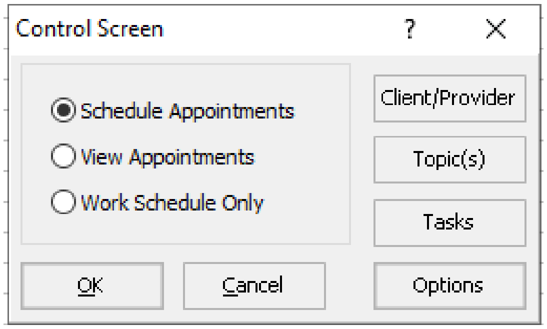
Scheduler Setup

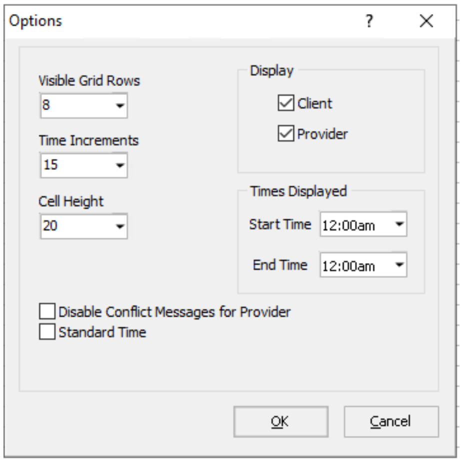
The scheduler may be used to schedule appointments for clients and work schedules for providers. This is a powerful tool that requires some initial setup.

Scheduler Description

To get to the scheduler, click on the **Schedule** icon (or click **American Data – ECS > View > Scheduler)**. Accessing the scheduler via these methods will present the user with a Control Screen. The Control Screen is used to define what schedule to view or set. There are three main options in the scheduler:



- **Schedule Appointments** is selected when the user needs to schedule an appointment.
- **View Appointments** is selected when the user needs to view a schedule.
- **Work Schedule Only** is selected when a user needs to set or alter a work schedule.
- The **Client/Provider** button calls a client/provider selection screen. The provider selection screen may be blank if this has not been implemented in your system. We will go through how to enter a provider and who to enter as a provider when talking about getting started in the scheduler.
- The **Topic(s)** button calls a topic selection screen. This is where the scheduling topic will be selected. Various topics are created for different scheduling needs.
- The **Tasks** button calls the Scheduler Tasks List. Tasks may be created to make scheduling more streamlined.

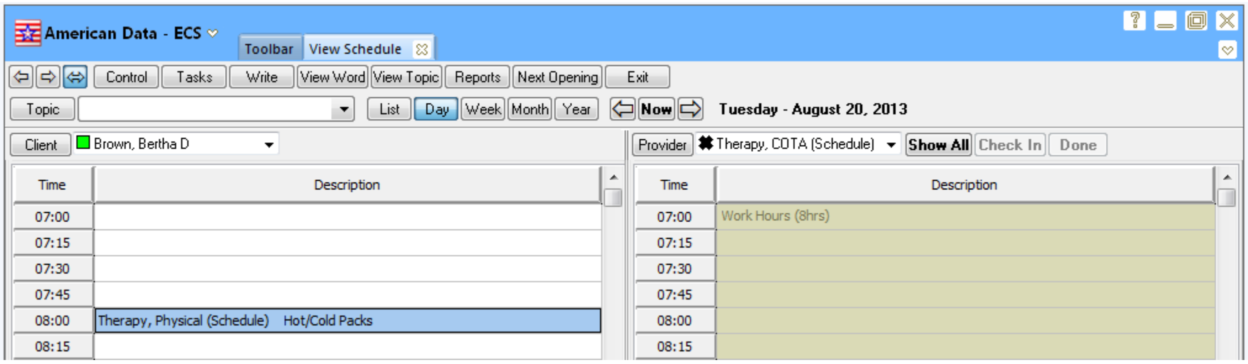


- The **Options** button calls an Options selection screen. The options selection screen allows the user to manipulate the scheduling screens:
- **Visible Grid Rows** controls how many grid rows are viewed when the scheduler screen is loaded.
- **Time Increments** controls how the times are broken down on the schedule. Default is 15-minute time increments.
- **Cell Height** manipulates how tall the schedule cells are.
- **Disable Conflict Messages for Provider** may be selected if the provider routinely schedules more than one client for a single time slot.
- **Standard Time** allows the task to override the System Settings screen and rather than display in military time, display in standard time. This is only necessary if the facility's database is set to display in military time by default, but a facility would like specific scheduler tasks to display in standard time. If a facility does not have military time

checked in System Settings, then the entire system will already default all screens/tasks to standard time.

- Display allows the user to manipulate the three-part screen of the scheduler. The top portion is the documenting portion, and the bottom is the schedule. The bottom is split into 2 portions; the left side is the client schedule, and the right side is the provider schedule. The screen may be altered to show only the provider schedule, or only the client schedule.
- Times Displayed allows the user to set what times on the schedule they would like to view. Times displayed may be used to define hours of service. For example, if the beauty shop is open from 10:00am – 2:00pm a task for the beauty shop appointment is made with these times displayed. When this task is loaded, only the hours between 10:00am and 2:00pm will be shown.

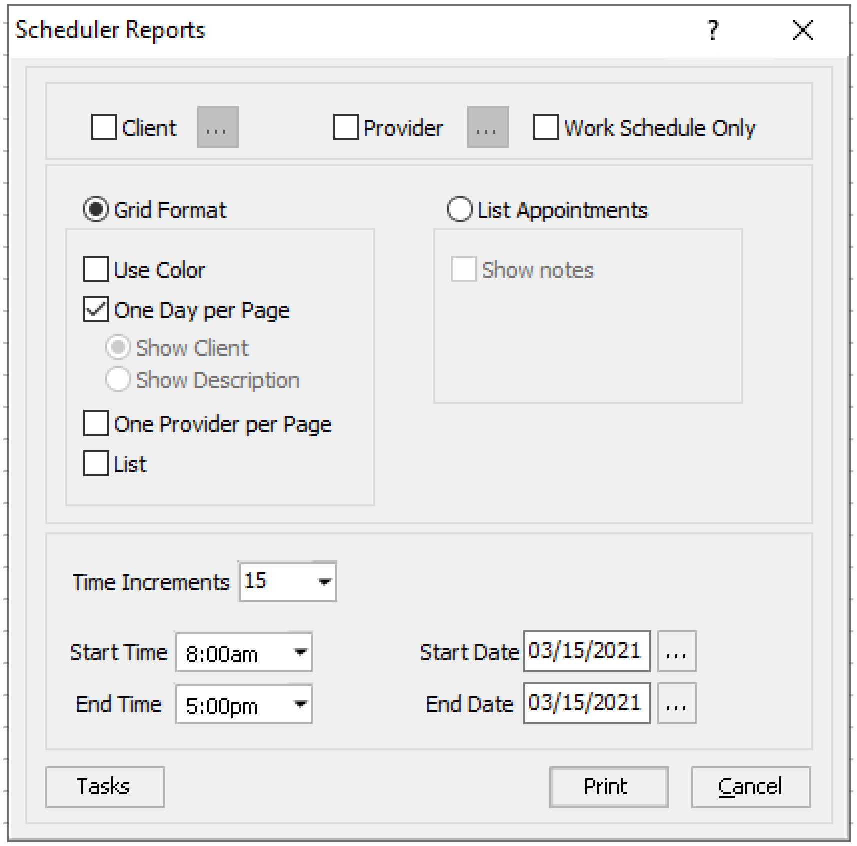
After the information has been defined in the Control screen, click OK to load the scheduler.



The scheduler screen has quick link buttons for the user to easily access data directly from the scheduler. The Write button takes the user to previously determined documenting screens in the system (please see Scheduler Tab "Write" in Word Setup). These are setup so the user can complete appropriate documentation while viewing their schedules. This eliminates the need to open and close or layer multiple screens. The View Word (please see Scheduler Tab "View" in Word Setup) and View Topic buttons take the user to previously determined view screens from the system without ever exiting the scheduler or opening another screen. The View Topic setting is more general where the View Word setting is more specific. The View Topic button reads the defined review of the topic that the appointment originates. In the beauty shop example, the View Topic may be set to show client phone numbers (set up in the defined review of the topic) whereas the appointment "45-minute permanent" may be set to show information about which permanent and curler rod size previously used and length of time to process.

- Scheduled events may be color-coded for quick reference.
- Alarms may be set to alert the provider of appointments (please see Scheduler Tab "Alarm" in Word Setup).
- Schedules may be viewed in List format, or as Daily, Weekly, Monthly, or Yearly.
- Multiple providers' schedules may be viewed simultaneously by using Show All.
- Events may be scheduled as recurring events. Recurring events have patterns set to them with start and end dates. This feature reduces the amount of time needed to place a recurring appointment on the schedule.

- A Next Opening button allows the user to quickly search for an opening for a particular provider, date, and/or time. This feature saves the user time from manually flipping through provider schedules and dates to find an opening.
- Schedules may be printed by clicking on the Reports button.



Getting Started with the Scheduler

The scheduler may be used for various types of scheduling. Clinics, therapists, and activity departments may use it for staff work schedules and for client appointments. Maintenance departments may use it to schedule routine maintenance. Facility transportation may use it for coordinating services. We will use the Out of Facility Appointments example in this portion of getting started with the scheduler.

Entering clients into ECS

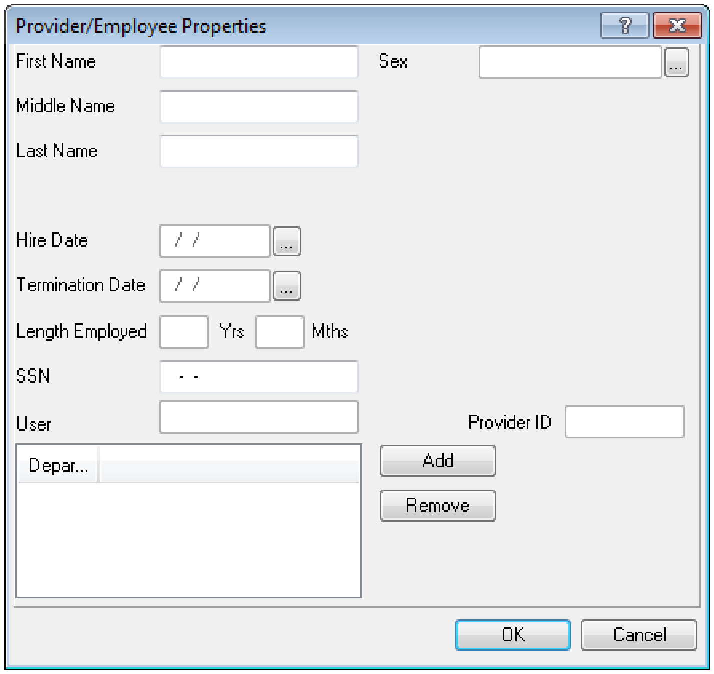
Please refer to the portion in the manual titled "Admission/Discharge/Transfer" on how to enter a client into ECS.

Entering providers into ECS

A provider may be any person or entity that requires a schedule.

1. Click the ID icon.
2. Click New and select Provider. A facility selection screen will appear, select the appropriate facility and click OK. Click Yes to confirm the facility is correct.

3. A Provider/Employee Properties box appears. Enter the provider's first name. Tab through the fields entering the appropriate data. Enter last name and then any other information as needed. The User and Provider ID fields are assigned automatically. Click **OK** to save the information.



4. To see the provider list on this screen (Demographic screen), selection the Provider checkbox on the bottom of the screen.
5. To close out of the Demographics screen, click the "x" in the upper right corner of the screen.

Create Scheduler Topic(s)

There are two major types of schedules that may be created: 1) work schedule, 2) schedule of appointments and/or events. We will create a work schedule topic and an out of facility appointments topic.

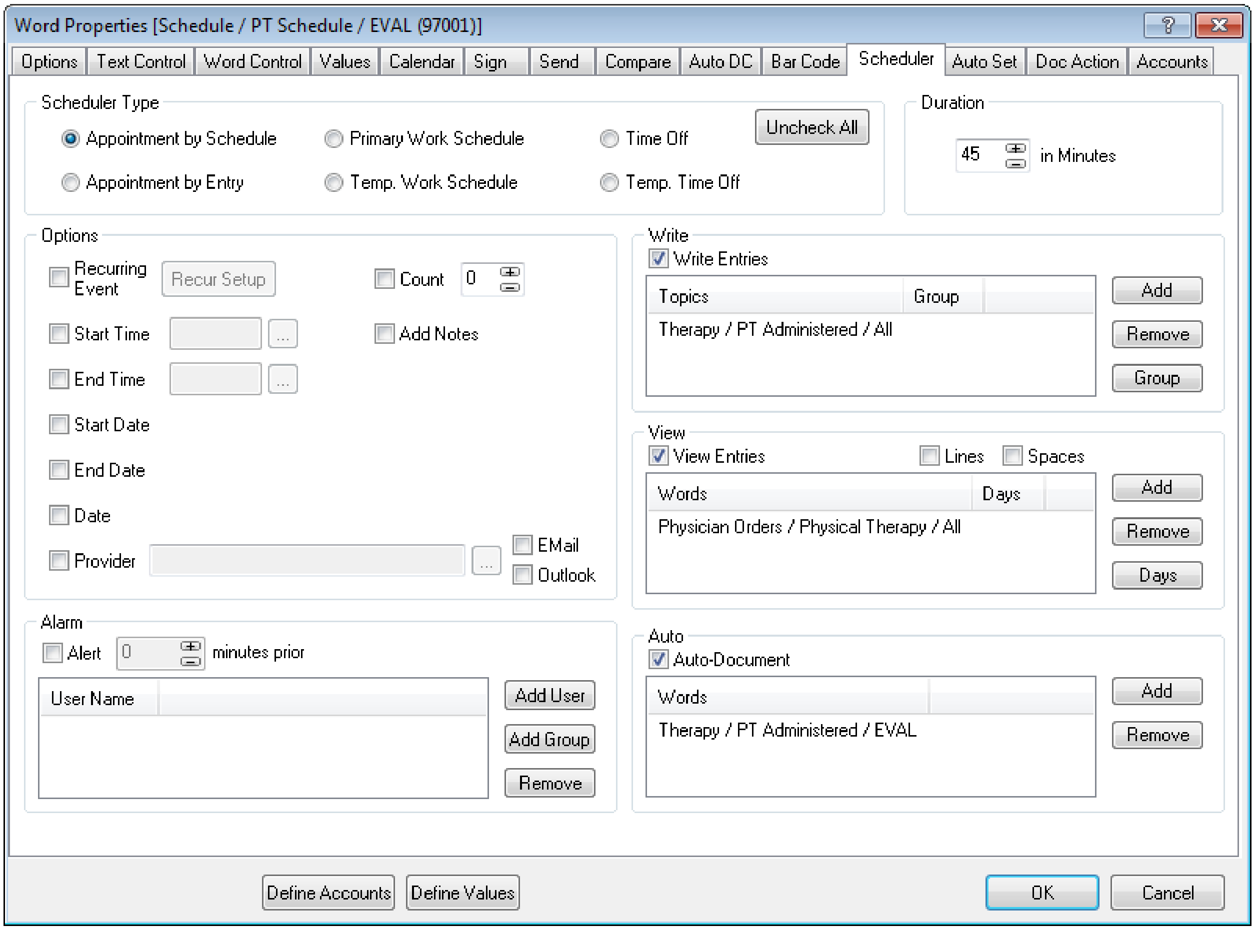
1. Right-click on the blank area. A drop-down menu appears. Select **New**.
2. Create new topic confirmation appears. Click on **Yes** to continue with topic creation.
3. A Topic Properties box appears. Type "Provider Schedule" in the Short Name field.
4. Click **OK** to save the information.
5. Follow above steps, only type "Out Of Facility Appts" in the short name field in step 3.

Create Scheduler Word(s)

Work Schedule Words

1. Double-click on the Provider Schedule topic. The topic will open showing a blank grid.
2. Right-click in the first blank cell. A drop-down menu appears.
3. Select **New**. A blue "NEW WORD" appears.

4. Double-click on the **NEW WORD**. The Word Properties appears. Type "Work Hours (4 hrs.)" in the short name.
5. Select the **Use Color** checkbox and click on the picklist by Background Color. Select a light color and click **OK**.
6. Click on the Scheduler tab. The scheduler word properties are shown.



7. Select a Scheduler Type. There are various types of Scheduler words that may be created. Selection of a type is dependent upon how you would like the word to function on the schedule.
   - Appointment by Schedule: use this to flag the word as an appointment in the scheduling screen (this is for use with scheduling appointments via the Schedule icon).
   - Appointment by Entry: use this to flag the appointment as a scheduling word in a documenting screen (this is for use with scheduling appointments via the Write icon).
   - Primary Work Schedule: used to establish the provider's work schedule. For example, to make the provider available for appointments.
   - Temp. Work Schedule: used to alter a Primary Work Schedule. For example, the provider picks up an extra shift or is available for extended hours.

- Time Off: used to establish scheduled time off for the provider. For example, temporarily close that time from appointment scheduling.
- Temp. Time Off: used to establish time off for the provider. For example, provider unable to take appointments as they are ill.

8. The minutes in Duration area is used to define the amount of time to be assigned on the schedule. Type in 240 for our 4-hour work block. (4 hrs. = 240 minutes)
9. Click OK to save the information.

Another typical work block may be 8 hours. To create the 8-hour Primary Work Schedule word, follow this short-cut:

1. Right-click on the "Work Hours (4 hrs.)" word that was just created. A drop-down menu appears.
2. Select Copy.
3. Right-click on the empty cell below the word "Work Hours (4 hrs.)". A drop-down menu appears.
4. Left click on Paste. There will now be a duplicate word.
5. Double-click on the word that was just pasted. The Word Properties appears. Type "Work Hours (8 hrs.)" in the short name.
6. Click on the Scheduler tab. The scheduler word properties are shown.
7. Change the minutes in duration to 480 (480 minutes = 8 hrs.).
8. Click OK to save the information.

Follow the above steps to create Time Off, Temp. Work Schedule, Temp. Time Off words. Make Time Off words a different color than the work schedule words (time off words are typically a dark color to signify that no scheduling should occur). It is advantageous to make the "Temp" words a different color than their Primary counterpart. E.g. make Temp Work Schedule words a different light color than Primary Work Schedule words. This difference in color alerts the user as to what is typical (primary work schedule) and what is not (temp work schedule).

Appointment/Event Words

1. Double-click on the Out Of Facility Appts topic. The topic will open showing a blank grid.
2. Right-click in the first blank cell. A drop-down menu appears.
3. Select New. A blue "NEW WORD" appears.
4. Double-click on the NEW WORD. The Word Properties appears. Type "Audiologist (60 min)" in the short name.
5. Select the Use Color checkbox and click on the picklist by Background Color. Select a darker color and click OK.
6. Click on the Scheduler tab. The scheduler word properties are shown.
7. Select the Appointment checkbox. This area will activate and the Provider Schedule area (located directly below Appointment) will be deactivated.
8. The minutes in duration area is used to define the amount of time to be assigned on the schedule. Type in 60 for our 60-minute appointment.

9. Click on **OK** to save the information.

Linking Write Screens to the Scheduler

Documentation may be completed from the Scheduler when topics are linked to the Appointment/Event words. In our Out Of Facility Appts (60 min.) example an appropriate topic to link for documentation would be an Appointment Follow-up topic. This topic may include that the resident has returned, how the appointment went, and whether there are new orders. To link a documenting screen to the scheduler, follow these steps:

1. Go into Setup Topics/Words. Select Schedule > Out of Facility Appts > and double-click on "Audiologist (60 min)". Click on the Scheduler tab.
2. Select the **Write Entries** checkbox in the Write section. This area will activate.
3. Click **Add**. The topic selection screen appears.
4. Select the desired tab (for example, Out Of Facility Appts).
5. Click on desired topic (for example, Appointment Follow-up).
6. Click **OK**. A link now appears in the Write Entries list box.
7. Click **OK** to save the information.

Linking View Screens to the Scheduler

View screens may be linked to the scheduler so the user may view necessary information about the appointment/event without opening/layering multiple screens. There are two different areas where these view screens may be linked.

View Word Links

These are view screens linked to the appointment/event word. These links are specific. For example, if the appointment is for an Audiologist, then only information pertaining to that topic will appear in the View Word link whereas if the appointment is for the Dentist, only information pertaining to that topic will appear in the View Word link. To link a view screen to a word, follow these steps:

1. Go into Setup Topics/Words. Select Scheduler > Out of Facility Appts > and double-click on "Audiologist (60 min). Click on the Scheduler tab.
2. Select the **View Entries** checkbox in the View section. This area will activate.
3. Click **Add**. The topic selection screen appears.
4. Select the desired tab (e.g., Out Of Facility Appts).
5. Click on desired topic.
6. Click **OK**. A link now appears in the View Entries list box.
7. Click **OK** to save the information.

** WORDS MAY BE ADDED TO THE VIEW ENTRIES LIST BOX. In step 5, instead of picking a topic, double click on the topic, and select a word.

View Topic Links

These are view screens linked to the Scheduler Topic. These links are more general. For example, in the Out Of Facility Appts, an appropriate View Topic link would be the Insurance Profile topic.

1. Go into Setup Topics/Words. Select Scheduler and right-click on the Out of Facility Appts topic. A drop-down menu appears.
2. Select **Properties**.
3. On the Control tab, click **Add** in the Defined Review Topics/Words section. The topic selection screen appears.
4. Select Face Sheet, click on the Insurance Profile topic, and click **OK**. A link now appears in the Defined Review Topics/Words section.
5. Click **OK** to save the information.

Setting Alarms

Alarms may be set to alert/remind the provider of appointments/events. The alarms may be set for certain users or user groups. To set an alarm for the Audiologist (60 min) appointment, follow these steps:

1. Go into Setup Topics/Words. Select Scheduler > Out of Facility Appts > and double-click on "Audiologist (60 min). Click on the Scheduler tab.
2. Select the **Alert** checkbox in the Alarm section.
3. The minutes prior area is used to define the amount of time before the appointment/event the user will be alerted. Type in 30 so that the user will be alerted of the Audiologist appointment 30 minutes before the appointment is set for.
4. If a user/user groups needs to be notified of the appointment, click **Add User** and/or **Add Group** and select the desired users/groups. If the user who needs the alert varies; the user can be defined at the time of scheduling the appointment. If this is what is desired, leave the User Name area blank.
5. Click **OK** to save the information.

Creating Scheduler Tasks

Tasks are created to optimize the scheduling process. Tasks may be personalized to facility, department, and/or user. There are times when both the provider's and the client's schedules are reviewed for scheduling. The scheduler could view both the client's schedule and the audiologist's schedule simultaneously to determine when an appropriate time for an appointment would be. To create a scheduling task for this circumstance, follow these steps:

1. Click the **Schedule** icon.
2. Click **Client/Provider**. The Client/Provider selection screen appears.
3. Make sure no client is selected by clicking on a blank area. Click Betty Smith (provider) and click **OK**.
4. Click **Topic**. The Topic Selection screen appears.
5. Click the Scheduler tab.
6. Click the Out Of Office Appts topic and click **OK.**
7. Click **Options**. The Options screen appears.
8. Select a Start Time of 9:00am and an End Time of 3:00pm and click **OK**.
9. Click **Tasks.**
10. Click **Save**. Name the task "Out Of Office Appts" and click **OK**.
11. Select the appropriate facility and click **OK**.

12. Select the appropriate user group(s) and click **OK**.
13. The task has been created and saved. Click **Cancel** and exit the scheduler.

The prior task is an efficient scheduling task. Another type of task is one more streamlined for the provider(s). When the beauticians/stylists would like to view today's schedule to see what is when, they do not need to view both the providers' and clients' schedules. A more efficient task for this purpose would be set as follows:

1. Click on the **Schedule** icon
2. Click on **Client/Provider**. The Client/Provider selection screen appears.
3. Make sure no client is selected (by clicking on a blank area).
4. Click the Beauty Shop provider and click **OK**.
5. Click **Topic**. The Topic Selection screen appears.
6. Click the Scheduler tab.
7. Click the Beauty Shop topic and click **OK**.
8. Click **Options**. The Options screen appears
9. Select **Client** to display only the client schedule.
10. Select **Provider** to display only the provider schedule.
11. Select a Start Time of 9:00am and an End Time of 3:00pm and click **OK**.
12. Follow steps 9-13 in the previous example.

Email Reminders

Clients may be notified or reminded of an appointment via email. This option is selected when the appointment is scheduled. To activate this option, the following setups must be in place:

1. The client must be set up in ECS through the Demographics screen (ID icon).
2. The client's email address must be documented somewhere in ECS (e.g.: Face Sheet/Email Addresses)
3. The Scheduler Task Selection screen must have the question word which preceded the Client's email address entered in Send Email Setup at the bottom of the Task Selection screen.

Scheduling

There are two primary types of scheduling: 1) setting the provider work schedule 2) scheduling appointments/events. Provider schedules are not required for scheduling appointments; however, they are intended to work together.

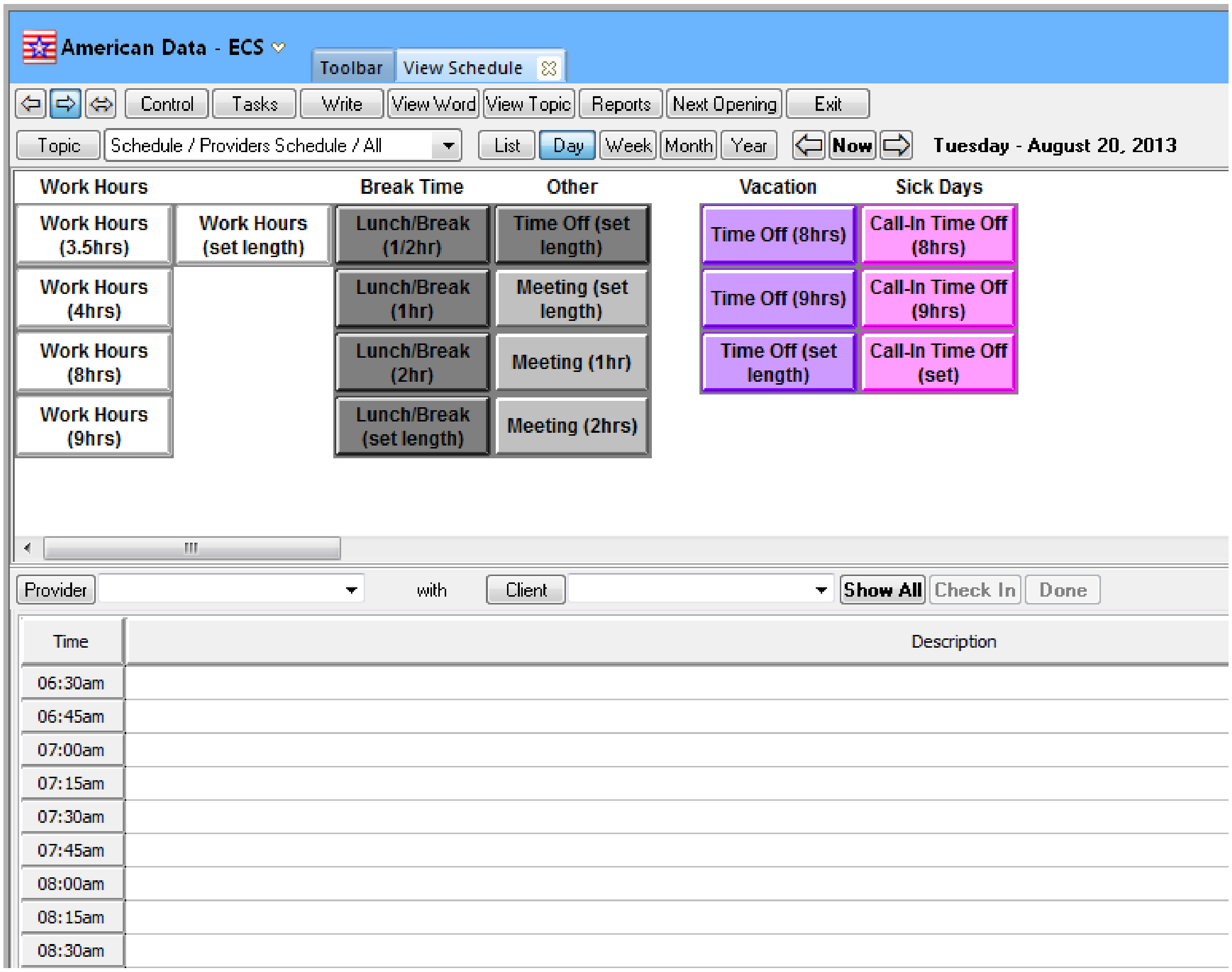
Setting the Provider Work Schedule

Please refer to the portion "Getting Started with the Scheduler" before setting the work schedule. The setups completed during this section are used in these examples. To enter the beautician's schedule, follow these steps:

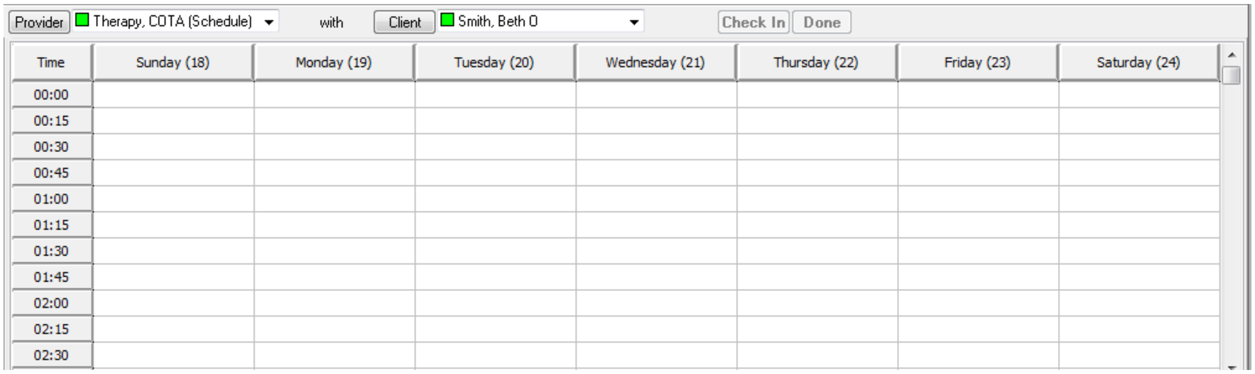
Scheduling a work block

1. Click on the **Schedule** icon.
2. Select **Work Schedule Only** and click **Client/Provider.**

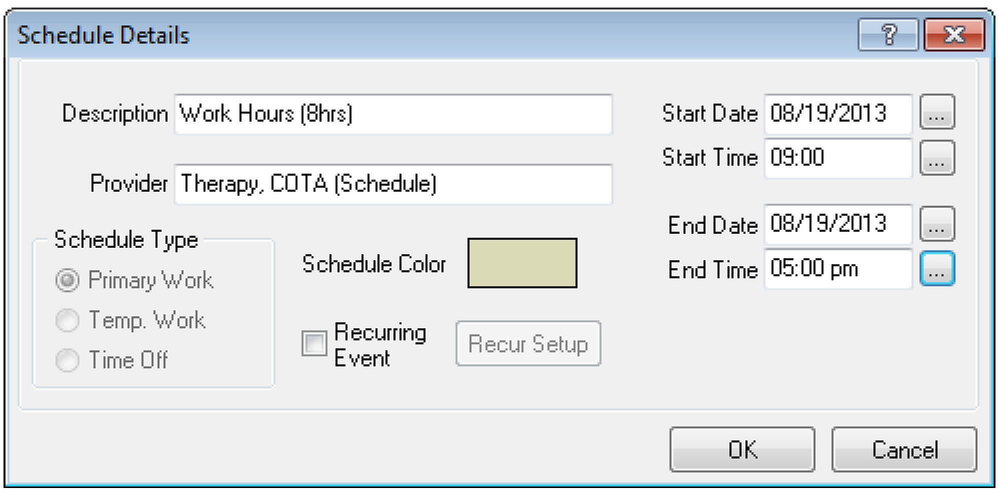
3. Select Betty Smith from the provider selection screen, click OK.
4. Click Topic. The topic selection screen appears.
5. Select the Schedule tab. Click the Providers Schedule topic, and click OK.
6. Click OK. The scheduler screen appears with the Provider Schedule topic loaded in the top portion of the screen and a blank schedule in 15 minute increments in the bottom portion.



7. The scheduler loads with the "day" view for "today". Click on Week on the scheduler toolbar. The bottom portion of the screen changes to show Sunday through Saturday.



8. To set Betty's work schedule to work 8 hours on Friday, click on the word "Work Hours (8 hrs.)" and then click on the 09:00am cell in Friday's column. A Schedule Details box appears.
9. The Schedule Details box fills in the start/end date, start/end time, description, and provider. If the information is correct click **OK**. The cells from 9:00am down to 5:00pm will fill with the color of the word "Work Hours (8hrs). This signifies that Betty is scheduled for that block of time.



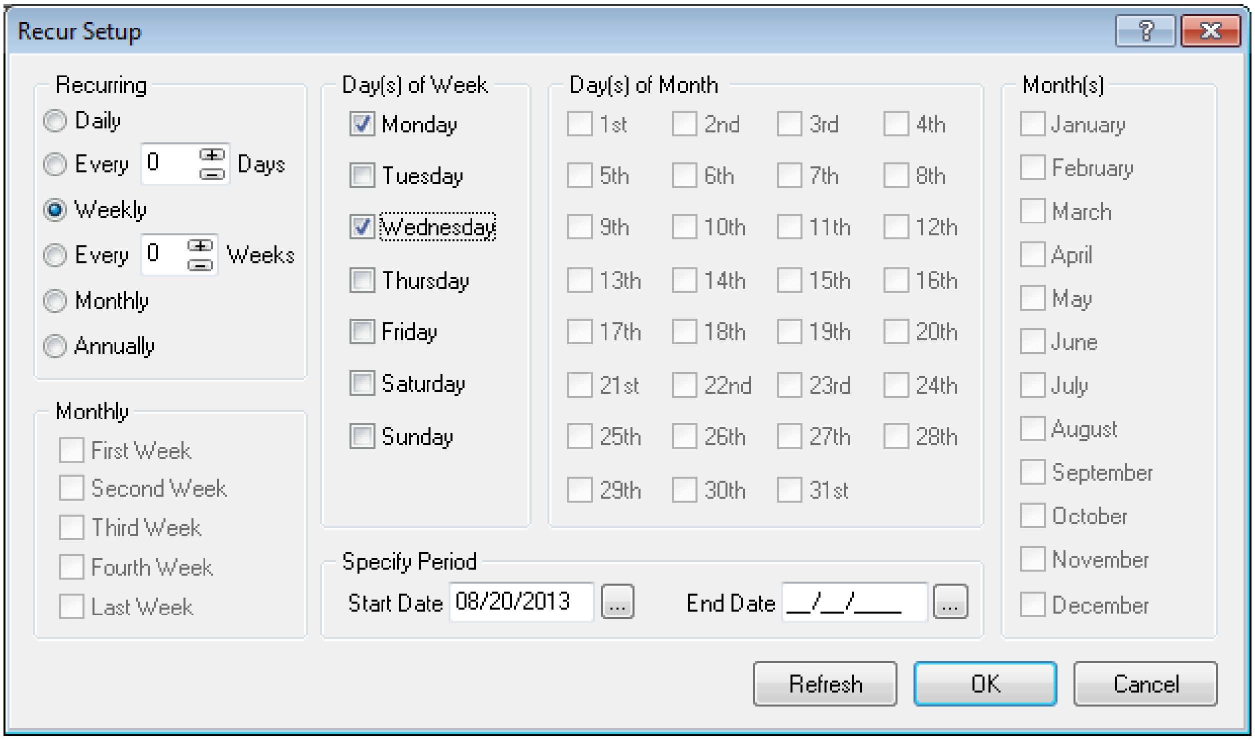
10. To assign lunch breaks for Betty the topic needs lunch break words created (see Getting Started with the Scheduler). If a lunch break word is in the word grid, simply click on it and then click on the time that the lunch break is to occur. The lunch break will be placed "on top" of the work schedule.

Scheduling a recurring work block

Betty works from 9:00am until 1:00pm every Monday and Wednesday. To schedule this recurring work block, follow these steps:

1. Follow steps 1-6 above for Scheduling a work block.
2. To set Betty's work schedule to work from 9am – 1pm on Mondays and Wednesdays click on the word "Work Hours (4hrs) and then click on the 09:00am cell in Monday's column. The Schedule Details box appears.
3. Select the **Recurring Event** checkbox and then click **Recur Setup**. Recur Setup screen appears.

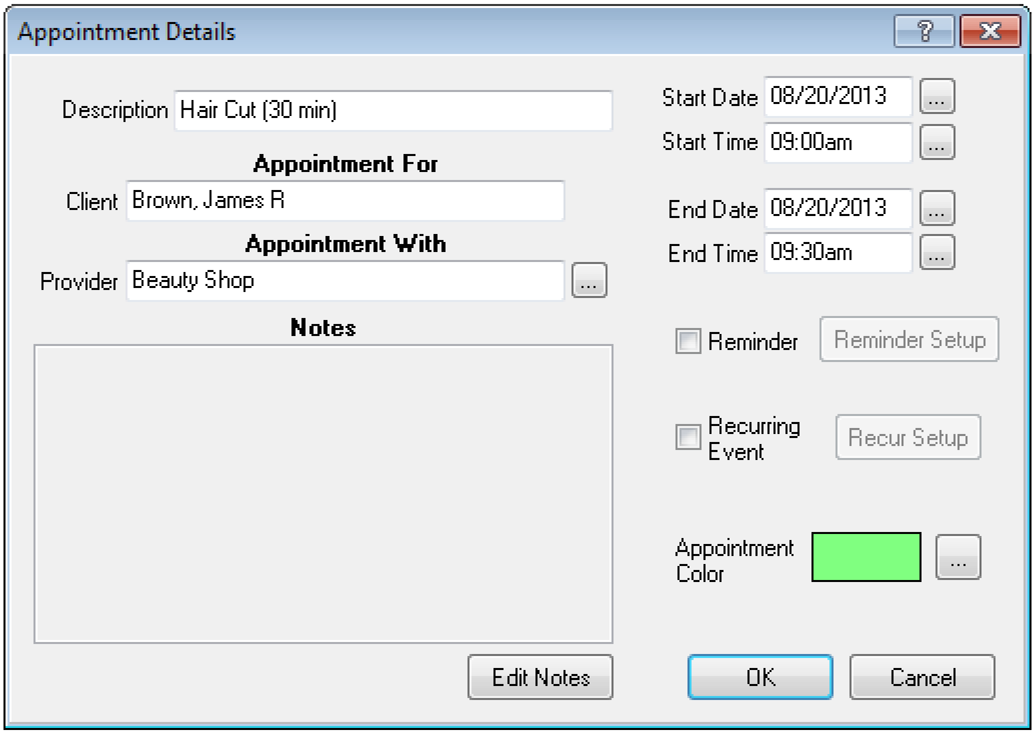
4. Click **Weekly** in the Recurring area and place checks in Monday and Wednesday in the Days(s) of Week area. The Start Date defaults to the day that was clicked on in the scheduler if this date is to be something different click on the picklist box and specify the date. If no End Date is selected the pattern will continue indefinitely.



5. Click **OK** to save the changes. The Schedule Details screen appears. Click **OK** to schedule the recurring 4hr work block.

Scheduling Appointments/Events

1. Click the **Schedule** icon.
2. Click **Tasks** and select Beauty Shop and click **Load.**
3. The Name Selection screen appears. Select a client and click **OK**. The scheduler loads with the Beauty Shop topic in the top portion and the client/provider schedules in the bottom portion.
4. To schedule a haircut for next Monday, click on Week to see the week's schedule and click on the arrow pointing to the right by Now. The schedule will move from this week to next week.
5. Click "Hair Cut (15min) and click on 11:30am in Monday's column. An Appointment Details box appears.



6. Review the information and add notes if desired. Select the Reminder checkbox and then click Reminder Setup to setup a reminder for the provider and/or the client. Follow the instructions on the Reminder Setup Screen.
7. Review information and click **OK** to schedule the appointment.

Documenting/Viewing from the Scheduler

Documentation may be completed from the schedule. When viewing the schedule click on the appointment that needs documentation. Click "Write" and the user is taken to the appropriate documenting screens. To view information from the schedule, click on the appointment and click "View Word" and/or "View Topic".

Printing from the Scheduler

Schedules may be printed for client appointments, provider appointments, or provider work schedules. Scheduler reports are printed from the Scheduler screen.

1. Click the **Schedule** icon.
2. Click **OK** to close the Control Screen.
3. Click **Reports**, the Scheduler Reports screen appears.

Client Appointments Report

1. Follow steps 1-3 above for Printing Schedules.
2. Select **Client** and click on the picklist box.
3. Select desired client(s) and click **OK.**
4. Select Grid Format or List Format:

- **Grid** Format (default) will list up to 5 clients per page.
- **List** Format will list as many clients as will fit on one page.

5. Select other options as listed (Color, limit report to one day per page and/or one provider per page, show notes for each appointment)
6. Select the time increments to display.
7. Select Start Time/Date and End Time/Date.
8. Tasks will bring up the list of Tasks set up under Scheduler.
9. Select **Print.**
10. The report previews before it is sent to the printer.
11. Client appointments are reports for individual clients.

Provider Schedule Report

1. Follow steps 1-3 above for Printing Schedules.
2. Select **Provider** and click on the picklist box.
3. Select desired Provider(s) and click **OK.**
4. Work Schedule Only may be checked to search the provider's work schedule, not just appointments.
5. Select Grid Format, List Format, and other options as listed above.
6. Select Start Time/Date and End Time/Date.
7. Tasks will bring up the list of Tasks set up under Scheduler.
8. Select **Print.**
9. The report previews before it is sent to the printer.
10. Client appointments are reports for individual clients.

*These functions work if they are set up. To set up these functions please see "Getting Started with the Scheduler" in this section.