


Templates and Schedule Setting

TEMPLATE CODES AND DAY TEMPLATE SETTINGS

Template Code Setting

Assign a one-character code letter or number and a description of less than 40 characters. The duration of each code unit is in minutes and code is used for the background colour. The screen shown is for v10_12



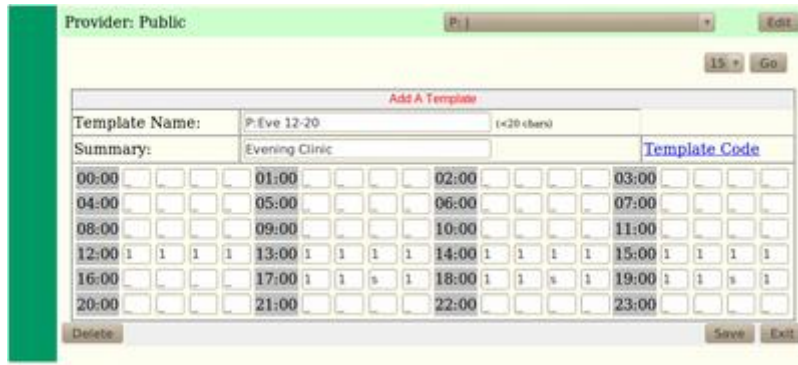
Appt Template Code	
Code:	S
Description:	Same Day
Duration:	15 mins.
Color:	FFF68F e.g. #1b2c3d, ivory.
Booking Limit:	1
Limit Type:	<input type="radio"/> Off <input type="radio"/> Warning <input checked="" type="radio"/> Same Day <input type="radio"/> Same Week

Code: only one char.
Description: less than 40 chars.
Duration: unit is minute.
Color: html code for background color.
Booking Limit: # of simultaneous appts in slot
Color chart links: lynda.com, Hillsborough Community College

1. The code is a one character number or letter to designate the booking slot
2. Description is the long description that appears to help you select the correct code
3. Duration in minutes
4. Color is the colour that you will use to highlight the code. Colour chart links are at the bottom of the window for reference
5. Limit type allows you to set the Confirm Warning for bookings above the limit, or alternately set the Same Day or Same Week limit for that appointment slot

Template Setting

1. Select Template Setting for Public or Provider templates from the drop-down menu. Public templates are automatically designated and will develop templates available to all users when setting up personal schedules. Personal templates remain available to the designated provider only.



2. Name the template to reflect the day's schedule. This information will be visible on the "Month" tab calendar only. Summarize the template (i.e. Provider Name - Monday). A template with the same name will overwrite the original template.
3. Assign appropriate template code to 15-minute time slots (default) or any other time schedule based on the dropdown corresponding to provider's schedule.
4. Click in the block and tab or shift-tab to add and delete code.
5. Save completed template.
6. The template will now be available on drop-down menu to edit or delete as necessary within the respective Public or Provider's template setting area.
7. Exit when all templates for one Provider are done.

NOTE: A template will not appear on the appointment screen once the date range for the template has exceeded one year. If the template is remaining the same, a new template with the start date at the current day needs to be set.

Meaning of Sample Codes

- A Academic (paperwork etc)
- B Behavioral Science
- C Chart Audit Rounds
- D Department Meeting
- E Study Leave
- H Hospital
- L Lunch
- M Monitoring
- P Phone Calls
- R Rounds
- V Vacation
- U Urgent
- t Travel
- a Administrative/Education Duties
- m Meeting
- s Same Day Appointment
- W Same Week Appointment
- 1 15 Minute Appointment
- 2 30 Minute Appointment
- 3 45 Minute Appointment
- 6 60 Minute Appointment

SETTING UP A SCHEDULE

1. Select a Provider from the drop down menu under ‘Select a Provider’ in order to set up the schedule using the templates you have developed.
2. The new window will show the provider’s name in the upper left corner of the screen



SCHEDULE TEMPLATE SETTING

1. Use the current R Schedule or select a different one from the select field.

2. Type in the start date and end date for this R Schedule.

3. Check the day of week which is AVAILABLE.

4. Click the 'Next' button.

5. Select R Schedule from the drop down list. Don't change the start date to update the R Sch.

Hutten-Czapski, Peter 2010-01-01 – 2010-12-31 Delete

Date from: 2010 - 1 - 1 (yyyy-mm-dd) to: 2010 - 12 - 31

is available EVERY (Day of Week) Alternating Week Setting

Sun	<<< 293 Meridian	
Monday	<<< 293 Meridian	P:9-1 days 9-1pm P:9-12 days 9-12
Tuesday	<<< 293 Meridian	P:9-4 lunch 12 lunch 12-1 9 to 4 P:Eve 12-20 Evening Clinic P:W/E rounds Weekend hospital rounds
Wed	<<< 293 Meridian	ER Aft AM office ER 1-7 office 9-11:30 ER AM ER in AM 7-10Office 2-5
Thursday	<<< 293 Meridian	Monday 9-12 1-4 Thursday 1-5
Fri	<<< 293 Meridian	Tuesday 10-12 1-4 Wednesday 12-5
Sat	<<< 293 Meridian	

Next Cancel

3. Specify a start and end date for the schedule.
 4. Check off the days of week that the provider is available
 5. For multiple site clinics pick the location for that provider for that day
 6. Transfer prepared templates by clicking on the template name and then the arrow beside the appropriate day
 7. Alternate Week Schedules: Click on if applicable, before transferring template information to schedule. This would be used if the provider has a schedule that alternates every two weeks on the same cycle. Transfer prepared templates to all applicable available
 8. When you have filled in all the appropriate days, click the “Next” button to save and view the schedule in calendar view.
- NOTE: The effective dates are the only ones that will actually appear in the provider’s schedule, although the template names appear on all calendars.

-TIP: Concurrent schedules will need a new start and end date or the current R Schedule can be extended by the end date. Never change the date of the current R Schedule. Each additional schedule will be added to the drop-down menu of available schedule fields.

UPDATING A SCHEDULE

1. When schedule updating is required for specific dates, select the appropriate schedule field containing these effective dates and modify. Click 'Next' to advance to the calendar view of the schedule.



2. Click on the appropriate calendar date (use arrows to advance calendars) to be changed
3. Replace the current template with the appropriate Public or Personal template from the drop-down menu.
4. If the schedule change needs to revert to the original or an error was made selecting the correct date for a change, click on the date to be updated and click “Delete” to return the schedule to the original template.
5. Temporary changes to a template over a longer period of time or ongoing changes can be made by specifying the start and end date, create a new schedule field and copying the appropriate templates for that time period.
6. New templates can replace old templates. Alternatively, a minor change to the same template in the Template Setting area may be sufficient.

SINGLE DAYS

- When you get to the calendar view of the process you can now select individual days that the provider will be ON-CALL or not available
- The provider can be made “available” (will show on Schedule View) or “not available” (will show on View All only). Save to update.
- A colour change to yellow on the schedule setting calendar indicates a template change and provider is available.
- A colour change on the schedule setting calendar to dark blue indicates a template change and provider is not available.
- Pink dates are holidays but can be booked unless explicitly set as not available

FINISHING

1. Click “Next” to save changes.
2. You have finished one Schedule Setting successfully.
3. Click the “Do It Again” button to go back to the first schedule page and do another provider’s schedule.
4. Choose next provider for template setting.
5. Click the “Finish” button to exit the window.

APPOINTMENT STATUS

Appointment Status Setting allows you to adjust the colours that the patient appointment can go through as the patient is processed

Appointment Status Manager					reset
Code	Description	BG Color	Status	Activation	
t	To Do	#FDFEC7	1	Edit	
T	Daysheet Printed	#FDFEC7	1	Edit	
H	Here	#00ee00	1	Edit	Disable
P	Picked	#FFBBFF	1	Edit	Disable
E	Empty Room	#E5F4FE	1	Edit	Disable
a	Customized 1	#4575DD	1	Edit	Disable
b	Customized 2	#E99310	1	Edit	Disable
c	Customized 3	#F5F351	1	Edit	Disable
d	Customized 4	#897DF8	0	Edit	Enable
e	Customized 5	#897DF8	0	Edit	Enable
f	Customized 6	#897DF8	0	Edit	Enable
N	No Show	#cccccc	1	Edit	
C	Cancelled	#999999	1	Edit	
B	Billed	#3ea4e1	1	Edit	

The Enable/Disable links toggle if that code is used

After you click on the Edit you have the option to change the code and its background colour

1. The colour can be edited manually or you can use the picker by clicking the palate icon.
2. Click on the colour slider on the right to get the base colour and then click and drag on the middle of the palate until you have the
3. Click OK to load that colour into the New Bg Colour text box
4. Then submit your changes

APPOINTMENT TYPE

Form preset appointments with common preset reasons for the receptionists to use

File Edit View History Bookmarks Tools Help

Appointment Status Manager

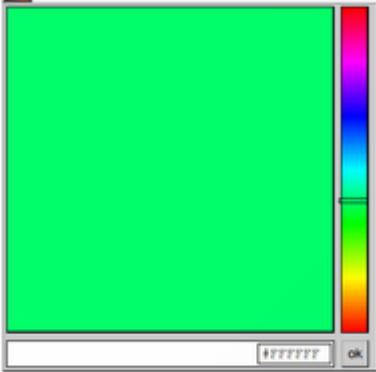
Appointment Status Manager

Code:

Description:

Old Bg Color:

New Bg Color:



Find: Match case

Appointment Types						
EDIT APPOINTMENT TYPE						
Name:	<input type="text" value="Rx"/>	Duration:	<input type="text" value="5"/>			
Reason:	<input type="text" value="prescription renewal only"/>	Notes:	<input type="text" value="advise doctor that the next patient is waiting if it is taking too long"/>			
Location:	<input type="text" value="Select Location"/>	Resources:	<input type="text" value=""/>			
<input type="button" value="Save"/>						
Name	Duration	Reason	Notes	Location	Resources	
Psych	60 min	one hour psychotherapy		0	Quiet room	edit delete

1. The Name is a short descriptor for the receptionist to pick from
2. Duration of the appointment in minutes
3. Reason is what shows as the 'reason for visit' for the appointment and for the associated encounter heading
4. Notes are for the secretary
5. Resources might be what resources you need for the appointment such as equipment, a particular room, or staff
6. Location is relevant in multi-sites Oscar clinics

Schedules

Only complete this step if you want the user to have a schedule on the appointment screen (eg. practicing doctors, residents, nurses, not receptionists). Otherwise, you are finished!



Schedule Setting

The template settings can be as complicated or as simple as your office requires. There is one default schedule in the system and it must be applied to each provider in order for them to show up on the appointments screen.

- Click on the 'Schedule Setting' Link under the Schedule heading.



Holiday Settings

Holiday Setting enables you to indicate recognized holidays and name them on the calendar. This information will be accessible to all users.

A separate public template for booked holidays will need to be developed and used on individual schedules.