

Community-Wide Scheduling

Applications Training Manual
Meditech Client Server 5.6



About this Manual

- This manual provides overviews and descriptions of the routines of Community-Wide Scheduling.
- We suggest that you use the online Help for information about responding to individual prompts, a glossary of terms, and to take advantage of the hypertext links that indicate related topics.
- This manual is current as of the date it was created. For the most up-to-date information about this application, consult the online Help.

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Main Desktop

| | |
|------------------------------|---|
| Community-Wide Sched. | |
| Scheduler Desktop | |
| Group Booking Desktop | |
| Dictionaries | ▶ |
| System Management | ▶ |
| Reports, Letters, Forms | ▶ |
| Appointment Lists | ▶ |

Scheduler Desktop - Process routines which allow you to book appointments and meetings, manage the waitlist and control resources' schedules. This will be the main focus of this guide.

Group Booking – Routine that allows users to book Group Appointments.

Dictionaries - Build and maintain the Resource, Appointment, Access and Other dictionaries that control the system.

System Management - View locks and verifies that background jobs are running correctly.

Reports, Letters, Forms - Print system reports, statistics and view or print the Letter Queue.

Appointment Lists - Print reports on Appointments by Department, Resource Group, Resource, Appointment Group and Pendlings. Can also print appointment lists for inpatients.

Scheduler Desktop



| | |
|--------------------------|---------------------------------|
| <u>Patient</u> | Process Patient Appointments |
| <u>Department</u> | Process Department Appointments |
| <u>Appt. Book</u> | Process Appointment Book |
| <u>Resource</u> | Process Resource Schedules |
| <u>Waitlist</u> | Process Waitlist Appointments |
| <u>Meeting</u> | Process Reservations & Meetings |

Patient Desktop

Patient


Scheduler Desktop - MVH (CUS2/MOV56/MOV56) - MEDITECH

| | | |
|------------------------|-------------------------|--------------------|
| Thrace, Kara | Soc Sec Num 131-54-8777 | Phone 154-844-4488 |
| 26/F 10/16/1982 | Med Rec Num M000000189 | |
| Allergy/AdvReac | | |

Patient

| ✓ | Day | Date | Time | Dur | Type | Status | Account | Pt Type | Location |
|--------------------------|-----|----------|------|-----|------------|--------|--------------|---------|----------|
| <input type="checkbox"/> | Thu | 10/16/08 | 1120 | 45 | IVP | Booked | V00000000266 | SCH CLI | RAD |
| <input type="checkbox"/> | Thu | 10/30/08 | 0900 | 30 | BARIUMENMA | Booked | V00000000267 | SCH CLI | RAD |
| <input type="checkbox"/> | Fri | 10/31/08 | 1100 | 30 | USABOP | Booked | V00000000268 | SCH CLI | RAD |
| <input type="checkbox"/> | Tue | 11/18/08 | 0700 | 15 | CTABD | Booked | V00000000265 | SCH CLI | RAD |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

| Insurance | Policy Number | Additional Information |
|-----------|---------------|------------------------|
| | | Facility: MVH |
| | | Prior Location: |
| | | Inpatient Room/Bed: |
| | | Provider: |

| Resource | Resource Name | Telephone |
|----------|------------------------------|-----------|
| CTRM | COMPUTERIZED TOMOGRAPHY ROOM | |
| CTTECH2 | CT TECHNICIAN TWO | |

Display
Letters Forms
Switch Acct
Change Status
Duplicate
Allergies
Times
E/E Alerts

Patient
Department
Appt Book
Resource
Waitlist
Meeting

Book
Edit
View
Pending
Set
Series
Orders
Registration
Check In

Reports
EMR

Group

Search for Appt
Search for Alias

This routine is ideal for centralized schedulers which allow users to process appointments for a patient. From this routine users are able to book, cancel, reschedule or edit, register or waitlist, while seeing the patient's appointment history.

Function Buttons



Book Book a patient appointment.

Edit Appointment – Make changes to the ‘checked-off’ appointment
Appointment Type – Change the type of appointment scheduled

View Views appointment detail for the currently selected appointment

Pending Book a pending patient appointment

Set Book a New or Pending Appointment Set

Series Book an Appointment Series

Orders

Once a patient is registered, you can branch to OE and enter additional care area orders for the specific appointment.

Registration

Pre-register - Fill in patient registration information prior to the date of service.

Questionnaire - Enter registration information without pre-registering/registering the patient.

Register - Register the patient.

SCH Patient Data - Edit patient demographic information.

Check-In

Will launch you into the Registration screen for an account that is in either a SCH or PRE status. If the account is in a REG status, and the appointment is in a BOOKED status, then clicking on 'Check In' will automatically switch the appointment from BOOKED to ATTENDED

Footer Buttons



Display Temporarily change your display settings to show or not show appointments of different types, through different dates, or of different statuses.

Letters/Forms Print a Letter or Form for the highlighted appointment(s).

Switch Acct Change the account number on an appointment.

Change Status Changes appointment status.

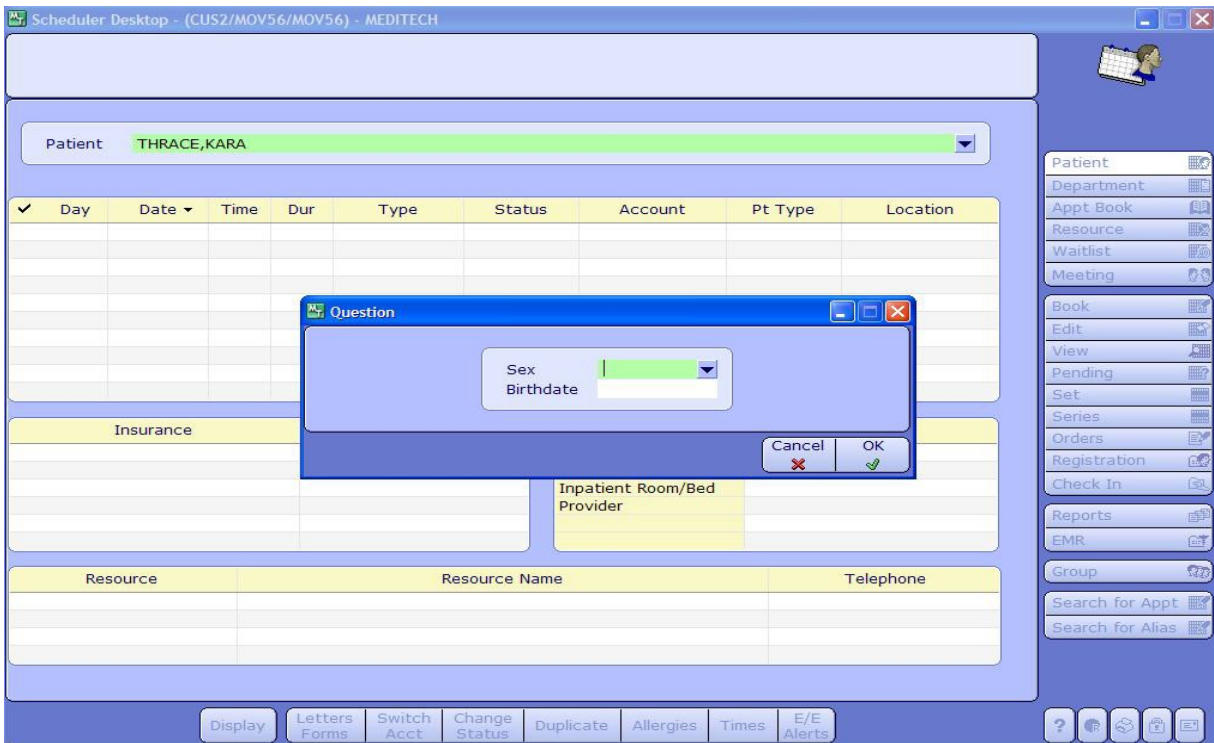
Duplicate Creates a duplicate appointment (on the same account).

Allergies Launches you into the Enter/Edit Allergies screen for that patient.

Times Enter Arrived, Seen and Departed times on a registered appointment.

E/E (View) Alerts: Enter/Edit/View any Patient Alerts on the patient.

Entering a Patient

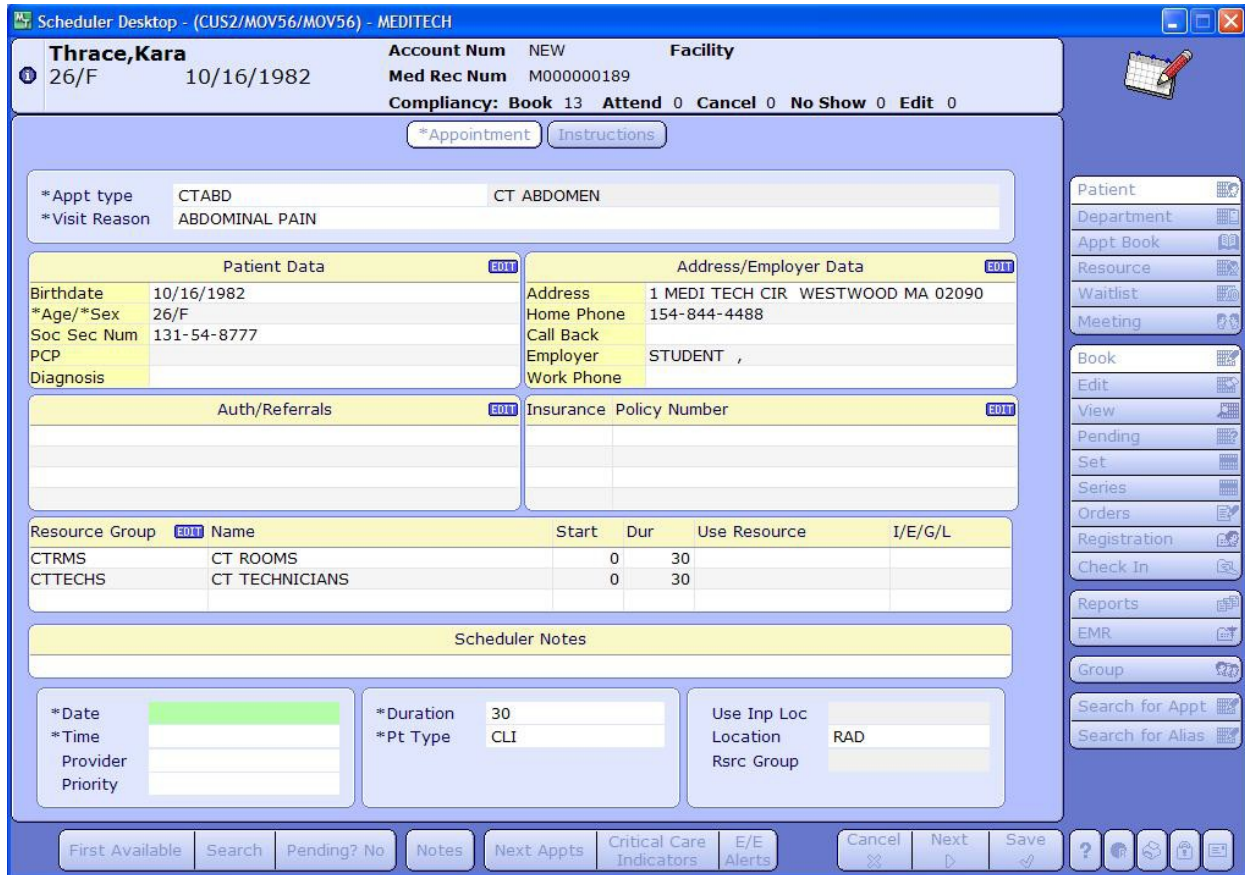


- Enter patient's name as **LAST, FIRST MI** all in capital letters with no spaces between first and last. Middle initial is optional.
- Optional: Enter in the patient's sex and birth date in the resulting question box. This will expedite searching the Medical Records Index. After entering the information, press **F12** (or click on the green check mark) to file it.

Alternate Ways of Finding a Patient

- Enter the patient's **partial name** Ex: LAS, FIR
- Most recently viewed patient:** Press the space bar and then the enter key
- Account Number:** Enter capital 'A', the # key, followed by the patient's account no.
- Medical Record Number:** Enter capital 'U', the # key, followed by the prefix letter and the patient's medical record number.
- Telephone Number:** Enter capital 'T', the # key, followed by the patient's telephone no.
- Social Security Number:** Enter the # key, followed by the patient's social security number
- Date of Birth:** Enter capital 'B', the # key, followed by the patient's date of birth
Ex: B#093083 (may omit slashes)

Booking an Appointment



Scheduler Desktop - (CUS2/MOV56/MOV56) - MEDITECH

Thrace, Kara Account Num NEW Facility
26/F 10/16/1982 Med Rec Num M000000189
Compliance: Book 13 Attend 0 Cancel 0 No Show 0 Edit 0

*Appt type CTABD CT ABDOMEN
*Visit Reason ABDOMINAL PAIN

| Patient Data | | Address/Employer Data | |
|--------------|-------------|-----------------------|-----------------------------------|
| Birthdate | 10/16/1982 | Address | 1 MEDI TECH CIR WESTWOOD MA 02090 |
| *Age/**Sex | 26/F | Home Phone | 154-844-4488 |
| Soc Sec Num | 131-54-8777 | Call Back | |
| PCP | | Employer | STUDENT , |
| Diagnosis | | Work Phone | |

| Auth/Referrals | | Insurance Policy Number | |
|----------------|--|-------------------------|--|
| | | | |

| Resource Group | Name | Start | Dur | Use Resource | I/E/G/L |
|----------------|----------------|-------|------|--------------|---------|
| CTRMS | CT ROOMS | | 0 30 | | |
| CTTECHS | CT TECHNICIANS | | 0 30 | | |

Scheduler Notes

*Date
*Time
Provider
Priority

*Duration 30
*Pt Type CLI

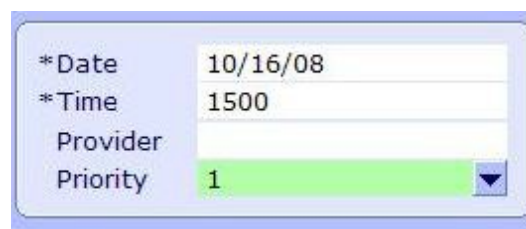
Use Inp Loc
Location RAD
Rsrc Group

Buttons: First Available, Search, Pending? No, Notes, Next Appts, Critical Care Indicators, E/E Alerts, Cancel, Next, Save

- Click on the **Book** button to book a new appointment for the patient.
- From the Appointment Screen you can view the patient's compliance, as well as their upcoming appointments, demographics and insurance information.

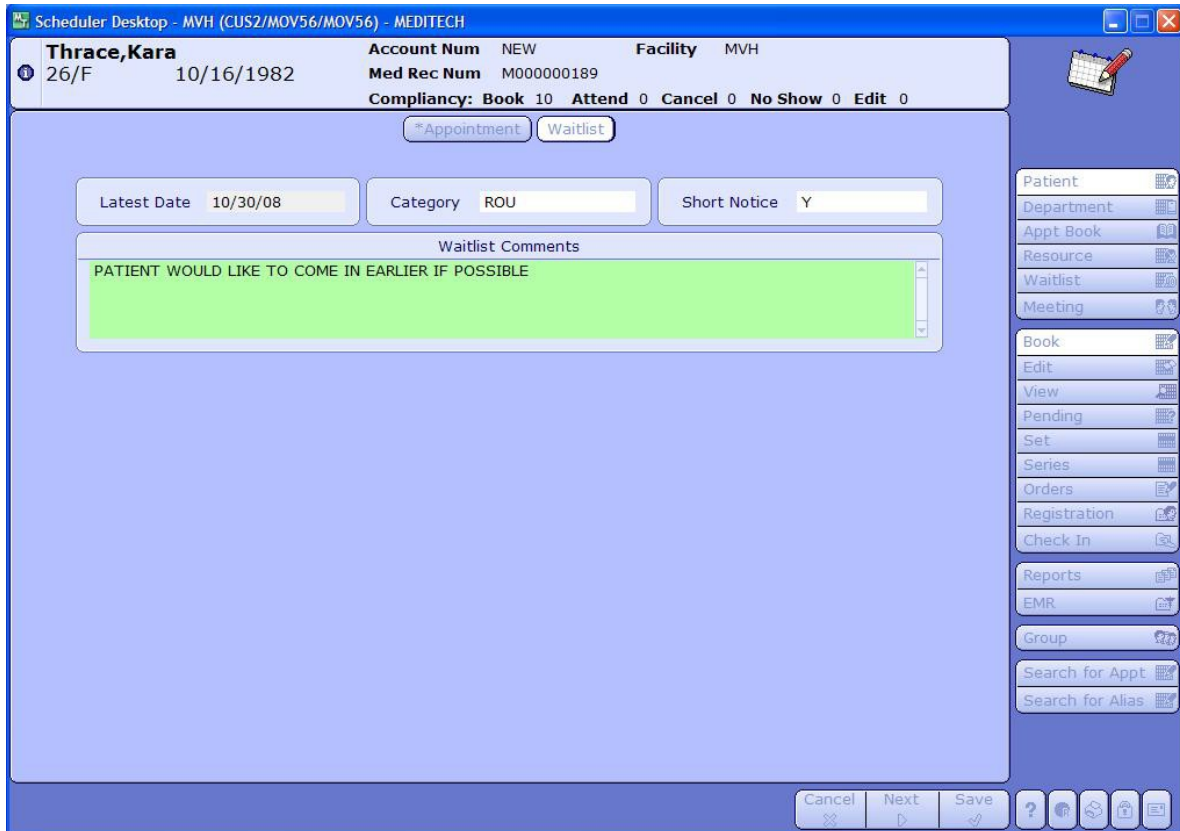
Methods of Searching for an Appointment Date and Time

- **First Available:** The absolute earliest time an appointment can be done.
- **Search:** A list of available times from which a user can choose.



*Date 10/16/08
*Time 1500
Provider
Priority 1

You may also place a booked appointment onto the waitlist. Notice that when if you fill out the priority field, a new Waitlist tab appears at the tab of the screen:



Scheduler Desktop - MVH (CUS2/MOV56/MOV56) - MEDITECH

Thrace, Kara Account Num NEW Facility MVH
 26/F 10/16/1982 Med Rec Num M000000189
 Compliancy: Book 10 Attend 0 Cancel 0 No Show 0 Edit 0

Appointment Waitlist

Latest Date 10/30/08 Category ROU Short Notice Y

Waitlist Comments
 PATIENT WOULD LIKE TO COME IN EARLIER IF POSSIBLE

Book Edit View Pending Set Series Orders Registration Check In Reports EMR Group Search for Appt Search for Alias

Cancel Next Save

The *Waitlist* tab is where the user can place a BOOKED appointment on the waitlist for the possibility of a sooner appointment time and date. The *Latest Date* field defaults in as the appointment date. Here, you may assign this pending appointment to a certain *Waitlist Category*. You may also note if the patient is available on short notice. The *Waitlist Comments* box is a free text field where you may enter in any comments.

Booking a Set



- Press the **Set (S)** button to get to the Schedule Appointment Set routine, where you can schedule a new appointment set (or a Pending Set).

On this screen you are able to enter/edit your appointment set.

Scheduler Desktop - (CUS2/MOV56/MOV56) - MEDITECH

Thrace, Kara Account Num NEW Facility MVH
 26/F 10/16/1982 Med Rec Num M000000189
 Compliancy: Book 4 Attend 0 Cancel 0 No Show 0 Edit 0

*Appointment Set *Search

Set type NMBONE NM INJECTION/BONE SCAN
 *Visit Reason

| Appt Type | Name | Duration | Facility | Early Start | Late Start |
|-----------|--------------|----------|----------|-------------|------------|
| NMINJ | NM INJECTION | 5 | MVH | | |
| NMBOS | NM BONE SCAN | 60 | MVH | 0 | 0 |

Patient Data **EDIT** Address/Employer Data **EDIT**

Birthdate 10/16/1982 Address 1 MEDI TECH CIR WESTWOOD MA 02090
 *Age/*Sex 26/F Home Phone 154-844-4488
 Soc Sec Num 131-54-8777 Call Back
 PCP Employer STUDENT ,
 Diagnosis Work Phone

Auth/Referrals **EDIT** Insurance Policy Number **EDIT**

Scheduler Notes

Minimum Gap
 Maximum Duration 6H
 *Sequential Y
 Priority

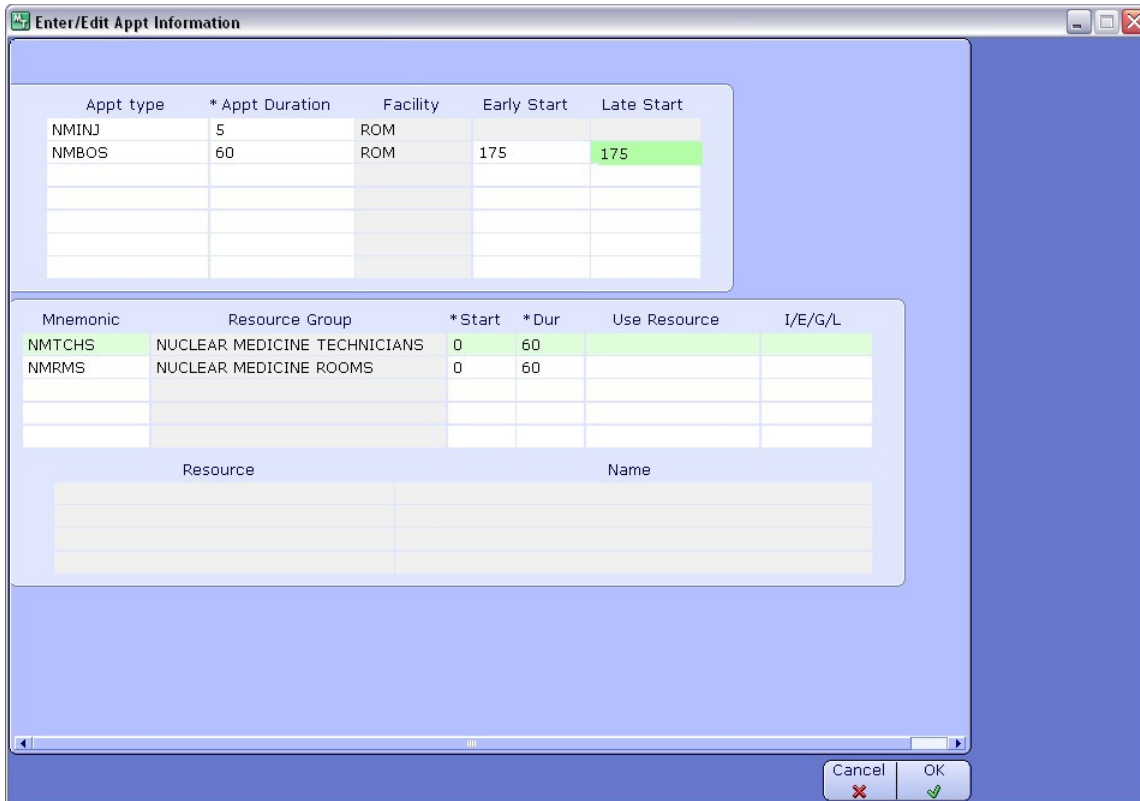
*Pt Type
 Provider

Notes

Cancel Next Save

Patient Department Appt Book Resource Waitlist Meeting Book Edit View Pending Set Series Orders Registration Check In Reports EMR Group Search for Appt Search for Alias

When you click on the EDIT button to change the appointment type details for the appointments in your set, you are brought to the Enter/Edit Appt Information screen.



| Appt type | * Appt Duration | Facility | Early Start | Late Start |
|-----------|-----------------|----------|-------------|------------|
| NMINJ | 5 | ROM | | |
| NMBOS | 60 | ROM | 175 | 175 |
| | | | | |
| | | | | |

| Mnemonic | Resource Group | * Start | * Dur | Use Resource | I/E/G/L |
|----------|------------------------------|---------|-------|--------------|---------|
| NMTCHS | NUCLEAR MEDICINE TECHNICIANS | 0 | 60 | | |
| NMRMS | NUCLEAR MEDICINE ROOMS | 0 | 60 | | |
| | | | | | |
| | | | | | |

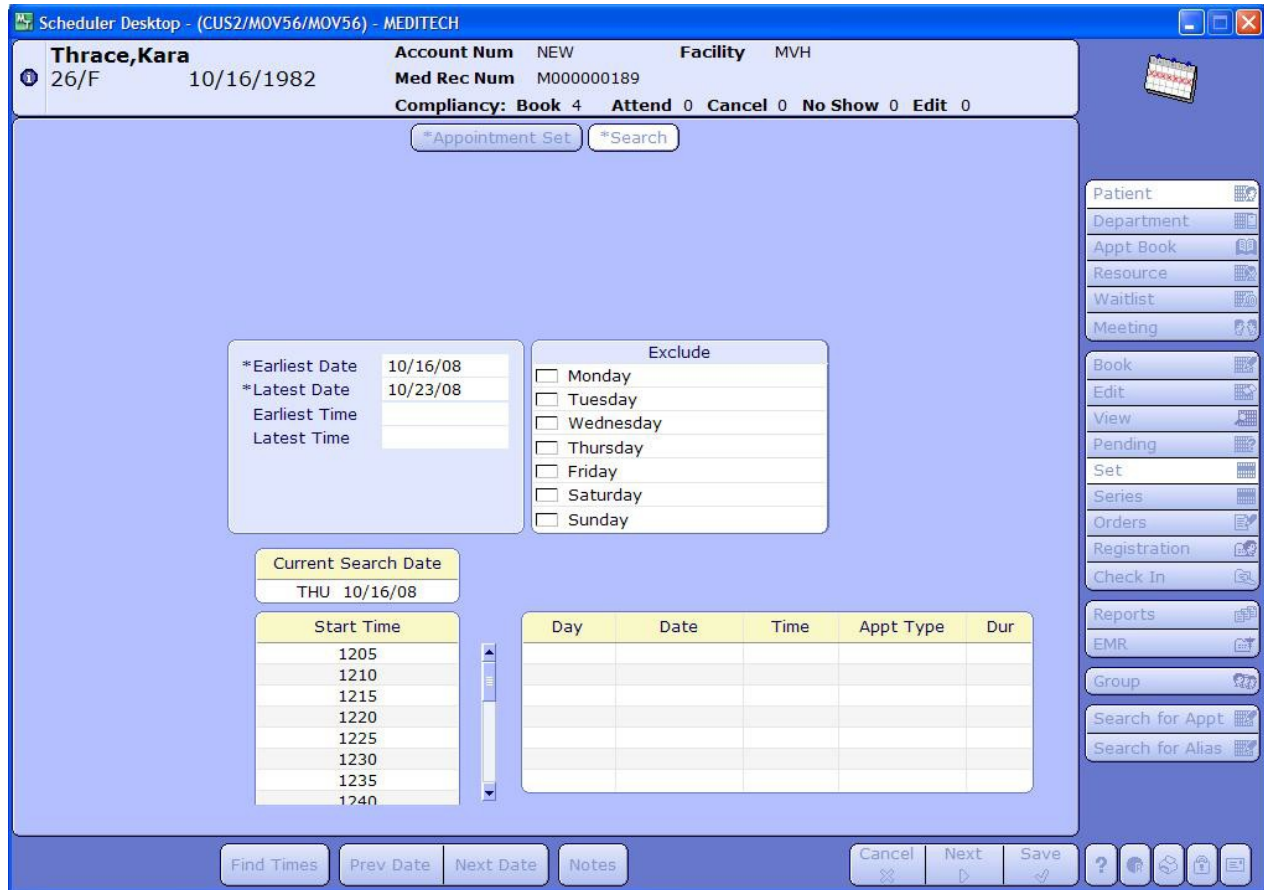
| Resource | Name |
|----------|------|
| | |
| | |
| | |

This screen allows you to change:

- Appointment Types and Durations
- Appointment Early and Late Start Times
- Resources for each Appointment in the Set

**When booking appointment sets – always keep in mind what your individual appointment types have their 'book minutes' set to. As well as any start time restrictions for the appointments, or the resources associated to them (especially if the associated resources have Appointment Profiles attached to them). Set Availability will greatly depend on these factors.*

After choosing the details about your appointment set, you'll click on the SEARCH button at the top of your screen:



Scheduler Desktop - (CUS2/MOV56/MOV56) - MEDITECH

Thrace, Kara Account Num NEW Facility MVH
 26/F 10/16/1982 Med Rec Num M000000189
 Compliancy: Book 4 Attend 0 Cancel 0 No Show 0 Edit 0

*Appointment Set *Search

*Earliest Date 10/16/08
 *Latest Date 10/23/08
 Earliest Time
 Latest Time

Exclude
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Current Search Date
 THU 10/16/08

| Start Time |
|------------|
| 1205 |
| 1210 |
| 1215 |
| 1220 |
| 1225 |
| 1230 |
| 1235 |
| 1740 |

| Day | Date | Time | Appt Type | Dur |
|-----|------|------|-----------|-----|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Find Times Prev Date Next Date Notes Cancel Next Save ?

Patient Department Appt Book Resource Waitlist Meeting Book Edit View Pending Set Series Orders Registration Check In Reports EMR Group Search for Appt Search for Alias

- Enter your search criteria and click **FIND TIMES** to get a list of available times to choose for your set. Notice on the bottom right hand side of the screen is where the details about the timeslot you selected will be displayed.
- Use the **Prev Day**, **Next Day**, **Go To Day** buttons to navigate the DAY in which you want to search for available times for your set.

Booking a Series



An Appointment Series is one appointment type that is scheduled for multiple visits over the course of time on the same account. Clicking on SERIES will bring you into the Book Appointment Series Screen.

Scheduler Desktop - (CUS2/MOV56/MOV56) - MEDITECH

Thrace, Kara Account Num NEW Facility MVH
 26/F 10/16/1982 Med Rec Num M000000189
 Compliancy: Book 4 Attend 0 Cancel 0 No Show 0 Edit 0

*Appointment *Series

| Use Same Resources | Appt Type | Dur | Date | Day | Time | Location |
|--------------------|-----------|-----|------|-----|------|----------|
| | CTABD | 30 | | | | RAD |

| Resource | Name |
|----------|------|
| | |

| Frequency | Day | Time | Qty | Thru Date |
|-----------|-----|------|-----|-----------|
| EVERY | MWF | 0900 | 6 | |

Total Appts/Appt Sets For Series 6

| Date | *Time | Appt Type | Dur | Location | Time Range | Resource |
|----------|----------|-----------|-----|----------|--------------|----------|
| 11/19/08 | WED 0900 | CTABD | 30 | RAD | 0730 TO 1130 | CTRM |
| 11/21/08 | FRI 0900 | CTABD | 30 | RAD | | CTRM |
| 11/24/08 | MON 0900 | CTABD | 30 | RAD | | CTRM |
| 11/26/08 | WED 0900 | CTABD | 30 | RAD | | CTRM |
| 11/28/08 | FRI 0900 | CTABD | 30 | RAD | | CTRM |
| 12/01/08 | MON 0900 | CTABD | 30 | RAD | | CTRM |

Search Re-Find Times Notes Cancel Next Save ?

Patient Department Appt Book Resource Waitlist Meeting Book Edit View Pending Set Series Orders Registration Check In Reports EMR Group Search for Appt Search for Alias

Editing/Rescheduling an Appointment



- From Scheduler Desktop, select the appointment to edit or reschedule, then hit the **Edit** button to access the Edit Appointment routine.

Scheduler Desktop - MVH (CUS2/MOV56/MOV56) - MEDITECH

Thrace, Kara Account Num V0000000265 Facility MVH
 26/F 10/16/1982 Med Rec Num M000000189
 Compliancy: Book 10 Attend 0 Cancel 0 No Show 0 Edit 0

*Visit Reason ABDOMINAL PAIN

| Patient Data | | Address/Employer Data | |
|--------------|-------------|-----------------------|-----------------------------------|
| Birthdate | 10/16/1982 | Address | 1 MEDI TECH CIR WESTWOOD MA 02090 |
| *Age/*Sex | 26/F | Home Phone | 154-844-4488 |
| Soc Sec Num | 131-54-8777 | Call Back | |
| PCP | | Employer | STUDENT , |
| Diagnosis | | Work Phone | |

| Auth/Referrals | | Insurance Policy Number | |
|----------------|--|-------------------------|--|
| | | | |

| Resource Group | Name | Start | Dur | Use Resource | I/E/G/L |
|----------------|----------------|-------|-----|--------------|---------|
| CTRMS | CT ROOMS | 0 | 30 | CTRM | |
| CTTECHS | CT TECHNICIANS | 0 | 30 | CTTECH2 | |

Scheduler Notes

| | | | |
|------|----------|-----------|------------|
| Date | 11/18/08 | Appt Type | CTABD |
| Time | 0700 | Name | CT ABDOMEN |

| | | | | | |
|----------|--|-----------|-----|--------------|-----|
| New Date | | *Duration | 15 | Rschd Reason | |
| New Time | | Pt Type | CLI | Location | RAD |
| Provider | | | | Rsrc Group | |
| Priority | | | | | |

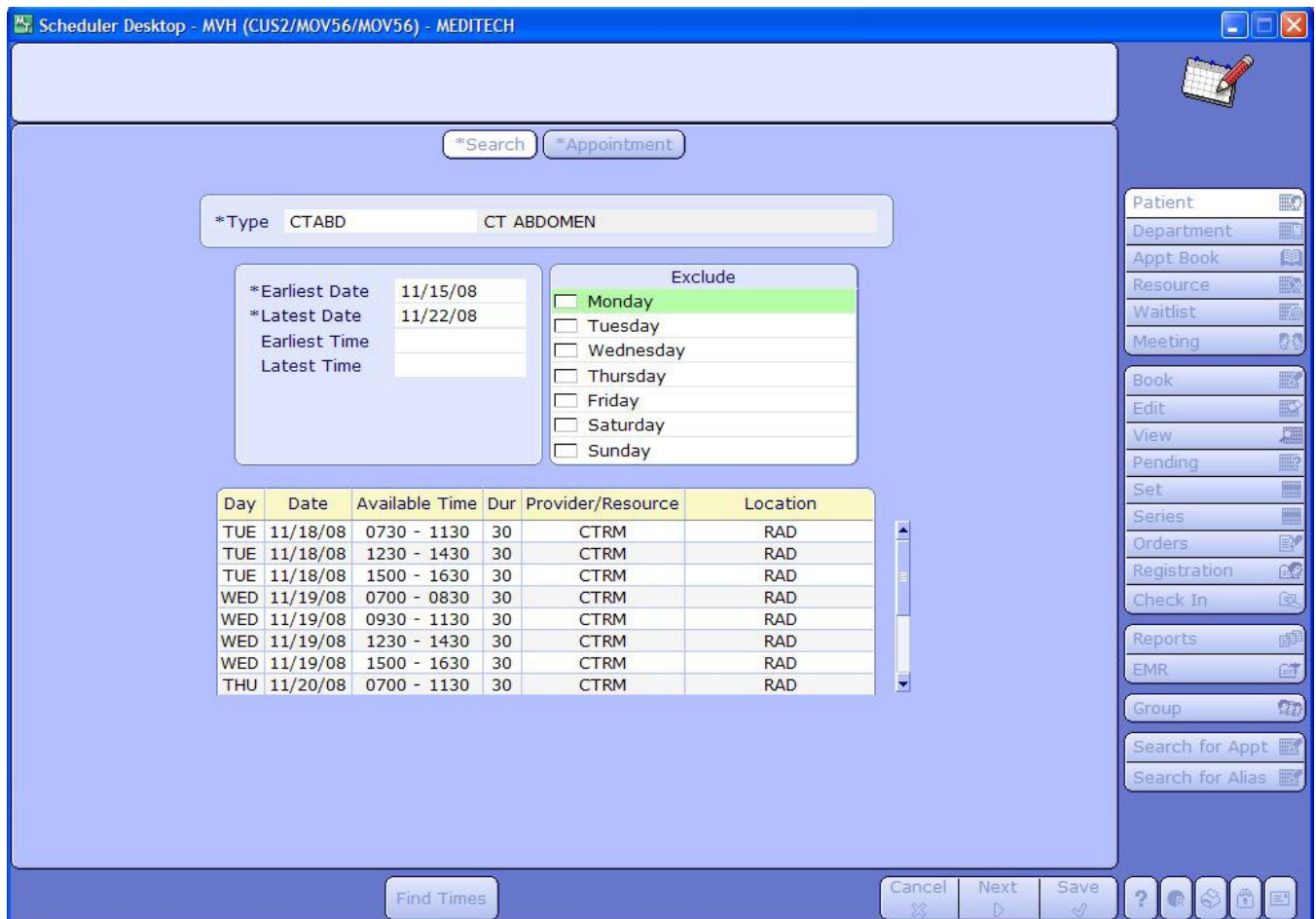
First Available Search Notes Next Appts Critical Care Indicators E/E Alerts Cancel Next Save ?

- This screen will allow you to edit any of the existing information about the scheduled appointment, resources, or queries – as well as an added section at the bottom to place a NEW date and time to the appointment (which will reschedule it) and to capture a Reschedule Reason.

Search for Appointment



Use this routine to search for an appointment time without entering patient info.



Scheduler Desktop - MVH (CUS2/MOV56/MOV56) - MEDITECH

*Search *Appointment

*Type CTABD CT ABDOMEN

*Earliest Date 11/15/08
*Latest Date 11/22/08
Earliest Time
Latest Time

Exclude
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

| Day | Date | Available Time | Dur | Provider/Resource | Location |
|-----|----------|----------------|-----|-------------------|----------|
| TUE | 11/18/08 | 0730 - 1130 | 30 | CTRM | RAD |
| TUE | 11/18/08 | 1230 - 1430 | 30 | CTRM | RAD |
| TUE | 11/18/08 | 1500 - 1630 | 30 | CTRM | RAD |
| WED | 11/19/08 | 0700 - 0830 | 30 | CTRM | RAD |
| WED | 11/19/08 | 0930 - 1130 | 30 | CTRM | RAD |
| WED | 11/19/08 | 1230 - 1430 | 30 | CTRM | RAD |
| WED | 11/19/08 | 1500 - 1630 | 30 | CTRM | RAD |
| THU | 11/20/08 | 0700 - 1130 | 30 | CTRM | RAD |

Find Times

Cancel Next Save

Enter the appointment type in the 'Type' field, or do an **F9** lookup to find it. Enter any day or time restrictions and click on **FIND TIMES**.

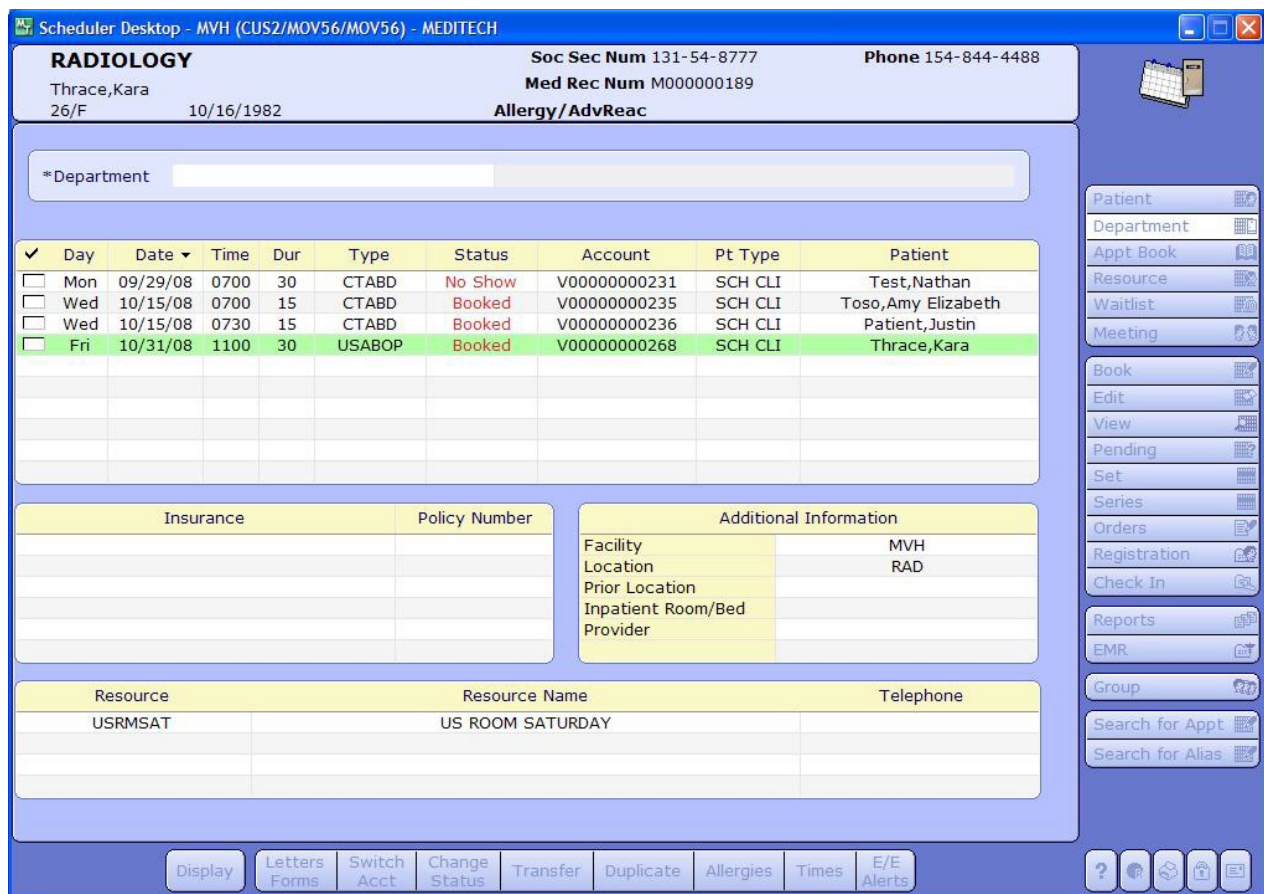
The list will display with available appointment times. To book one, click on the slot you want and then either on **NEXT** on the bottom, or **APPOINTMENT** on the top of the screen to be brought into the Appointment Booking Screen.

Department Desktop



Use this routine to see appointments in a particular department. You can change the display to include only certain appointments or appointment statuses.

This routine is ideal for departmental staff to use as a work list or for a department head to keep track of what is going on in the department.



Scheduler Desktop - MVH (CUS2/MOV56/MOV56) - MEDITECH

RADIOLOGY Soc Sec Num 131-54-8777 Phone 154-844-4488
 Thrace, Kara Med Rec Num M000000189
 26/F 10/16/1982 Allergy/AdvReac

*Department

| ✓ | Day | Date | Time | Dur | Type | Status | Account | Pt Type | Patient |
|--------------------------|-----|----------|------|-----|--------|---------|--------------|---------|---------------------|
| <input type="checkbox"/> | Mon | 09/29/08 | 0700 | 30 | CTABD | No Show | V00000000231 | SCH CLI | Test, Nathan |
| <input type="checkbox"/> | Wed | 10/15/08 | 0700 | 15 | CTABD | Booked | V00000000235 | SCH CLI | Toso, Amy Elizabeth |
| <input type="checkbox"/> | Wed | 10/15/08 | 0730 | 15 | CTABD | Booked | V00000000236 | SCH CLI | Patient, Justin |
| <input type="checkbox"/> | Fri | 10/31/08 | 1100 | 30 | USABOP | Booked | V00000000268 | SCH CLI | Thrace, Kara |

Insurance Policy Number

Additional Information
 Facility: MVH
 Location: RAD
 Prior Location
 Inpatient Room/Bed
 Provider

Resource Resource Name Telephone
 USRMSAT US ROOM SATURDAY

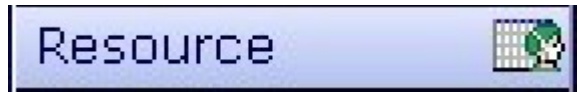
Display Letters Forms Switch Acct Change Status Transfer Duplicate Allergies Times E/E Alerts

Patient
 Department
 Appt Book
 Resource
 Waitlist
 Meeting
 Book
 Edit
 View
 Pending
 Set
 Series
 Orders
 Registration
 Check In
 Reports
 EMR
 Group
 Search for Appt
 Search for Alias

The footer buttons on this screen are the same as the Patient Booking screen, with one addition:

Transfer: Enables you to Transfer an appointment from one resource to another.

Resource Desktop



Use this routine to view or edit an individual resource's schedule. You can also book appointments from this routine.

Scheduler Desktop - MVH (CUS2/MOV56/MOV56) - MEDITECH

COMPUTERIZED TOMOGRAPHY ROOM
Resource Group
CT ROOMS

Date 10/16/08 Schedule 0700-1800

Resource

October 2008

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 28 | 29 | 30 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |

Thursday October 16, 2008

| | | | |
|------|------|-------------------|---|
| 0700 | 0730 | Palmer, Amanda F | |
| 0730 | 0900 | Available - CTRMS | |
| 0900 | 0930 | Guy, Alberta | |
| 0930 | 1000 | Available - CTRMS | W |
| 1000 | 1100 | Available - CTRMS | |
| 1100 | 1130 | Hrach, Gina | |
| 1130 | 1200 | Hobbs, Ellis | |
| 1200 | 1230 | Adama, Lee | |
| | | Adams, Sue | |
| 1230 | 1400 | Available - CTRMS | |
| 1400 | 1430 | Adams, Sue | |
| 1430 | 1800 | Available - CTRMS | |

| Patient Information | |
|---------------------|--------------|
| Birthdate | 04/02/1979 |
| Age/Sex | 29/F |
| Home Phone | 156-484-8488 |
| Soc Sec Num | 023-15-6454 |
| Account Num | V00000000273 |
| Med Rec Num | M000000191 |
| Insurance | |

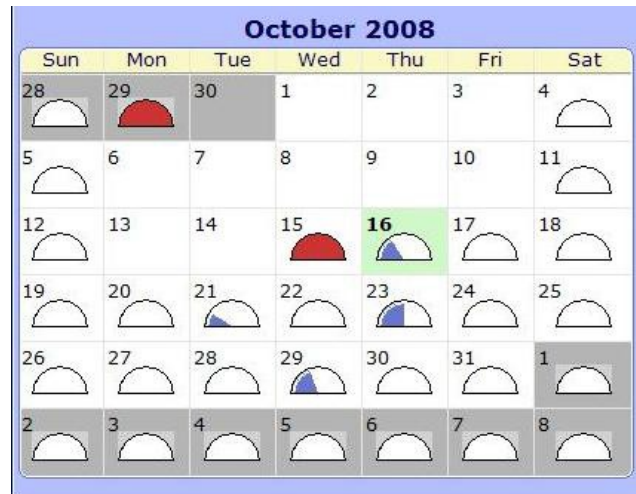
| Appointment Information | |
|-------------------------|---------|
| Appt Type | CTABD |
| Appt Duration | 30 |
| Facility | MVH |
| Provider | |
| Appt Status | BOOKED |
| Patient Type | SCH CLI |
| Reason For Visit | TEST |

[Patient](#) [Department](#) [Appt Book](#) [Resource](#) [Waitlist](#) [Meeting](#)
[Book](#) [Edit](#) [View](#) [Pending](#) [Set](#) [Series](#) [Orders](#) [Registration](#) [Check In](#)
[Reports](#) [EMR](#) [Group](#) [Search for Appt](#) [Search for Alias](#)

[Prev Month](#) [Next Month](#) [Go To Day](#) [Cut](#) [Copy](#) [Paste](#)

This routine is ideal for hospital personnel who wish to view their own schedule or book for themselves, as well as for schedulers who wish to process the appointments of a single resource.

In the calendar portion of this routine, a gauge tracks how much time the resource is booked for per day. If this gauge is red, it indicates that the resource has been overbooked.



In the pad portion of this routine, color coded boxes displays availability. A white line indicates that the time slot is available. A blue line indicates that the resource is booked for an appointment at that time. The Appointment Type and patient name displays in the line. A red line indicates overbooked time. Each patient that is booked in this time slot will have an individual line. When a users clicks on a line, additional patient and appointment information is displayed on the bottom of the screen.

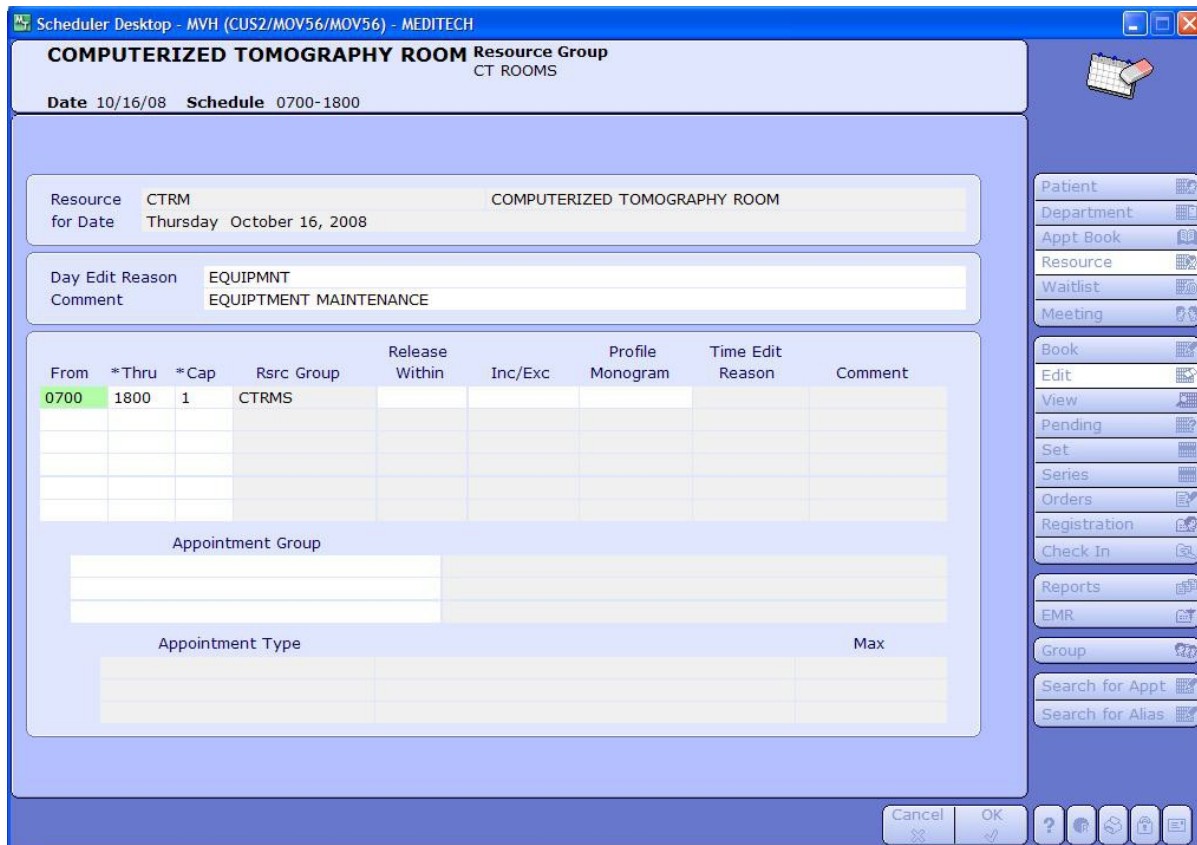
If time is being held for the waitlist, the system will display a “W” after any profile monogram. If a user clicks on the time slot the message "Time held For The Waitlist" will be displayed under the resource name in the header. Please see the parameters portion of the Dictionary Training Reference Guide for more information on waitlist held time.

| Thursday October 16, 2008 | | |
|---------------------------|------|-------------------|
| 0700 | 0730 | Palmer, Amanda F |
| 0730 | 0900 | Available - CTRMS |
| 0900 | 0930 | Guy, Alberta |
| 0930 | 1000 | Available - CTRMS |
| 1000 | 1100 | Available - CTRMS |
| 1100 | 1130 | Hrach, Gina |
| 1130 | 1200 | Hobbs, Ellis |
| 1200 | 1230 | Adama, Lee |
| | | Adams, Sue |
| 1230 | 1400 | Available - CTRMS |
| 1400 | 1430 | Adams, Sue |
| 1430 | 1800 | Available - CTRMS |
| | | |
| | | |
| | | |
| | | |

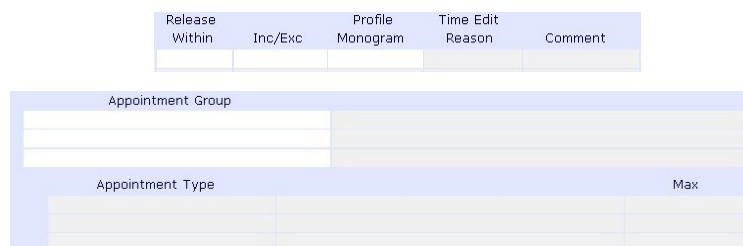
Editing a Resource's Schedule



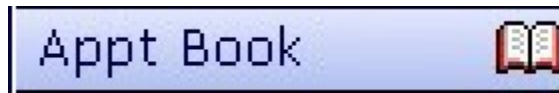
- With the desired day selected, hit the **Edit (E)** button. You will be brought to the Edit Resource Schedule screen.



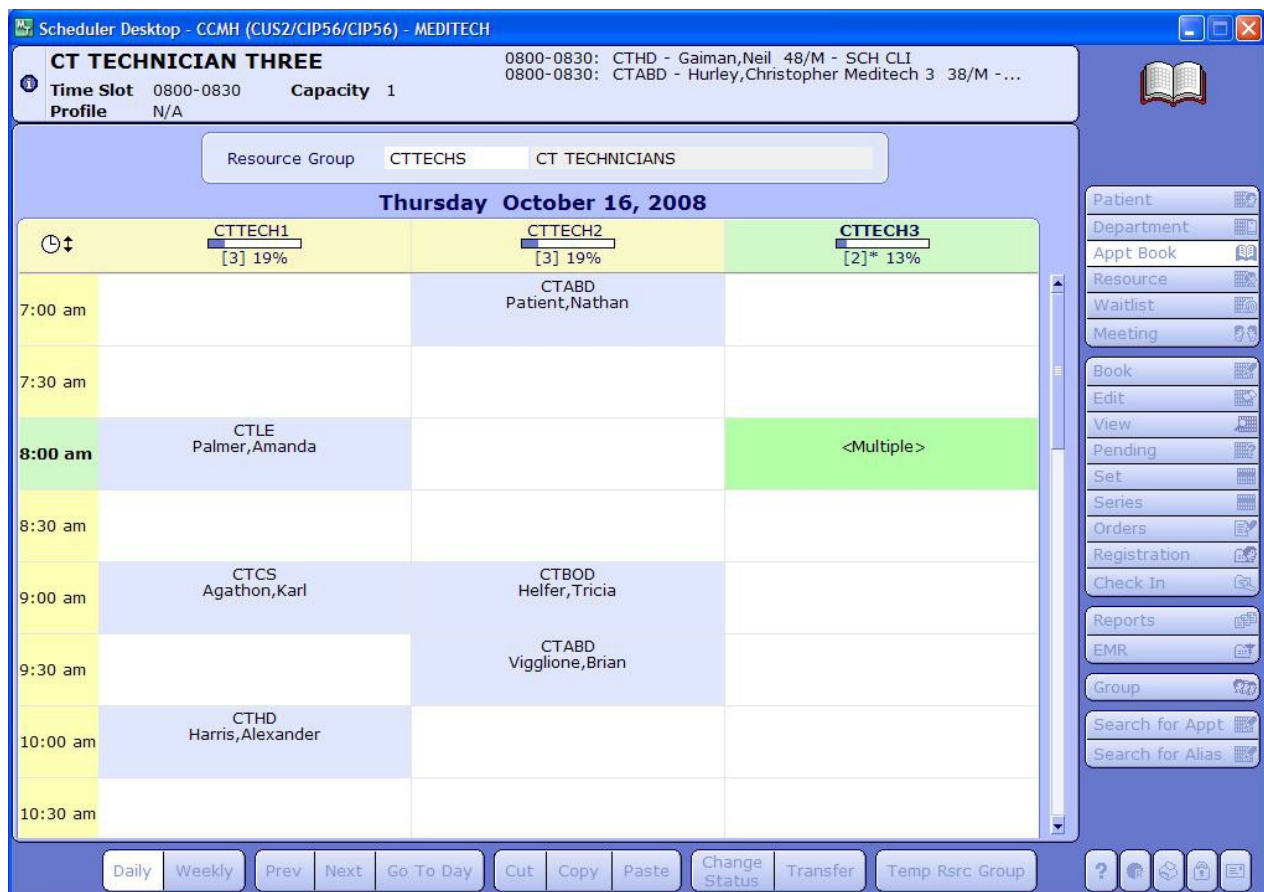
- To make a resource unavailable for all or part of the day, change the capacity in the available timeslots to 0 – or simply delete the timeslots from the day.
- The bottom portion of the screen can also be used to place temporary Appointment Profiles on selected time slots for a Resource



Appointment Book Desktop



Use this routine to view the schedules for an entire resource group at once. You can also view one resource's schedule for the week.



The screenshot shows the 'Scheduler Desktop - CCMH (CUS2/CIP56/CIP56) - MEDITECH' window. The main area displays a grid for 'Thursday October 16, 2008' with columns for three technicians: CTTECH1, CTTECH2, and CTTECH3. The rows represent time slots from 7:00 am to 10:30 am. The grid shows various appointment blocks with resource names and appointment types. For example, at 8:00 am, CTLE Palmer, Amanda is booked for CTTECH1, and CTTECH3 has a '<Multiple>' block. At 9:00 am, CTCS Agathon, Karl is booked for CTTECH1, and CTBOD Helfer, Tricia is booked for CTTECH2. At 9:30 am, CTABD Viglione, Brian is booked for CTTECH2. At 10:00 am, CTHD Harris, Alexander is booked for CTTECH1. The interface includes a top header with resource group information, a right-hand sidebar with navigation options like 'Patient', 'Department', 'Appt Book', 'Resource', 'Waitlist', 'Meeting', 'Book', 'Edit', 'View', 'Pending', 'Set', 'Series', 'Orders', 'Registration', 'Check in', 'Reports', 'EMR', 'Group', 'Search for Appt', and 'Search for Alias'. The bottom of the window has a toolbar with buttons for 'Daily', 'Weekly', 'Prev', 'Next', 'Go To Day', 'Cut', 'Copy', 'Paste', 'Change Status', 'Transfer', and 'Temp Rsrc Group'.

Appointments can be booked from this screen, as well as easily transferred between times and/or resources via a cut and paste function.

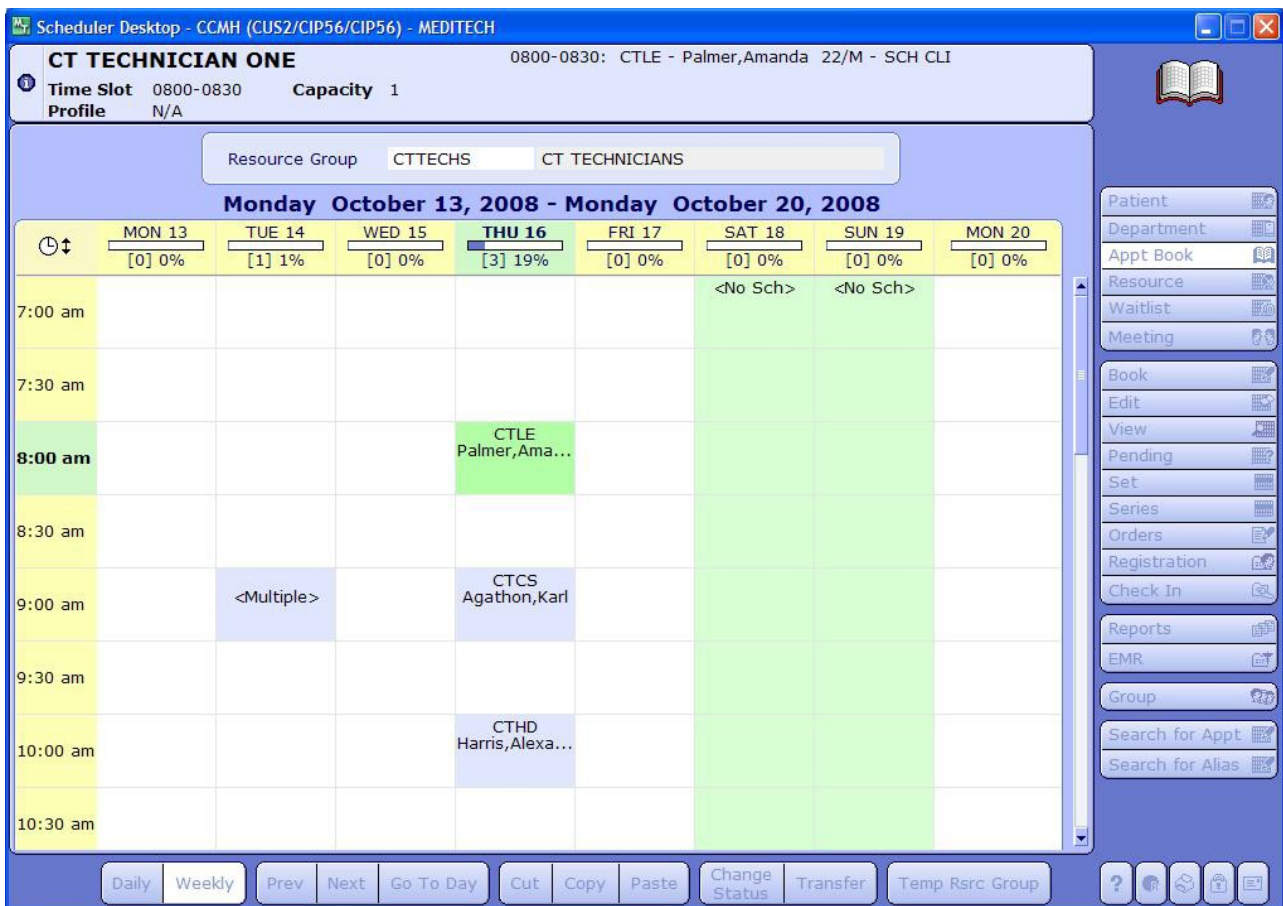
A **white** block indicates that the time slot is available. A **blue** block indicates that the resource is booked for an appointment at that time. The Appointment Type and patient name displays in the block. A **red** block indicates overbooked time or an appointment booked at an unavailable time. **<Multiple>** indicates that there are two or more patients booked at

the same time. Additional patient information is displayed in the top bar when a user clicks on a time block. If time is being held for the waitlist, the system will display that slot in **yellow**.

If a user clicks on the time slot the message, **"Time Held for the Waitlist"**, it will be displayed under the capacity in the header. Finally, a **grey** block indicates that there is no schedule defined for the resource at that time.

By clicking on the clock in the left corner of the Appointment Book, you may change the time display. For example, you may choose to view thirty minute time increments instead of sixty.

Views can be changed from **Daily** to **Weekly** views. **Daily** shows you all the resources in the group for the day you've selected. **Weekly** will show you the weekly schedule for whatever resource you've highlighted.



The screenshot shows the Scheduler Desktop interface for 'CT TECHNICIAN ONE'. The window title is 'Scheduler Desktop - CCMH (CUS2/CIP56/CIP56) - MEDITECH'. The header displays '0800-0830: CTLE - Palmer,Amanda 22/M - SCH CLI' and 'Capacity 1'. The 'Resource Group' is set to 'CTTECHS' and 'CT TECHNICIANS'. The main view is a weekly appointment book for 'Monday October 13, 2008 - Monday October 20, 2008'. The interface includes a navigation bar at the bottom with buttons for 'Daily', 'Weekly', 'Prev', 'Next', 'Go To Day', 'Cut', 'Copy', 'Paste', 'Change Status', 'Transfer', and 'Temp Rsrc Group'. A right-hand sidebar contains various menu options like 'Patient', 'Department', 'Appt Book', 'Resource', 'Waitlist', 'Meeting', 'Book', 'Edit', 'View', 'Pending', 'Set', 'Series', 'Orders', 'Registration', 'Check In', 'Reports', 'EMR', and 'Group'.

| | MON 13 | TUE 14 | WED 15 | THU 16 | FRI 17 | SAT 18 | SUN 19 | MON 20 |
|----------|--------|------------|--------|----------------------|--------|----------|----------|--------|
| 7:00 am | [0] 0% | [1] 1% | [0] 0% | [3] 19% | [0] 0% | <No Sch> | <No Sch> | [0] 0% |
| 7:30 am | | | | | | | | |
| 8:00 am | | | | CTLE Palmer,Ama... | | | | |
| 8:30 am | | | | | | | | |
| 9:00 am | | <Multiple> | | CTCS Agathon,Karl | | | | |
| 9:30 am | | | | | | | | |
| 10:00 am | | | | CTHD Harris,Alexa... | | | | |
| 10:30 am | | | | | | | | |

This routine is ideal for decentralized schedulers who need to view the schedules of all resources in a group simultaneously.