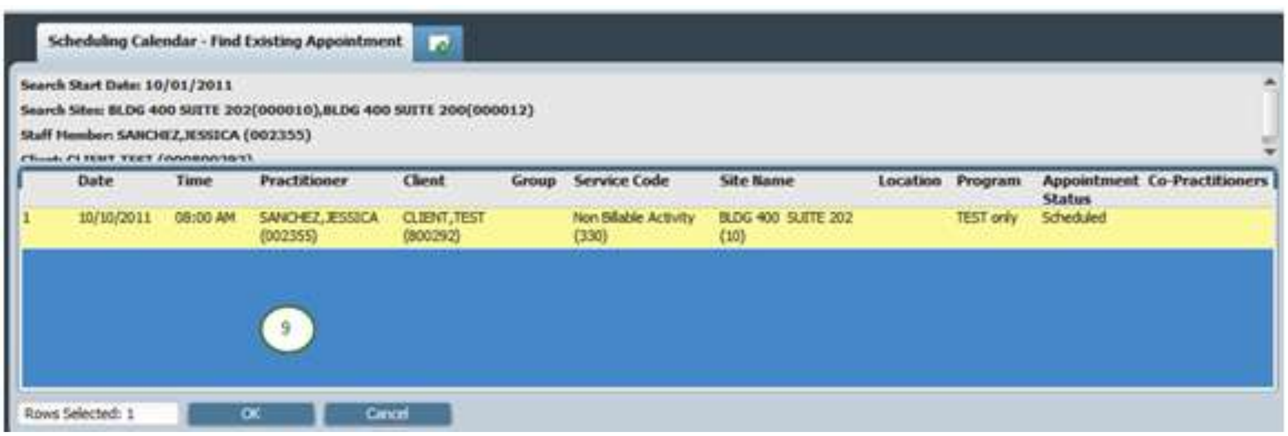


	Appointment Date	Day	Start Time	End Time	Site	Practition
1	10/11/2011	TUESDAY	08:00 AM	09:00 AM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
2	10/11/2011	TUESDAY	09:00 AM	10:00 AM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
3	10/11/2011	TUESDAY	10:00 AM	11:00 AM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
4	10/11/2011	TUESDAY	11:00 AM	12:00 PM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
5	10/11/2011	TUESDAY	12:00 PM	01:00 PM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
6	10/11/2011	TUESDAY	01:00 PM	02:00 PM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
7	10/11/2011	TUESDAY	02:00 PM	03:00 PM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
8	10/11/2011	TUESDAY	03:00 PM	04:00 PM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
9	10/11/2011	TUESDAY	04:00 PM	05:00 PM	BLDG 400 SUITE 200(000012)	SANCHEZ,J
10	10/11/2011	TUESDAY	05:00 PM	06:00 PM	BLDG 400 SUITE 200(000012)	SANCHEZ,J

HOW TO FIND AN EXISTING APPOINTMENT

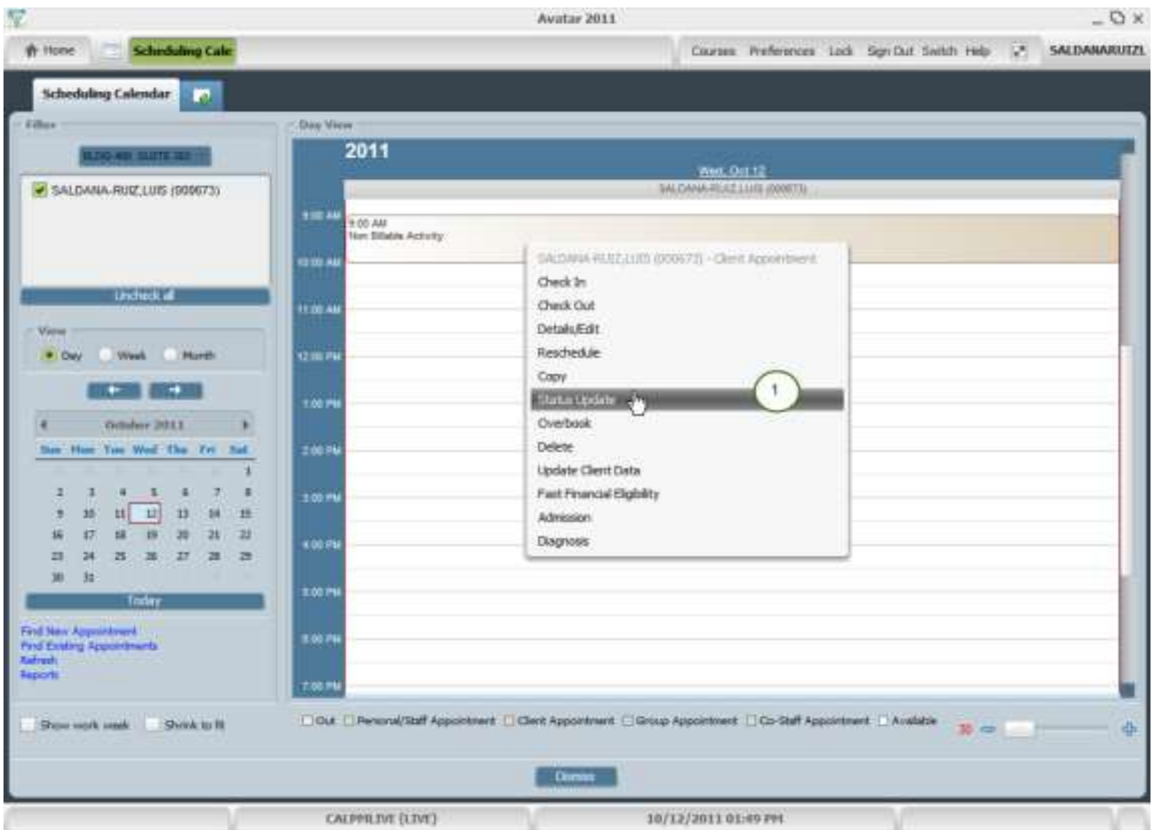
LOCATION	PM → Appointment Scheduling→ Scheduling Calendar
PURPOSE	This option is used to find existing appointments
RULES	•
STEPS	1. Click on the "Find Existing Appointments " text 2. Select the Site where to search 3. Enter the search dates and times if necessary 4. Select the days of the week to search for 5. Enter the maximum number of search results you wish to view 6. Enter the practitioner that you are searching for 7. Enter the client number you are searching for 8. Click on find appointment so see the search results 9. Click okay to return to the find appointment screen





CONFIRMING APPOINTMENTS

LOCATION	PM → Appointment Scheduling → Scheduling Calendar
PURPOSE	This form is used to confirm the appointment
RULES	•
STEPS	1. Right Click on the appointment and left click on status update 2. If the appointment has been confirmed click this box 3. Enter any necessary notes (who you spoke with etc…) 4. Submit your entry



MISSED VISIT – KEEPING TRACK

LOCATION	PM → Appointment Scheduling → Scheduling Calendar
PURPOSE	This form is used to marked an appointment as a missed visit
RULES	•
STEPS	a. Right Click on the appointment and left click on status update b. Click on the missed visit box c. Select from the drop down the reason for the missed visit d. Enter any missed visit notes e. Submit your entry