

APPOINTMENT REASONS

The appointment reasons are a very powerful part of the MaxGold system. They impact on multiple major areas of the program including;

- Scheduling of Appointments for standard healthcare clinics
- Scheduling and management for OR (operating room) scheduling
- Billing system

Usually appointment reasons are assigned when scheduling an appointment for a patient. They are valuable in that they not only indicate why a patient has an appointment, but with our appointment reason features, you can visually see what the reason for an appointment is with user defined colours. In addition, you can define the duration for an appointment, which also impacts on your scheduler. If you normally book 15 minute appointments, you will likely set up you scheduler with 15 minute time slots (ie; 9:00 am, 9:15 am, etc). When you do have an appointment for 30 minutes, our scheduler visually displays this by blocking out 30 minutes (or two 15 minute time slots). Each appointment reason can also have a billing type assigned to it. Depending on your region, you can bill to;

- Healthcare system (provincial healthcare system – Only used in Canada)
- Private Billing (billings to direct to patients or 3rd parties such as Employers, Insurance Companies, etc)
- WCB (Workers Compensation Board – Only used in Canada)
- Autopac (Automobile Insurance – Only used in Canada)

You can define appointment reasons from two places in the MaxGold7 program. First you can access the appointment reasons table from the main menu by going to the menu item FILES and then selecting APPOINTMENT REASONS. The other place you can access this section is right from the scheduler itself by simply clicking on the appointment reason lookup button on the scheduler (please refer to the section of HOW TO SCHEDULE APPOINTMENTS and SCHEDULER BUTTONS AND FUNCTIONS for a thorough review on using the scheduler).

Once you open the appointment reason section you will display a table of appointment reasons. You can click on the ADD button to add an appointment. In addition you can also EDIT (make changes) to existing appointments or even DELETE and appointment reason.

The following screen shows you what the appointment reason looks like and what options you can use:

Appointment Reasons

The screenshot shows the 'Edit Appointment Reason' window with the following callouts:

- Each appointment reason is given a unique description.** (Points to the 'Reason' field containing 'CPX')
- You can define the duration of the appointment reason. This will affect the scheduler and how the appointment is displayed** (Points to the 'Duration' field set to '00:30')
- Appointment reasons can also include a prep time. This is common for surgeries where the duration of an appointment may be 30 minutes, but it also requires prep time. Prep time is also then displayed on the scheduler** (Points to the 'Prep Time' field set to '00:00')
- Each appointment reason can also have both a background color and a font color defined. This will impact how the appointment looks on your scheduler.** (Points to the 'Background Color' and 'Font Color' dropdowns)
- Appointment reasons can be assigned to a specific billing code (private billings) and/or a healthcare billing code. This impacts the OR (operating room) scheduling system.** (Points to the 'Billing Code' dropdown)
- Each reason can also have a billing type defaulted to it. When billing for appointments, the program will bill according to the billing type assigned to the reason: HC - Healthcare Billings (Canada only), Private - Private Billings, WCB - Workers Compensation (manitoba only), AUTOPAC - MPIC (Manitoba only)** (Points to the 'Billing Default' section with checkboxes for HC, AUTOPAC, WCB, and Private)
- Built in color palette allows you to assign your own color to appointment reasons with ease.** (Points to the 'Color' palette window)
- If using Max Online you can indicate if the appointment reason will appear with the online scheduling system** (Points to the 'Include in Online booking' checkbox)
- HC Fee Code** (Points to the 'HC Fee Code' dropdown)

HINT: When creating appointment reasons it is advisable to utilize short descriptions that are also unique and distinct. When booking an appointment for a complete physical examination, the shorthand term CPX is often used. Use of shorter descriptions make scheduling far more efficient and our program allows you to type in a reason when booking an appointment. It's far simpler to type in CPX instead of COMPLETE PHYSICAL EXAMINATION and conveys the same information.