

PIMS V. 5.3 Scheduling Module User Manual Supervisor Menu

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Revision History

Initiated on 04/11/05

Date	Description (Patch # if applic.)	Project Manager	Technical Writer
4/11/05	SD*5.3*380 – updated options: Inactivate a Clinic Reactivate a Clinic Set up a Clinic	Beverly Jones	Berry Anderson
5/13/05	SD*5.3*398 – updated option Cancel Clinic Availability		Corinne Bailey
7/31/06	SD*5.3*478 - Consult/Scheduling Appointment Link Updated Cancel Clinic Availability option	Zach Fain	Corinne Bailey
8/14/08	Minor Formatting Changes	Zach Fain	Corinne Bailey
1/27/10	SD*5.3*547 – Update to: Non-Conforming Clinics Stop Code Report	April Scott	Gary Werner
10/25/10	SD*5.3*568 – Added two new options to the SDSUP menu: “Edit Clinic Stop Code Name- Local Entries Only” option and the “Clinic Edit Log Report” option.	John Mahan	Tavia Leonard

Overview

The Supervisor Menu provides the capability for supervisors and their designees to set up and maintain the Scheduling module. The following is a brief description of the options included in the Supervisor Menu.

ADD/EDIT A HOLIDAY

This option is used to add, edit and delete holidays to or from the HOLIDAY file.

APPOINTMENT STATUS UPDATE MENU

APPOINTMENT STATUS UPDATE

This option is used by the supervisor to update the status of appointments within a specified date range.

PRINT APPOINTMENT STATUS UPDATE (DATE RANGE)

This option is used to produce a report showing the status update history in the APPOINTMENT STATUS UPDATE LOG file for each individual date in a specified date range.

PURGE APPOINTMENT STATUS UPDATE LOG FILE

This option is used to purge data within a specified date range from the APPOINTMENT STATUS UPDATE LOG file.

VIEW APPOINTMENT STATUS UPDATE DATE (SINGLE DATE)

This option is used to view the status update history for a specified date in the APPOINTMENT STATUS UPDATE LOG file.

APPOINTMENT WAITING TIME REPORT

This option is used to show the waiting times for patients with scheduled appointments.

CANCEL CLINIC AVAILABILITY

This option is used to cancel a clinic's availability for either a whole day or portions of a day.

Overview

CHANGE PATTERNS TO 30-60

This option is used to change patterns which had been created with 15 minute increments to the 30-60 minute increment pattern.

CLINIC EDIT LOG REPORT

This option will allow you to identify changes made to entries in the HOSPITAL LOCATION file (#44). This report is sorted by USER NAME or by DATE CHANGED and will identify the field changed. Each change is reported individually and includes the old and new values along with identifying who made the change.

NOTE:

This option will not be assigned to any given menu in the SD namespace at this time; however it can be assigned to any menu or individual user as needed.

CONVERT PATIENT FILE FIELDS TO PCMM

This option is used to convert the primary care data manually entered prior to the release of the PCMM software.

CURRENT MAS RELEASE NOTES

This option is used to generate a copy of the current release notes for the MAS product.

EDIT CLINIC STOP CODE NAME-LOCAL ENTRIES ONLY

This option will allow the user to edit only the NAME field for CLINIC STOP (#40.7) file. Only those entries identified as "local" may be edited.

Any entry associated with the AMIS REPORTING STOP CODE VALUES of 451-456, 458-473, 475-479, and 482-485 is considered local and may be edited.

ENTER/EDIT LETTERS

This option is used to enter individual letters under the following four letter types: Pre-appointment, Appointment Cancelled, No-Show, and Clinic Cancelled.

INACTIVATE A CLINIC

This option is used to render a clinic inactive (no activity allowed) as of a selected date. Once the clinic is inactivated, it will remain so until it is reactivated through the Reactivate a Clinic option.

LOOK UP ON CLERK WHO MADE APPOINTMENT

This option is used to view information on a selected appointment.

NON-CONFORMING CLINICS STOP CODE REPORT

This option is used to list clinics in the HOSPITAL LOCATION file that do not conform to the stop code restriction types. Additionally, the report will include clinics that contain stop codes (i.e. primary, secondary or both) that have been inactivated and the effective date of the inactivation.

PURGE SCHEDULING DATA

This option is used to delete various non-essential nodes created by the Scheduling module in the HOSPITAL LOCATION and PATIENT files.

REACTIVATE A CLINIC

This option is used to reactivate clinic availability for any clinic which has been inactivated through the Inactivate a Clinic option.

REMAP CLINIC

This option is used to reset the clinic availability patterns of established clinics. It updates the pattern to insure knowledge of a holiday or deletion of a holiday.

RESTORE CLINIC AVAILABILITY

This option is used to restore the availability for a previously cancelled clinic.

SCHEDULING PARAMETERS

This option is used to display and edit the Scheduling site parameters.

SET UP A CLINIC

This option is used to define/edit clinic parameters and establish appointment availability patterns for the clinics.

SHARING AGREEMENT CATEGORY UPDATE

This option is used to define subcategories for appointment types and assign them as active status.

Add/Edit a Holiday

The Add/Edit a Holiday option is used to add/edit/delete holidays. It is important to note that clinics affected by changes to holiday dates must be remapped. Remapping updates the clinic pattern to insure inclusion or exclusion of the holiday.

Appointment Status Update Menu

Appointment Status Update

The Appointment Status Update option is used by the Scheduling supervisor to update the status of outpatient encounters (appointments, add/edits, and dispositions) within a specified date range.

A status of NO ACTION TAKEN or ACTION REQUIRED is assigned to any encounter within the specified date range that has not been checked in, checked out, no-showed or cancelled. These appointments will not be transmitted to the NPCDB to Austin.

Normally, the system should be set up to automatically execute this function by running the SDAM BACKGROUND JOB. This background job should be queued to run daily. If, however, this daily background job fails to run or does not complete the update, you may use this option to execute the update functionality.

You are prompted for a date range. The date range entered must be in the past, beginning on 6/1/92 or later and ending no later than the current date. You are also prompted for a date/time to queue the update. Once the update function has been queued, it will be assigned an internal task number. This is the number you would use to identify the task to IRM service should problems occur.

Both the background job and this option generate a MailMan message to the mail group specified by the APPT. UPDATE MAIL GROUP site parameter. The message includes the following information: the start and finish date/time for the job, date range covered by the update, clinic or stop code name, number of outpatient encounters that require action, total number of appointments, stops, and dispositions, and the percentage of each with a status of NO ACTION TAKEN or ACTION REQUIRED.

Appointment Status Update Menu

Print Appointment Status Update (Date Range)

The Print Appointment Status Update (Date Range) option is used to produce a report showing the status update history in the APPOINTMENT STATUS UPDATE LOG file for each individual date in a specified date range.

You will be prompted to select a date range and a device. If the appointment status update process has not been accomplished for any date within the selected date range, that date will not appear in the output.

An Appointment Status Log will be displayed showing the following information for the specified date:

- Appointment Date - date specified by user
- Date Update Started - date/time the appointment status update process was begun
- Completed - date/time the appointment status update process was completed
- Method - will be either DAILY BACKGROUND JOB (if update process was accomplished automatically) or MANUALLY QUEUED (if update process was generated through the Appointment Status Update option)
- By - user who generated the status update process

Appointment Status Update Menu Purge Appointment Status Update Log File

The Purge Appointment Status Update Log File option is used to purge data within a specified date range from the APPOINTMENT STATUS UPDATE LOG file.

You will be prompted for a date range. The selected time frame cannot be later than the current fiscal year plus one fiscal year. For example, if today's date is March 18, 1997, you may only select a date range before September 30, 1995 (current FY97 plus FY96). Remember, September 30 is the last day of the fiscal year.

Once the output has been queued, it will be assigned an internal task number. This is the number you would use to identify the task to IRM service should problems occur.

A MailMan bulletin will be generated to the user who purged the data. It will appear as NEW mail and will show the date/time the appointment status update log purge was completed and the total number of records purged within the selected date range.

Appointment Status Update Menu

View Appointment Status Update Date (Single Date)

The View Appointment Status Update Date (Single Date) option is used to view the status update history for a specified date in the APPOINTMENT STATUS UPDATE LOG file.

You will be prompted to select a single appointment date. You will only be allowed to select a date for which the appointment status update process has been accomplished. The default date at this prompt will be LAST, allowing you to select the last date the appointment status update process was generated.

An Appointment Status Log will be displayed showing the following information for the specified date.

- Appointment Date - date specified by user
- Date Update Started - date/time the appointment status update process was begun
- Completed - date/time the appointment status update process was completed
- Method - will be either DAILY BACKGROUND JOB if update process was accomplished automatically) or MANUALLY QUEUED (if update process was generated through the Appointment Status Update option)
- By - user who generated the status update process

Appointment Waiting Time Report

The Appointment Waiting Time Report option is used to show the waiting times for patients with scheduled appointments. The patient must have been checked-in and checked-out to appear on the output.

You may choose a full report (containing individual patient names, appointment dates/times, check-in/check-out dates/times) or a totals report only.

The top level sort of any report will be by division. Second level sort choices include the following.

- Clinic, patient
- Clinic, appointment date/time
- Stop code, clinic
- Stop code, patient
- Patient, appointment date/time

If choosing to sort by clinic or stop code, all or up to 20 individual clinics/stop codes may be selected. When choosing the last sort selection, all patients will be included.

Definitions of the data elements used on the report are provided as part of the output. You must print the output at 132 col. margin width.

Cancel Clinic Availability

The Cancel Clinic Availability option allows the user to cancel a clinic's availability for either a whole day or portions of a day. Only one portion of a day may be cancelled at a time. If several portions of a day are to be cancelled, the option must be re-entered to cancel each portion. If part of the same day has been cancelled previously, the cancellation(s) will be listed. You may cancel another portion(s) as long as the new cancellation does not overlap any previous cancellation(s).

After you have entered the desired clinic name and date, the system will list any scheduled appointments that exist during that time in a report entitled Pre-cancellation List. This report lists the patient name, SSN, appointment time, appointment length, and the patient's telephone number. Any patients with a Bad Address indicator will be denoted with an asterisk (*) and a message will be printed at the end of the report. If the cancelled appointments are not auto-rebooked, they will need to be rescheduled through the Make Appointment option in the Appointment Menu. The information requested to accomplish this could be taken from the Pre-Cancellation List report. The report could also be an aid in notifying patients of cancellations by telephone in the event there was not enough time to reach them by mail.

If you choose to automatically re-book the cancelled appointments, the Cancelled Clinic Auto-Rebook Report will be generated. This report provides the clinic name, date cancelled, patient name and social security number, old appointment time, and new date and time.

If auto-rebooking of appointments has occurred while utilizing this option, the Cancelled Clinic Auto-Rebook Report will be generated. This report shows the new date/time of the rebooked appointments including the ancillary test time. There are three parameters that affect the auto-rebooking of appointments with associated ancillary tests. They are: OP LAB TEST START TIME, OP EKG START TIME, and OP X-RAY START TIME. If a time is entered at these parameters, the ancillary test time will not rebook before the start time specified in the parameter.

The option requires a reason for clinic cancellation (3-160 characters). This reason will be made part of all cancelled appointments and can be seen using the Expand Entry (EP) command in Appointment Management.

Cancel Clinic Availability

The option provides the capability to print cancellation letters at this time. A cancellation letter must have been previously entered through the Enter/Edit Letters option and assigned to the clinic being cancelled through the Set up a Clinic option. This letter will notify patients of the appointment cancellation and the new date/time scheduled. A list of patients with a Bad Address indicator will print after the cancellation letters have printed. Letters for these patients will not print.

A status of CANCELLED BY CLINIC will appear on the Patient Profile of each patient whose appointments are cancelled through this option. The user who entered the cancellation will also be noted.

Change Patterns to 30-60

The Change Patterns to 30-60 option allows you to change patterns that were created with 15 minute increments to the 30-60 minute increment pattern. If you need assistance in establishing clinic availability patterns, please refer to the Set Up a Clinic option documentation.

The “Display Increments per Hour: {#} MIN//” field **SHOULD NOT BE EDITED** when patterns have been established using another increment per hour. Editing this field will cause existing patterns to be erroneous and scheduling conflicts may also occur if the increments are changed.

You may be asked if you wish to delete clinic availability for a particular day of the week. The system will not permit deletion of existing appointments through this option.

Utilizing the Change Patterns to 30-60 option may adversely affect existing appointments.

The software will check to see if any availability dates for the selected clinic have previously been cancelled. If so, the following message will appear and you will be given the opportunity to print a listing of the affected days.

"Availability has been cancelled previously. The day(s) has been overwritten with the new availability. Would you like to see the day(s) that has been affected? YES//".

NOTE: If you initially set up a clinic with 20 minute increments, using this option to change the pattern could cause the clinic availability pattern to display incorrectly. This option is **NOT** recommended for use with 20 minute increment appointment slots.

Clinic Edit Log Report

The Clinic Edit Log Report option allows the user the ability to identify changes made to entries in the HOSPITAL LOCATION file (#44). This option has the capability of sorting a report by using one of the following categories: USER NAME or DATE CHANGED, either method will identify the field changed and include the old and new values.

This option is added to the ECX SETUP CLINIC menu.

Convert Patient File Fields to PCMM

This option is used to convert the data stored in the following fields of the PATIENT file (#2) to primary care data for those facilities which have been manually entering primary care data prior to the release of the PCMM software.

CURRENT PC PRACTITIONER (#404.01) and CURRENT PC TEAM (#404.42)

The team must be fully defined and a practitioner can be assigned to only one position on the team before the software will assign patients to that team and team positions.

You may choose to assign patients to teams and team positions right away. It is recommended that you initially choose not to assign patients, so that the option will generate a report showing how what assignments would be made. You could then use the output as a guide when setting up new teams and assigning practitioners and patients to teams.

You may also choose to print a detail line on the report for each patient that is assignable. At those sites where the patient number would be quite large, you may wish to just print the team and practitioner information.

Since this output may be quite lengthy, it is recommended the report be queued.

NOTE: This option is not intended for use as an alternative to patient assignments via PCMM.

Current MAS Release Notes

The Current MAS Release Notes option is used to generate a copy of the current release notes for the MAS (PIMS) software product. When selected, the option will display which version number of the MAS release notes it will generate. You will then be prompted for a device. Due to the length of the MAS release notes, you may wish to queue the output.

Edit Clinic Stop Code Name – Local Entries Only

The Edit Clinic Stop Code Name – Local Entries Only option is used to edit the NAME field of entries identified as “local” in the CLINIC STOP file (#40.7). Entries in the CLINIC STOP file (#40.7) are considered local if their AMIS REPORTING STOP CODE falls into the one of the following ranges: 451-456, 458-473, 475-479 and 482-485.

The CLINIC STOP file (#40.7) is now locked down and this option is the “*only*” method that can be used to edit existing entries and allows editing the NAME of “local” entries.

Enter/Edit Letters

The Enter/Edit Letters option is used to enter individual letters under the following four letter types: Pre-appointment, Appointment Cancelled, No-Show, and Clinic Cancelled. At the time a clinic is set up, the user may choose which specific letter for each letter type he/she wants associated with that clinic. These letters will then be generated through selected Scheduling options.

The purposes of the four letter types are:

Pre-Appointment - to remind the patient of pending appointment(s).

Clinic Cancelled - to notify patient(s) that a clinic appointment has been cancelled by the clinic; due to either cancellation of the entire clinic or cancellation of an individual appointment, and to inform them if a new appointment was made through auto-rebook.

No-Show - to alert the patient to the fact that a scheduled appointment was missed.

Appointment Cancelled - to inform the patient that a new appointment was made through auto-rebook when the patient cancelled the appointment.

Whether the patient's address appears at the top or bottom of the page when these letters are generated depends on how the site parameter, ADDRESS LOCATION ON LETTER, is set at your facility. If parameter, USE TEMPORARY ADDRESS, is set to NO, the patient's permanent address will be used when printing the letters even if the temporary address date range is in effect.

Inactivate a Clinic

The Inactivate a Clinic option is used to render a clinic inactive (no activity allowed) as of a selected date. Once the clinic is inactivated, it will remain so until it is reactivated through the Reactivate a Clinic option. You may not inactivate a clinic which has appointments scheduled on and/or after the selected inactivation date.

If the clinic was previously scheduled to be inactivated, you will be able to choose one of the following courses of action: to delete the inactivate date and either restore or reconstruct the previous clinic availability patterns; to allow the present inactivation date to remain in effect; to change the present inactivation date to another date.

If you decide to restore or reconstruct clinic availability patterns, you will be prompted to either examine existing patterns and verify them and/or enter each new availability date, time, and number of slots. See the Set Up a Clinic option for help in establishing clinic availability patterns.

If a clinic has nonconforming stop codes in the CREDIT STOP CODE (ACST) [2053,(0;18)] and STOP CODE NUMBER [8,(0;7)] you will be given a warning message. You may inactivate the clinic without fixing the problem. To correct the problem, use the Set up a Clinic option.

Look up on Clerk Who Made Appointment

The Look up on Clerk Who Made Appointment option is used to view information on a selected appointment. The user chooses the patient, clinic, and date/time of appointment.

Information which may be displayed includes patient name and SSN, clinic name, appointment date/time, person who made appointment, date appointment was made, purpose of visit, and appointment type.

The first two groups of data headings will be shown for every appointment. The elements which appear in the third group will depend on the appointment status. If the appointment was cancelled, the first two entries in the second data group will be blank.

The appointment status may be NO-SHOW, CANCELLED, or INPATIENT. If the appointment was a no-show or cancellation, the name of the clerk who entered the status may be provided along with the date/time of the entry, cancellation reason, cancellation remarks, auto-rebook date, and whether or not the appointment was rescheduled. If the appointment was routinely kept or is in the future, the appointment status will read ACTIVE.

If the Purge Scheduling Data option has been utilized, some fields may not appear.

Non-Conforming Clinics Stop Code Report

Effective 10/1/2003, stop codes shall be assigned a restriction type of primary, secondary, or either. Primary types can only be used in the primary stop code position; secondary types can only be used in the secondary stop code position; and those with a type of either can be used in the primary or secondary stop code position. Stop codes that have a restriction type of primary or secondary will also have a restriction date to track when the stop code is designated as a restricted stop code.

The Non-Conforming Clinics Stop Code Report option is used to print a listing of the clinics that do not conform to the stop code restriction types. Additionally, the report will include clinics that contain stop codes (i.e. primary, secondary or both) that have been inactivated and the effective date of the inactivation.

You may choose to print the report for active clinics, inactive clinics, or both. The report will list the IEN number, clinic name, primary stop code, secondary stop code, and the reason for non-conformance.

If all the selected clinics conform to the stop code restriction types, "No problem clinics found" is displayed on the report. If necessary, you may use the Set up a Clinic option to make corrections to the problem clinics.

Purge Scheduling Data

The Purge Scheduling Data option is used to delete various non-essential nodes created by the Scheduling module in the HOSPITAL LOCATION and PATIENT files. You are required to keep one full fiscal year of data on line. You may select which files to purge and may choose to print the nodes (in GLOBAL format - %G) as they are deleted.

This option is utilized to retrieve disk space and should be run during off-hours.

Reactivate a Clinic

This option enables the user to reactivate clinic availability for any clinic which has been inactivated through the Inactivate a Clinic option. A valid reactivate date is any date that is later than the inactivate date.

When the clinic is initially reactivated, you will be prompted to establish clinic availability patterns for the reactivate date. It is imperative that a pattern be established for this date. Without re-establishing the pattern, users will be **unable** to book appointments into the reactivated clinic. Patterns for other dates may be established at this time, if desired. For assistance in establishing clinic availability patterns, please refer to the Set Up a Clinic option.

If the selected clinic was previously assigned a reactivate date, you may either change the old date to a new date or delete the old date entirely. It is important to note that if you choose to delete, the clinic will remain inactivated until a new reactivate date is entered.

If a clinic does not have conforming stop codes, you will not be able to reactive it before correcting the problem by returning to Set up a Clinic. Stop codes are used in accordance with their assigned restriction types. Stop codes with restriction type "P" can only be used in the primary stop code position. Stop codes with restriction type "S" can only be used in the secondary stop code position. Stop codes with restriction type "E" can be used in either the primary or secondary stop code position.

Remap Clinic

The Remap Clinic option is used to reset the clinic availability patterns of established clinics. It updates the pattern to insure knowledge of the holiday or deletion of the holiday. The HOLIDAY file is usually updated annually. This option must be run for each clinic which meets on the date of the holiday. The Remap Clinic option would also be utilized if the clinic set-up was edited from no scheduling on holidays to scheduling on holidays or vice/versa. Before the clinic is remapped for any date on which existing appointments may be deleted, the appointments must be cancelled.

You may choose to remap for one/many/all clinics and, at multidivisional facilities, for one/many/all divisions. The system will insert the holiday name into clinic availability patterns even if the clinic does not meet on the day of the holiday.

The following messages may appear under the "Remark" section of the output generated by this option or on your screen while utilizing the option.

MESSAGE

Bogus clinic day- Appts!

[HOLIDAY NAME]- Appts!

no master pattern found
for this day

OCCURS WHEN

the date and day of the week
do not correspond

appointments exist on a holiday and
the clinic does not schedule on
holidays. This allows you to cancel
and reschedule appointments if
necessary.

no day of the week template exists
for this day of the week

Remap Clinic

The following message may appear on the output.

MESSAGE

Cancelled

OCCURS WHEN

availability was cancelled. If appointments were originally scheduled on a holiday and later cancelled, you must restore availability for the selected date and remap that date to insert the holiday; otherwise, it will remain cancelled.

The following message may appear on the screen.

Cancelled - Appts!

appointments were originally scheduled on a holiday and later cancelled. You must first restore clinic availability for the selected date in order to remap and to show the holiday in the pattern.

Restore Clinic Availability

The Restore Clinic Availability option is used to restore the availability for a previously cancelled clinic. Availability may be restored for the entire day. If only portions of the day were cancelled, one/many/all of those portions may be restored.

Appointments which were rescheduled using the auto-rebook feature at the time of cancellation will **not** be moved back to their original time slots.

Scheduling Parameters

The Scheduling Parameters option is used to display and edit the Scheduling-related parameters using the List Manager functionality.

If a plus sign + appears at the bottom of the display region, it means more information is available and you may use other commands (e.g., Next Screen, Previous Screen, First Screen, Last Screen, Up a Line, Down a Line) to scroll the display and view the additional screens. <??> may be entered to display all of the List Manager actions available.

Site Parameters

APPT. SEARCH THRESHOLD

The number of days in the past the Appointment Management option should initially search for appointments. When the user selects a patient, this parameter will automatically be used to search that many days in the past for appointments. When a clinic is selected, the user is prompted for a date range. This number will be used to calculate the default beginning date. If this field is left blank, the system will use 2 days.

APPT. UPDATE MAIL GROUP

The name of the mail group which should be notified whenever the Appointment Status Update Job has been completed.

NPCDB GENERATE MAIL GROUP

The name of the mail group which should be notified whenever generation of the NPCDB update has been completed.

VIEW CHECK OUT INFO DEFAULT

During the editing of the disposition, should the user default answer to the "Do you wish to see the check out screen" prompt by YES or NO.

LATE ACTIVITY MAIL GROUP

The name of the mail group which should be notified when there is late entry/edit of NPCDB-related information. "Late entry" is defined as information entered after workload closeout has occurred for the visit date.

API ERRORS MAIL GROUP

The name of the mail group that will receive notification messages from the Scheduling API.

Scheduling Parameters

Site Parameters

API NOTIFICATIONS TO PROCESS

Enter the type of notification messages the Scheduling API should process. The choices are Errors Only, Warnings & Errors, or None.

ALLOW UP-ARROW OUT OF CLASSIFICATION

If set to YES, this parameter allows the user to up-arrow out of the classification questions. These questions are required for workload credit. Allowing the user to exit without answering these questions could also result in additional work at a later time.

Division Parameters

ADDRESS LOCATION ON LETTERS

The location (top or bottom) where the address should appear for letters generated for appointments or other activities at this division.

OP LAB TEST START TIME

OP EKG START TIME

OP X-RAY START TIME

The time at which lab, EKG, x-ray tests begin. When an appointment is rebooked, the test time will not rebook before the time specified in the parameters. The times must be entered in military time format (e.g., 0800).

Two functions of the Automated Information Collection System (AICS) software are available through this option - Clinic Print Manager and Division Print Manager.

Clinic Print Manager

Enter or edit reports/encounter forms printed for a specified clinic.

BASIC DEFAULT ENCOUNTER FORM

This is the encounter form that will be printed for every appointment.

SUPPLMNTL FORM - ALL PATIENTS

A supplemental form to be used by all patients of the clinic. A form in this category should **not** also be in one of the other categories for supplemental forms or it would print twice. You may have up to three supplemental forms for all patients.

Scheduling Parameters

Clinic Print Manager

SUPPLMNTL FORM - ESTBLSHED PT.

A supplemental form that will print only for patients who have previously been seen in the clinic.

SUPPLMNTL FORM - FIRST VISIT

A supplemental form that will print only for patients who have not previously been seen at the clinic.

FORM W/O PATIENT DATA

The encounter form that should be printed for unscheduled visits. It can have a space in the top left hand corner for imprinting the embossed patient card or writing in patient data.

RESERVED FOR FUTURE USE

This category was created to store new forms that have not yet been completed. Forms entered here are not printed.

DON'T USE PCMM PROVIDERS

The software defaults to printing providers specified in PCMM, if defined; otherwise, providers from the clinic setup are used. If YES is entered, the software prints the providers from clinic setup regardless of PCMM.

SELECT REPORT

Reports that should be printed for the clinic **in addition** to the encounter forms that have been selected. Only reports contained in the PACKAGE INTERFACE file can be selected at this prompt.

SIMPLEX/DUPLEX

Allows reports to be printed one-sided or two-sided.

SELECT EXCLUDED REPORT

Reports that you **do not** want to print for this clinic. Entering a report as an excluded report will prevent it from printing even if it is defined to print for every appointment for the division. Reports defined through the Division Print Manager action as printing *only earliest appointment* or *only if multiple appointments* will not be excluded from printing for the first clinic.

Scheduling Parameters

Division Print Manager

Print selected reports for a specified division under certain conditions.

SELECT REPORT

Only reports contained in the PACKAGE INTERFACE file can be printed. Other reports can be added to the file; however, only health summary reports can be added by most users. Reports other than health summary can only be added by IRM personnel.

REPORT PRINT CONDITION

The condition under which the report should print. Choose from:

For Every Appointment - Form will print for every appointment.

Only for Earliest Appointment - Form will print once per patient, even if the patient has multiple appointments. It will print even if it is defined to be excluded through the Clinic Print Manager action. One form will print for each division.

Only if Multiple Appointments - Form will print for the earliest appointment for patients with multiple appointments. It will print even if it is defined to be excluded through the Clinic Print Manager action. One form will print for each division.

SIMPLEX/DUPLEX

Allows reports to be printed one-sided or two-sided.

Set up a Clinic

The Set up a Clinic option is used to define/edit clinic parameters and establish appointment availability patterns for the clinics at your facility. Appointments may not be made through the Scheduling package to clinics not defined through this option.

Following is some of the basic clinic information established through this option.

- service associated with the clinic
- is/is not a non-count clinic
- ask for check in/out time
- number of allowable consecutive no-shows
- appropriate stop code number
- is/is not a variable length clinic
- can/cannot schedule to this clinic on holidays
- include/don't include on file room lists
- whether or not each visit to the clinic requires x-ray films and/or action profiles

Prior to using this option, the four letter types which the Scheduling package uses (NO-SHOW, PRE-APPOINTMENT, CLINIC CANCELLED, and APPOINTMENT CANCELLED) must have letters defined through the Enter/Edit Letters option of this menu. Each letter type may have several differently worded letters associated with it. This option will allow you to associate these letters with the clinic you are entering. Letters are automatically generated when the appropriate action is taken through one of the Scheduling menu options.

When editing the parameters of an existing clinic, previous entries will appear as defaults. When setting up a new clinic, certain prompts will appear with defaults. When editing an existing clinic, entry of an up-arrow <^> will generally advance you to the "AVAILABILITY DATE" prompt. When entering a new clinic, up-arrows <^> are generally not permitted until all information up to the "AVAILABILITY DATE" prompt has been entered.

Once you have established the pattern for the clinic you will be asked if that pattern is correct for that day of the week indefinitely. If you answer YES, the Availability Date prompt will appear again. You may enter a date for a new day of the week and then establish the pattern, or enter <RET> to exit. If you answer NO, you must then verify the pattern for each consecutive matching day of the week as far into the future as is necessary.

Set up a Clinic

When editing an existing clinic set up through this option, the software will check to see if any availability dates for that clinic have previously been cancelled. If so, the following message will appear and you will be given the opportunity to print a listing of the affected days.

"Availability has been cancelled previously. The day(s) has been overwritten with the new availability. Would you like to see the day(s) that has been affected? YES//".

You cannot establish a pattern for a clinic that is too wide to fit the 80 character screen. The INCREMENTS PER HOUR, LENGTH OF APPOINTMENT, and HOUR CLINIC DISPLAY BEGINS fields SHOULD NOT BE EDITED (either through this option or through FileMan) once the clinic has been established. If the desired changes cannot be made through the Change Patterns to 30-60 option, the clinic will have to be inactivated and then rebuilt.

Set up a Clinic

This supplement describes the fields as they will appear during entry of a new clinic.

ABBREVIATION

An abbreviation for the clinic name 1-7 characters in length.

CLINIC MEETS AT THIS FACILITY?: YES

<RET> to accept the default of YES. NO if the clinic meets elsewhere.

SERVICE

The hospital service associated with this clinic. Enter <RET> for a list of services.

NON-COUNT CLINIC? (Y OR N)

YES if visits should **not** affect AMIS statistics. NO if visits **should** affect AMIS statistics

INCLUDE ON FILE ROOM LISTS

This field will only appear for non-count clinics. YES to include this clinic on file room lists; NO to not include.

STOP CODE NUMBER

Three digit stop code number assigned to this clinic. <??> for a list of stop codes. Inactive stop codes are invalid. Stop code 900 cannot be used for a clinic. Stop code must have a restriction type of "Primary" or "Either" and not have a future restriction date.

DEFAULT APPOINTMENT TYPE: REGULAR

Default appointment type for this clinic. <RET> to accept default. <?> for list of appointment types.

REQUIRE X-RAY FILMS

YES to have x-ray films pulled for visits to this clinic. <RET> for no films.

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, enter an at-sign <@> to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

REQUIRE ACTION PROFILES?: YES

Will pharmacy action profiles be required for patients scheduled in this clinic? <RET> or 0 for YES, 1 for NO.

Set up a Clinic

The next four fields prompt for the letters which are printed for this clinic through other menu options. An entry is not required; however, no letter will be printed for this clinic when action is taken through the listed menu option if the field is blank.

NO-SHOW LETTER

This letter will be generated in conjunction with no-shows entered for this clinic through the No-Show option of the Appointment menu. Enter the name of the no-show letter. <?> for a list of no-show letters. <RET> to leave blank.

PRE-APPOINTMENT LETTER

This letter will be generated through the Print Scheduling Letters option of the Output menu advising patients of upcoming appointments to this clinic. Enter the name of the pre-appointment letter. <?> for a list of pre-appointment letters. <RET> to leave blank.

CLINIC CANCELLATION LETTER

This letter will be generated for this clinic whenever either the clinic availability is cancelled through the Cancel Clinic Availability option of this menu, or when an appointment is cancelled through the Cancel Appointment option of the Appointment menu and the cancellation is at the request of the clinic. Enter the name of the clinic cancellation letter. <?> for a list of clinic cancellation letters. <RET> to leave blank.

APPT. CANCELLATION LETTER

This letter will be generated for this clinic whenever an appointment is cancelled at the patient's request through the Cancel Appointment option of the Appointment menu. Enter the name of the appt. cancellation letter. <?> for a list of appt. cancellation letters. <RET> to leave blank.

ASK FOR CHECK IN/OUT TIME

YES to ask the date/time each time a patient is checked in or out of this clinic. <RET> or NO to have the system automatically enter the current date/time.

It is recommended you set this parameter to NO for most clinics; however, if you wish to track the actual check in or out time for a particular clinic, set this parameter to YES.

Your entry here will override how this field is set in the Scheduling Parameters. A <RET> entered here will act the same as a NO response and will also override the Scheduling Parameters.

Set up a Clinic

When retroactively scheduling an appointment, the system will use the date/time of the appointment as the check in time. This date/time will either be automatically entered or used as the default, depending on how this parameter is set.

SELECT PROVIDER

Enter the providers associated with this clinic. These providers will then be displayed when updating the provider through Appointment Management or Check Out.

DEFAULT PROVIDER

Enter 1 or YES if you wish to make the selected provider appear as the default provider for this clinic; otherwise, enter 0 or NO.

DEFAULT TO PC PRACTITIONER

Should the primary care practitioner be the default provider for this clinic if no default provider has been indicated? 1=YES, 0=NO. If the DEFAULT PROVIDER field is answered YES, this field will have no effect.

SELECT DIAGNOSIS

Enter the diagnoses associated with this clinic. These diagnoses will then be displayed when updating the provider through Appointment Management or Check Out.

DEFAULT DIAGNOSIS

Enter 1 or YES if you wish to make the selected diagnosis appear as the default diagnosis for this clinic; otherwise, enter 0 or NO.

WORKLOAD VALIDATION AT CHK OUT

For this clinic, run a validation as each encounter is checked out? 1=YES, 0=NO. The validation logic will perform the same validation checks as the Austin database to identify encounter errors before they are transmitted. All errors are stored for later reporting and correction.

ASK STOP CODES AT CHECK OUT

When checking out a patient for an appointment, should the user be prompted for stop codes? 1=YES, 0=NO.

ALLOWABLE CONSECUTIVE NO-SHOWS

This is the number of times in a row that a patient can be a no-show in this clinic before being flagged for possible discharge from the clinic.

Set up a Clinic

MAX # DAYS FOR FUTURE BOOKING

Maximum number of days available when searching for open clinic slots for this clinic in the future. A number between 11 and 999.

HOUR CLINIC DISPLAY BEGINS

Appears for new clinics only. <RET> if 8AM. Otherwise, the time should be entered as follows.

9AM = 9	1PM = 13
10AM = 10	2PM = 14
11AM = 11	3PM = 15
NOON = 12	4PM = 16

START TIME FOR AUTO REBOOK

Start time (hour of day) that should be searched for when auto rebooking an appointment to this clinic. Enter the time or <RET> to begin at the clinic start time.

MAX # DAYS FOR AUTO REBOOK

Maximum number of days the system can be set to search up to when auto rebooking appointments. A number between 1 and 365.

SCHEDULE ON HOLIDAYS

Should the user be able to schedule appointments to this clinic on holidays?
YES or <RET> for NO.

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, enter an at-sign <@> to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

CREDIT STOP CODE

<RET> if credit should be made to the same stop code as entered in the STOP CODE NUMBER field. Otherwise, enter stop code to credit.

PROHIBIT ACCESS TO CLINIC

Should only privileged users have access to book to this clinic?
YES or <RET> for NO.

If you are editing the parameters of an existing clinic and wish to change a previous YES entry to NO, enter an at-sign <@> to delete the YES entry. This will change the entry to a null response which will be interpreted as NO by the system.

Set up a Clinic

SELECT PRIVILEGED USER

Will only appear if previous field answered YES. Enter the user's name or DUZ. This prompt will repeat until <RET> is entered. You may delete a previous entry by entering an at-sign <@> at this prompt.

PHYSICAL LOCATION

Enter the location of the clinic (0-25 characters). <RET> to not enter a location.

PRINCIPAL CLINIC

If enrollment in this clinic is equivalent to enrollment in a larger one, enter the larger clinic here. If your entry is not in the HOSPITAL LOCATION file, you will be prompted for Hospital Location Type and Hospital Location Type Extension.

OVERBOOKS/DAY MAXIMUM

Enter the number of allowable overbooks per day to this clinic. If overbooks are not allowed, enter zero

SELECT SPECIAL INSTRUCTIONS

Any special instructions concerning this clinic, 0-25 characters.

LENGTH OF APP'T

Enter the time, in minutes, of an average appointment for this clinic (must be a multiple of 10 or 15). The length of time entered here directly affects the INCREMENTS PER HOUR display set up later. Be sure to calculate the desired time/increment relationship before entering them as you are not able to edit INCREMENTS PER HOUR after an availability date has been entered.

VARIABLE APPOINTMENT LENGTH

Does this clinic have variable appointment lengths? Enter V to allow for a varied appointment length or <RET> to not allow variable appointment length.

DISPLAY INCREMENTS PER HOUR: 4

The number of increments that will be displayed per hour for this clinic. Accept the default or enter a <?> for a list of choices.

AVAILABILITY DATE

Enter the first date appointments can be made to this clinic.

Set up a Clinic

TIME

Scheduling patterns for the date chosen at the previous prompt may now be set up. Enter the time range the clinic will be available. Decide upon times/slots prior to entering them into the system as each day the clinic will meet in the future will need to be changed individually if the data is entered erroneously. Times should be entered in this format: 0800-1200. You cannot establish a pattern for the clinic that is too wide to fit the 80 character screen.

NO. OF SLOTS: 1

This is the number of patients which will be seen in each increment per hour. <RET> to accept the default or enter another number up to 9. If you enter 10 to 26, the display will be in letters of the alphabet starting with j and ending with z. Block scheduling should only be used for group clinics such as group therapy.

The Time and No. of Slots prompts will repeat until a <RET> is entered instead of a time.

Sharing Agreement Category Update

This option allows the user to define subcategories for appointment types and assign them an active status. Each appointment type may have multiple subcategories. You may associate subcategories with any appointment type but the intent of this option is to do so for the “sharing agreement” appointment type.

This information is utilized at the site level only and is not transmitted to a national database.