SOS Appointment Scheduler

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SOS Appointment Scheduler

Overview

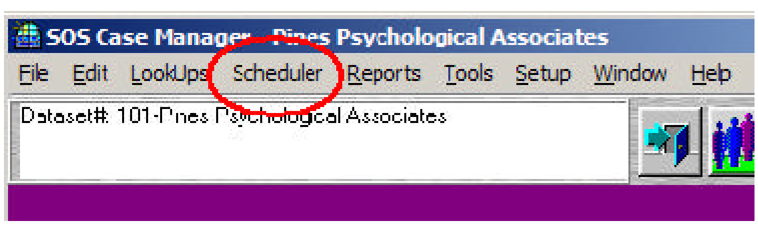
The SOS Appointment Scheduler module is an add-on for SOS Office Manager for Windows (OMWin) or SOS Case Manager for Windows (CMWin). It provides full-featured time scheduling for service providers and resources, such as treatment rooms or equipment. Each appointment can optionally specify the site, making the system a good choice for organizations in which providers schedule appointments at different service locations.

- The schedule may be viewed as a single day, a single week, or a six week period. Multiple views and provider schedules may be open simultaneously.
- A very powerful search feature allows searches on any combination of date range, time range, patient, day of the week, provider, appointment type, service, site, resource, and appointment status. Search queries may be named and saved for quick and easy re-use.
- Customizable routing/encounter forms may be generated for scheduled appointments.
- Selected appointments may be imported directly into OMWin's Daysheet for billing.

In this manual, we will use the term *provider* to indicate the person for whom appointments or scheduled activities are being created. Other staff may take advantage of the Scheduler features as well by adding their names to the Provider List in OMWin.

Starting the Scheduler

Start the scheduler from the main menu in either SOS Office Manager or SOS Case Manager.



The Scheduler should appear as a top level menu item in both SOS Office Manager (OMWin) and SOS Case Manager (CMWin). Just select this menu item to launch the program. Once it has been started, the Scheduler runs as an independent program. You will see it displayed as a button on the Windows "Start" bar and you can switch back and forth between it and your other applications. Once the Scheduler has been launched, you can close the main SOS application and continue to use the Scheduler. When you are finished with the Scheduler, exit just as you would any other program, by clicking the “X” in the upper right corner, by pressing <Alt>-<F4> or by selecting **View > Exit**.

Setting up the System

Scheduler User Options

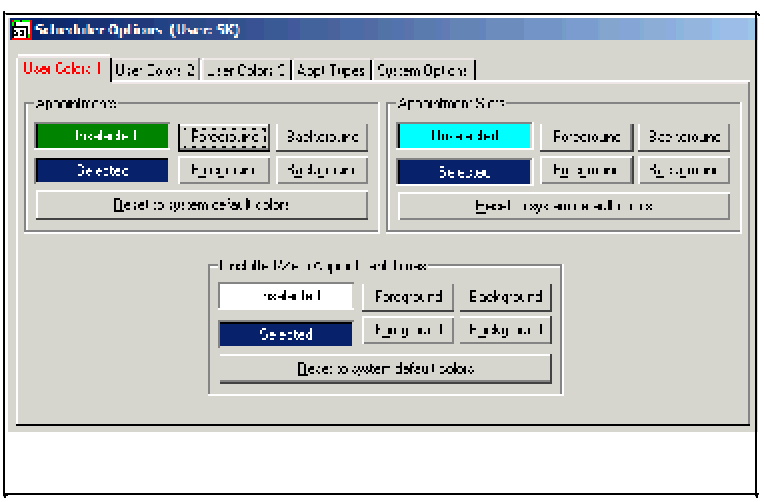
Setting Color Preferences

The scheduler is highly dependent upon color coding, which is used in to denote:

- Open appointment slots
- Time periods that are “blocked” and should not be scheduled (vacations, etc.)
- Slots with scheduled appointments
- Times with no appointment slots
- Appointments of different types
- The time column in the display
- Schedule warnings/reminders
- Month View days with no appointment times
- Month View days with open appointment times

You may change the default colors used by the Scheduler. In fact, every user can select his or her own colors. Configure the colors to your liking by selecting **Setup > Scheduler Options**. Set your own preferred colors on the **User Colors** tabs of this form. Remember that your color choices are used only when you have logged into the main SOS application with the same ID used when making the settings. Notice that the current user ID is displayed in the title bar at the top of the Scheduler Options window.

The first three tabs of this form allow you to set your preferred colors for various scheduler elements



Scheduler System Options

To set scheduler system options (as opposed to user options), select **Setup > Scheduler Options**, then the **System Options** tab. There are several system options that you should set on this window:

Work Day Start and End Times

The *Work Day Start* and *Work Day End* times should be set to the earliest and latest times that you expect to ever schedule an appointment. These times control the range of times that appear in your Day and Week View windows and the times available to select when creating an appointment.

Required Fields

If appropriate for your organization, you may want to require that the *Resource* (see page 8) or *Site* (see page 8) field, or both, be completed prior to saving a new appointment. Any organization in which treatment rooms are limited and shared among providers should consider listing all the shared rooms in the resource list and making the *Resource* field required. Doing so will prevent users from making appointments for providers without also reserving a treatment room at the same time.

Note that resources and sites can be defaulted in each provider's appointment *templates* (see page 8). If some providers always use the same room (or other scheduled resource), it can be specified in the providers' templates, making it the default when entering new appointments for that provider.

Sites can be handled the same way. If tracking appointments by site is important to your organization, consider making the appointment *Site* field required. As with resource, you can specify the default site for each provider in the templates.

Custom Periods

When doing appointment *queries* (searches based on selections that you provide), you can save some time by predefining certain time periods within which you might like to search. Such as defining *Period I* as 9AM through noon, *Period II* as 1PM through 5PM, and *Period III* as 7PM through 10PM. Doing so would make it easier to search for appointments in the morning (Period I), afternoon (Period II) or evening (Period III). You might want to come back to these settings after using the query feature for a while.

Providers, Patients, and Services

While creating appointments, you will be selecting from lists of providers, patients, and services. These are versions of the same lists used in OMWin and CMWin, *except that you cannot add to or modify those lists from within the Scheduler module*. Refer to your OMWin or CMWin documentation if you need information on adding, deleting, or modifying information in these lists. The differences between the lists as they appear in OMWin and as they appear within the scheduler are detailed in the following sections.

Configuring the Provider List for use in the Scheduler

If desired, it is possible to filter the provider display in the Scheduler to only those provider codes that you actually use in this program.

From OMWin or CMWin, go to **Lookups** > **Providers**. Highlight a provider code that you do want to display within the Scheduler. Click **Change**. When the form opens, select the **Scheduler** tab.

To display the provider within the scheduler, check the *Show this provider code in Scheduler* option. To suppress this code in the Scheduler's Provider List, uncheck the option.

Some OMWin and CMWin users use two or more alternate codes for a single provider. When scheduling, of course, it is important to use only one of these codes to avoid double-scheduling the same provider. For example, let's say that provider Albert Baines appears in the provider list as AB, AB1, and AB2. You would not want to accidentally schedule a 9am appointment for both AB and AB1. To prevent any accidents, it would be a good idea to uncheck *Show this provider code in Scheduler* for both AB1 and AB2. Just below this option is a field with the prompt *Provider code used in Appointment Scheduler*. Here you would select code AB for all three of Albert's codes.

Note *By setting each provider in this fashion, you will be able to select a "billing provider" from among all of the scheduled provider's alternate codes (in this example: AB, AB1, and AB2) when creating appointments that you will subsequently be importing into an OMWin daysheet. The imported appointments will generate charge entries with the appointment's* Billing Provider *as the Provider on the charge.*

Scheduler-specific Lists

Prior to entering any appointments, however, you must set up several other lists that are specific to the Scheduler module: *Appointment Types*, *Resources*, and *Sites*.

Appointment Types

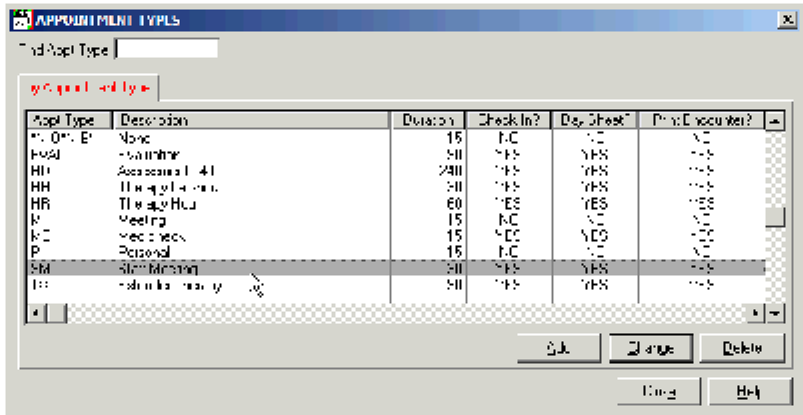
When you enter an appointment you must indicate an appropriate *appointment type*. Appointment types assist in locating appropriate open appointment times, make entering appointments faster, and designate which appointments should be selected for Check-in List printouts, for export to OMWin daysheets for billing, and to generate encounter forms.

At minimum you will probably want to set up two appointment types: one for patient appointments and another for personal appointments. You might very well want to create a type for staff meetings, paperwork, and other types of activities as well.

One significant benefit of appointment types is that each includes a default duration and therefore can generally eliminate the need for you to manually enter an ending time for your appointments. If a certain type of appointment is set to a duration of 45 minutes, then the Scheduler will automatically set the ending time for an appointment of that type to 45 minutes after the designated starting time. You can override this time, of course, but creation of a sufficient selection of appointment types should make this step unnecessary.

To create your Appointment Types, select **Lookups > Appointment Types**.

A good assortment of appointment types can enhance the usefulness of the Scheduler and make appointment entry more efficient.



Remember that each user can set distinctive colors to signify different appointment types. Doing so will help you avoid over-scheduling a particular type of service. To set color preferences for appointment types, click the **Set Colors** button at the bottom of the Appointment Type form or go to **Setup** > **Scheduler Options** > **Appt Types**.

IMPORTANT: Durations for each appointment type must always be a multiple of the minimum appointment time of 15 minutes.

Resources

Resources refer to something that is scheduled in addition to a provider and patient or client. For example, in some settings providers share treatment rooms. You would therefore create a resource item for each shared treatment room and designate the room to be used as you make appointments. The Scheduler will then be able to prevent room conflicts and you will be able to display appointments by room as well as by provider.

To create Resources, select **Lookups > Resources**. Enter a shorthand code and description for each and indicate whether Scheduler should:

- Allow the resource to be simultaneously allocated to more than one provider,
- Warn if it is already allocated to another provider, or
- Prevent simultaneous use by more than one provider.

Sites

Organizations with more than one service location may want to designate sites while making appointments.

To create sites, select **Lookups > Sites**.

Provider Appointment Templates

The next step is to set up daily *Appointment Templates* for each provider for each work day. The templates determine the appointment time periods that the provider is normally available for scheduling and how many simultaneous appointments should be permitted at various times of the day.

Each template you enter contains the configuration for each day of the week and is effective as of the beginning (Sunday) of any week you select. For example, you could create a template for Dr. Smith that becomes effective on Sunday, January 5, 2003. This template specifies that Dr. Smith has single appointments available from 9AM though noon, and 1PM through 6PM on Mondays, Tuesdays, Wednesdays, and Thursdays, and group times that permit up to eight simultaneous appointments to be scheduled on Tuesday and Wednesday evenings from 7:30 through 9:00. All other days and times would be set to permit no appointments.

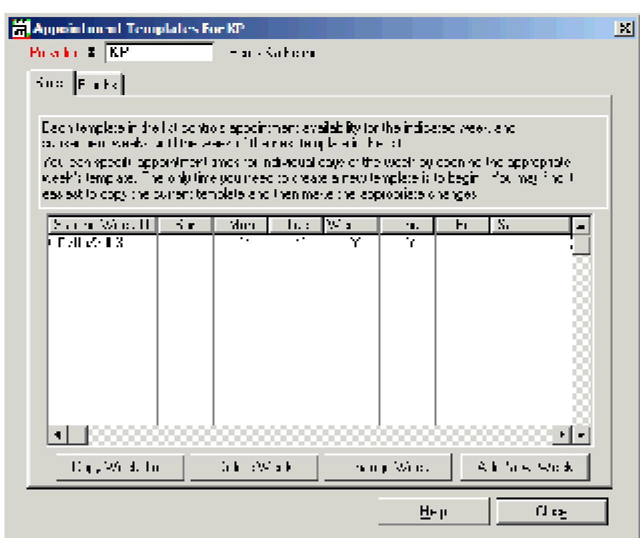
Attempts to schedule an appointment in a time that is not "templated" will result in a message asking whether you want to create an exception appointment. Likewise, if you try to schedule a second appointment in a period that permits only single appointments, the same sort of message will appear.

Continuing with our example, let's say that Dr. Smith decides to add a new treatment group on Thursday night, starting the first Thurday of March. We would use the **Copy Week To...** button on the Appointment Templates list window to create a new template for Dr. Smith, starting the week of March 2, in which we modify the times on Thurday evening to permit eight simultaneous appointments between 7:30 and 9:00.

The templates provide the system with the information needed to find open appointment times when you use the Query feature. Times that permit appointments, but are not already filled, will show as available. To create a template:

1. Select **Lookups > Templates**.
2. Select a provider at the top of the list box window. If this is the provider's first template, the list will be empty. Othewise, any existing templates will be displayed and the template window will look something like this:

Templates determine the normal scheduling periods for each provider on each day of the week.



3. Select **Add New Week**. Complete the day of the week and time fields and indicate the number of appointments permitted during that time period. Include a default *Site* and *Resource* if desired. Finally select **OK** to save. This action will create a new template and set the first templated day and period.

   Double click other time periods you would like to configure for this day of the week. If you make a mistake or would like to change the number of appointments during a period, you can just re-enter the time period with the correct number of appointments. To remove appointment times, simply reset them with a maximum appointment setting of zero for that time period.

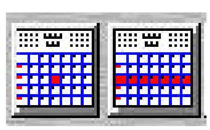
To modify the number of appointments in a particular time period of a day, double-click the beginning of the period you wish to change, then set the times and number of appointments. For example, if you previously set the period from 9AM through 5PM to allow one appointment, but want to modify the template to have zero appointments during the noon lunch hour:

1. Double-click the 12:00 - 12:15 cell on the desired day. The form will appear.
2. Set the *Start Time* to 12:00PM and the *End Time* to 1:00PM.
3. Set the *Number of appointments permitted* to zero.
4. **OK** to save. The previous setting for this time period will be over-written with the new zero appointments setting.

It is not necessary to manually create templates for every day of the week. If your available appointment times are the same for other days, you can simply copy the templates from the first day to the others that are the same, as follows:

1. Select the **Copy Template Day To...** button.
2. In the drop list, select the day that you would like to copy .
3. Check the boxes next to the days to which you want to copy the first day.
4. Click **OK**.

Entering Appointments



New appointments are entered from the *Day View* or *Week View*. The toolbar icon on the left above opens the *Day View*, and the one on the right opens the *Week View*. Alternately, select **View > Day View** or **View > Week View** on the Scheduler menu.

TIP *Once the selected view window is open you can stretch it horizontally or vertically with your mouse to see more appointments without scrolling. Position the mouse on the edge of the window. The pointer will change to a double-headed arrow. Click and hold the left mouse button and “drag” the edge of the window as desired.*

1. Select the desired provider.

2. Notice that the times available for appointments specified in this provider's template are shown in a contrasting color. (The specific color will depend on your User Setup options.)

3. Select the desired date, using the controls in the Appointment Date panel in the upper right hand corner of the view window. Click the large button at the top, the one that shows the current day or week, to select a day or week from a pop-up calendar window, or use the "VCR" buttons on the second row to move forward or back a week (> or <) or a month (>> or <<) at a time.

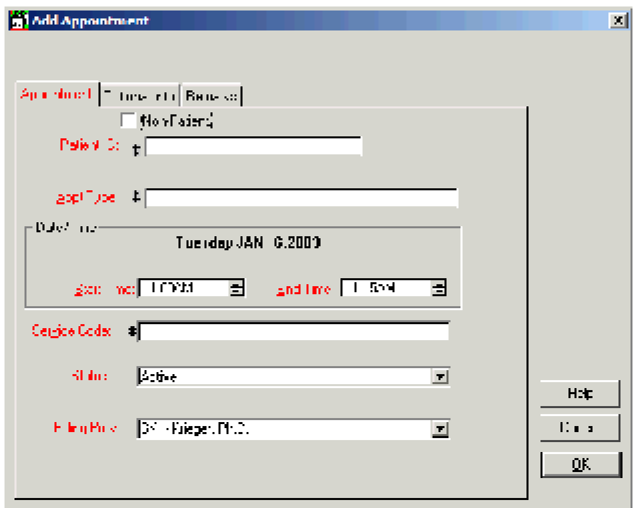
3. Highlight the desired starting time (within the time slots you have scheduled for this provider) by clicking with your mouse.

4. Right-click, select the **Menu** button, or press <F2> to pop up the menu.

5. Select **Add Appointment**.

TIP *Another way to create a new appointment is to double-click an empty cell in the appointment grid.*

This is the appointment window. You must complete all the red fields in order to save the appointment.



6. Complete all required (red) fields and add any other desired information. Note that the *Resource* and *Site* fields are on the second **(Optional Info**) tab, and there is an area for free text notes on the **Remarks** tab. *Service Code* on the first tab is required only when you are selecting a patient from the Active Patients List.

   Normally when you first create an appointment, you will set the status to the default, *Active*. If your office typically confirms appointments the day before, you can use the **Appointment Check-In List with Phone Numbers and Status** report to tell you which appointments are Active, but not confirmed. When you have confirmed the appointment, change its status to *Confirmed* by editing the appointment in the provider's schedule.

Making an Appointment Outside Normal Hours

You are not limited to the times within your provider templates. If the need should arise, you can create an appointment outside normal hours. Begin just as with any new appointment. A warning will appear to tell you that there are no available appointments, but you may continue anyway.

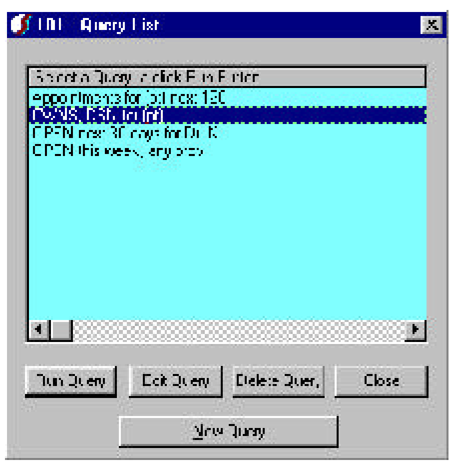
Adding a Second Appointment to the Same Time Slot

If the selected appointment time permits more than one appointment, you can schedule additional patients or other activities in the same time period. If the template is not configured to permit additional appointments in that time slot, you can still add them, by continuing after the warning appears.

Searching for Appointments

One of the scheduler's most powerful features is the ability to search through your appointments and present you with a list of those meeting your specified criteria. To use the search and query feature, select **Search Appointments** on the pop-up menu in the Day or Week View. Remember that you can display the pop-up menu by either right-clicking in the appointment grid, or, after clicking in the grid to activate it, click the **Menu** button at the top of the window. One common use of the search window is to find available appointments on the days and times that the patient can come in.

From here you can quickly run a previously saved search ("query") or specify a new one.

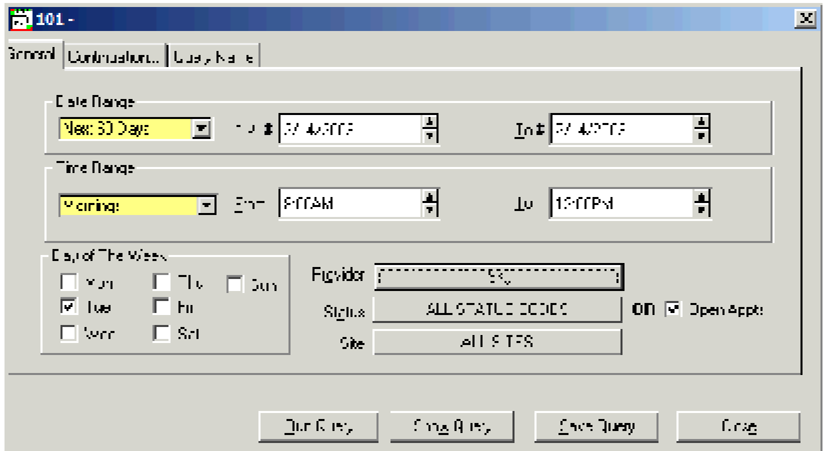


To create a new query, click the **New Query** button. Once you have saved one or more queries, you can run a query immediately by highlighting the item and clicking **Run Query**, or view and modify the query before running it by selecting **Edit Query**.

The Query form has three tabs. Use the first two to set your selections and the third to assign a name to your query if you want to save it for future use.

First Search Tab

Use this window to define your search parameters. This example shows how you would search for open Tuesday morning appointments with provider SK during the next 60 days.



Date Range

You can select a specific date range or use the drop list to select relative ranges in the future, including: Today, Next 7 days, Next 14 days, Next 30 days, Next 60 days, Next 90 days, or Next 120 days. If you want to do a search including all dates, specify a date range yourself, such as 1/1/1980 through 12/31/2025.

Time Range

To search all times, just leave the time selection blank. If you are looking for appointments within a specific time period, set the time period here. For example, you might have a patient who needs an appointment between 4:30 and 6:00PM, so you would select those times here. Use the droplist to the left of the time entry fields to select from pre-configured time periods, such as “Mornings”, “Afternoons”, and “Evenings”.

Days of the Week

Continuing with our example, let’s say that the patient can only come in on Tuesday, Wednesday or Friday. We would then check those days of the week in the panel on the lower left of the window. If our query does not need to be restricted to certain days of the week, just leave all the days unchecked; it is not necessary to check every day.

Provider

To specify one or more providers for your query, click the button next to *Provider*. Click to tag/untag providers on the list. If you want to query all providers, use this button to clear the default provider selection.

Status

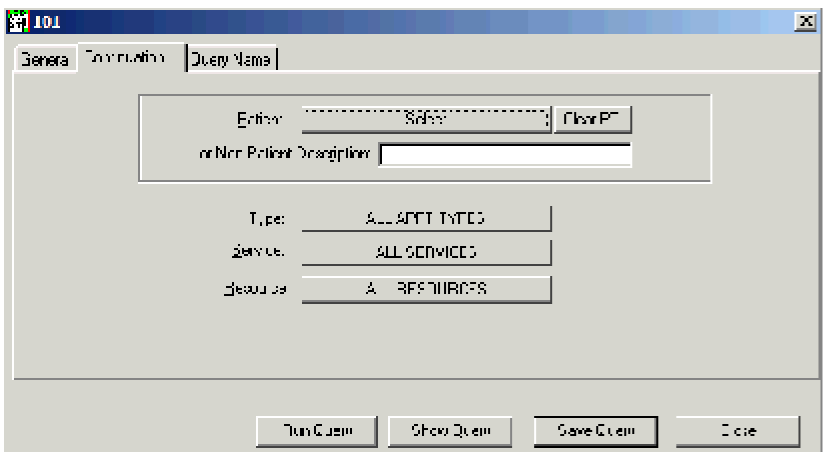
One of the primary uses of this feature is to find open appointment times into which a patient can be booked. Use the **Status** button to select OPEN or any other listed status. You can select more than one, if appropriate for your search.

Site

If you want to restrict the results to appointments at a specific site or sites, use this button to select one or more sites. To include all sites, do not make a selection or clear any selections that may already be present.

Second Search Tab

Second tab of the query form



Patient

Use the **Select** button to choose a particular patient from your active patient list. Use the **Clear Pt** button to remove a patient selection. If you are searching for appointments with a manually entered description, type it in the entry field below the **Select** button.

Appointment Types, Services, Resources

Use the remaining buttons on this tab to restrict your search to one or more appointment types, services, and/or resources.

Completing Your Query

To review your query, select the **Show Query** button. If this is a one-time query that you do not want to save for future use, or you have already saved it, run your query by clicking the **Run Query** button. To save the query so it will appear in the query list and can be easily run again in the future, select **Save Query**. If you have not already specified a name for the query on the third tab, the form will advance there. Enter an appropriate name and click **Save Query** again.

The scheduler will display the results of the query. To view the schedule for any of the days that come up in the results, highlight the desired appointment time and click the button that corresponds to the view your prefer: Day, Week, or Month.

Query Examples

When is my next appointment? Set the *Date Range* you want to search, select the *Patient*, then **Run Query**.

Does Dr. Smith have any openings on Tuesday afternoon in the next few weeks? Set your *Date Range* for the next month, set your *Time Range* to 12:00PM through 5:00PM, set your *Provider* to Dr. Smith, and set your *Status* to OPEN. Select **Run Query**.

I would really like to come in today. Does anyone have an opening this morning? Confirm that the *Date Range* is set to today, set the *Time Range* to 8:00AM through 11:45PM, make sure that no *Provider* is selected, and set *Status* to OPEN. Select **Run Query**.

TIP *These sorts of queries are likely to be run very frequently. You can make the process much faster by creating and saving an “almost-complete” query. When you want to run that particular search, highlight it and click* **Edit Query***, add the one or two pieces of additional, specific information, then click* **Run Query***. For example, create a query that specifies a date period of “Next 60 days” and a status of “Open”, then save it as “Open appointments, next 60 days”. Next time you need a list of open appointments for a particular provider, highlight that query, click* **Edit Query***, set the desired provider, and click* **Run Query***.*

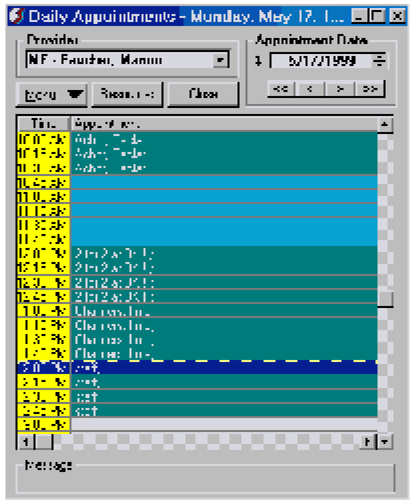
Another common example: “When is my next appointment?” Create a query that specifies “Next 120 days” for the date range, and a status of “Active” and save with a name like “Find patient’s next appointments.” When it comes time to do this kind of search, highlight this query and click **Edit Query***. Click the Continuation tab of the query form, select the desired patient, and click* **Run Query***.*

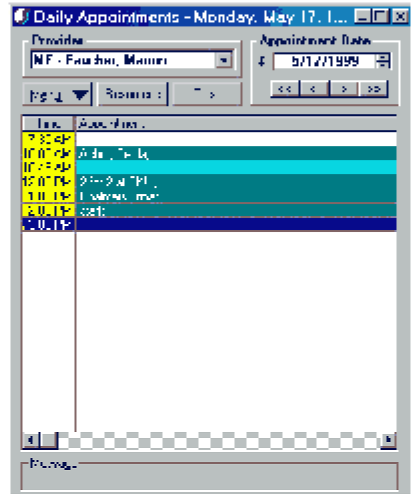
Alternate Views

Collapsed Day View

By default, the Day View shows every 15 minute interval in your defined workday period. When you schedule an appointment across two or more 15 minute intervals, the patient’s name appears in each of those intervals. There is an alternate *collapsed* view that removes duplicates, making it easier to see what has been scheduled and what is open.

On the left is the standard Day View. On the right is the same day shown in the collapsed view.



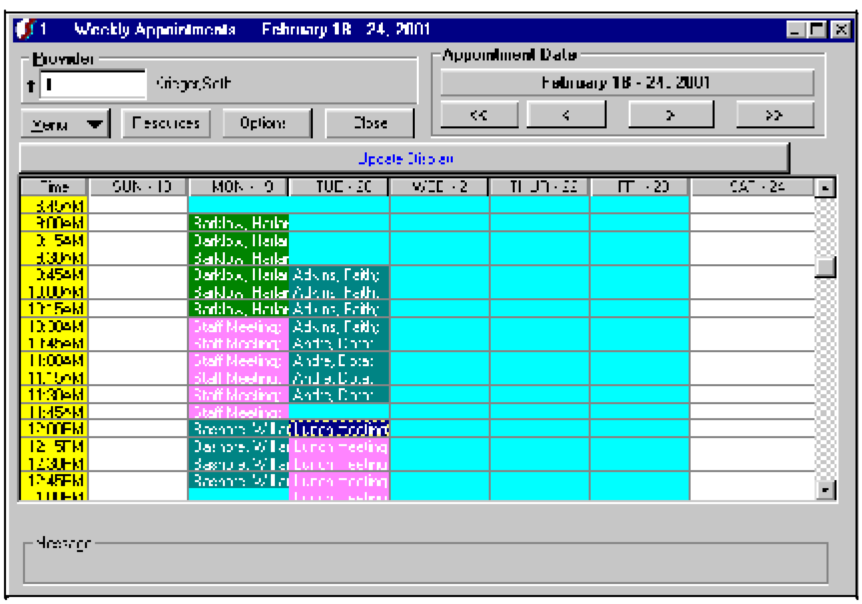


You can toggle back and forth between the two views using the <F5> key, or by selecting **Collapse View** on the menu. Remember that you can call up the menu with <F2>, <Alt><M>, or by clicking the **Menu** button. Repeat the same steps to switch back the other view.

Week View

You can view appointments a week at a time by selecting **Week View** from the scheduler pop-up menu, or by selecting **View > Week View**.

The Week View shows all seven days of the week. Don't forget that you can change the column widths by dragging the vertical separator lines with your mouse.

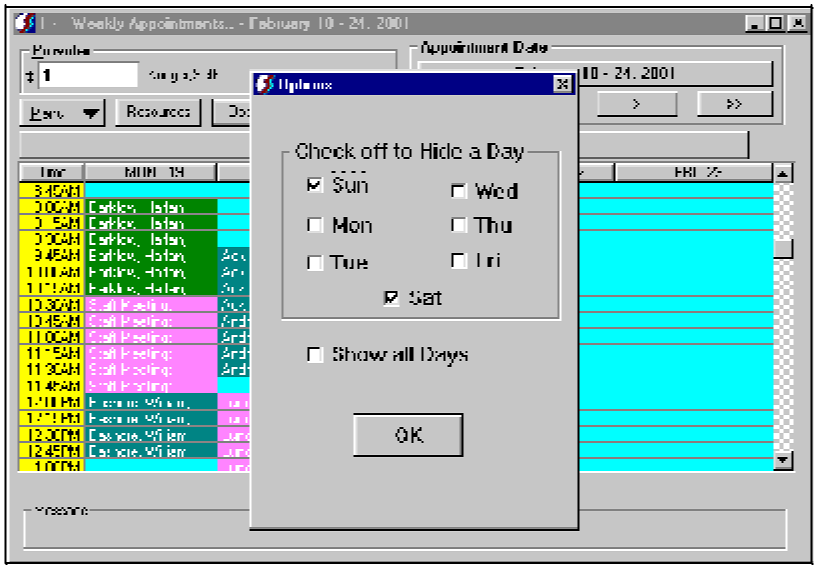


You can use the Week View just as you would use the Day View, selecting operations from the pop-up menu. Use the *Collapse* feature in Week View just as you would in

Day View to reduce the display to show you the most information in the least amount of space.

TIP *You can re-size the columns in the Week View by clicking and dragging the separator (vertical line) between the columns in the view. When the mouse is correctly positioned over a column separator it changes to a double arrow with a vertical line in the middle. To hide days that you never schedule, use the* **Options** *button.*

You can give yourself more room by hiding days on which you do not schedule appoint-ments with the Options button on the Week View.



Month View

At times you may find it convenient to view the schedule a month at a time. Select **Show Month View** from the pop-up menu or select **View > Month View**.

Use the provider drop-list to select the desired provider. The Month View displays a six week period. You can set the first week by clicking the **Appointment Month** bar. The week you select on the pop-up calendar will become the first week of the six weeks displayed. Use the "VCR" buttons below the Appointment Month bar to quickly move back a year (**<<**), back a month (**<**), forward a month (**>**), or forward a year (**>>**).

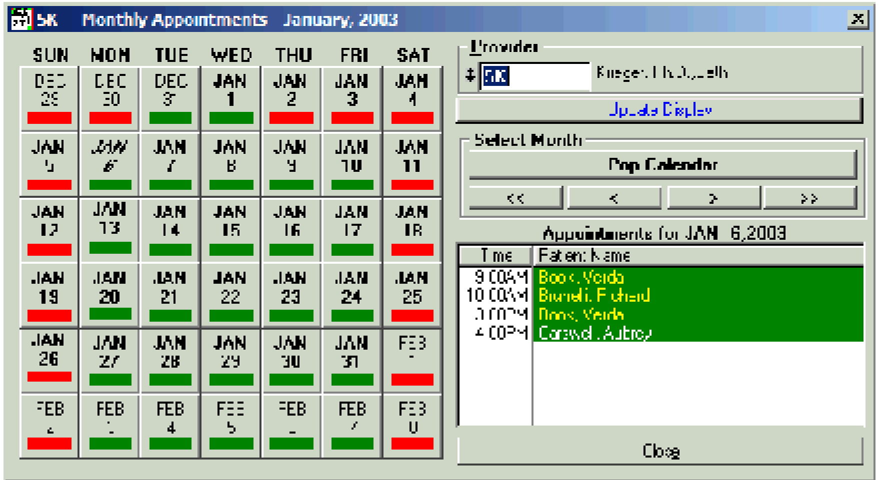
The color coding on the calendar tells you whether the day is templated for appointments or not. Green indicates that one or more appointments times are templated. Red indicates that no appointment times are templated. Position the mouse over the day to see summary information about the day's appontments.

If you click once on a day in the Month View, you will see the appointments for that day in the list window to the right of the calendar.

If you double-click or right-click a day in the calendar, the scheduler pop-up menu will appear, from which you can select a different view, search, or print option.

If you double click in the appointment list window, the Day View for the selected day will open, from which you can check, add, delete, cancel and otherwise manipulate appointments.

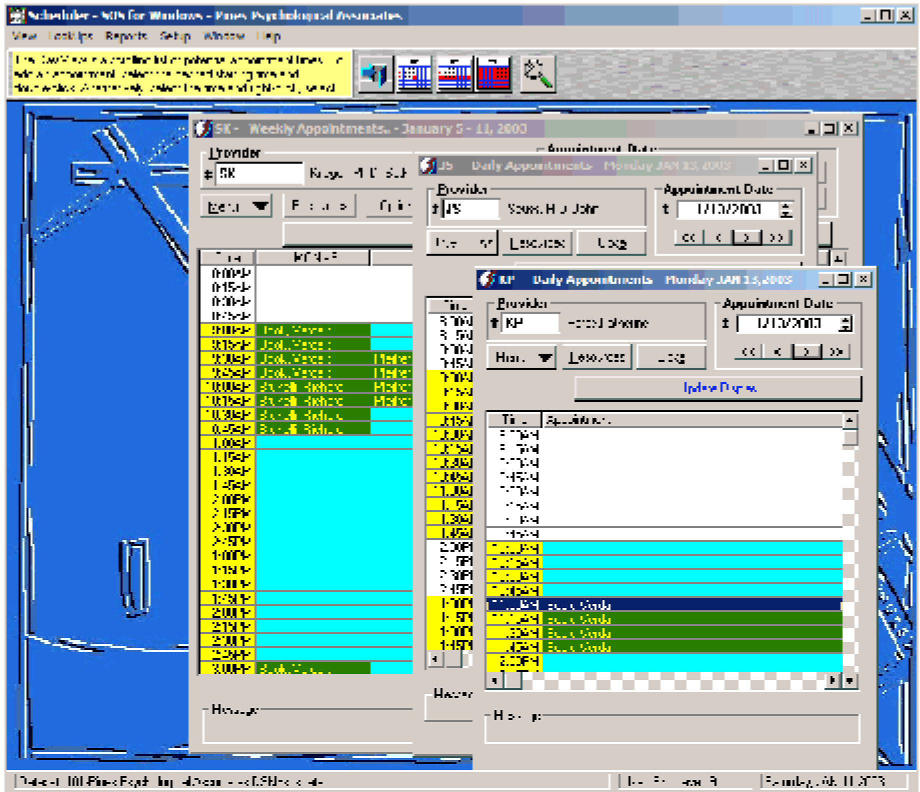
The Month View is actually a six-week calendar. A green bar indicates that there are appointments or open slots; red means there are no slots. Clicking a day shows the appointments in the lower right window.



Viewing More than One Schedule

You can open several schedules, with the same or different views, at the same time. You do not have to close the one currently open on your desktop to open another. To open the schedule for a different provider, you must start at the top level, so select the desired view from the Scheduler menu or the task bar. As with the first schedule *thread* that you opened, you will see the provider list so that you can make your selection. If you were to select **View** > **Day View** three times, you would end up with three Day View windows open on the desktop. Each one is independent of the others and can show a different provider, day, view, etc. The number of scheduler windows that you can usefully display on your monitor at once is determined by your screen resolution and monitor size. Realistically, a station that is used for heavy scheduling should have at least a 17" monitor set to a resolution of 1024 x 768 or higher.

Several schedules can be open on the desktop at the same time.



Advanced Appointment Management

Creating the Same Appointment For More Than One Provider

Let’s say that you want to schedule a meeting for several providers. Begin with **Find Meeting** on the pop-up menu. Select the desired date and time range, day(s) of the week, providers, and site (if applicable). **Run Query** to search the indicated schedules to find times when all of the providers are available.

Now that you have some acceptable times, you could open each provider’s schedule and enter the same appointment, but there is a much faster way:

1. Open the Day or Week View.
2. Create the meeting appointment for one of the providers and save it.
3. Move the mouse pointer over the appointment and right-click. Alternatively, select the appointment and press <F2> or click the **Menu** button.
4. Select **Multiple Providers**.
5. Click to select one or more providers.

6. Select **OK**. The scheduler will create the same appointment for all the tagged providers.

Replicating (Copying) an Appointment

A common need is to schedule the same appointment at certain intervals, for example, every seven days for the next four weeks.

To quickly schedule a repeating appointment:

1. Enter and save the first appointment.
2. Right-click the appointment. Alternatively, select the appointment and press <F2> or click the **Menu** button.
3. Select **Replicate Appointment** from the pop-up menu.
4. Indicate the number of appointments to create and the interval between appointments.
5. Select **OK**.

Canceling and Deleting Appointments

The Scheduler differentiates between *canceling* an appointment and *deleting* an appointment. When you cancel an appointment, you indicate the type of cancellation and the information remains in the database, where it can be retrieved for future reference. For example, if you wanted to see how often a particular patient cancels appointments, you could go to **Search Appointments** and display all appointments for that patient with one or more cancellation statuses.

Normally you won't see the canceled appointments in Day, Week, or Month View. You can set the **Show Canceled Appointments** option on the pop-up menu (click anywhere in the appointment grid, then <F2>, right-click, or <Alt><M>) if you would like to see these appointments in Day or Week View. Canceled appointments are followed by an asterisk (*) when displayed.

Contrast canceling appointments with deleting appointments. When you delete an appointment, it is removed from the database and will not appear in any search results or reports.

To <u>cancel</u> an appointment:

1. Right-click the desired appointment. Alternatively, select the appointment and press <F2> or click the **Menu** button.
2. Select **Cancel Appointment** from the pop-up menu.
3. Select the appropriate *Cancel Status* from the drop-list.
4. Select **OK**.

To <u>delete</u> an appointment:

1. Right-click the desired appointment. Alternatively, select the appointment and press <F2> or click the **Menu** button.
2. Select **Delete Appointment** from the pop-up menu.

3. Confirm the deletion by selecting **Yes**.

Rescheduling Appointments

To reschedule an appointment:

1. Right-click the desired appointment on the Day or Week View. Alternatively, select the appointment and press <F2> or click the **Menu** button.
2. Select **Reschedule Appointment** from the pop-up menu.

Canceling and Rescheduling

If you simply reschedule an appointment as described in the previous section, the effect is the same as if you had deleted the appointment and then added it again on the new date and time. Some may prefer to keep a record of the original appointment by canceling it rather than deleting it. The scheduler's pop-up action menu includes an option to **Cancel**/**Reschedule** the appointment, which does both operations in a single step.

Blocking Dates

You can *block* dates, or periods of time on certain dates, to prevent any appointments from being added or copied to those days. This feature is handy for marking vacation time and other dates on which no appointments should be scheduled.

Blocked times and dates are entered on the second tab of each provider's Templates. There are two ways to block a date:

The first way is to enter the block from either the day view or week view:

1. Right-click the cell in the appointment grid that marks the beginning of the period that you would like to block.
2. Select **Add Block**. The Add Block form will appear, the starting date and time of the block set to match the currently selected cell in the appointment grid.
3. Change the ending date if necessary and set the desired ending time.
4. **OK** to save.

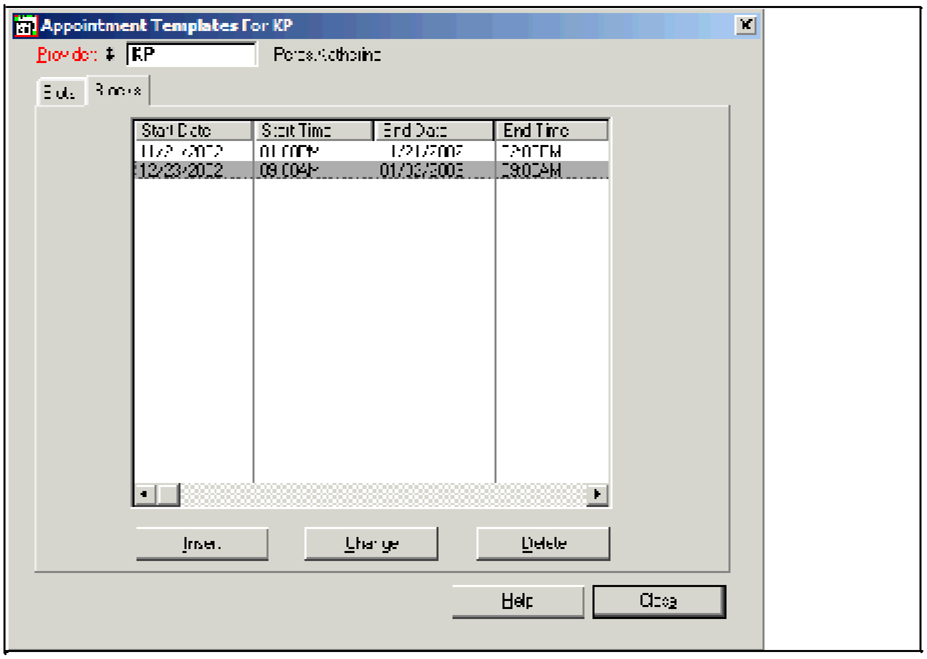
If you later would like to modify or delete the block, go to the **Blocks** tab of the **Lookups > Templates** window to do so.

The second way is to enter the blocked periods directly on the on the **Blocks** tab of the **Lookups > Templates** form:

1. Select **Lookups** > **Templates**.
2. Select the desired provider from the drop-list.
3. Click the second tab, **Blocks**, or press <Ctrl><Tab> to change to the **Blocks** tab.
4. Select the **Add** button and complete the form, specifying the starting date and time and the ending date and time for the period to be blocked. Note that the

entire period between the starting date and time and ending date and time will be set as blocked.

Set blocked dates and time periods on the Blocks tab of the provider's template window. In this example, the provider is leaving an hour early on Friday, Jan 10th, and has blocked out a vacation period in June.

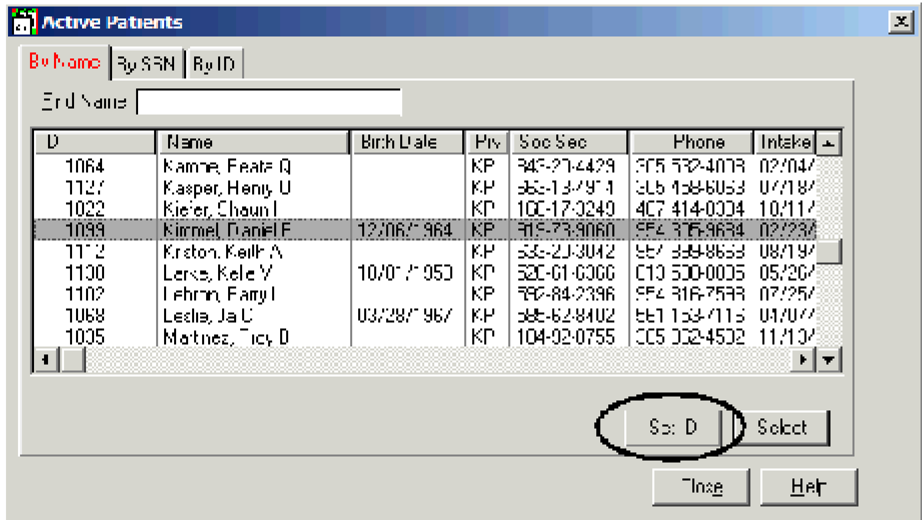


Quickly Finding a Patient in OMWin or CMWin

From time to time as you are creating an appointment for an existing patient, you may have the need to access some related information in either OMWin or CMWin. Normally doing so would require that you switch to that program (either by clicking the appropriate button on the toolbar or by pressing <Alt><TAB> one or more times), open the Active Patient list, type in an ID or name, and press <Tab>. There is a faster way:

1. At the top of the Appointment Form is a lookup field to select the patient for the current appointment. Right-click in that field, or <TAB> to that field and press <F2>. The patient selection window shown below will appear.
2. Find and highlight the desired patient.
3. Click the Set ID button or press <Alt><D>.
4. Switch to the either OMWin or CMWin and press <Ctrl><F> to open the Active Patient List to the desired patient.
5. Once you have checked the desired information in the other program, switch back to the Scheduler using <ALT><TAB> or by clicking the Scheduler button on your Windows taskbar.

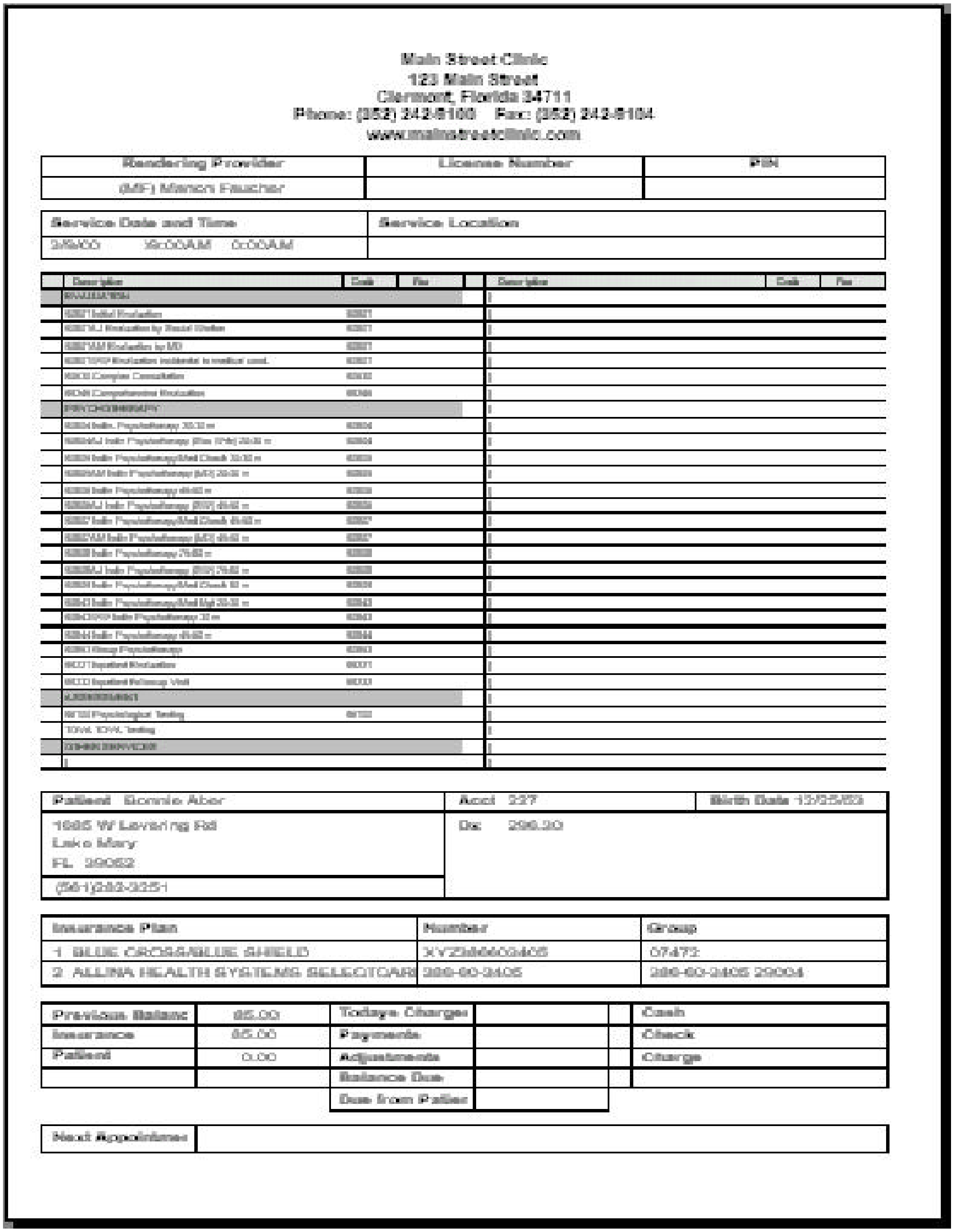
Use the Set ID button on the patient selection list in the Appointment Form to store the highlighted patient's ID for quick access in either OMWin or CMWin.



Configuring and Printing Encounter Forms

Encounter forms, sometimes referred to as "superbills" are an institution in many healthcare offices. They are used for routing, as a billing input document, as a patient receipt, and as a patient insurance filing document. These forms contain patient demographic and insurance information, along with a list of common services, CPT codes, and a place to write in fees and amount received.

OMWin's encounter forms feature is available only with the Appointment Scheduler option. Input for the report comes from the appointments entered in the scheduler. Below is a sample of an encounter form:



Main Street Clinic
123 Main Street
Clermont, Florida 34711
Phone: (352) 242-8100 Fax: (352) 242-8104
www.mainstreetclinic.com

Rendering Provider	License Number	PIN
(MF) Marion Faucher		

Service Date and Time	Service Location
3/9/00 9:00AM 0:00AM	

Patient Bonnie Aber	Acct 227	Birth Date 12/25/53
1985 W Lavering Rd Lake Mary FL 29082	Dx: 296.30	
(561)248-3251		

Insurance Plan	Number	Group
1 BLUE CROSS/BLUE SHIELD	XYZ8660340S	07472
2 ALLINA HEALTH SYSTEMS SELECTCAR	389-60-3405	389-60-3405 29004

Previous Balanc	85.00	Todays Charges			Cash
Insurance	85.00	Payments			Check
Patient	0.00	Adjustments			Charge
		Balance Due			
		Due from Patien			

Next Appointmen	

Encounter forms are customizable at two levels. The center portion of the encounter form consists of a checklist of up to 60 services, optionally organized in sections with headers. You determine the services, the text for each service, sections, and headings in this portion of the form. Each of these configurations is saved as an *encounter form style*, and you can create as many styles as you like. Once you have created your styles, simply link the appropriate one to each of your providers on the **Additional** tab of the Provider Form in OMWin or CMWin. When you print encounter forms, the

Scheduler automatically selects the correct style for each provider. Information on how to create encounter form styles appears in the next section.

The second level of customization is available to more sophisticated users who have, and know how to use, Crystal Reports Pro. The encounter form itself is a Crystal Reports RPT file, ENCNTR0.RPT, located in the \SOS folder. If you want to make some changes in the header or footer of the output, you can easily do that by modifying the RPT file and saving it under a different name, such as ENCNTR01.RPT. You can use any number as the eighth character of the file name and the report will still run correctly, but be sure to retain the first seven characters (ENCNTR0). The last step is to add your customized version to the **Reports** menu in the Scheduler. Just right-click in the white area of the menu box and select **Add**. Type in an appropriate description and the filename of your modified report and save. The standard Encounter Form selection will be reinstalled every time you update, so it is important to create a new menu item with a different description, rather than changing the existing one.

Note *At present, the SOS products include Crystal Reports version 8.5 runtime components. This software can run reports created with versions 7.x through 8.5, but are* ***not compatible with Crystal Reports version 9 and later!*** *If you plan do create custom reports, make sure that you use one of the compatible versions of Crystal Reports to do so.*

Creating an Encounter Form Style

To create a new encounter form style:

1. Select **Setup** > **Encounter Form Styles** from OMWin's main menu.
2. Select **Add** under the list box on the left.
3. Give your style a shorthand *Code* and a longer *Description*, then **OK** to save.

The next step is to set the services and headings for the style that you just created.

Adding and Changing Encounter Form Lines

Encounter form lines include service codes and descriptions, section headings, and empty boxes. You can create a set of 60 lines for each encounter form style, with any combination of services, headings, and blank lines.

1. Select **Setup** > **Encounter Form Styles** from Scheduler's main menu.
2. Highlight the style on the left that you want to configure or modify.
3. To add a new line item, click the Plus (+) button under the list box on the right. (Or, using the keyboard: tab to right-side list, then press <Insert>.)
4. If you want to create a heading, check the *Section heading* box and enter your heading text next to *Description*. If you want to enter a service line, then enter the appropriate shorthand code for that service next to *Service Code* or select the desired service from your Services List by pressing <F2> or right-clicking in that field. When you tab to the *Description* field Scheduler will insert the description for that service for you automatically. You can, if you like, modify the description text. Select **OK** to save.

5. Press <Insert> or click the Plus button to add additional section headings and services. You can enter up to 60 lines.
6. If you would like to include blank lines as shown in the right-hand column in the image above, enter lines without selecting a service and entering only a period (.) as the *Description*.
7. To rearrange the order of the headings and services, use the move-up/move-down buttons below the list.
8. To modify an existing item, highlight it and press the delta (?) button beneath the list.

Reports

The reports described below and more may be found on the **Reports** menu or by clicking the **Print...** button on one of the pop-up menus. You may add new reports, created by yourself, another member of your organization, or by SOS programmers.

Appointment Check-In and Confirmation Lists

The *Check-In List* prints all active appointments for the desired date. This report is meant to serve as a front desk appointment sheet. It includes all providers and sorts appointments by time.

Another version of this report, the Check-in List with Phone and Appointment Status adds the phone numbers and appointment status for each appointment. The report can be used in the same way as the standard Check-In List, but can also be used as a worksheet for offices that call to confirm appointments.

Daily Provider Log

The *Daily Provider Log* is designed for distribution to service providers at the beginning of the day. It contains details of each appointment, but also some information about each patient, including primary diagnosis, current balance, and telephone numbers. The report also has blanks next to each appointment for the provider to write the service, fee, and any payment received. In some offices these blocks are completed and the provider returns the sheet at the end of the day. Office staff enter the charges and payments from the *Provider Log* the following day.

Appointments for Period

This report prints a summary of scheduled appointments for the specified date range and provider and includes notes entered on each appointment form.

Other Reports

Additional reports included with the product include the following:

- Check-in List with Phone Numbers and Status
- Appointments by Resource for Period
- Appointments for Period without Notes
- Appointments History
- Canceled Appointments
- Resource Schedule

Importing Appointments into OMWin's Daysheet

In many cases, manual entry of charges can be greatly reduced by importing charges directly from the appointment scheduler to the Daysheet. To enable this feature in OMWin, select **Setup > System Options**, **Transactions** tab. Set the *Import into daysheet from* option to "Scheduler". Click **OK** to save.

To import appointments, open the OMWin Daysheet window, then select the **Import Appointments** button. Specify the date range and, if desired, specify a particular provider. If no provider is specified, then all will be imported.

A list window containing all the specified appointments will appear. By default, all are tagged for import. If there are any you do not wish to import, simply untag them. When you are ready to continue, select the **OK** button.

As the appointments are being imported, OMWin examines them to be sure that the system has enough information to create a complete charge. If it does not, then it will display the normal charge entry window so that you can complete the entry.

After import, the new entries will appear in the Daysheet where you can view, change, or delete them as necessary. Note that you can import appointments only for existing patients.