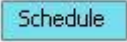# Scheduler

The scheduler is a powerful tool that can be used to schedule both client and provider schedules. A client is a person who usually resides within your facility or is someone to whom your facility is providing services. A provider can be people (physicians, therapists, beauticians), departments (physical therapy, activities, maintenance), entities (beauty shop, clinic), or things (out of facility appointments, lab schedule). This session will focus on creating an out-of-facility appointment schedule.

Accessing the Scheduler

The scheduler can be accessed three different ways:

1. By going to the path American Data – ECS>View>Scheduler.
2. By clicking on the **Schedule** icon on your toolbar.
3. By launching the desired schedule task off an Easy button (focus of this handout).

Scheduling Appointments/Events

The Scheduler may be used for keeping track of various types of appointments/events. Therapists and activity departments may use it for work schedules or resident appointments. Maintenance departments may use it to schedule routine maintenance. Facility transportation may use it to coordinate services, and the list goes on. There are two methods for scheduling appointments or events:

1. Directly from the Scheduler, some benefits for using this method include:
    a. Allows the user to see both the client and the provider schedule while entering the appointment.
    b. Takes less setup time to create a schedule using this method.
2. Using a documentation screen; some benefits for using this method include:
    a. Allows appointments to be tracked (will track the date/time/user that entered/edited/deleted the appointment).
    b. Allows appointments to pull to other report maker or calendar reports.
    c. Allows more than one provider to be scheduled at the same time.

## Scheduling Appointments/Events from the Scheduler

1. Click on the desired Easy button to launch the needed scheduler task.
    a. Example:
        i. From the Nurses Access Menu, click the **Schedules** easy button.
        ii. Choose the Out of Facility – Schedule option.
2. Select the desired resident, and click **OK**

Schedules

3. The schedule will load with the Scheduler topic in the top portion of the screen. The bottom portion of the screen will display both the client (left) and the provider (right) schedules.
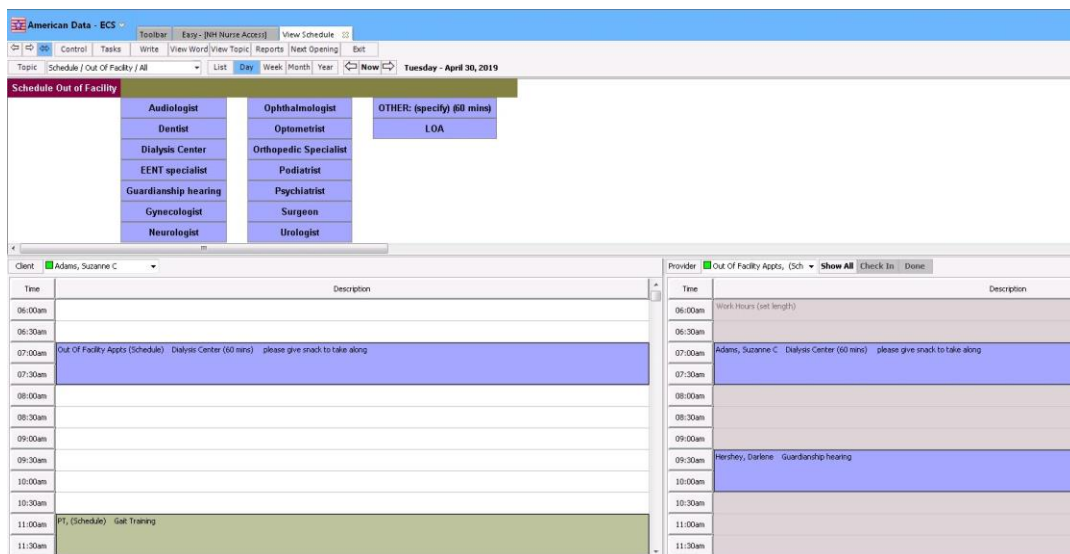
4. To schedule a Dentist appointment for today, click on the Dentist word in the top portion of the screen and then on the desired time slot under the client's schedule.
5. The **Appointment Details** box will appear.
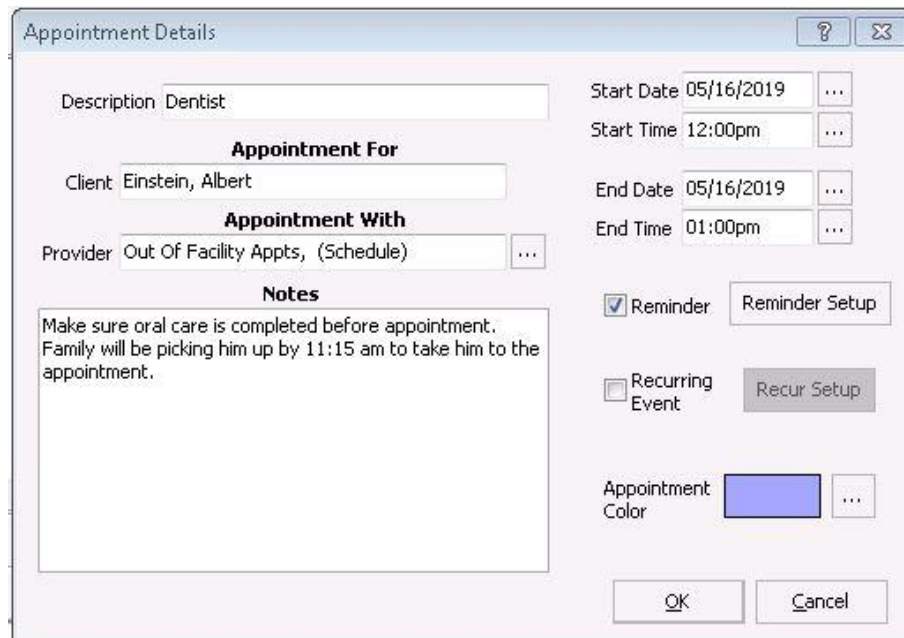
   a. If desired, you may adjust the date and/or time settings of the appointment by clicking the pick list box next to the appropriate field.
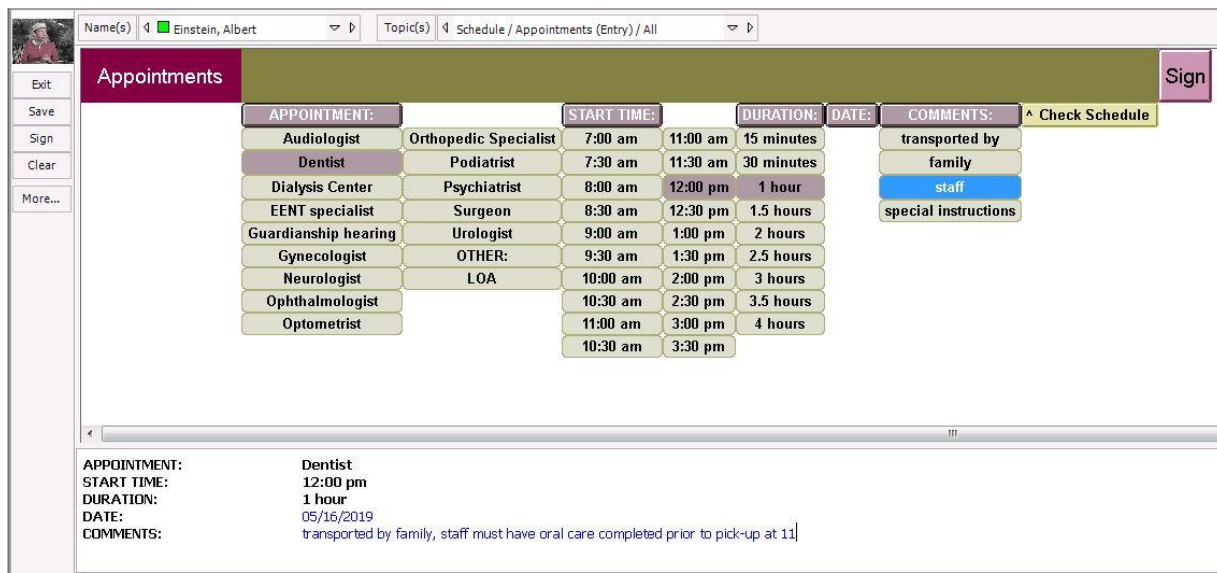   b. You may add notes regarding the appointment in the **Notes** box.

c. You may place a check next to **Reminder,** and then click the **Reminder setup** button to set the schedule to send an Alarm or Email reminder prior to the appointment.

d. If needed, you can place a check next to **Recurring Event,** and click the **Recur Setup** button to set the appointment to recur over time based on the desired frequency.

e. You may adjust the color display by clicking the pick list box next to **Appointment Color**.

6. After all the details of the appointment have been set, click **OK** to schedule the appointment.

7. The appointment should now display on the schedule.

Editing/Deleting Appointments that Originated from the Scheduler

1. Right-click the appointment that needs to be edited. Select the desired option:
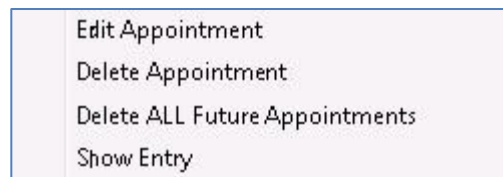
a. **Edit Appointment** – this option will allow you to modify existing appointments.

b. **Delete Appointment** – this option will allow you to delete existing appointments.

c. **Delete ALL Future Appointments** – this option will allow you to delete ALL appointments on any given resident from a specified date forward. This is often used if a resident is discharged from the facility, and the user would like to clear out future appointments.

d. **Show Entry**—this will allow a user to see the entry that created the appointment on the schedule so the charting could be edited. This only applies to those using schedule-by-entry, which is using a documentation screen to chart the appointment and associated details that will then flow to the scheduler.

"Other" Scheduler features

Regardless of whether you schedule events via the Scheduler or a Write screen, there are several other features that the Scheduler has to provide.

Navigating the Scheduler

There are several options that allow the user to navigate the Scheduler quickly and easily.

- **Left/Right Arrows:** The left and right arrows maximize the left and right screens, respectively. The double-ended left/right arrow returns the screen to a split screen.

- **List/Day/Week/Month Year:** Schedules may be viewed as daily, weekly, monthly, or yearly. Which option to select depends on personal preference and what is being scheduled. The user may toggle through all the options without reloading screens. The **List** option changes the arrangement of the appointments. When multiple appointments occur at the same time, the blocks are split to accommodate this. Using **List** will put each appointment on its own line and create duplicate time lines. For example, instead of 2 appointment showing as blocks split on the one line for 7am to 7:15am, there would be two lines for 7am to 7:15 am, and each appointment is listed separately.
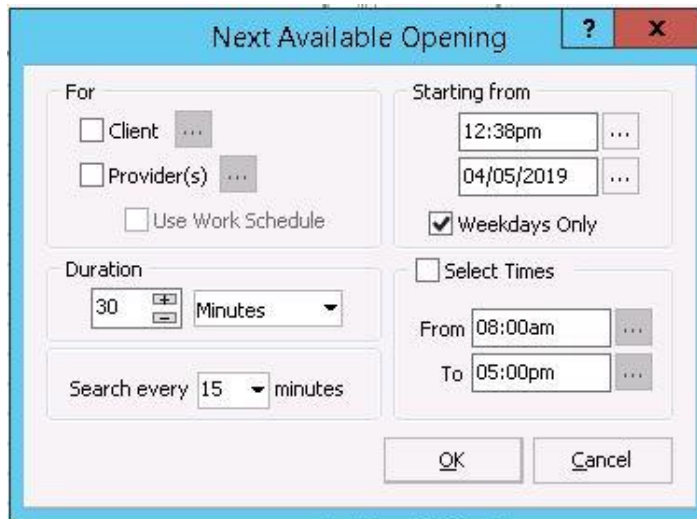

- **Left Arrow/Now/Right Arrow:** The user utilizes the forward and backward arrows to toggle to different days/weeks/months to schedule an appointment. The **Now** button is a quick way for the user to return to "today's" date on the schedule.

Using the Next Opening Button

The **Next Opening** button allows the user to quickly search for an opening for a provider, date, and/or time when scheduling appointments. This feature saves the user time from manually flipping through provider schedules to find an opening and is available only when scheduling appointments using the Schedule icon.

1. Click the **Next Opening** button Next Opening . The Next Available Opening window appears.

- Select a **Client** and **Provider(s)** checkboxes and define them by using the pick list boxes.
- Select the **Use Work Schedule** checkbox if desired.
- Define the duration of the appointment and the frequency with which to search.
- Select a Start Date and Start Time, and select the **Weekdays Only** checkbox, if desired.
- Choose the **Select Times** checkbox if there is a specific time the appointment needs to be set (for example, 8:00 - 10:00 a.m.).

2. Click **OK.** The Open Schedule Results window appears.
3. Select an appointment opening by looking at the Next Opening Start Time column.

Managing Events on the Scheduler

There are two key features that can be used to help staff keep track of appointments/events that are being worked on or have been completed.

- **Check In:** This button is used to notify others that an appointment has checked in. To use this button, the user first selects the appropriate appointment on the schedule, and then he or she clicks on the **Check In** button. A red box appears in the upper left corner of the appointment block. To remove the red box, click on the **Check In** button again.

- **Done:** This button is used to notify others than an appointment is finished. To use this button, the user first selects the appropriate appointment on the schedule, and then they click on the **Done** button. A little blue box appears in the upper left-hand corner of the appointment block. To remove the blue box, click on the **Done** button again.

Generating reports from the Scheduler

Schedules may be printed for resident appointments, provider appointments, or provider work schedules. Schedule reports are printed from the scheduler screen.

1. From inside the Scheduler, click the **Reports** button **Reports**.
2. If using a schedule task for printing, select the task first by clicking the **Tasks** button; otherwise the Report will default to the current task you are viewing.
3. Select Client/Provider to define whose schedule you would like to print (if using task, the provider will already be selected).
4. Select the type of report to print: **Grid Format** or **List Appointments.**
   - **Grid Format** prints the schedule as you see it electronically. This is the default. Appointments are blocks of time on the report, and the provider available hours show regardless if appointments are set or not. There are several other options the user has when printing reports in the Grid Format. Choose these options as desired.

   (See image below as an example of Grid format)

- Select **List Appointments** when you would like the report to print listed out instead of blocks of time. This view appears as if someone writes out the appointments in a notebook, one appointment per line. List Appointments only shows appointments-- it does not list the available provider times when appointments are not scheduled.

Provider: Out Of Facility Appts, (			04/30/2019 to 04/30/2019
Time	Date	Notes	Client
07:00am - 08:00am	04/30/2019	Dialysis Center (60 mins) please give snack to take along	Adams, Suzanne C
09:30am - 10:30am	04/30/2019	Guardianship hearing	Hershey, Darlene
10:00am - 10:30am	04/30/2019	Optometrist	Einstein, Albert
01:30pm - 02:30pm	04/30/2019	Dentist Please make sure resident is ready!	Nixon, Dwight A

5. Based on type of report chosen, define other options (e.g., if List Appointments are selected, decide if you would like notes to show or not).
6. Determine the "other details" for the report. Select the *Start/End Times/Dates* and *Time Increments* to display (15 minutes, 30 minutes, etc.). For example, if a user is looking at a Care Conference schedule where care conferences are about 15 minutes in length, the user would want to have 15 minute increments formatted on the report versus a schedule for transportation that would most likely have hours of time blocked off. For a schedule like that, the user would most likely want to select 30 min or 60 min increments. (These only apply to grid format reports.)
7. In the example below, the report is set to 15-minute increments, which is necessary for this client because one of his appointments is only 15 minutes in duration:

Client: Einstein, Albert	04/30/2019
Time	Tuesday
08:00am	SLP, (Schedule) Swallow Oral Function Tx
08:15am	
08:30am	
08:45am	
09:00am	
09:15am	
09:30am	Beauty Shop, (Schedule) Trim (15 min)
09:45am	
10:00am	Out Of Facility Appts (Schedule)
10:15am	PT, (Schedule)
10:30am	
10:45am	
11:00am	
11:15am	

To the right-hand side is a **Grid** format report with 30-minute increments. Note the 15-minute appointment is just a sliver and does not contain any details.

Time	Tuesday
Client: Einstein, Albert	04/30/2019
08:00am	SLP, (Schedule) — Swallow Oral Function Tx
08:30am	
09:00am	
09:30am	
10:00am	Out Of Facility Appts (Schedule) — PT, (Schedule)
10:30am	
11:00am	
11:30am	
12:00pm	
12:30pm	
01:00pm	
01:30pm	PT, (Schedule) — Group Therapeutic
02:00pm	
02:30pm	
03:00pm	
03:30pm	
04:00pm	
04:30pm	

Below is the **List** format option where increments do not matter because each appointment is listed out on its own line: (Most space conservative option)

Client: Einstein, Albert — 04/30/2019 to 04/30/2019

Time	Date	Notes	Provider
08:00am - 08:30am	04/30/2019	Swallow Oral Function Tx	SLP, (Schedule)
09:30am - 09:45am	04/30/2019	Trim (15 min)	Beauty Shop, (Schedule)
10:00am - 10:30am	04/30/2019	Optometrist	Out Of Facility Appts (Schedule)
10:15am - 11:00am	04/30/2019	Hot/Cold Packs	PT, (Schedule)
01:30pm - 02:15pm	04/30/2019	Group Therapeutic	PT, (Schedule)

If a master copy of the printed schedule is needed, multiple clients can be on one report, stacked one after another in the **List** format. If a user were to run a **Grid** format on multiple clients, each client would have a separate page because it will print the entire time grid for the day, whether a person has appointments. Using a group of 16 residents,

Client: Einstein, Albert — 04/30/2019 to 04/30/2019

Time	Date	Notes	Provider
08:00am - 08:30am	04/30/2019	Swallow Oral Function Tx	SLP, (Schedule)
09:30am - 09:45am	04/30/2019	Trim (15 min)	Beauty Shop, (Schedule)
10:00am - 10:30am	04/30/2019	Optometrist	Out Of Facility Appts (Schedule)
10:15am - 11:00am	04/30/2019	Hot/Cold Packs	PT, (Schedule)
01:30pm - 02:15pm	04/30/2019	Group Therapeutic	PT, (Schedule)

Client: Hershey, Darlene — 04/30/2019 to 04/30/2019

Time	Date	Notes	Provider
09:30am - 10:30am	04/30/2019	Guardianship hearing	Out Of Facility Appts (Schedule)
10:00am - 10:15am	04/30/2019	Hot/Cold Packs	PT, (Schedule)

Client: Adams, Suzanne C — 04/30/2019 to 04/30/2019

Time	Date	Notes	Provider
07:00am - 08:00am	04/30/2019	Dialysis Center (60 mins) please give snack to take along	Out Of Facility Appts (Schedule)
11:00am - 12:00pm	04/30/2019	Gait Training	PT, (Schedule)

Client: Ben, Jerry N — 04/30/2019 to 04/30/2019

Time	Date	Notes	Provider
10:30am - 10:45am	04/30/2019	Trim (15 min) Prefers only 1/2 inch taken off at each trim. Enjoys getting his hair washed after the hair cut (to get rid of stray hairs).	Beauty Shop, (Schedule)

Client: Edwards, Jack C — 04/30/2019 to 04/30/2019

Time	Date	Notes	Provider
09:00am - 09:45am	04/30/2019	Gait Training	PT, (Schedule)
09:00am - 09:30am	04/30/2019	Aquatic Therapy	PT, (Schedule)
09:30am - 10:00am	04/30/2019	Self Care Mangement Trg	OT, (Schedule)
01:30pm - 02:15pm	04/30/2019	Group Therapeutic	PT, (Schedule)

Client: Nixon, Dwight A — 04/30/2019 to 04/30/2019

Time	Date	Notes	Provider
01:30pm - 02:30pm	04/30/2019	Dentist Please make sure resident is ready!	Out Of Facility Appts (Schedule)

here is the example of their appointments for the day in a **List** format; it easily fits on one page and anyone without an appointment does not show up on the report.

In running a **Grid** format report on the same 16 residents, it produces 16 pages of reports, some of them completely blank except for the name and the empty grid lines.