

## CHAPTER 13 – SCHEDULING CALENDAR

### STAFF MEMBERS HOURS AND EXCEPTIONS

<b>LOCATION</b>	PM → Appointment Scheduling → Staff Members Hours and Exceptions
<b>PURPOSE</b>	You will need to enter information here before you can begin scheduling appointments in your scheduling calendar.
<b>RULES</b>	<ul style="list-style-type: none"> <li>You will need to make one entry individually for each day of the week.</li> </ul>
<b>STEPS</b>	<ol style="list-style-type: none"> <li>Enter the staff name or staff number and click select.</li> <li>Click on Staff Member Hours</li> <li>Click on New Row (this will display a row in the grid above for you to enter the information directly in the fields).</li> <li>Enter Effective Date, see notes for Day and Site, Start time and End time. To add additional days repeat the process.</li> </ol> <p><b>NOTE:</b> Do not enter an 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.</p> <ol style="list-style-type: none"> <li>Submit your entry</li> </ol>

The screenshot shows a 'Select Staff' dialog box. At the top, there is a search input field with a magnifying glass icon. A green circle with the number '1' is placed over this search field. Below the search field is a list box. At the bottom of the dialog, there are two buttons: 'Select' and 'Cancel'.

The screenshot shows the 'Staff Members Hours And Exceptions' screen. On the left, there is a 'Submit' button highlighted with a green circle and the number '5'. The main form contains the following fields and buttons:

- Staff Member Name: TEST, QI CLINICIAN
- Staff Member Registration Date: 08/19/2011 (with T and Y dropdowns)
- Staff Member Id: 000032
- Buttons: Staff Member Hours (highlighted with a green circle and the number '2'), Staff Member Exceptions

At the bottom, there is a section for 'Online Documentation' with several icons.

Staff Members Hours And Exceptions Appointment Scheduling

Effective Date	End Date	Day	Site	Start Time	End Time

New Row Delete Row Save Close/Cancel Copy/Paste Row Copy Cell Paste Cell

Staff Members Hours And Exceptions Appointment Scheduling

Effective Date	End Date	Day	Site	Start Time	End Time
12/01/2011		Monday (2)	BLDG 400 SUITE 200 (12)	8:00 AM	8:00 PM

New Row Delete Row Save Close/Cancel Copy/Paste Row Copy Cell Paste Cell

CALPMLIVE (LIVE) 03/07/2012 04:16 PM

**Note:****Days of the week are numbered in the following method**

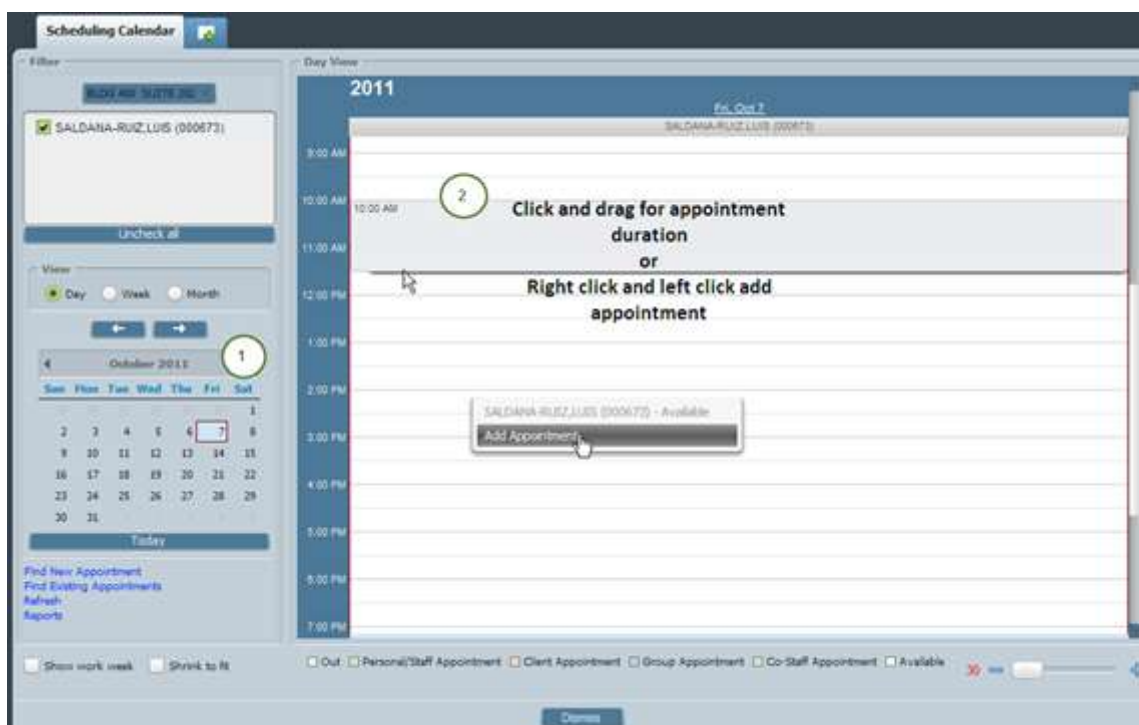
- (2) Monday
- (3) Tuesday
- (4) Wednesday
- (5) Thursday
- (6) Friday

**Sites are numbered in the following method:**

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

## SCHEDULING CALENDAR

<b>LOCATION</b>	PM → Appointment Scheduling → Scheduling Calendar
<b>PURPOSE</b>	This form is used to schedule appointments
<b>RULES</b>	<ul style="list-style-type: none"> <li>You must add a new row to enter information into the grid</li> </ul>
<b>STEPS</b>	<ol style="list-style-type: none"> <li>Click on the date you wish to schedule the appointment</li> <li>Click and drag from appointment start time to end time or Right click and left click add appointment</li> <li>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</li> <li>Enter appointment data (date, start time, end time and duration)</li> <li>Select the program from the drop down box (the program the client is opened to)</li> <li>Enter the service code or name (example 301 or linkage)</li> <li>If the appointment will be a reoccurring appointment enter the details in this section</li> <li>Enter the client number or name</li> <li>Choose the episode/program from the drop down box</li> <li>Practitioner should auto default</li> <li>Choose the location where the service took place</li> <li>If co practitioners were present enter their name/staff number in this section as well as their duration</li> <li>Enter any appointment notes (example who called to schedule the appointment )</li> <li>Submit/save the appointment</li> </ol>



The screenshot shows the 'Add New Appointment' form in Avastar 2011. The form is titled 'Add New Appointment' and has a sub-header 'Update Client Data'. The form is divided into several sections:

- Appointment Details:** Includes fields for Appointment Site (BDG 400 SUITE 252), Appointment Date (10/10/2011), Appointment Start Time (08:00 AM), Appointment End Time (08:30 AM), Duration (30), Program (TEST only), Service Code (Non Billable Activity (120)), Recurrence Schedule (Once), Appointment Status (Scheduled), # of Sessions, Client (TEST CLERK (860292)), Episode Number (Episode # 35, Admit: 08/23/2008, Discharge: None), Client Willing To Pay At Front Desk (Yes/No), and Appointment Notes.
- Client Information:** Includes fields for Practitioner (SALDANHA-RUIZ,LUIS (800473)), Location (Office), First Co-Practitioner, First Co-Practitioner Duration, Second Co-Practitioner, Second Co-Practitioner Duration, Group #, and # of Clients (1).
- Buttons:** 'View Client Data', 'View Financial Eligibility', 'View Authorizations', and 'Submit'.

Numbered callouts (1-14) highlight specific fields and buttons:

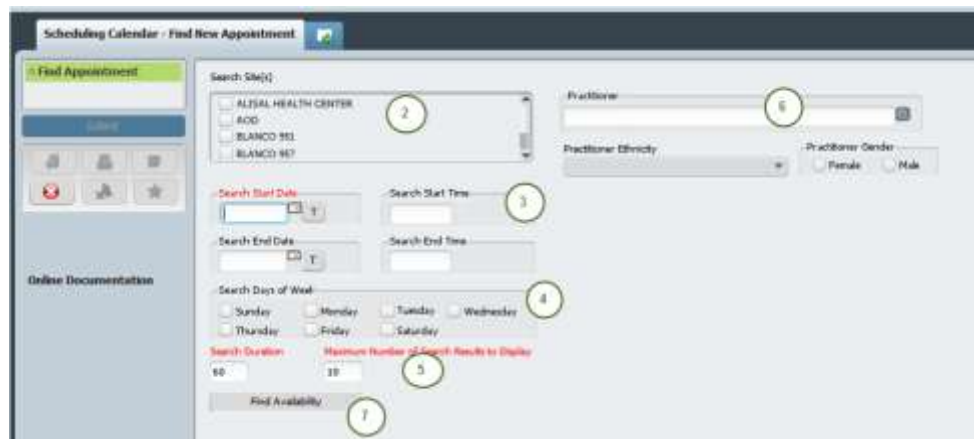
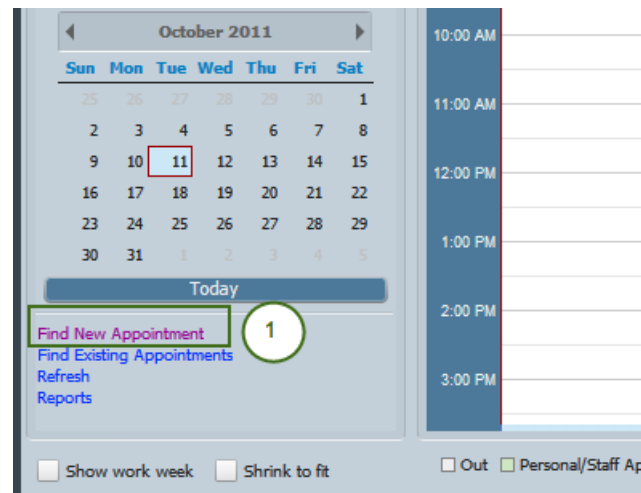
- 1: Appointment Site
- 2: Appointment Date
- 3: Appointment Start Time
- 4: Appointment End Time
- 5: Duration
- 6: Program
- 7: Service Code
- 8: Recurrence Schedule
- 9: Appointment Status
- 10: # of Sessions
- 11: Client
- 12: Episode Number
- 13: Client Willing To Pay At Front Desk
- 14: Appointment Notes

View Client Data

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

## HOW TO FIND AN AVAILABLE APPOINTMENT SLOT

<b>LOCATION</b>	PM → Appointment Scheduling → Scheduling Calendar
<b>PURPOSE</b>	This option is used for a detailed search for a new appointment
<b>RULES</b>	•
<b>STEPS</b>	<ol style="list-style-type: none"> <li>1. Click on the “Find New Appointment” text</li> <li>2. Select the Site where to search</li> <li>3. Enter the search dates</li> <li>4. Select the days of the week to search for</li> <li>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)</li> <li>6. Enter the practitioner for which you are searching for availability</li> <li>7. Click on find availability and a list of available time slots will be generated</li> <li>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)</li> </ol>



**Scheduling Calendar - Find New Appointment**

Search Sites: BLDG 400 SUITE 200(000012)  
Practitioner: SANCHEZ,JESSICA(002355)  
Search Start Date: 10/11/2011 Search End Date: 10/10/2012  
Search Start Time: Not Specified Search End Time: Not Specified Duration: 60

	Appointment Date	Day	Start Time	End Time	Site	Practitioner
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

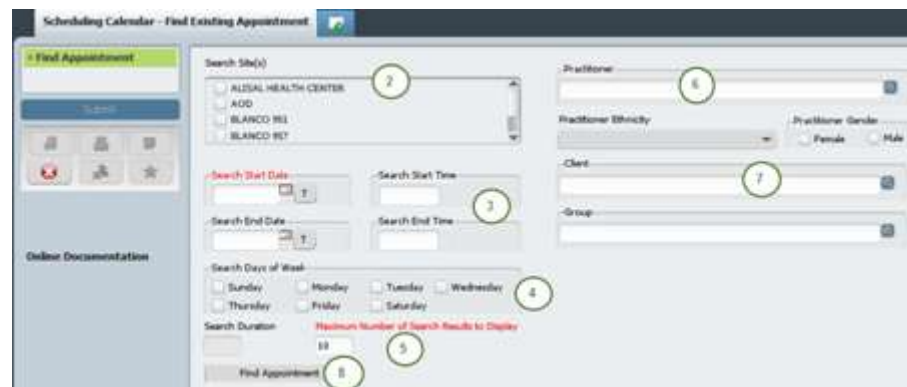
8

Rows Selected: 6

OK Cancel

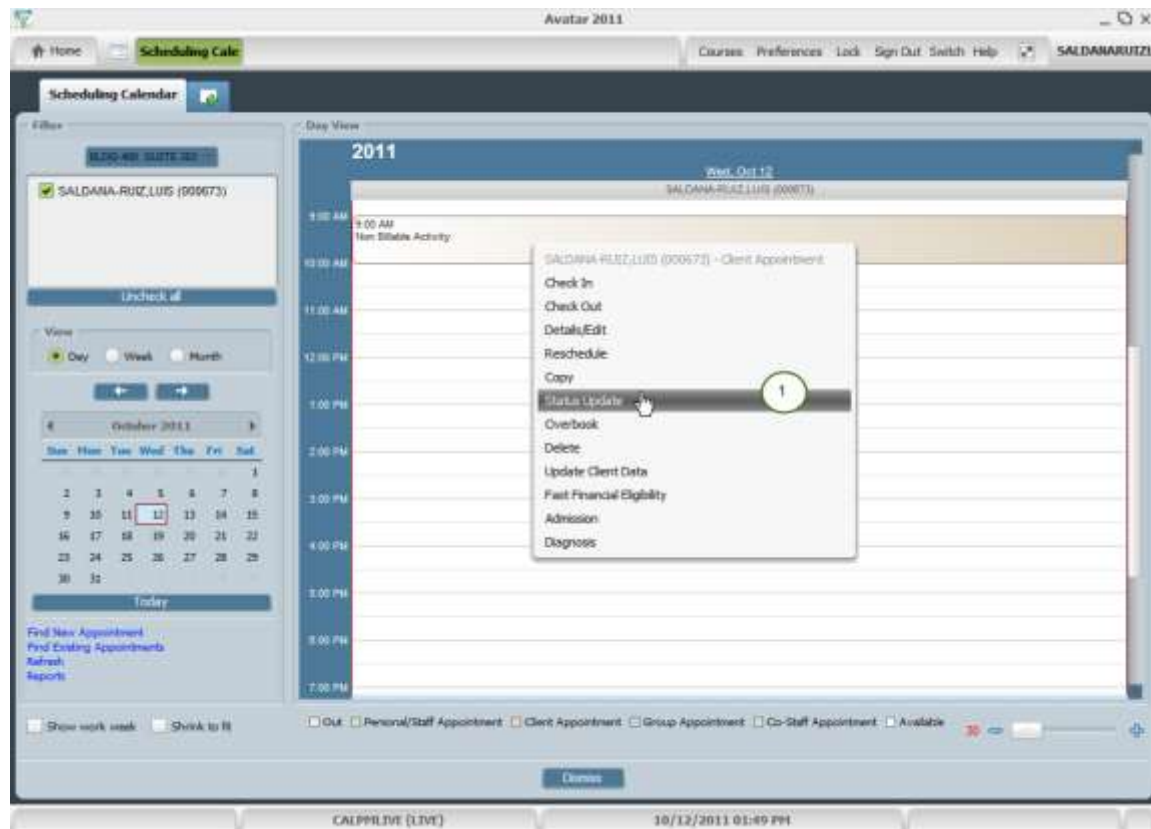
## HOW TO FIND AN EXISTING APPOINTMENT

<b>LOCATION</b>	PM → Appointment Scheduling → Scheduling Calendar
<b>PURPOSE</b>	This option is used to find existing appointments
<b>RULES</b>	•
<b>STEPS</b>	<ol style="list-style-type: none"> <li>1. Click on the “Find Existing Appointments” text</li> <li>2. Select the Site where to search</li> <li>3. Enter the search dates and times if necessary</li> <li>4. Select the days of the week to search for</li> <li>5. Enter the maximum number of search results you wish to view</li> <li>6. Enter the practitioner that you are searching for</li> <li>7. Enter the client number you are searching for</li> <li>8. Click on find appointment so see the search results</li> <li>9. Click okay to return to the find appointment screen</li> </ol>



## CONFIRMING APPOINTMENTS

<b>LOCATION</b>	PM → Appointment Scheduling → Scheduling Calendar
<b>PURPOSE</b>	This form is used to confirm the appointment
<b>RULES</b>	•
<b>STEPS</b>	<ol style="list-style-type: none"> <li>1. Right Click on the appointment and left click on status update</li> <li>2. If the appointment has been confirmed click this box</li> <li>3. Enter any necessary notes (who you spoke with etc...)</li> <li>4. Submit your entry</li> </ol>





## MISSED VISIT – KEEPING TRACK

<b>LOCATION</b>	PM → Appointment Scheduling → Scheduling Calendar
<b>PURPOSE</b>	This form is used to marked an appointment as a missed visit
<b>RULES</b>	•
<b>STEPS</b>	<ol style="list-style-type: none"> <li>Right Click on the appointment and left click on status update</li> <li>Click on the missed visit box</li> <li>Select from the drop down the reason for the missed visit</li> <li>Enter any missed visit notes</li> <li>Submit your entry</li> </ol>

