

How To Schedule Appointments

Appointments are booked using the scheduling system. When you first open the scheduler you are taken to the **daily view** of the first provider (based on alphabetical order). Appointments can be booked in several ways as the scheduler offers multiple views or screens from which you can select the day and time. Besides the **daily view**, you can also use the **weekly view**, the **monthly view**, **2 multiple provider views**, the **calendar view**, the **select data function** and the **find time slot function**. Simply click on one of these buttons and you'll be started. Although each one offers its unique ways to book appointments, they all accomplish the same task, and that is to select a time and a date for the appointment.

How To Schedule An Appointment - Multiple Views

The screenshot shows a medical scheduling software interface. At the top, there are several view selection buttons: "Select Date Function", "Multiple Provider View #1", "Calendar View", "Monthly View", "Weekly View", and "Multiple Provider View #2". Below these are icons for different views: a calendar icon, a plus sign, a "P" icon, a "D" icon, a "M" icon, a "W" icon, a grid icon, a magnifying glass, a printer icon, a list icon, and a home icon. A red circle highlights the "M" (Monthly) and "W" (Weekly) icons. On the left side, there is a calendar for the month of March 2011, with a red circle around the dates 10, 11, 12, 13, 14, 15, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31. Below the calendar is a patient profile for "Adamson, Jennifer" with various details like M.H.S.C. number, phone, reason for visit (Botox), and referred doctor (KREML, J). On the right side, there is a table with columns for Time, Name, Reason for a Visit, Stat, Loc, ID, and CNF. The table shows a schedule for "Adamson, Jennifer" with a Botox appointment at 10:00 AM. A red box highlights the time slots from 12:00 PM to 4:00 PM. At the bottom left, there is a "Find Time Slot Function" button with a red line pointing to the "Find Time Slot" button in the right-hand menu.

Notes: Although there is no one way to book an appointment, experienced users working in busy clinics tend to find that the monthly or weekly view offer the most efficient way to book an appointment. Both views display your schedule over many days making it very easy to spot an open time slot.

The Daily View and Select Date Function:

The daily view really works with the select date function. If you have more than one provider, you will also have to select the provider that you wish to book an appointment for. When you initially open the scheduler it goes to the **daily view** of the first provider using today's date (based on alphabetical order). You can change the provider by using either the **change doctor** button or **next provider** button. The

change doctor button is more efficient if you have more than three providers as it offers you a list of all providers that you can simply select (click and enter or just right click for advanced mouse users). The **next provider** button is really efficient for two or three providers as it simply toggles to the next provider on your list. With a large number of providers, this would take several mouse clicks. Once the provider is selected, their schedule comes up on the current date. You can go to whatever date you want by simply clicking on it in the **select date function**. Once you have the date, you select a time by clicking on the time slot you want on the daily view (click in the name column, not the time column). You can even select a time if there is already an appointment booked (double booking). The scheduler will simply add a second (or more) appointment at the same time.

The Daily View and Select Date Function

Select Date Function: Just click on the date you want. If you click on a date that's on the next month, the calendar display will move forward to the next month. You can also change the month and the year using the pull down and **ENTER** buttons.

Change Doctor Button **Next Provider Button**

Your selected date and time are displayed

To select a time slot click in the name column of the time slot that you want, (NOT the time column)

Time	Name	Reason for a Visit	Stat	Loc	ID	CNF
8:00 AM						OF
8:15 AM						OF
8:30 AM						OF
8:45 AM						OF
10:00 AM	Adamson, Jennifer	Botox	ARR	OF	BB	
10:15 AM						OF
10:30 AM						OF
10:45 AM						OF
11:00 AM						OF
11:15 AM						OF
11:30 AM						OF
11:45 AM						OF
12:00 PM						OF
12:15 PM						OF
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3:30 PM						OF
3:45 PM						OF
4:00 PM						OF
4:15 PM						OF
4:30 PM						OF
4:45 PM						OF

Now you can select the patient that you are booking an appointment for (either their name or their health number), indicate the reason for the appointment, indicate the referring practitioner (if any), indicate which staff member made the appointment and even add a note to the appointment. You can book for a patient that is already on file (an existing patient) or you can even book for a new patient. If the appointment is for an existing patient, you can select that patient by looking them up on your files. You can likely find the patient faster if you first type in their last name or even a part of their last name and pressing the ENTER key on your keyboard. **Or, you can find a matching patient by entering their**

health number. Likewise an appointment reason, referring doctor and staff ID can be looked up or you can find them faster by typing in the appointment reason and/or the referring doctor's last name or a part of the last name and the staff ID and pressing the ENTER key on your keyboard. If what you typed is unique (only one matching record) then that patient, reason, referring doctor or staff ID will be immediately selected. If there is more than one match (ie; last name JONES), then the program opens to a list of all matching records and allows you to select the one you want.

HINT: When looking for an existing patient with a common last name (ie; JONES), you can narrow the search by adding their first name or a part of their first name. The entry must be last name then comma then the first name. This is entered as JONES, ROBERT or even JONES, RO).

HINT: When looking for an existing patient with an uncommon and complex last name (ie; ANDRAXOULOUS) it will likely be quicker to simply enter a part of the last name and pressing the ENTER key and let the program find the matching patient (ie; ANDRAX)

HINT: To make it efficient, use short descriptions for appointment reasons (ie; CPX instead of Complete Annual Physical).

Entering name, healthcare number, reason, referring doc and staff ID

The screenshot shows a medical scheduling software interface. A calendar for March 2011 is visible at the top left. A patient's digital picture is displayed in a central window. Below the picture, various fields are populated with patient information: Name (Adamson, Jennifer), Health care number (M.L.S.C. 747473), Reason (Botox), Referring Doctor (KREML, J), and Staff ID (00523). A table on the right shows appointment slots with columns for Time, Name, Reason for a Visit, and Status. A callout box at the top right states: "Patient's digital picture will display if stored in the patient file. Question mark button will display personal notes about the patient". Several callout boxes on the left point to specific fields: "Lookup buttons. Clicking on these opens up the corresponding list (ie, patients, reasons, etc)", "Patient name entered here", "Health care number", "Appointment Reason", "Referring doctor", and "Staff ID".

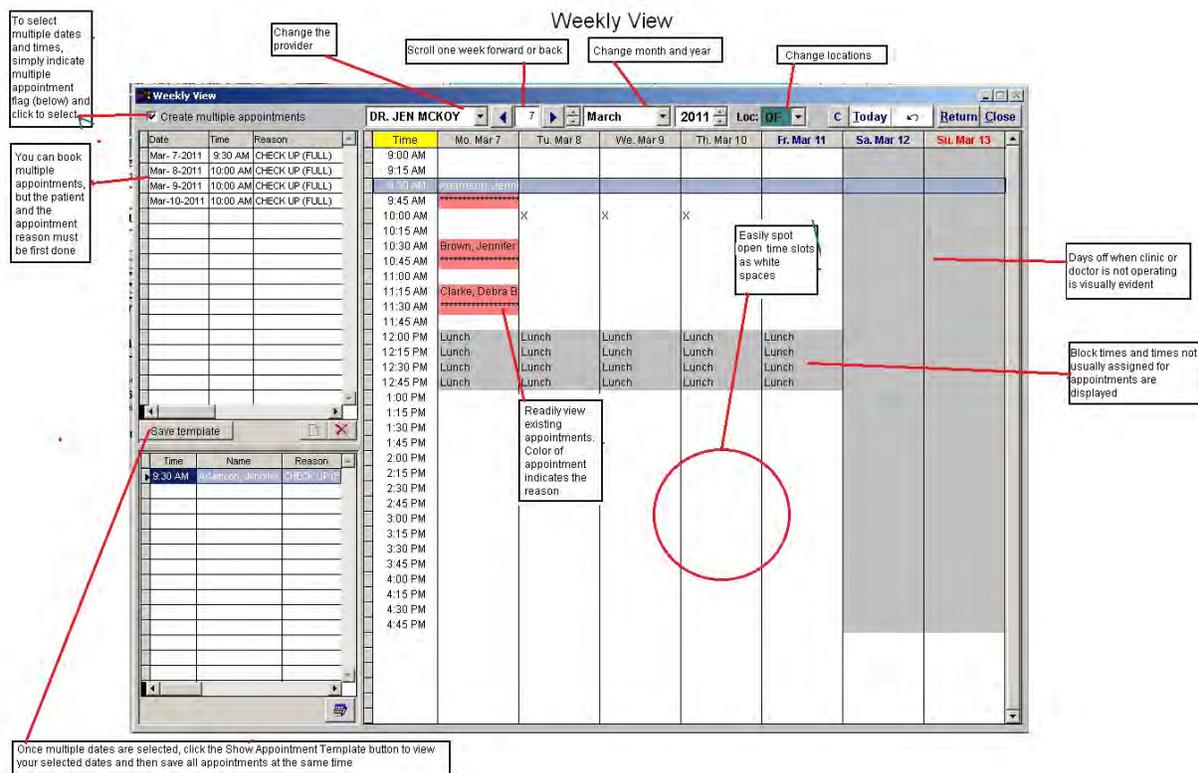
The Weekly View:

The **weekly view** provides a way for users to more quickly identify and select an open time slot when booking an appointment. You can access your weekly view by simply clicking on the weekly view (or W) button. You can easily spot an open time slot as it is simply displayed as white space. Appointments are

displayed and can readily be identified. To select a time slot you either click on the time slot and then press enter or right click on the time slot. This will take you back to daily view to the date and time that you selected on the weekly view.

While in the weekly view you can change to provider to see their view. You can easily scroll from one week to the next. If you wanted to see the details of any booked appointments, you can simply double click on the appointment. This is commonly called a drill down function.

One of the big features for the weekly view is that you can book multiple appointments for the same patient. To do this though, you need to first select the patient, indicate a reason and then open the weekly view. Once there, click on the **create multiple appointments** box and then start clicking on the dates and times you want to book for that patient. When you've finished selecting the dates and times click on **the show appointment template** button. This will display the appointment dates you've selected. Now you can click on the **save template** button, to save the appointments to the scheduler.



The Monthly View:

The **monthly view** provides a way for users to more quickly identify and select an open time slot when booking an appointment. You can access your monthly view by simply clicking on the monthly view (or M) button. You can easily spot an open time slot as it is simply displayed as white space. Appointments are displayed and can readily be identified. To select a time slot you either click on the time slot and then press enter or right click on the time slot. This will take you back to daily view to the date and time that you selected on the monthly view.

While in the monthly view you can change to provider to see their view. You can easily scroll from one month to the next. If you wanted to see the details of any booked appointments, you can simply double click on the appointment. This is commonly called a drill down function.

One of the big features for the monthly view is that you can book multiple appointments for the same patient. To do this though, you need to first select the patient, indicate a reason and then open the monthly view. Once there, click on the **create multiple appointments** box and then start clicking on the dates and times you want to book for that patient. When you've finished selecting the dates and times click on **the show appointment template** button. This will display the appointment dates you've selected. Now you can click on the **save template** button, to save the appointments to the scheduler.

Monthly View

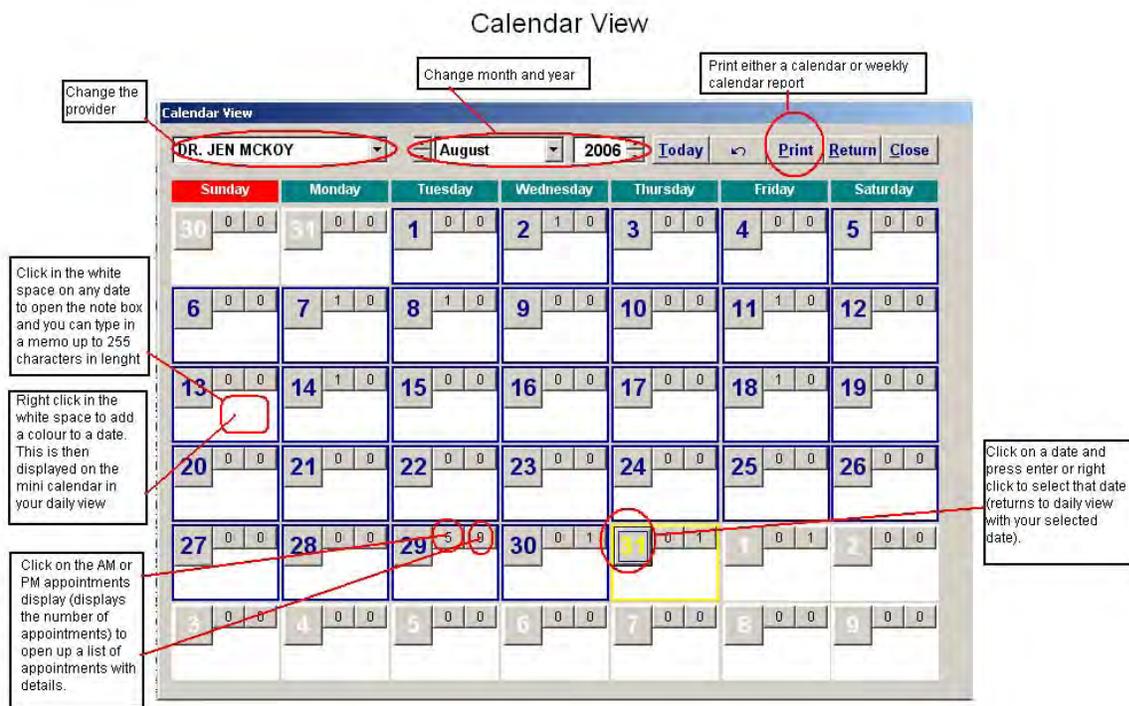
The screenshot shows a software interface for a monthly appointment view. At the top, it displays 'DR. JEN MCKOY' and 'March 2011'. Below this is a grid with days of the week (Tu, We, Th, Fr, Sa, Su) as columns and times (from 9:00 AM to 4:45 PM) as rows. Several appointments are booked, indicated by colored cells with '+' signs. A 'Book multiple appointments' checkbox is checked. A 'Save appointment' button is visible at the bottom left. A 'Show Appointment Template' button is also present. The interface includes various navigation and control buttons like 'Today', 'Regret', 'Refresh', 'Return', and 'Close'. Several callout boxes provide instructions: 'To select multiple dates and times, simply indicate multiple appointment flag (below) and click to select', 'Change the provider', 'Scroll one month forward or back', 'Change month and year', 'Change locations', 'You can book multiple appointments, but the patient and the appointment reason must be first done', 'Easily spot open time slots as white spaces', 'Days off when clinic or doctor is not operating is visually evident', 'Block times and times not usually assigned for appointments are displayed', 'Readily view existing appointments. Color of appointment indicates the reason', and 'Once multiple dates are selected, click the Show Appointment Template button to view your selected dates and then save all appointments at the same time'.

The Calendar View:

The **calendar view** provides a way for users to more quickly identify and select an open time slot when booking an appointment. You can access your calendar view by simply clicking on the calendar view button. You can spot days that might have available time slots as the calendar view displays the total appointments in the morning and the afternoon for a provider. This is ideal for clinics that have set numbers of appointments for a given day. To select a day you either click on the date and then press enter or right click on the date. This will take you back to daily view to the date that you selected on the

calendar view. While in the monthly view you can change to provider to see their view. You can easily scroll from one month to the next. If you wanted to see the details of any date, you can simply double click on the date (AM or PM) button and a list of appointments will be displayed. This is commonly called a drill down function.

One of the big features for the calendar view is that you can add notes and colours to any date. To do this though, you need to simply click on a date and a note box will appear where you can type up to 255 characters. A right click in this box allows you to add a colour. The colours will then carry forward to your daily view and now your mini calendar displays those colours. Right click on a coloured day in the mini calendar to reveal the note. You can also print out your calendar and even a detailed weekly calendar.



Multiple Provider Views:

There are two (2) multiple provider views in the scheduler. Both offer multiple provider views and both can be used to select an open appointment date and time. However, both views can only be displayed by day. The key difference between the two views is that the second view is displayed on the daily scheduler view. This means that users do not have to leave the daily view screen in order to find and select an open time slot.

Multiple provider view #1: To select a time slot on any particular day you either click on the slot and then click on the **return button** or right click on the time slot. This will take you back to daily view to the date that you selected on the calendar view. While in the multiple provider view #1 you can change the date and easily change from one month to the next using the **date lookup** button. Another nice feature of multiple provider view #1 is that you can print or view on screen a multi-column report that shows the appointments for the providers on a given date.

Multiple Provider View # 1

Change the date either by clicking the spinner buttons or using the date lookup button.

For clinics with dynamic provider schedules, you can display only those providers working that day

Print or view a multiple column report detailing the days appointments for all providers

Time	DR. JEN MCKOY	DR. MARK GOLDMAN, MD	OPERATING ROOM 1	X-RAY ROOM
9:00 AM	Barton, Jill			
9:15 AM				
9:30 AM	2-Thompson, Barbara			
9:45 AM	Andrews, Jane			
10:00 AM	Adanson, Jennifer			
10:15 AM				
10:30 AM	Barrett, David			
10:45 AM	Brown, Jennifer			
11:00 AM		Chepil, Dana		
11:15 AM	Clarke, Debra	Chepil, Dana		
11:30 AM	Friesen, Elizabeth			
11:45 AM	Cadwell, Sandra			
12:00 PM				
12:15 PM				
12:30 PM				
12:45 PM				
1:00 PM	Malory, Joseph			
1:15 PM	Rattai, Julia			
1:30 PM				
1:45 PM	Zellner, Roberta			
2:00 PM	Smith, Jane			
2:15 PM				
2:30 PM	Saunders, Jeremy			
2:45 PM	Richardson, Bill			
3:00 PM	Enriquez, Emilia			
3:15 PM	Brown, Dave			
3:30 PM	Green, Bobbie			
3:45 PM				
4:00 PM	Rosenberg, Hillary			
4:15 PM				
4:30 PM	Black, Joe			
4:45 PM				
5:00 PM				

Click on a time slot and then click on the return button to select that time or simply right-click on a time slot. This will take you back to the daily view to the provider, date and time you selected.

Multiple provider view #2: To select a time slot on any particular day simply click on the time slot to select that time slot. With multiple provider view #2 you can navigate the same way that you would when using the daily view. This will take you back to daily view to the date that you selected on the calendar view.

You can go to whatever date you want by simply clicking on it in the **select date function**. Once you have the date, you select a time by clicking on the time slot you want on the daily view (click in the name column, not the time column). You can even select a time if there is already an appointment booked (double booking). The scheduler will simply add a second (or more) appointment at the same time.

Multiple Provider View #2

Select Date Function: Just click on the date you want. If you click on a date that's on the red month, the calendar display will move forward to the next month. You can also change the month and the year using the **Left** and **Right** buttons.

Your selected date and time are displayed.

To select a time slot, click in the name column of the time slot that you want. (NOT the time column)

The screenshot shows a software interface for appointment scheduling. On the left, there is a calendar for the month of March 2011. A callout box explains that clicking on a date moves the calendar forward to the next month. Below the calendar, a patient profile for 'Adams, Jennifer' is displayed, including her name, ID number (A81775), and contact information. To the right of the calendar is a grid of appointment slots for three providers: DR. JEN MCKROY, DR. JOHN JONES, and DR. MARK GOLDMAN, MD. The grid shows time slots from 8:15 AM to 5:45 PM. A callout box explains that clicking on a time slot in the name column selects that slot.

Find Time Slot Function:

The final method that users can choose to select an appointment date and time with a provider is to use the **find time slot** function. The other functions including the **daily view**, the **weekly view**, the **monthly view**, **2 multiple provider views** and the **calendar view**, all rely on the user to select a date a time by visually spotting an open time slot. The **find time slot** function will actually find the open time slot for you based on how you want it to search. You can search for an open time slot for one provider or multiple providers. You can even tell the function when to start looking for an open time slot (ie; 2 weeks from the current date). You can even ask the function to find a time slot set aside for a particular reason (ie; check-ups). Whatever the request, the function will display the available time slots and lets you choose one or continue to look farther.

Find Time Slot Function

Select one provider or multiple providers when seeking an open time slot

Indicate when the function should start search from (eg; 1 week from current date)

Can specify Am, Pm or even a time range

Can specify what days are preferred

You can specify a time slot set aside for a particular reason

Available time slots are displayed and you can select one and click on the accept button or continue to search

The screenshot shows a dialog box titled 'Find Open Time Slots'. It contains several search criteria:

- Available Users:** A list of providers including DR. JEN MCKROY (111), DR. MARK GOLDMAN, MD (111), OPERATING ROOM 1 (999), and X-RAY ROOM (07).
- Order by:** Radio buttons for 'User Id' and 'Specialty'.
- Start Search on:** A date field set to '28/08/2006' and a 'Weeks' field set to '1'.
- Time of Day:** Radio buttons for 'AM', 'PM', and 'Either', along with a 'Time Range' field set to 'From: 01:00 PM To: 05:00 PM'.
- Day of Week:** Checkboxes for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday'. 'Tuesday' and 'Thursday' are checked.
- Reason:** A dropdown menu set to 'CHECK UP (NORMAL)'.
- Results:** A list of available time slots for 'Tuesday, August 29, 2006', showing '2:15 PM OF DR. JEN MCKROY' and '4:15 PM OF DR. JEN MCKROY'.
- Buttons:** 'Next', 'Previous', 'Refresh', 'Accept', and 'Exit'.

 Callouts explain that users can specify a time slot set aside for a particular reason, and that available time slots are displayed for selection.