SCHEDULER BUTTONS AND FUNCTIONS

The scheduler has many powerful features and functions. These are accessed by a number of strategically placed buttons and functions:

Clear Fields Button (▢): The clear fields button is used to quickly clear the scheduler of any information displayed in the fields (Name, Chart, HC#, Phone, Reason, Referred, etc). Sometimes the reason field will display the last entry or you might have populated the fields by right clicking on a scheduled appointment (used in conjunction with several functions). To clear the fields (in order to book a new appointment) the clear button is quick and efficient.

Multiple Provider View #1 (📂): This button will take you to the multiple provider view #1, and is one of many views (or ways) you can look at appointments or find an open time slot.

Change Provider Function (✚): Clicking on this button will display a list of all providers in your scheduler. It is used to select which provider you are booking an appointment for, or viewing appointments for. It is best used when you have more than three providers.

Next Provider Function (P): Clicking on this button will toggle to the next provider in your scheduler (alphabetically). It is used to select which provider you are booking an appointment for, or viewing appointments for. It is best used when you have three or fewer providers. Also work if you press ALT-P on your keyboard.

Calendar View ( ): This button will take you to the calendar view, and is one of many views (or ways) you can look at appointments or find an open time slot.

Monthly View (M): This button will take you to the monthly view, and is one of many views (or ways) you can look at appointments or find an open time slot.

Weekly View (W): This button will take you to the weekly view, and is one of many views (or ways) you can look at appointments or find an open time slot.

Day List ( ): This button accesses the day list and is primarily used by the provider as it displays patient details, appointment status and notes in an easy to read format. In addition, it provides access to electronic medical records, prescriptions, lab requisitions and other high level functions.

Walk-In Function ( ): This button will open up the walk in function and is used to manage walk in patients. This works very effectively for true walk in clinics as it manages and sorts walk in appointments.

Patient File ( ): This button will access patient information. To view or access a patient's file, click on a patient in the scheduler (or right click) and then click on the patient button. That patient's file is accessed and displayed on screen. If no patient is selected or active, then this button will display the list of all patients in alphabetical order.

Labels ( ): Accesses the various labels available in MaxGold. If a patient is selected (that is you have clicked on them or right clicked) then that patient is immediately selected for a label print.

Reports ( ): Accesses the various scheduler reports available in MaxGold.

Forms ( ): Accesses the various forms available in MaxGold. If a patient is selected (that is you have clicked on them or right clicked) then that patient is immediately selected for a form print.

Multiple Provider View #2 ( ): This button will take you to the multiple provider view #2, and is one of many views (or ways) you can look at appointments or find an open time slot.

Exit ( ): Exit button. Exits the scheduler and returns to the main menu.

Refresh Button ( ): This button is used to refresh the display. In network environments with multiple users booking appointments, the refresh button will instantly display any changes, additions and deletions from the scheduler screen. Otherwise the display changes based on certain events (ie; adding a new appointment).

Room View Button ( ): Provides a multi-room view and is useful if a provider is being booked in 2 or more rooms as it displays multiple rooms for each provider.

Schedule, Walk-In, Multiple Selection (Schedule): This pull down is used in special circumstances when booking appointments. The default is schedule, which is a normal scheduling event. If you select walk in, it will treat an added appointment as if it is arrived (NB: should not be used in place of the walk in function for walk-in clinics). The multiple indicates that you wish to book more than one appointment for a patient. This holds on to the patient and allows you to book more than one appointment. This is very often done if booking a patient to multiple providers. Once done, use the **_Clear Fields Button_ ( )** to reset to normal schedule mode.

Email Button (Email): This is a powerful function that will send an email with appointment details for a selected patient to that patient's referring practitioner.

Prepare Max Notes Button (P): The prepare Max Notes button functions if you use Microsoft OneNote in your charting system. This function prepares OneNote so that all of your appointments for the day are loaded up in Microsoft OneNote and ready to use.

Record An Audio File Button ( ): This button function if you have Max Audio, our audio recording add-on. You can click on an appointment and then when you click on the audio button, it allows you to record an audio file (WAV format) that is associated with that appointment.

Telephone Message Button (T): This powerful function accesses our Telephone Message Add-On that allows you to create electronic telephone messages that can then be accessed by the user through their INBOX in the Day List.

Notes Button (N): The **_notes button_** allows you to add a note to each appointment. To use this feature, you simply click on the button and a memo pad appears where you can type in an appointment note or memo. Press the TAB key on the keyboard to close the memo pad and then save the appointment. Any appointments with notes attached have a red exclamation mark next to them on the daily scheduler display.

Edit Appointment Button (E): This little button allows you to edit any appointment. On the daily scheduler view, simply right click on the appointment you wish to edit and the complete appointment details will display and allow you to make changes or additions.

Create Letter Button (L): This button allows you to open up the letters form and add a letter for the selected patient. On the daily scheduler view, simply right click on the appointment you wish to add a letter for and the letter form appears. For a complete discussion on letters, see the letters section.

Scanned Management Button (SI): This button allows you to access the scanned documents for the selected patient on the scheduler. Simply click on the patient and then click on the scanned management button to view all scanned documents for that patient.

Save Appointment Button (Save): This button will save appointments being created. Also works if you use press ALT-S on your keyboard.

Function Buttons:

Find Appointments This button is used to display a patient's appointment history or to view any future appointments that they have. You can right click on a patient name in the scheduler and then click on the Find Appointments button and that patient's appointments will be displayed. Alternatively you can go directly to the Find Appointments and bring up the patient by accessing the patient table lookup. Also works if you use press ALT-F on your keyboard.

Find Time Slot This function is used to find an open time slot using some very advanced features and filter options. You can find open time slots for one or more providers and even request specific days and times. Also works if you use press ALT-I on your keyboard.

Block Time The Block Time function allows you to set up blocked times and days for your providers. An example would be to block out the lunch hour for bookings or block out a number of days for holidays. Also works if you use press ALT-K on your keyboard.

Reschedule The Reschedule button is used to reschedule an appointment. Simply select the patient on the daily schedule and then click the Reschedule button. You can then reschedule to another date, time and/or provider. Also works if you use press ALT-E on your keyboard.

Manual Billing Manual Billing will take you to the private billing screen. This function does NOT work with the patient's on the scheduler. It's primarily used to bill a private service for a patient who does not have an appointment. Also works if you use press ALT-B on your keyboard.

Bill Private Bill Private will take you to the private billing screen. This function does works with patients on the scheduler. It's primarily used to bill a private service for a patient who has an appointment. It allows you to add a private invoice to a patient.

Recall The recall function is used to set up a list of patients that need to be recalled at a future date for an appointment. If there are outstanding recalls not yet dealt with, the Recall button will turn red. Also works if you use press ALT-L on your keyboard.

The Internal Referral Letter is used to access any letters that have been sent to you by another user within your clinic. Typically used when a clinic has both GP's and Specialists so Specialists can get letters from GP's within their own clinic, however, it can be used by ALL users within a clinic regardless of specialty.

Staff The Book Staff button only works if you are scheduling for a room. The typical application would be scheduling and operating room. The Book Staff function allows you to assign staff and surgeons to the operation and works in conjunction with the staff tables. Also works if you use press ALT-S on your keyboard.

WL The Wait List button allows you to access patients that are on the wait list and to add patients to the wait list. To add a patient to the wait list, first make an appointment for the patient. Click on that appointment and then click on the wait list button and add the patient to the wait list. If a cancellation comes up you can browse the wait list, select a patient off the wait list and book the appointment and then their future appointment is automatically cancelled.

RADIOLOGY BUTTONS:

The radiology buttons only work if you are running the radiology charting features in MaxGold and if the user has been set up as an X-RAY room.

List Exams The LIST EXAMS button allows you to access all of the radiology reports (exams) for a patient booked on the scheduler. Simply click on the patient name and then click on the list exams button.

Exam Fees The EXAM FEES button allows you to enter exam fees (type of x-ray) that will be done on a patient with an appointment. The patient must be marked as arrived first. Then you can click on the Exam Fees button to open the radiology exam/fee codes screen.

Dictate The DICTATE button allows you to access exams and dictate your x-ray report

Time Seen Button (): Inserts the current time into the time seen field. Used commonly to indicate when the patient is seen by the provider or goes to the examining room. Can also be used to indicate the time the patient leaves the clinic.

Billing Type Button (): This button indicates the type of billing that an appointment is set to. The billing types are M for healthcare, P for private, W for WCB and A for MPIC or Auto Insurance. The billing type is associated to the appointment reason, otherwise it defaults to the user preferences setting. You can click on this button to change the billing type or add a billing type in addition to the default.

Appointment Status Switches:

 This section allows you to indicate the status of the appointment. Those being;

CAN – Cancellation

NOS – No Show

ARR – Arrival

BIL – Billed

The CLR switch is used to clear one of the other switches (in case of an incorrect switch being tripped).

 The CNF button is for appointment confirmation. You can indicate if an appointment was confirmed (CNF), a message left (LM) or no answer (NA) on appointment reminder calls.