# SCHEDULE

The Schedule module consists of the following six sections (or sub menus):

1. Patient Appointment
2. Daily Appointment
3. Batch Recall
4. Create: Provider Schedule and Resource Schedule
5. Profile: Reason, Resource, Schedule Group, Recall Definition and Holidays
6. Batch Slot Utility

The scheduling module is designed to be an entity wide scheduling solution, meeting the needs of a single provider or a complex organization of multiple providers and resources. It helps you to:

- schedule the time of the provider(s) and the resource(s) efficiently
- set up the time slot(s) in a customized way giving you options to create time slots, as well as block, book, overbook, full and open specific time slots for specific reasons temporarily or permanently
- check if provider(s) or resource(s) is/are available at specific time(s) in a single glance using the user-friendly monthly calendar
- set and retrieve the appointments and available time of the providers and the resources
- enter the name of patient to check for the existing appointment or to set a new appointment
- select the specific or all days to see the appointments at once
- check the times the provider(s)/resource(s) is/are available for appointment, the time provider(s) has an appointment and the time provider(s) is not available (blocked)

A great user-friendly feature of SequelMed's Schedule module is that the slots are designated by specific colors for ease of view. Blocked slots appear in yellow color, Booked slots appear in green color, Overbooked slots appear in orange, Full slots in Red and Open slots in Gray.

Note: In most cases the information can be retrieved from the system if it exists in it just by pressing the 'Home' key that opens up a list box from which the required information can be selected.

**How to use SequelMed Scheduler:**

<u>Step 1</u>: In order to use SequelMed Scheduler, you have to ensure the correct setup of profiles (reasons, resources, schedule groups, recall definitions and holidays) in the 'Profile' section of the Schedule menu. Please refer to the 'Profile' section for detailed instructions on how to set up the various profiles.

<u>Step 2</u>: Once the profiles are set up, you have to now create schedule(s) for respective provider(s) and/or resource(s) in the 'Create' section of the Schedule menu. Please refer to the 'Create' section for detailed instructions on how to create schedules for provider(s) and resource(s).

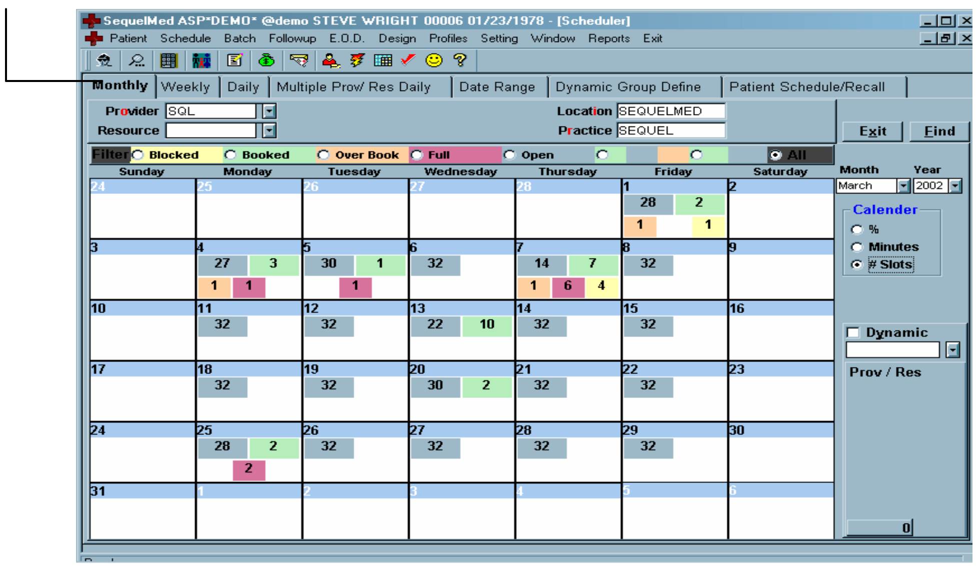
<u>Step 3</u>: You are now ready to use the Scheduler. Please refer to the 'Scheduler' section of the Schedule menu for detailed instructions on how to start scheduling provider(s)/resource(s) appointments.

## 1. PATIENT APPOINTMENT

The Patient Appointment section/window is subdivided into seven parts:

- Monthly
- Weekly
- Daily
- Multiple Provider / Resource Daily
- Date Range
- Dynamic Group Define
- Patient History

## MONTHLY




The monthly calendar allows you to view the schedule for a whole month in one glance. However, before the information is displayed, the following needs to be done:

- The provider schedule in the ‘Create’ section of the Schedule menu has to be created. The details of creating a provider schedule as well as to view the existing schedules are explained in the ‘Create’ section.

- Resource(s) has to be created first, which is done in SequelMed Security application by an administrator, whereby it appears in the ‘Profile’ section of the Schedule menu. Then it can be scheduled in the ‘Create’ section here in the Schedule menu. The details of how to create a resource schedule are explained in its respective section.

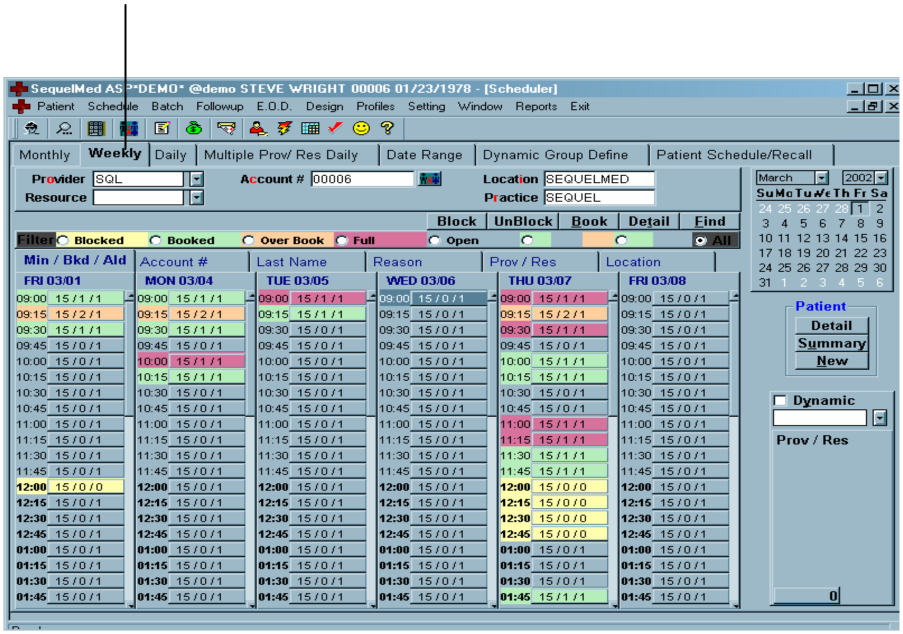
- Dynamic groups have to be defined in the ‘Dynamic Group Define’ tab. The pre-defined groups that have provider/resource relation can be selected from the drop-down menu placed under the Dynamic checkbox. The purpose and how to create groups is explained in the ‘Profile’ section of the Schedule menu.

- After entering relevant information in respective sections as explained above, the schedule of the selected provider would appear in the schedule window as per the given ‘Find’ criteria. Each box in the schedule depicts one day. The color scheme within each box shows the type of filtering and the number associated with each filter gives the percentage of scheduling done. The sum of all filters has to add up to 100%.

| Field | Description |
|---|---|
| Provider | User-defined short name of the provider |
| Resource | User-defined short name of the resource |
| Location | User-defined short name of the location |
| Practice | User-defined short name of the practice |
| Month | The drop-down menu allows you to select the month for which you want to create or see the schedule for |
| Year | The drop-down menu allows you to select the year for which you want to schedule appointments for |
| Calendar | Using the radio buttons, the monthly schedule may be dynamically sorted by percent, minutes or number of slots |
| Dynamic | Check this box if you want to use the Dynamic Group feature. Dynamic Group allows you to easily import from already created providers/resources from the Dynamic Group Define window into a desired group to be used. You can define a group in the Dynamic Group by clicking on the "Dynamic Group Define" section, which is the sixth tab on the right. You can easily "Move>>>" to the right any provider(s) / resource(s) into the Dynamic Group Column to the right. You can also "<<<Move" any provider(s) / resource(s) back in the Prov/Res column to the left if you do not want it in the Dynamic Group |
| Prov/Res | Lists all the provider(s)/resources(s) which are part of a specified group already created in the 'Profile' section of the Schedule menu |
| Filter | Allows you to filter the desired slot(s) according to: Blocked, Booked, Over Book, Full, Open, All |

| Button | Description |
|---|---|
| Find | Finds and displays the desired information |
| Exit | Exits you out of the patient appointment window |

## WEEKLY



In this window, the schedule of a provider/resource is retrieved on a weekly basis. Slots are generated allowing patients to be booked for appointment with provider(s). The following information is displayed:

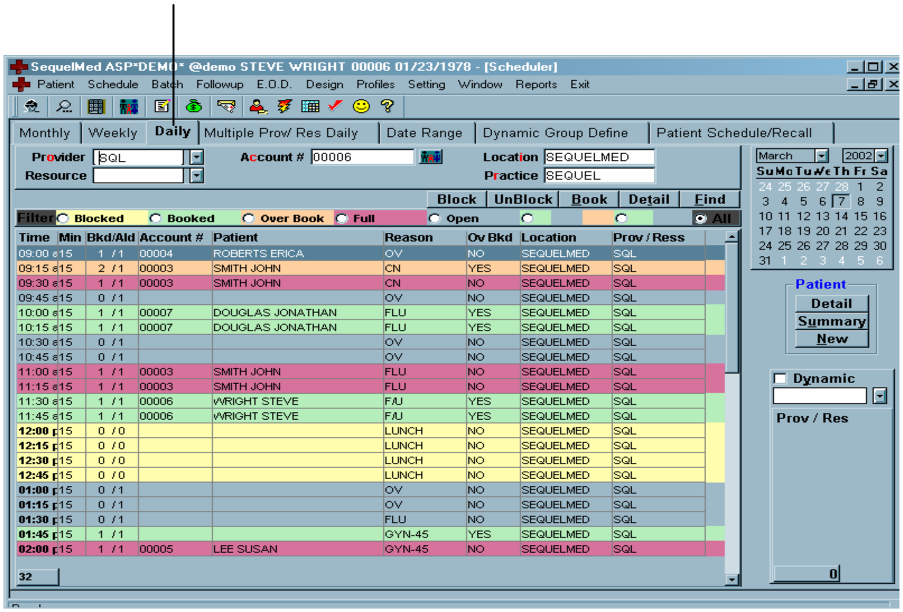
- Min/bkd/ald: shows the number of slots available for each day of that week, the time for each slot, and the number of patients allowed in each slot. In case of over-booking two or more patients can be booked in on slot but the number of patient(s) allowed would remain as one if it was assigned one while creating the schedule of the provider/resource.
- Account Number: Gives the account number of the patient booked in a particular slot.
- Last Name: Shows the last name of the patient.
- Reason: Shows the reason for booking the slots.
- Prov/Resource: Gives the name of the provider/resource scheduled for the slot.
- Location: the location name would appear in front of each slot.

| **Field** | **Description** |
|---|---|
| **Provider** | **User-defined short name of the provider** |
| **Resource** | **User-defined short name of the resource** |
| **Account #** | **Account number of the patient** |
| **Location** | **User-defined short name of the location** |
| **Practice** | **User-defined short name of the practice** |

| | |
|---|---|
| Calendar | The calendar allows you to easily select the year, month and date for which you want to see the schedule of the slots of the desired provider(s) / resource(s). When you click on a particular date in the calendar, it will show you the schedule for the desired provider(s) / resource(s) for a week after the date selected. You can view the information about the slots in terms of:<br>Minutes / Booked / Allowed; Account #; Last Name; Reason; Provider / Resource; Location |
| Dynamic | Check this box if you want to use the Dynamic Group feature. Dynamic Group allows you to easily import from already created providers/resources window into a desired group to be used. You can define a Dynamic Group by clicking on the “Dynamic Group Define” section, which is the sixth tab on the right. You can easily “Move>>>” to the right any provider(s) / resource(s) into the Dynamic Group Column to the right. You can also “<<<Move” any provider(s) / resource(s) back in the Prov/Res column to the left if you do not want to include it in the Dynamic Group. |
| Prov/Res | Lists all the provider(s)/resources(s) which are part of a specified group |
| Filter | Allows you to filter the desired slot(s) according to: Blocked, Booked, Over Book, Full, Open, All |

| Button | Description |
|---|---|
| Find | Finds and displays the desired information |
| Block | Blocks that particular slot and cannot be used for booking till the time it is unblocked. |
| Unblock | Allows you to unblock the slots |
| Book | Allows you to book/schedule a patient for a provider/resource |
| Detail | Shows you the details of the specified slot |
| Patient Detail | Takes you to the Patient Registration window, which shows the patient’s demographic and the insured party information |
| Summary | Shows the summary of the selected patient |
| New | Allows you to enter a new patient by opening a window titled “New Patient”. |

## DAILY



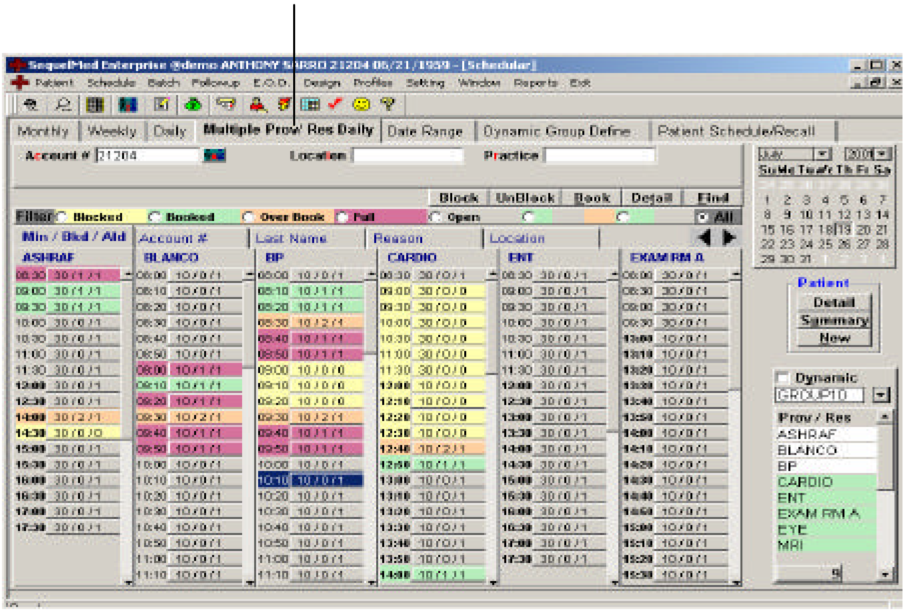
The Daily window, like the Weekly window, serves the same purpose except that the slots here are on a daily basis and therefore only one day's slot can be seen here.

| Field | Description |
|---|---|
| **Provider** | **User-defined short name of the provider** |
| **Resource** | **User-defined short name of the resource** |
| **Account #** | **Account number of the patient** |
| **Location** | **User-defined short name of the location** |
| **Practice** | **User-defined short name of the practice** |
| **Calendar** | **The calendar allows you to easily select the year, month and date for which you want to see the schedule of the slots of the desired provider(s) / resource(s). When you click on a particular date in the calendar, it will show you the schedule for the desired provider(s) / resource(s) for a week after the date selected. You can view the information about the slots in terms of: Time; Minutes; Booked / Allowed; Account #; Patient; Reason; Overbooked; Location; Provider / Resource;** |
| **Dynamic** | **Check this box if you want to use the Dynamic Group feature. Dynamic Group allows you to easily import from already created providers/resources window into a desired group to be used. You can define a Dynamic Group by clicking on the "Dynamic Group Define" section, which is the sixth tab on the right. You can easily "Move>>>" to the right any provider(s) / resource(s) into the Dynamic Group Column to the right. You can also "<<<Move" any** |

| | |
|---|---|
| | **provider(s) / resource(s) back in the Prov/Res column to the left if you do not want to include it in the Dynamic Group** |
| **Prov/Res** | **Lists all the provider(s)/resources(s) which are part of a specified group** |
| **Filter** | **Allows you to filter the desired slot(s) according to: Blocked, Booked, Over Book, Full, Open, All** |

| **Button** | **Description** |
|---|---|
| **Find** | **Finds and displays the desired information** |
| **Block** | **Blocks that particular slot and cannot be used for booking till the time it is unblocked.** |
| **Unblock** | **Allows you to unblock the slots** |
| **Book** | **Allows you to book/schedule a patient for a provider/resource** |
| **Detail** | **Shows you the details of the specified slot** |
| **Patient Detail** | **Takes you to the Patient Registration window, which shows the patient's demographic and the insured party information** |
| **Summary** | **Shows the summary of the selected patient** |
| **New** | **Allows you to enter a new patient by opening a window titled "New Patient"** |

## MULTIPLE PROVIDER / RESOURCE DAILY



This window displays information after groups, whether dynamic or pre-defined group (from the drop down menu), have been selected. There are two tabs associated with this window, one row of tabs in the rear and one row in the front. Details of the tabs in the rear are as follows:

- Min/bkd/ald: shows the number of slots available for each day of that week, the time for each slot, and the number of patients allowed in each slot. In case of over-booking two or more patients can be booked in on slot but the number of patient(s) allowed would remain as one if it was assigned one while creating the schedule of the provider/resource.

- Account Number: Gives the account number of the patient booked in a particular slot.

- Last Name: Shows the last name of the patient.

- Reason: Shows the reason for booking the slots.

- Location: the location name would appear in front of each slot.

The front tabs indicate information regarding the provider and the resource selected in the group. The resource, unlike the provider, cannot be independently scheduled with the patient. To schedule a resource with the patient, a provider will have to be selected first and then a resource can be scheduled for the patient. Note that:

- Slots for the provider and resource have to be booked simultaneously by using the ‘Ctrl’ key and the date/time of both slots must fall within the same time.

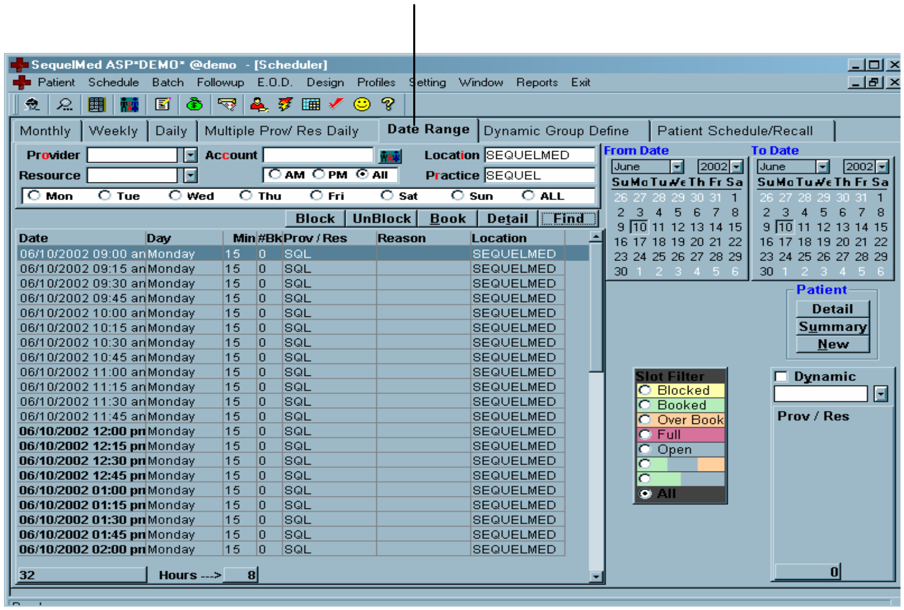
- Provider and resource have to be in the same location, otherwise booking cannot be done.

| Field | Description |
|---|---|
| **Account #** | **Account number of the patient** |
| **Location** | **User-defined short name of the location** |

| | |
|---|---|
| Practice | User-defined short name of the practice |
| Calendar | The calendar allows you to easily select the year, month and date for which you want to see the schedule of the slots of the desired provider(s) / resource(s). When you click on a particular date in the calendar, it will show you the schedule for the desired provider(s) / resource(s) for a week after the date selected. You can view the information about the slots in terms of: Minutes / Booked/ Allowed; Account #; Last Name; Reason; Location |
| Dynamic | Check this box if you want to use the Dynamic Group feature. Dynamic Group allows you to easily import from already created providers/resources window into a desired group to be used. You can define a Dynamic Group by clicking on the "Dynamic Group Define" section, which is the sixth tab on the right. You can easily "Move>>>" to the right any provider(s) / resource(s) into the Dynamic Group Column to the right. You can also "<<<Move" any provider(s) / resource(s) back in the Prov/Res column to the left if you do not want to include it in the Dynamic Group |
| Prov/Res | Lists all the provider(s)/resources(s) which are part of a specified group |
| Filter | Allows you to filter the desired slot(s) according to: Blocked, Booked, Over Book, Full, Open, All |

| <u>Button</u> | <u>Description</u> |
|---|---|
| Find | Finds and displays the desired information |
| Block | Blocks that particular slot and cannot be used for booking till the time it is unblocked. |
| Unblock | Allows you to unblock the slots |
| Book | Allows you to book/schedule a patient for a provider/resource |
| Detail | Shows you the details of the specified slot |
| <u>Patient</u> Detail | Takes you to the Patient Registration window, which shows the patient's demographic and the insured party information |
| Summary | Shows the summary of the selected patient |
| New | Allows you to enter a new patient by opening a window titled "New Patient". |

## DATE RANGE



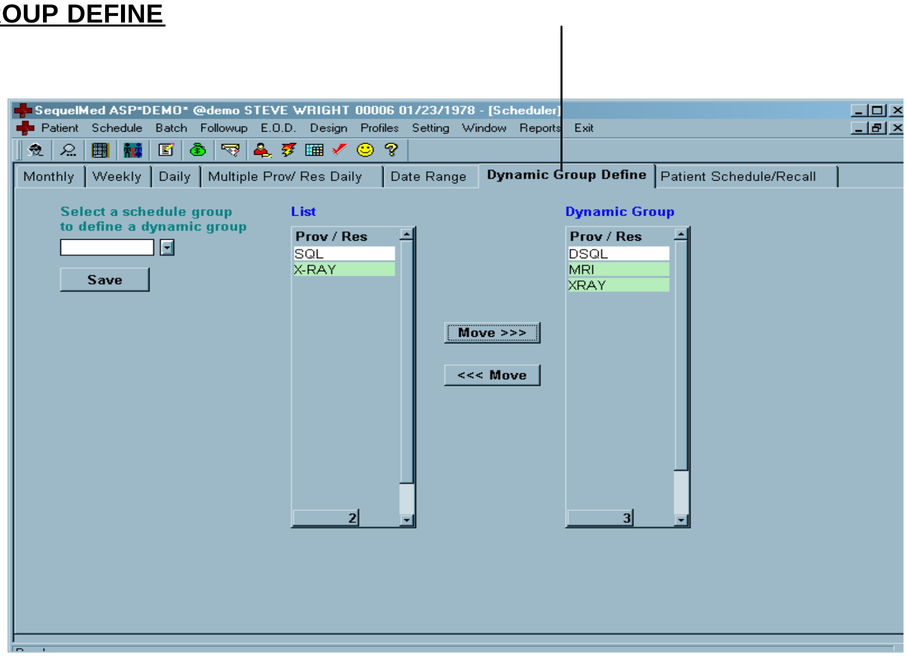

In this window, scheduling information for a specific period can be viewed and patients can be scheduled vis-à-vis the 'Book' button.

| **Field** | **Description** |
|---|---|
| **Provider** | **User-defined short name of the provider** |
| **Resource** | **User-defined short name of the resource** |
| **Account #** | **Account number of the patient. Icon placed close to this field is used to select patients for scheduling.** |
| **Time** | **Gives information about timing (AM, PM, or ALL)** |
| **Location** | **Short name of the location, as defined/created in the Profile menu** |
| **Practice** | **Short name of the practice, as defined/created in the Profile menu** |
| **Days** | **Information required for particular day** |
| **Calendar (From Date & To Date)** | **Used to select the span of days for which information is desired** |
| **Dynamic** | **Check this box if you want to use the Dynamic Group feature. Dynamic Group allows you to easily import from already created providers/resources window into a desired group to be used. You can define a Dynamic Group by clicking on the "Dynamic Group Define" section, which is the sixth tab on the right. You can easily "Move>>>" to the right any provider(s) / resource(s) into the Dynamic Group Column to the right. You can also "<<<Move" any** |

| | |
|---|---|
| | provider(s) / resource(s) back in the Prov/Res column to the left if you do not want to include it in the Dynamic Group |
| **Prov/Res** | **Lists all the provider(s)/resources(s) which are part of a specified group** |
| **Slot Filter** | **Allows you to filter the slot(s) as desired: Blocked, Booked, Over Book, Full, Open, All** |

| **Button** | **Description** |
|---|---|
| **Find** | **Finds and displays the desired information** |
| **Block** | **Blocks that particular slot and cannot be used for booking till the time it is unblocked.** |
| **Unblock** | **Allows you to unblock the slots** |
| **Book** | **Allows you to book/schedule a patient for a provider/resource** |
| **Detail** | **Shows you the details of the specified slot** |
| **Patient Detail** | **Takes you to the Patient Registration window, which shows the patient's demographic and the insured party information.** |
| **Summary** | **Shows the summary of the selected patient.** |
| **New** | **Allows you to enter a new patient by opening a window titled "New Patient".** |

## DYNAMIC GROUP DEFINE

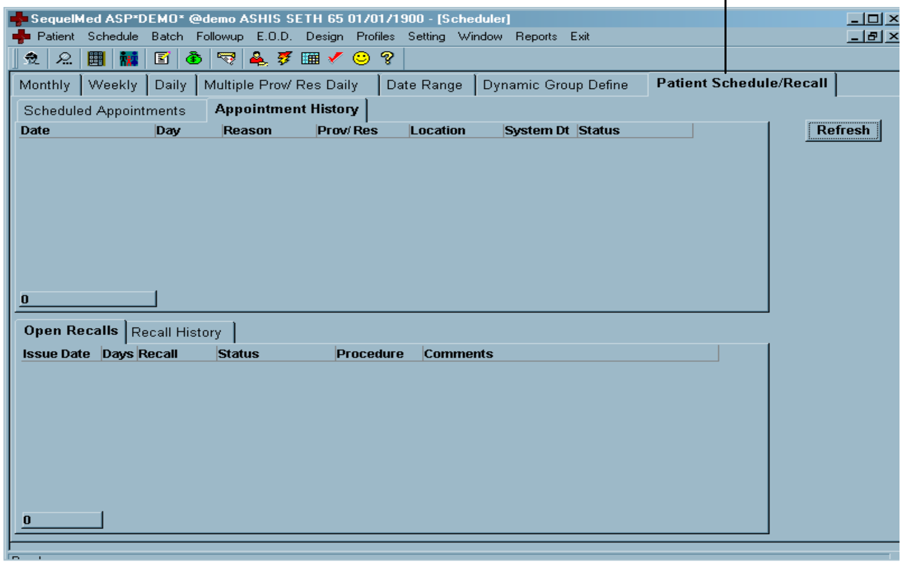



Dynamic Group allows you to easily import already created providers/resources into a larger group. You can define a Dynamic Group by clicking on the “Dynamic Group Define” section, which is the sixth tab on the right. You can easily “Move>>>” to the right any provider(s) / resource(s) into the Dynamic Group Column to the right. You can also “<<<Move” any provider(s) / resource(s) back in the Prov/Res column to the left if you do not want in the Dynamic Group.

You can also select a schedule group (see “Schedule Group under “Profile” section of this chapter on how to create a schedule group) to define a dynamic group and then save this group using the “save” button.

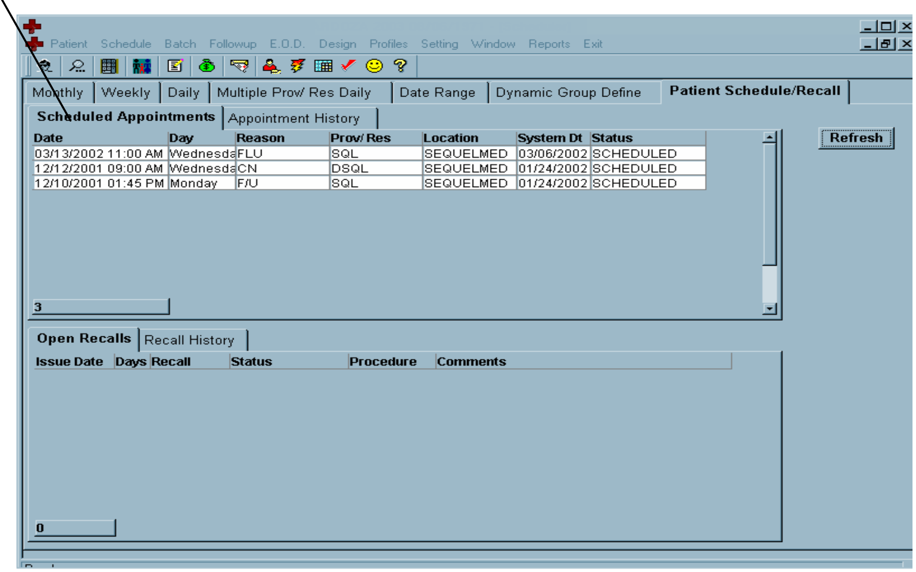
| Button | Description |
|---|---|
| **Save** | **Allows you to save an already created schedule group as a Dynamic Group** |
| **<<< Move** | **Allows you to move any provider(s) / resource(s) from the Dynamic Group column back into the list of Provider(s) / Resource(s) to the left** |
| **Move >>>** | **Allows you to move any provider(s) / resource(s) from the list of provider(s) / resources on the left in the Dynamic Group on the right** |

## PATIENT SCHEDULE/RECALL HISTORY




This window is divided into four sections: Scheduled Appointments, Appointment History, Open Recalls and Recall History. The Scheduled Appointments' tab shows the date, day, reason, Provider/Resource, location, System date and Status of the scheduled appointments of the selected patient. The 'Appointment History' tab shows the history of appointments of the selected patient. And when the 'Recall' tab is clicked, it shows the recall history of the patient.

Scheduled Appointments



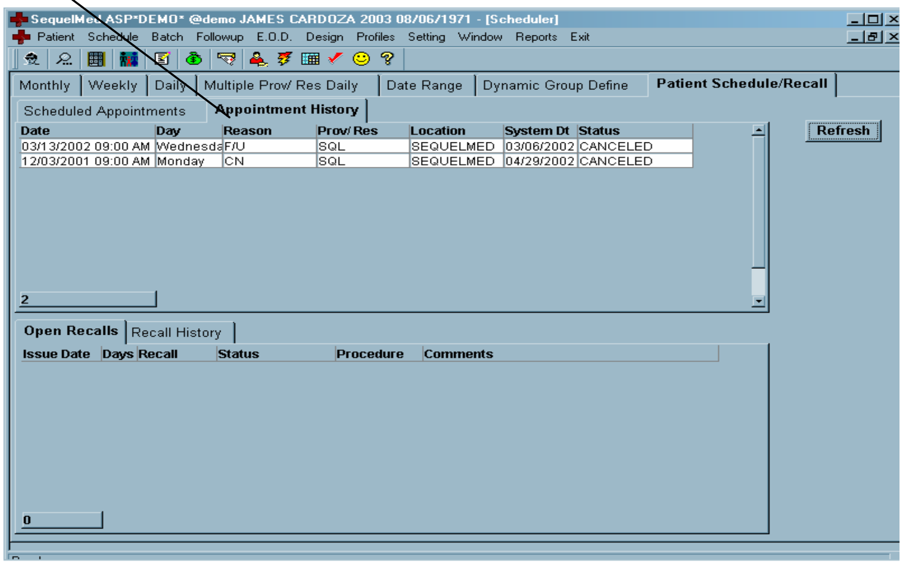
| Field | Description |
|---|---|
| **Date** | **Date the appointment was created** |
| **Day** | **Day of the appointment** |
| **Reason** | **Reason for which the appointment was scheduled** |
| **Prov/Res** | **Provider/Resource for whom the appointment was created** |
| **Location** | **User-defined short name of the location where the patient is to be seen** |
| **System Dt** | **Date the System recorded the appointment** |
| **Status** | **Status or nature of the appointment** |
| Note: | Double-clicking on a highlighted row opens up "Patient Appointment" Window, in which you can edit the "Reason" field, enter any comments in the "Comments" field, or change the status of the patient (seen, confirm, no show, scheduled, rescheduled, or canceled) by using the "New Status" button on the right. The rest of the fields are not editable, which is why they appear gray. |

| Button | Description |
|---|---|
| **New Status** | **Allows you to assign a new status for the appointment: seen, confirm, scheduled, rescheduled, no show, canceled.** |
| **History** | **Shows the history of appointment(s) by showing you the "Status Changes" and "Card History".** |
| **Send Card** | **Opens up "Send Card for An Appointment" window, which allows you to send a card for an appointment. It also shows the "Last Card Sent Date", i.e. the date on which the card was sent last. You may also enter any comments, if necessary. Click the OK button when finished.** |
| **Delete** | **Allows you to delete specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Save** | **Allows you to save the current record** |
| **Exit** | **Lets you exit out of the window** |

Attached Provider/Resource

| | |
|---|---|
| **Additional** | **Allows you to attach additional provider/resource** |
| **Delete** | **Allows you to delete selected information (appointment)** |

Appointment History



| **Field** | **Description** |
|---|---|
| **Date** | **Date the appointment was created** |
| **Day** | **Day of the appointment** |
| **Reason** | **Reason for which the appointment was scheduled** |
| **Prov/Res** | **Provider/Resource for whom the appointment was created** |
| **Location** | **User-defined short name of the location where the patient is to be seen** |
| **System Dt** | **Date the System recorded the appointment** |
| **Status** | **Status or nature of the appointment** |
| Note: | Double-clicking on a highlighted row opens up “Patient Appointment” Window, in which you can edit the “Reason” field, enter any comments in the “Comments” field, or change the status of the patient (seen, confirm, no show, scheduled, rescheduled, or canceled) by using the “New Status” button on the right. The rest of the fields are not editable, which is why they appear gray. |

| **Button** | **Description** |
|---|---|

**New Status** — **Allows you to assign a new status for the appointment: seen, confirm, scheduled, rescheduled, no show, canceled.**

**History** — **Shows the history of appointment(s) by showing you the "Status Changes" and "Card History".**

**Send Card** — **Opens up "Send Card for An Appointment" window, which allows you to send a card for an appointment. It also shows the "Last Card Sent Date", i.e. the date on which the card was sent last. You may also enter any comments, if necessary. Click the OK button when finished.**

**Delete** — **Allows you to delete specified information**

**Help** — **Takes you to the Help file for this window**

**Save** — **Allows you to save the current record**

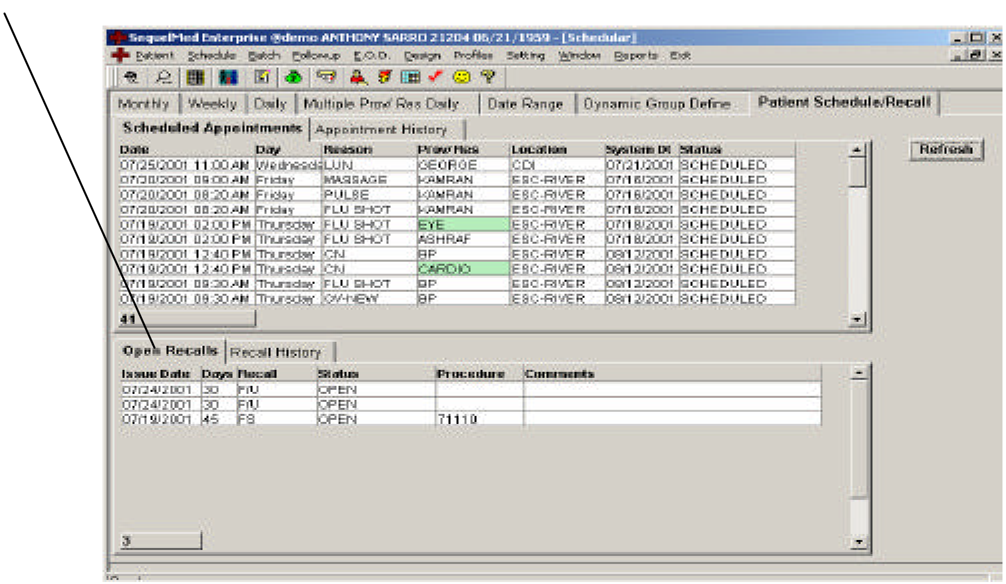
**Exit** — **Lets you exit out of the window**

<u>Attached Provider/Resource</u>

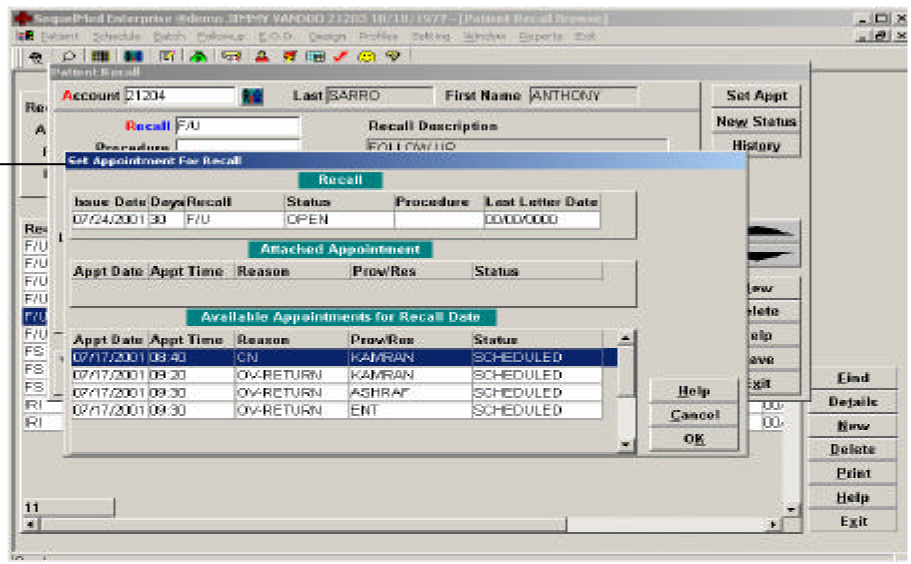
**Additional** — **Allows you to attach additional provider/resource**

**Delete** — **Allows you to delete selected information (appointment)**

<u>Open Recalls</u>



| Field | Description |
|---|---|
| **Issue Date** | **Date the Recall was issued** |
| **Days** | **Number of Days after recall is effective** |
| **Recall** | **Reason for recall** |
| **Status** | **Status of the recall appointment (open, scheduled, resolved, or canceled)** |
| **Procedure** | **Procedure (CPT) code for which the recall was made** |
| **Comments** | **Any comments related to the recall may be entered here** |
| Note: | Double-clicking on a highlighted row opens up “Set Appointment for Recall” Window, which is divided into three sections: “Recall,” “Attached Appointment,” and “Available Appointments for Recall”. You can drag an appointment from the “Available Appointments for Recall” window and drop it in the “Attached Appointment” window. Once you have dragged and dropped, click on the “OK” button. |

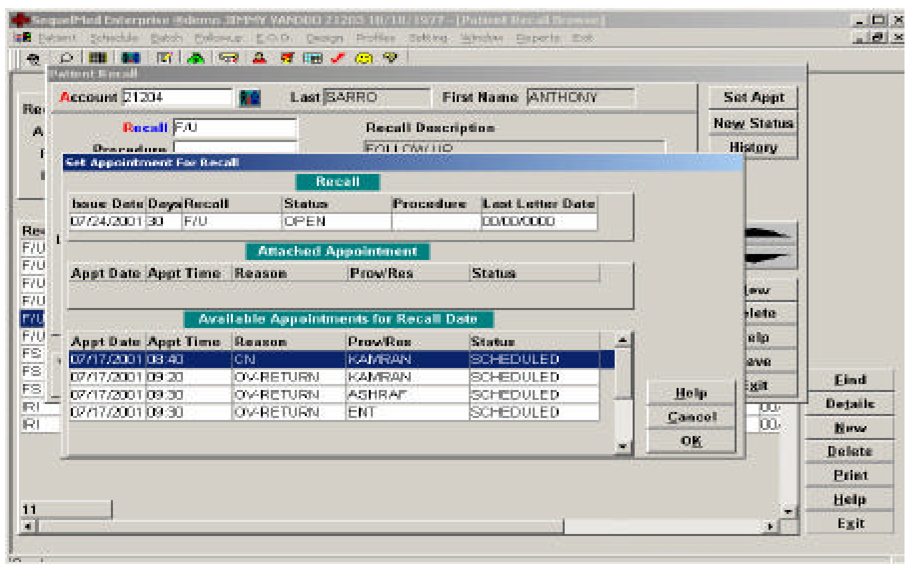



| Button | Description |
|---|---|
| **Help** | **Takes you to the Help file for this window** |
| **Cancel** | **Allows you to cancel selected information** |
| **OK** | **Verifies the input of the information** |

| Button | Description |
|---|---|
| **Refresh** | **Refreshes the window to reflect the updated information** |

Recall History

| | |
|---|---|
| **Issue Date** | **Date the Recall was issued** |
| **Days** | **Number of Days after recall is effective** |
| **Recall** | **Reason for recall** |
| **Status** | **Status of the recall appointment (open, scheduled, resolved, or canceled)** |
| **Procedure** | **Procedure (CPT) code for which the recall was made** |
| **Comments** | **Any comments related to the recall may be entered here** |
| Note: | Double-clicking on a highlighted row opens up "Set Appointment for Recall" Window, which is divided into three sections: "Recall," "Attached Appointment," and "Available Appointments for Recall". You can drag an appointment from the "Available Appointments for Recall" window and drop it in the "Attached Appointment" window. Once you have dragged and dropped, click on the "OK" button. |

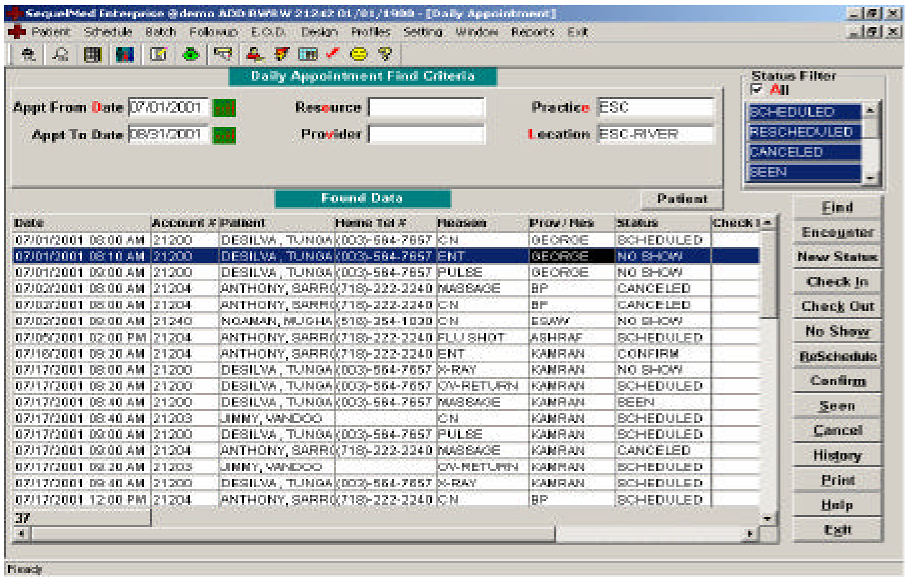



| **Button** | **Description** |
|---|---|
| **Help** | **Takes you to the Help section for this window** |
| **Cancel** | **Allows you to cancel selected information** |
| **OK** | **Verifies the input of the information** |

| **Button** | **Description** |
|---|---|
| **Refresh** | **Refreshes the window to reflect the updated information** |

## 2. DAILY ROSTER

Daily Roster is the second option in Scheduling. Selecting this option opens up the Daily Appointments window. This window lets you check all the appointments of provider(s) or resource(s) on a specific day at the selected practice and location. It lets you change the status of each appointment right in this window. It gives you options to see all appointments: rescheduled, scheduled, cancelled, seen, no show, and confirm.

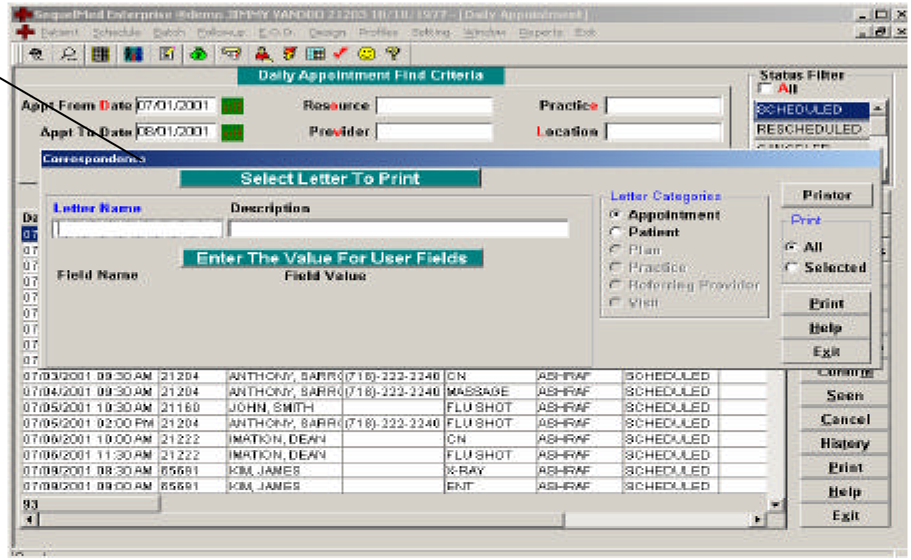



| Field | Description |
|---|---|
| **Appt From Date** | **The date you want to see the appointments for** |
| **Appt To Date** | **The date you want to see the appointments up to** |
| **Resource** | **Short name of the resource, as defined/created in the Profile section of the Schedule menu** |
| **Provider** | **Short name of the provider, as defined/created in the Profile menu** |
| **Practice** | **Short name of the practice, as defined/created in the Profile menu** |
| **Location** | **Short name of the location, as defined/created in the Profile menu** |
| **Status Filter** | **Allows you to see only the appointments for selected status from the list: Scheduled, Rescheduled, Cancelled, Seen, No Show, Confirm** |

| Button | Description |
|---|---|
| **Patient** | **Takes you to the Patient Registration window, which shows the patient's demographic and insured party information** |
| **Find** | **Finds the appointments based on selected criteria** |

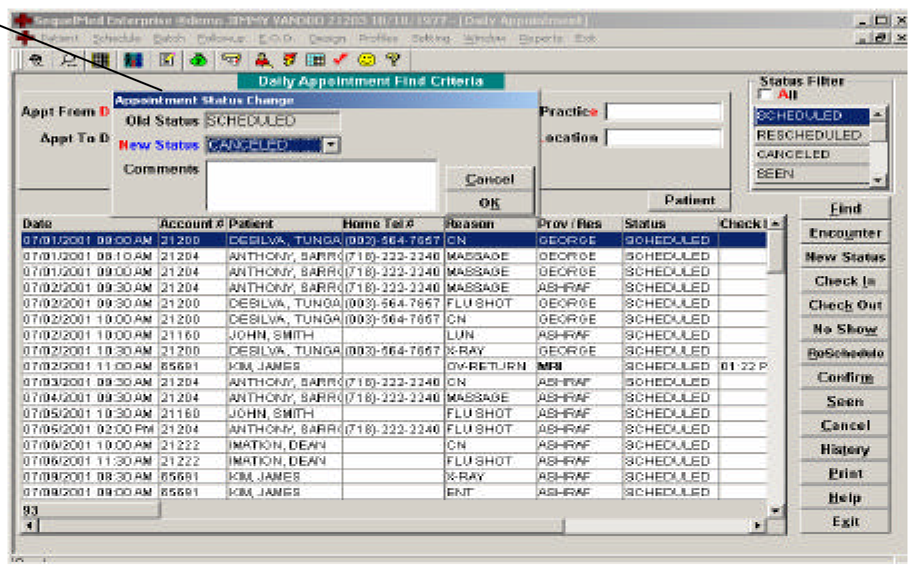
**Encounter**

**Displays the correspondence window for printing the selected category of letter**

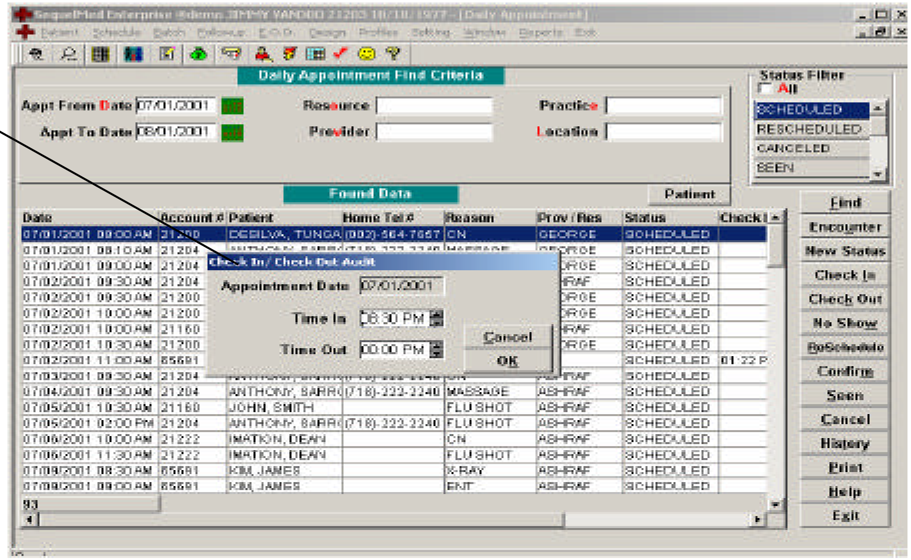



**New Status**

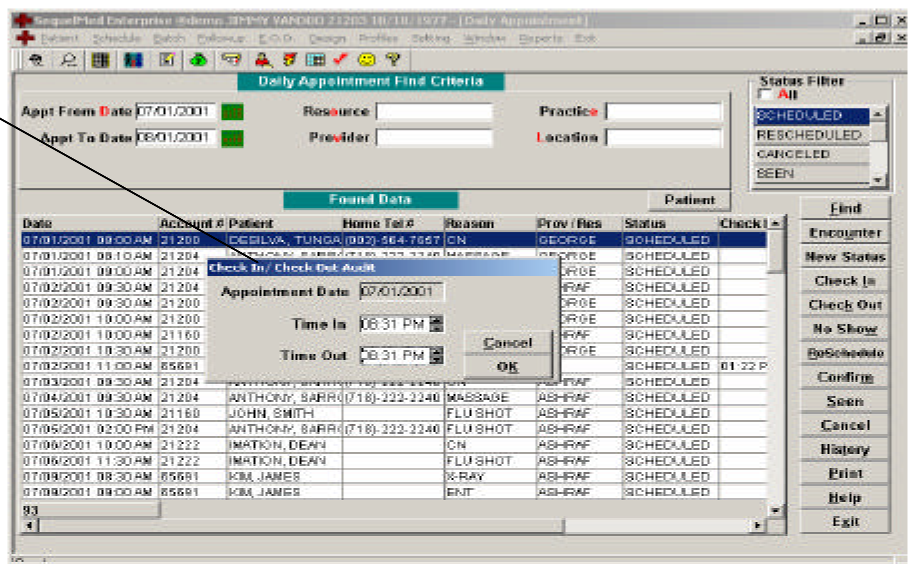
**Allows you to change the type of status for the scheduled appointment (Canceled, Confirmed, Seen, etc.)**



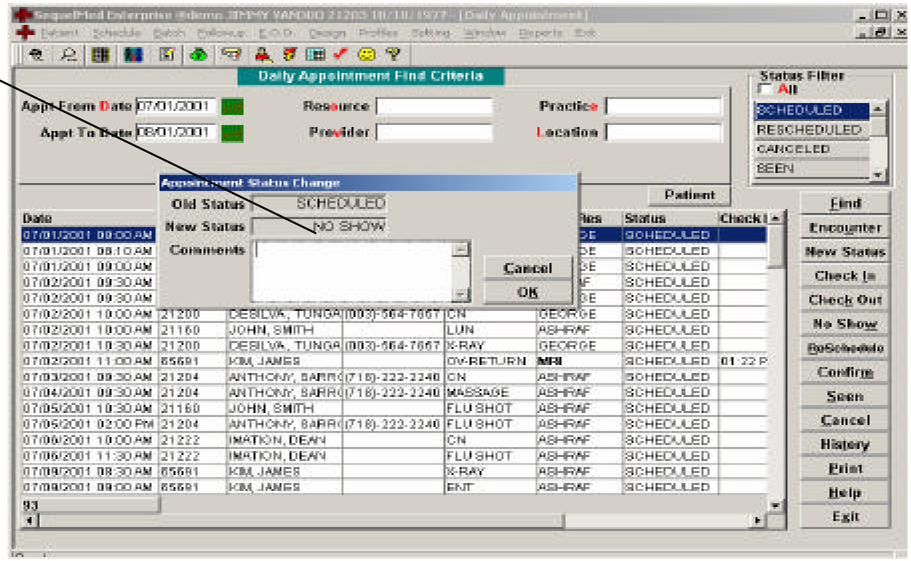
**Check In** Allows you to enter patient's check-in time



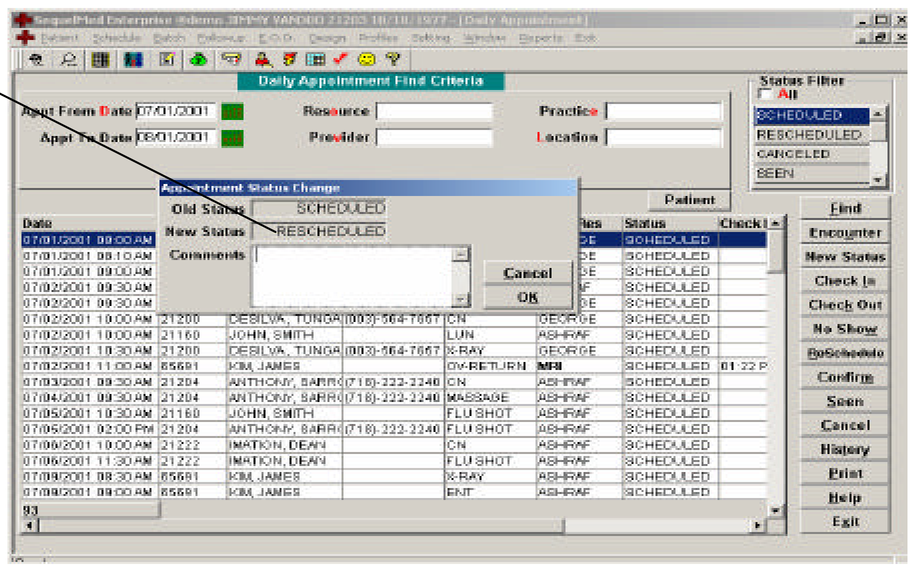

**Check Out** Allows you to enter patient's check-out time



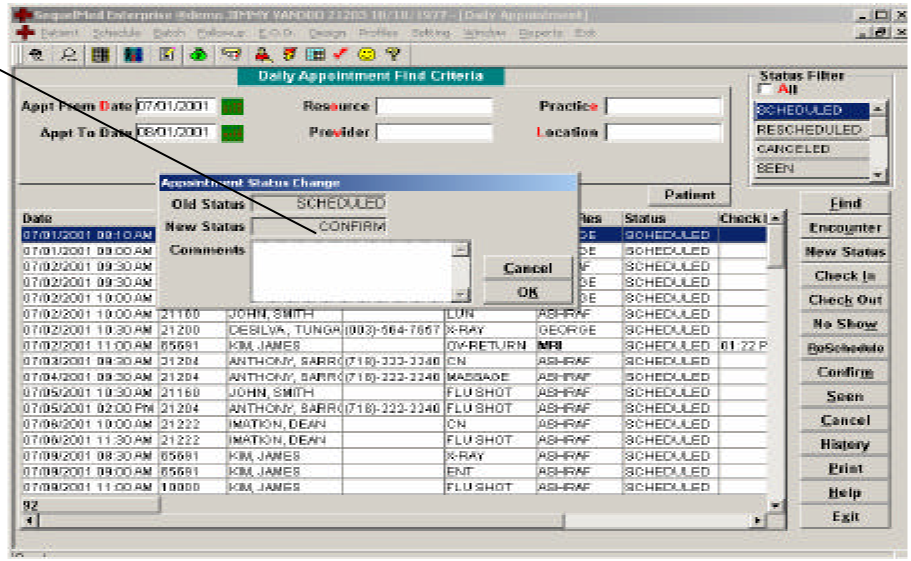
**No Show** — **Allows you to enter a patient who did not show up for his/her appointment**



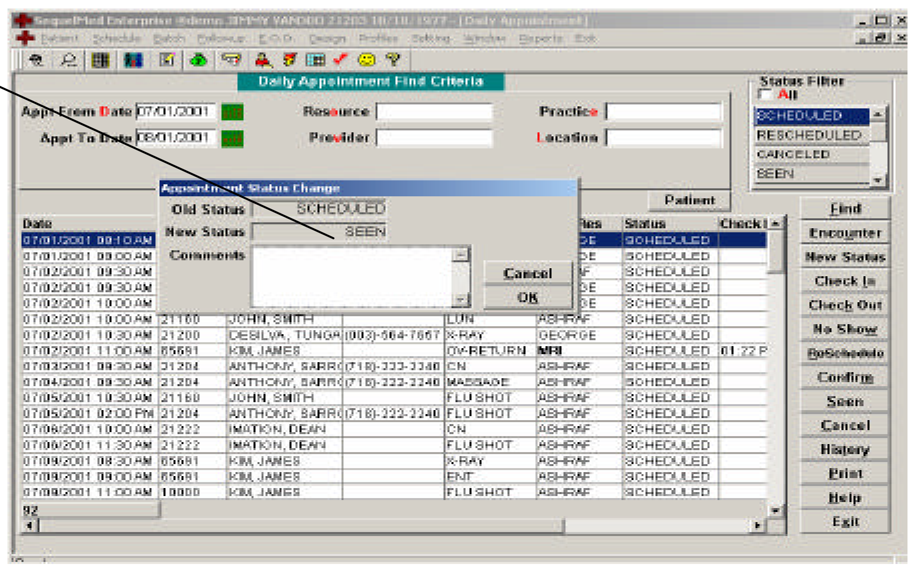

**ReSchedule** — **Allows you to reschedule a patient**



**Confirm** — Allows you to change the status of the selected appointment to confirm

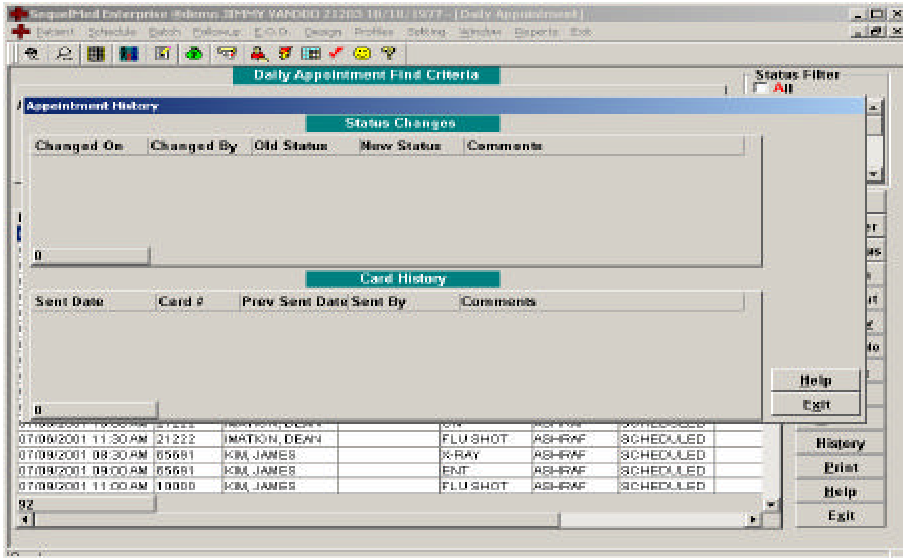



**Seen** — Allows you to change the status of the selected appointment to seen




**Cancel** — Allows you to change the status of the selected appointment to canceled

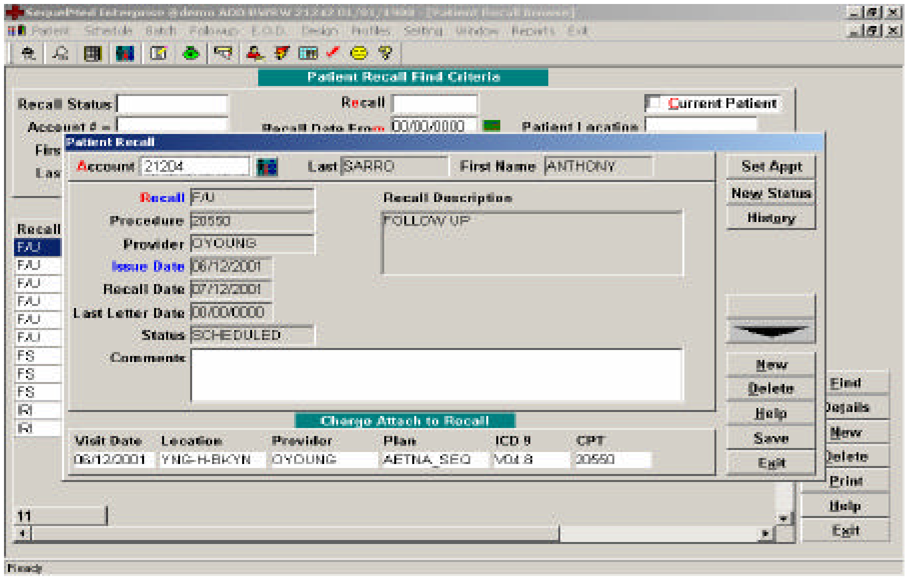
| | |
|---|---|
| **History** | **Shows the history of appointments and status changes for selected appointment** |



| | |
|---|---|
| **Print** | **Allows you to print the specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Exit** | **Allows you to exit out of this window** |

## 3. BATCH RECALL

The purpose of batch recall is to allow multiple recalls.




| Field | Description |
|---|---|
| **Account #** | **Account number of the patient** |
| **Last Name** | **Last Name of the patient** |
| **First Name** | **First Name of the patient** |
| **Recall** | **User-defined short name of the reason for the Recall** |
| **Recall Description** | **Descriptive name of the Recall** |
| **Procedure** | **Procedure (CPT) code for which the Recall was made** |
| **Provider** | **Name of the Provider** |
| **Issue Date** | **Date the Recall was issued** |
| **Recall Date** | **Date of the Recall** |
| **Last Letter Date** | **Date the last letter was sent** |
| **Status** | **Status of the recall appointment (open, scheduled, resolved, or canceled)** |
| **Comments** | **Any comments related to the recall may be entered here** |

Charge Attach to Recall

Visit Date — Date of the visit, i.e. date when the service was rendered

Location — User-defined short name of the location where the service was rendered

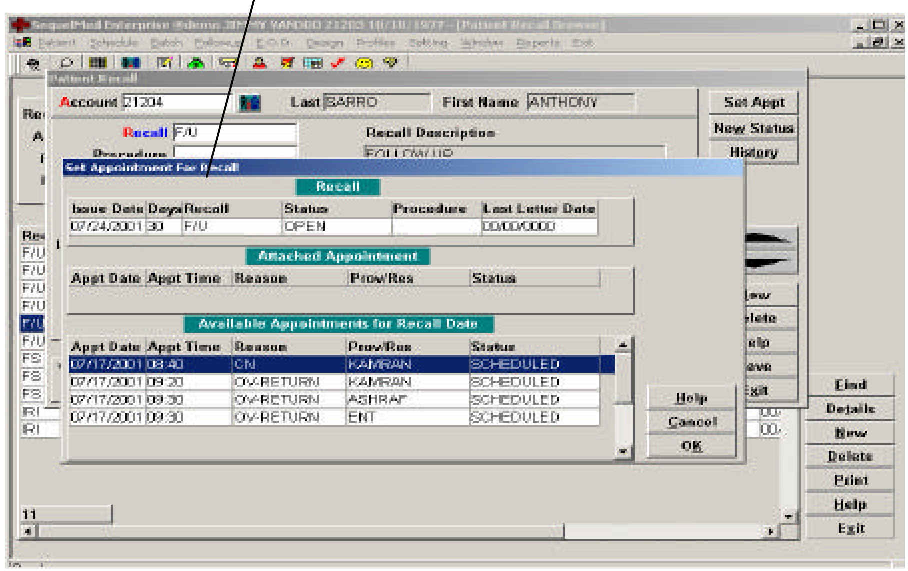
Provider — User-defined short name of the provider who rendered the service

Plan — User-defined short name of the plan responsible for this charge

ICD9 — Diagnosis code attached to this charge

CPT — Procedure code attached to this charge

| Button | Description |
|---|---|
| Set Appt | Opens up “Set Appointment for Recall” Window, which is divided into three sections: “Recall,” “Attached Appointment,” and “Available Appointments for Recall”. You can drag an appointment from the “Available Appointments for Recall” window and drop it in the “Attached Appointment” window. Once you have dragged and dropped, click on the “OK” button. |




| Button | Description |
|---|---|
| Help | Takes you to the Help section for this window |
| Cancel | Allows you to cancel selected information |
| OK | Verifies the input of the information |

New Status — Allows you to assign a new status for the appointment: seen, confirm, scheduled, rescheduled, no show, canceled.

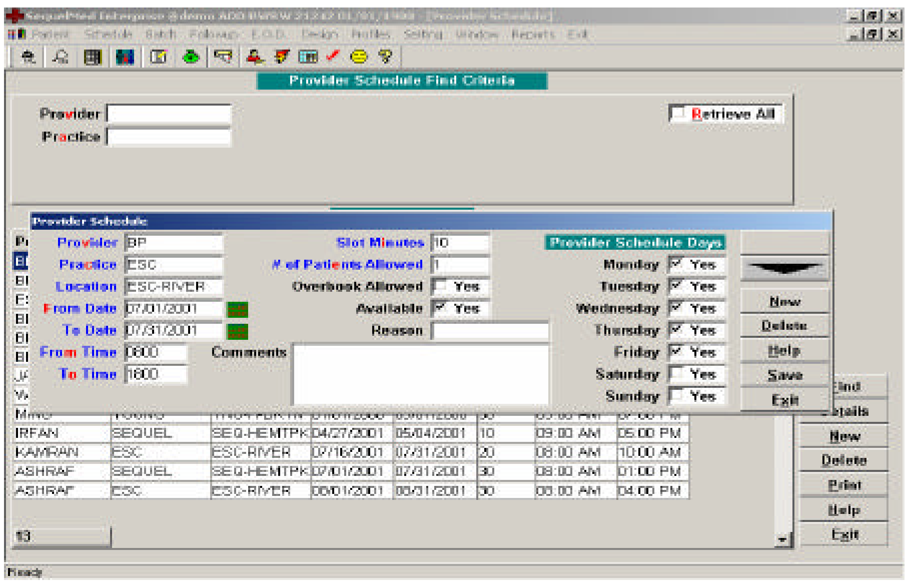
| | |
|---|---|
| **History** | **Shows the history of appointment(s) by showing you the “Status Changes” and “Card History”.** |
| **New** | **Refreshes to window to allow you to enter a new Recall** |
| **Delete** | **Allows you to delete specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Save** | **Saves current information** |
| **Exit** | **Exits out of the current window** |

## 4. CREATE: Provider Schedule and Resource Schedule

The first thing you do in the schedule module is to create a provider/resource schedule. If a provider/resource does not exist in the system, then you have to create the new provider/resource. In order to create a new provider, go to the 'Profiles' menu and click on 'Provider'. Click on the 'New' button, fill in the required information and 'save' it.

### Create Provider Schedule

Having created the provider, you can now go back to the 'Create' section of the 'Schedule' menu and begin creating a schedule for the desired provider/resource. This is the first thing to be done before booking the providers for the patients. In this option you will create time slots for the providers. Fill out the information in the fields given below and click the Save button to create the time slots. After you have clicked the Save button, it will take a second to make the slots and then will tell you how many slots were made.



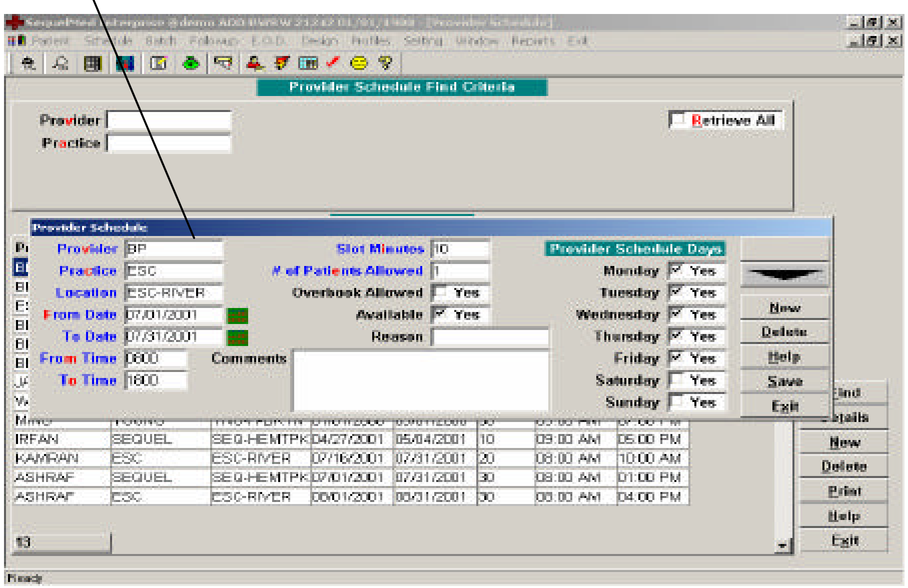

Provider Schedule Find Criteria window

| **Field** | **Description** |
|---|---|
| **Provider** | **Provider short name for whom the slots are to be made** |
| **Practice** | **Practice short name for which the slots are being made** |
| **Retrieve All** | **Check this box if you want to see a list of all the providers that exist in the system. Click on the "Find" button and it will show you a list of all the providers along with the following information: Practice, Location, From Date, To Date, Minutes, From Time, To Time.** |

| **Button** | **Description** |
|---|---|

| | |
|---|---|
| **Find** | **Finds the existing schedule of provider** |
| **Details** | **Gives detailed information for the selected row** |
| **New** | **Refreshes the window to let you create new schedule for another provider** |
| **Delete** | **Lets you delete the slots made in this record if no bookings have been made in them yet; If any booking has been made then the slots will not be deleted** |
| **Print** | **Allows you to print the specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Exit** | **Allows you to exit out of this window** |

<u>Creating a New Provider Schedule</u>



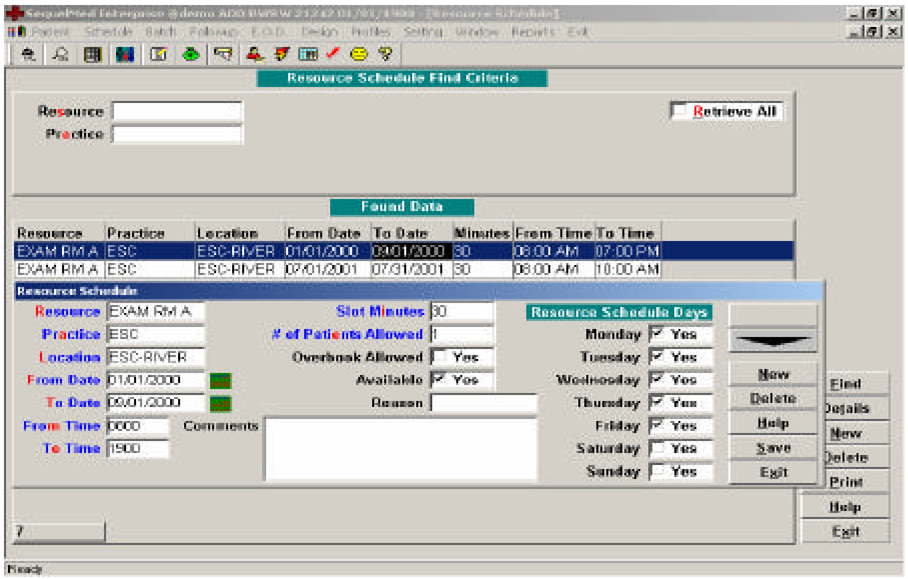

| **<u>Field</u>** | **<u>Description</u>** |
|---|---|
| **Provider** | **Provider short name for whom the slots are to be made** |
| **Practice** | **Practice short name for which the slots are being made** |
| **Location** | **Location short name for which the slots are being made** |
| **From Date** | **Date from which the slots are to be made** |
| **To Date** | **Date till slots are to be made** |
| **From Time** | **Provider schedule start time** |

| | |
|---|---|
| To Time | Provider schedule end time |
| Slot Minutes | Duration of each slot in minutes |
| # of Patient Allowed | Number of patients allowed per slot |
| Overbook Allowed | Check this box, if overbooking is allowed for the slots being made |
| Available | The slots will only be available if this flag is checked. If unchecked, slots will be unavailable/blocked and will have to be made available/unblock first for every booking by giving the appointment reason |
| Reason | Default appointment reason for the provider |
| Provider Schedule Days | The days for which you want to create time slots for provider |
| Comments | Comments related to the schedule |

| Button | Description |
|---|---|
| New | Refreshes the window to let you create time slots for another provider. |
| Delete | Lets you delete the slots made in this record if no bookings have been made in them yet; If any booking has been made then the slots will not be deleted |
| Help | Takes you to the Help file for this window |
| Save | Saves the information |
| Exit | Allows you to exit out of this window |

**Create Resource Schedule**

This is the first thing to be done before booking the resources for the patients. In this option you will create time slots for the resources. Fill out the information in the fields given below and click the Save button to create the time slots. After you have clicked the Save button, it will take a second to make the slots and then will tell you how many slots were made.



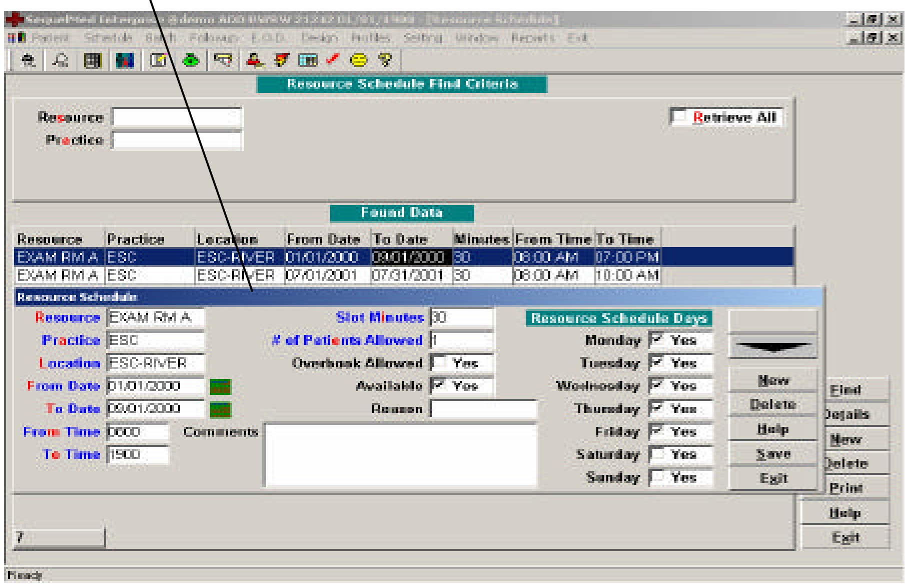

Resource Schedule Find Criteria window

| **Field** | **Description** |
|---|---|
| **Provider** | **Provider short name for whom the slots are to be made** |
| **Practice** | **Practice short name for which the slots are being made** |
| **Retrieve All** | **Check this box if you want to see a list of all the resources that exist in the system. Click on the "Find" button and it will show you a list of all the resources along with the following information: Practice, Location, From Date, To Date, Minutes, From Time, To Time.** |

| **Button** | **Description** |
|---|---|
| **Find** | **Finds the existing resource scheduled** |
| **Details** | **Shows you the details of the resource scheduled** |
| **New** | **Refreshes the window to let you create new schedule for another resource.** |

| | |
|---|---|
| **Delete** | **Lets you delete the slots made in this record if no bookings have been made in them yet; If any booking has been made then the slots will not be deleted** |
| **Print** | **Allows you to print the specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Exit** | **Allows you to exit out of this window** |

Creating New Resource Schedule



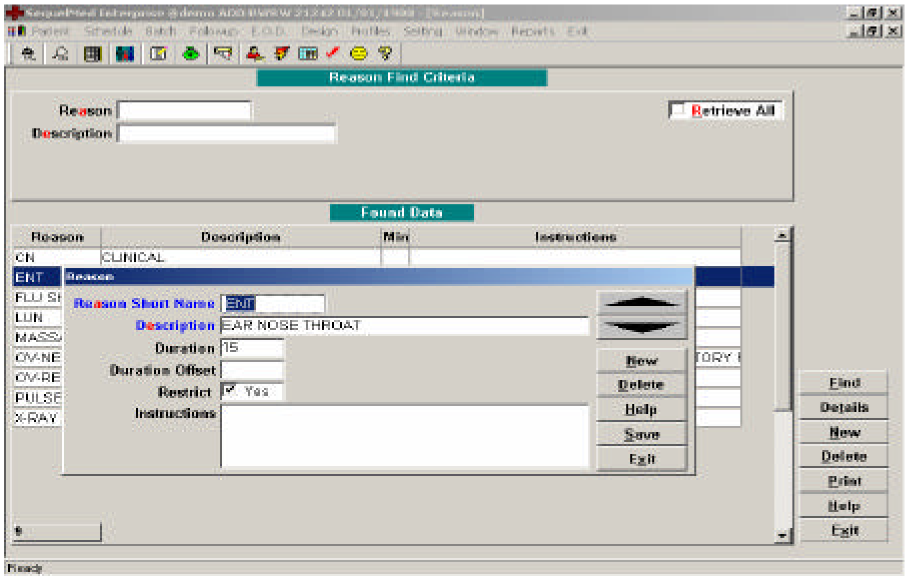

| **Field** | **Description** |
|---|---|
| **Resource** | **Resource short name for which the time slots are being made** |
| **Practice** | **Practice short name** |
| **Location** | **Location short name** |
| **From Date** | **Date from which the slots are to be made** |
| **To Date** | **Date till slots are to be made** |
| **From Time** | **Resource schedule start time** |
| **To Time** | **Resource schedule end time** |
| **Slot Minutes** | **Duration for each slot in minutes** |
| **# of Patients Allowed** | **Number of patients allowed per slot** |
| **Overbook Allowed** | **Checked if overbooking is allowed for the slots being made** |

| | |
|---|---|
| **Available** | **The slots will only be available if this flag is checked. If unchecked, slots will be unavailable/blocked and will have to be made available/unblock first for every booking by giving the appointment reason** |
| **Reason** | **Default appointment reason for the resource** |
| **Resource Schedule Days** | **The days for which you want to create time slots for resource** |
| **Comments** | **Comments related to the schedule** |

| **Button** | **Description** |
|---|---|
| **New** | **Refreshes the window to let you create time slots for another resource.** |
| **Delete** | **Lets you delete the slots made in this record if no bookings have been made in them yet. If any booking has been made then the slots will not be deleted** |
| **Help** | **Takes you to the Help file for this window** |
| **Save** | **Saves the information** |
| **Exit** | **Allows you to exit out of this window** |

## 5. PROFILE: Reason, Resource, Schedule Group, Recall Definition and Holidays

### Profile Reason




Reason Find Criteria

**Field** | **Description**

**Reason** — **Short name of the reason (ex: ENT)**

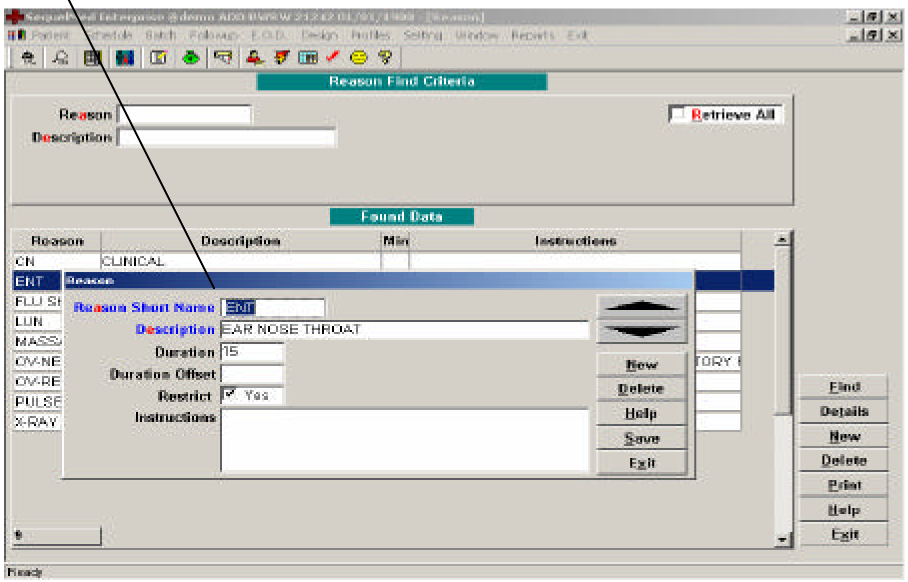
**Description** — **Descriptive name of the reason (ex: Ear Nose Throat)**

**Retrieve All** — **If you want to see a list of existing reason(s) in the system, check this box, which will retrieve all the existing reason(s) in the system. You can then select the reason as appropriate.**

| Button | Description |
|---|---|
| **Find** | **Finds the desired information** |
| **Details** | **Shows the details (Reason Short Name, Description, Duration offset, Duration, Restrict check box, Instructions) of the selected/highlighted Reason by opening a small window titled "Reason".** |
| **New** | **Allows you to create a new reason** |
| **Delete** | **Allows you delete specified information** |
| **Print** | **Allows you to print the specified information** |
| **Help** | **Takes you to the Help file for this window** |

| | |
|---|---|
| **Exit** | **Allows you to exit out of this window** |

Creating New Reason

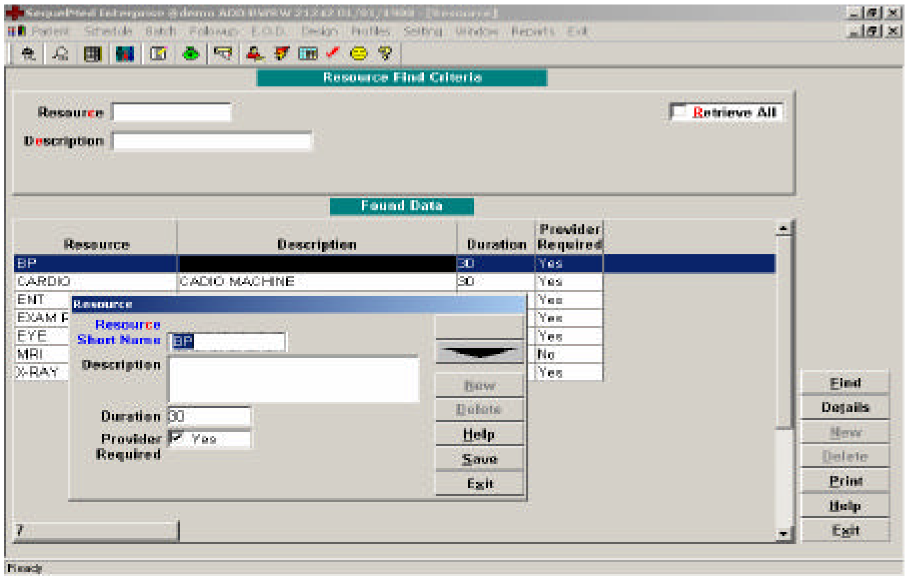



| **Field** | **Description** |
|---|---|
| **Reason Short Name** | **Short name of the Reason (ex: ENT)** |
| **Description** | **Descriptive name of the Reason (ex: Ear Nose Throat)** |
| **Duration** | **The amount of time in minutes this reason should automatically book when selected at the time of setting up the appointment** |
| **Duration Offset** | **Allows you to offset the resource availability for similar reason before next appointment on the same day by the specified number of minutes** |
| **Restrict** | **If you do not want to allow booking the same resource for the same reason in the same time slot even if overbooking is allowed but the same resource can be booked for a different reason in the same time slot, then check this box.** |
| **Instructions** | **You may write any instructions for the specific reason here, if necessary** |

| **Button** | **Description** |
|---|---|
| **New** | **Refreshes the window to let you create a new reason** |
| **Delete** | **Allows you delete an existing reason** |
| **Help** | **Takes you to the Help file for this window** |

| | |
|---|---|
| **Save** | **Allows you to save the current record** |
| **Exit** | **Allows you to exit out of this window** |

## Profile Resource

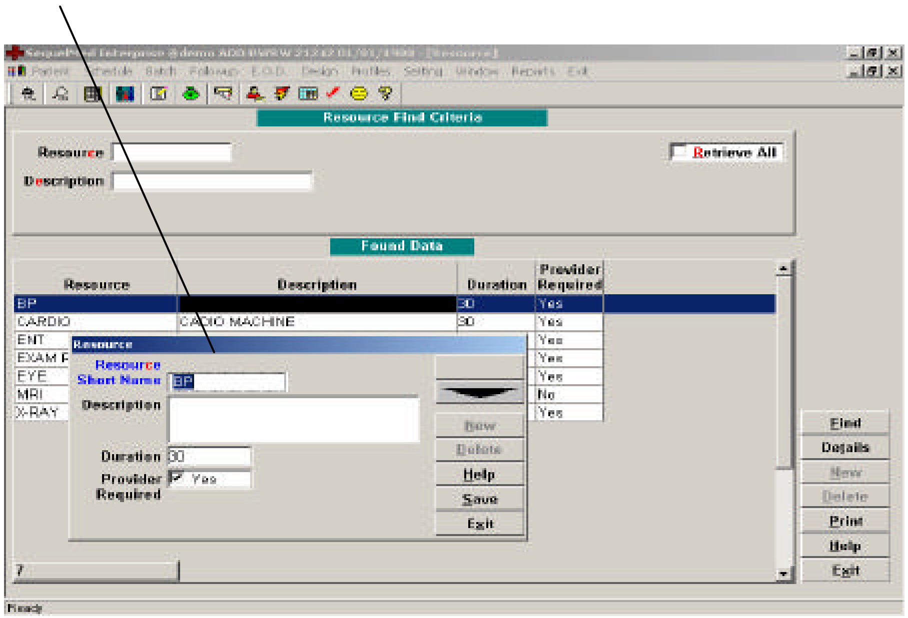



Resource Find Criteria

| **Field** | **Description** |
|---|---|
| **Resource** | **User-defined short name of the resource** |
| **Description** | **Descriptive name (any details) of the resource** |
| **Retrieve All** | **If you want to find an existing resource in the system, check this box, which will retrieve all the existing resource(s) in the system** |

| **Button** | **Description** |
|---|---|
| **Find** | **Finds the desired information** |
| **Details** | **Shows the details (Resource Short Name, Description, Duration, Provider Required check box) of the selected/highlighted Resource by opening a small window titled "Resource.** |
| **Delete** | **Allows you to delete specified information** |
| **Print** | **Allows you to print the specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Exit** | **Allows you to exit out of this window** |

Creating New Resource




| **Field** | **Description** |
|---|---|
| **Resource Short Name** | **User-defined short name of the Resource (ex: GSMRI)** |
| **Description** | **Descriptive name of the Resource (ex: Good Sam Hospital MRI)** |
| **Duration** | **Duration in minutes of the Resource, i.e. the duration of time the resource will be used for. For example, if it will take 30 minutes for an MRI, you will put 30 in this field. Note that this information is used for information purposes only, it is not used anywhere in the system** |
| **Provider Required** | **Make sure that you always check this box, as a resource cannot be scheduled independently of a provider. In other words, you cannot do individual resource scheduling.** |

| **Button** | **Description** |
|---|---|
| **Delete** | **Allows you delete specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Save** | **Allows you to save the current record** |
| **Exit** | **Allows you to exit out of this window** |

## Profile Schedule Group

Schedule Group Find Criteria

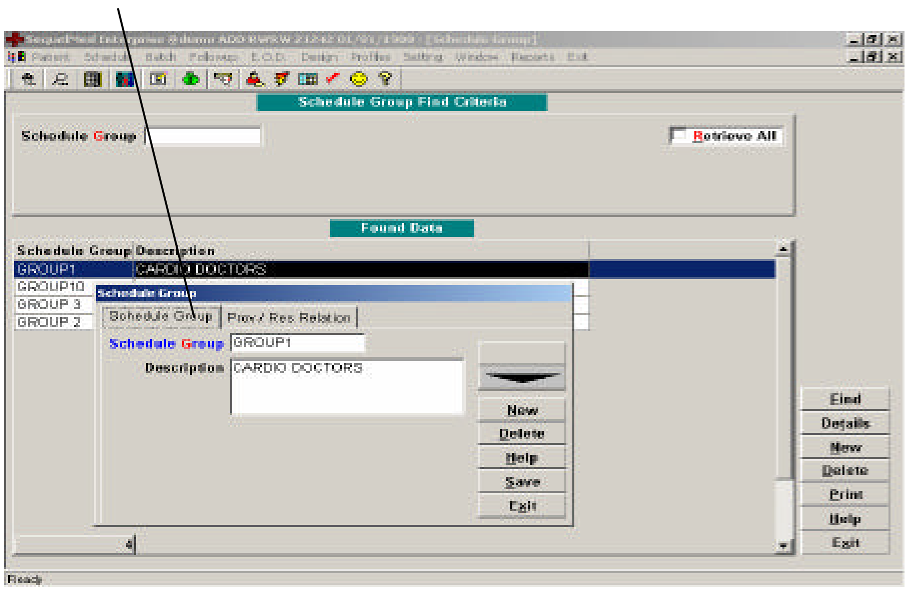
| Field | Description |
|---|---|
| Schedule Group | User-defined short name of the group |
| Retrieve All | Allows you to see all the existing groups in the system |

| Button | Description |
|---|---|
| Find | Finds and displays the existing groups in the system |
| Details | Shows you the details of the existing groups |
| New | Refreshes the window to let you create another group |
| Delete | Allows you delete specified information |
| Print | Allows you to print the specified information |
| Help | Takes you to the Help file for this window |
| Exit | Allows you to exit out of this window |

Creating New Schedule Group

This window has two tabs: Schedule Group and Prov/Res Relation.

**SCHEDULE GROUP TAB**

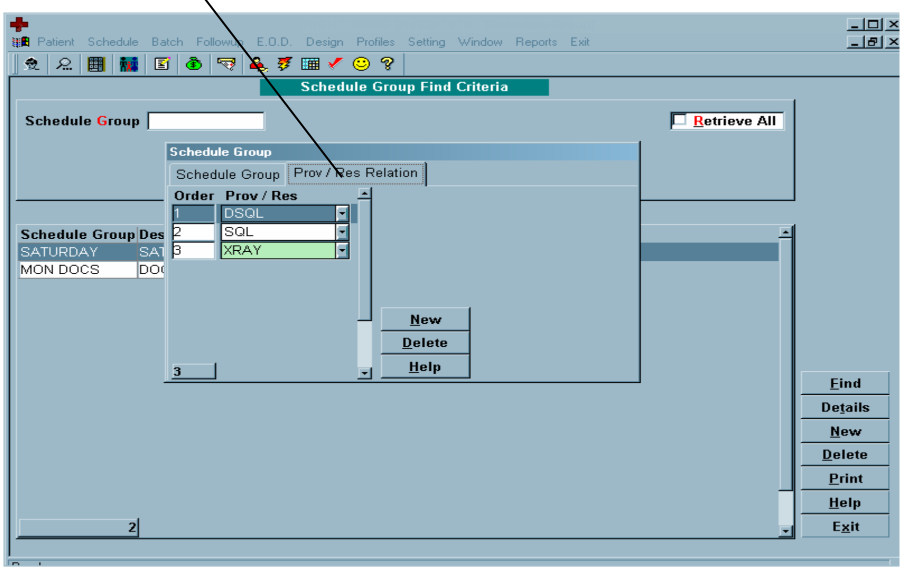


| Field | Description |
|---|---|
| Schedule Group | User-defined short name of the group |
| Description | Description of the group |

| Button | Description |
|---|---|
| New | Refreshes the window to let you create another group |
| Delete | Allows you delete an existing reason |
| Help | Takes you to the Help file for this window |
| Save | Allows you to save the current record |
| Exit | Allows you to exit out of this window |

## PROV/RES RELATION TAB

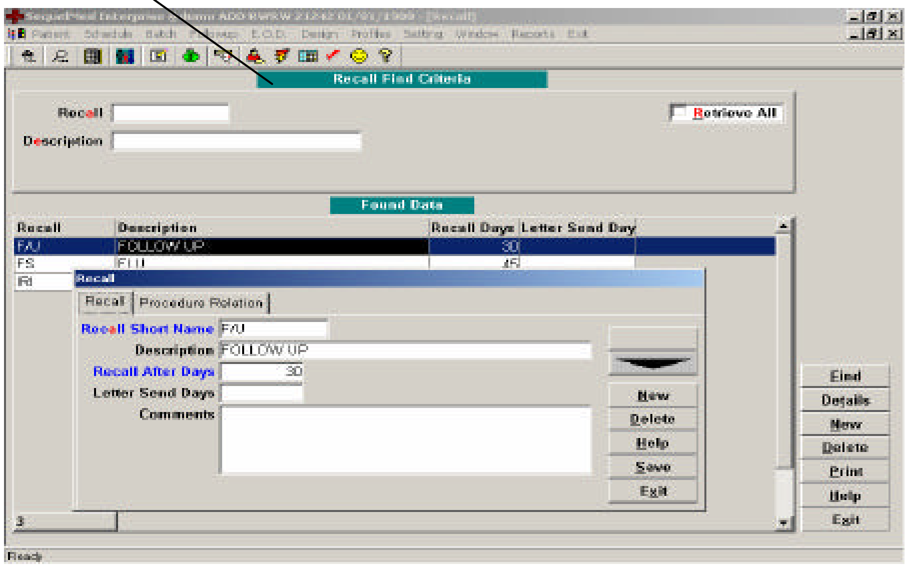
In this window, multiple providers/resources can be selected from the drop down menu and attached to the group created in the 'Schedule Group' tab.



## Profile Recall Definition

In this window, recalls are defined and related with procedure to be

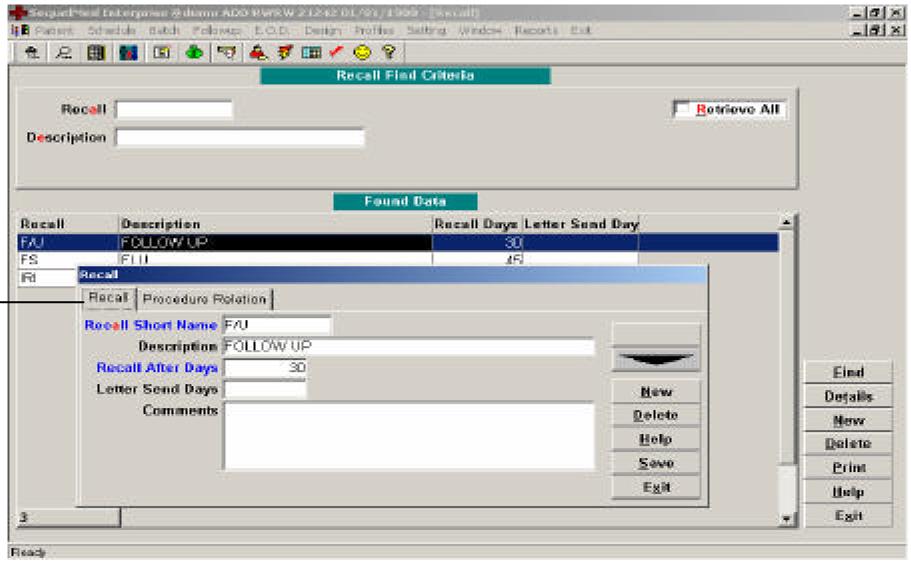
Recall Find Criteria window




| Field | Description |
|---|---|
| Recall | User-defined short name of the recall |
| Description | Descriptive name of the recall |
| Retrieve All | If checked, this checkbox will retrieve all available recalls in the system |

| Button | Description |
|---|---|
| Find | Finds the specified information |
| Details | Opens up the "Recall" window displaying the details of the recall and the procedure related to the recall |
| New | Refreshes the window to let you enter a new recall and procedure relation |
| Delete | Allows you delete an existing recall |
| Print | Allows you to print specified information |
| Help | Takes you to the Help file for this window |
| Exit | Allows you to exit out of this window |

Recall Window

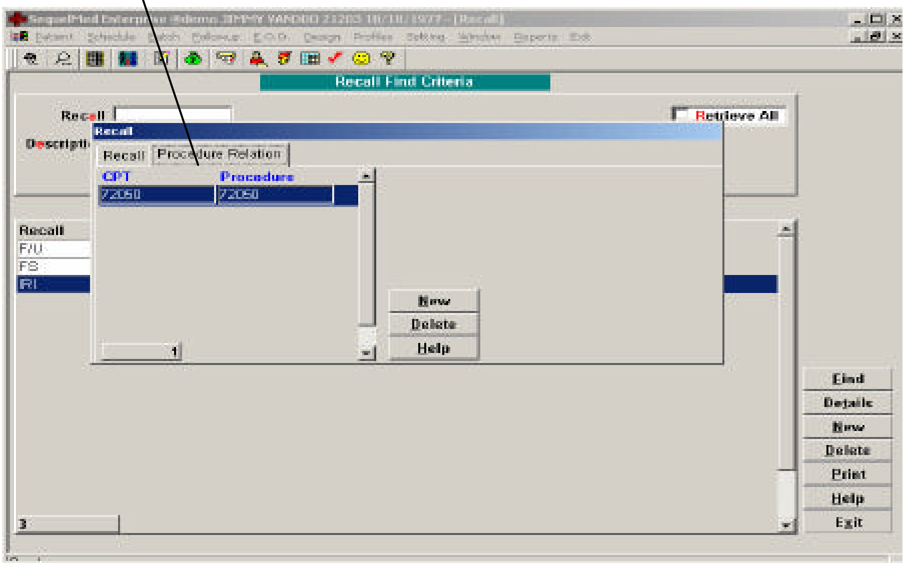



## RECALL TAB

| Field | Description |
|---|---|
| Recall Short Name | User-defined short name of the recall |
| Description | Descriptive name of the recall |
| Recall After Days | Number of Days after which the recall is to become effective |
| Letter Send Days | Number of Days to send the letter |
| Comments | Any comments may be entered here |

| Button | Description |
|---|---|
| New | Refreshes the window to let you create another recall |
| Delete | Allows you delete an existing recall |
| Help | Takes you to the Help file for this window |
| Save | Allows you to save the current record |
| Exit | Allows you to exit out of this window |

**PROCEDURE RELATION TAB**

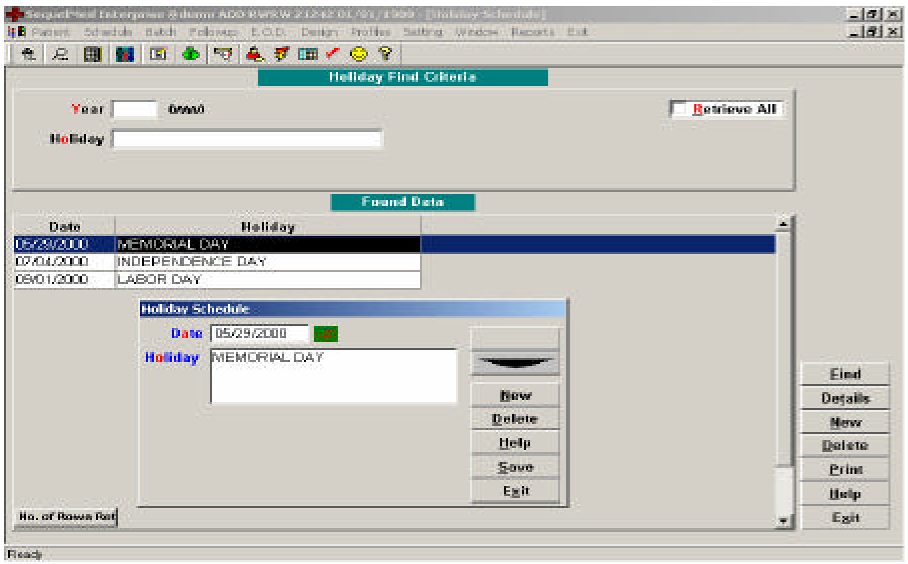


| Field | Description |
| --- | --- |
| CPT | Procedure code |
| Procedure | Procedure code |

| Button | Description |
| --- | --- |
| New | Refreshes the window to let you enter new procedure |
| Delete | Allows you delete an existing procedure |
| Help | Takes you to the Help file for this window |

## Profile Holidays

Selecting this option from the Schedule in main menu bar brings the Find window in front of the user. This window will let you browse for the specific holiday based on the year or description of the holiday. Double clicking the found record or clicking the Details button will show the details of the holiday. If the slots are made and there happens to be a holiday between the From and To Dates of slot creation, SequelMed will automatically make the time slots unavailable by blocking them for the holiday. These slots can be made available manually by unblocking. If the holiday has been entered into SequelMed after creating the slots it will not affect them.

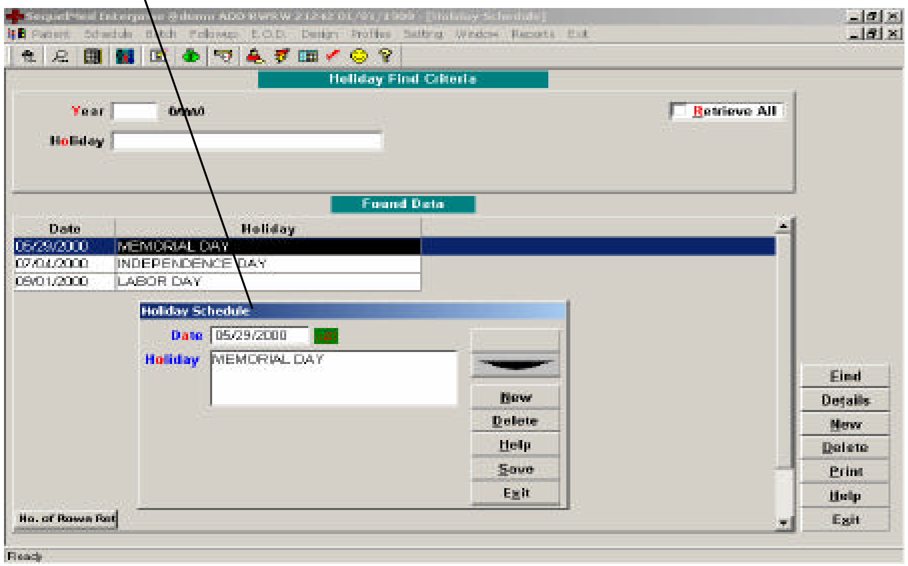



Holiday Find Criteria

| **Field** | **Description** |
|---|---|
| **Year** | **The year of holiday** |
| **Holiday** | **The description of holiday** |

| **Button** | **Description** |
|---|---|
| **Find** | **Finds and displays the existing/specified information** |
| **Details** | **Shows you the details of the existing/specified information** |
| **New** | **Refreshes the window to let you create time slots for another provider** |
| **Delete** | **Allows you delete specified information** |
| **Print** | **Allows you to print the specified information** |
| **Help** | **Takes you to the Help file for this window** |
| **Exit** | **Allows you to exit out of this window** |

Creating New Holiday Schedule

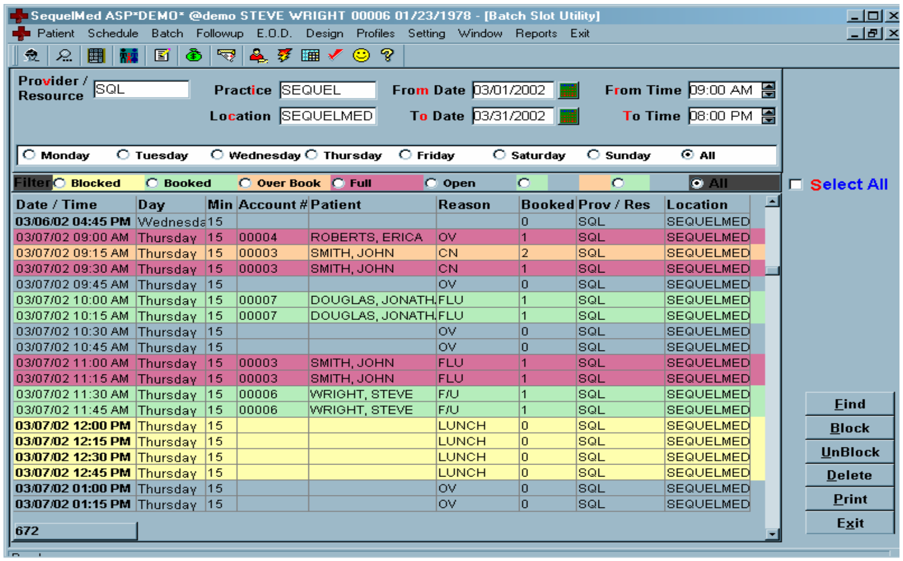



| Field | Description |
|---|---|
| Date | The year of holiday |
| Holiday | The description of holiday |

| Button | Description |
|---|---|
| New | Lets you enter a new holiday |
| Delete | Lets you delete the selected holiday |
| Help | Takes you to the Help file for this window |
| Save | Allows you to save the current record |
| Exit | Allows you to exit out of this window |

## 6. BATCH SLOT UTILITY

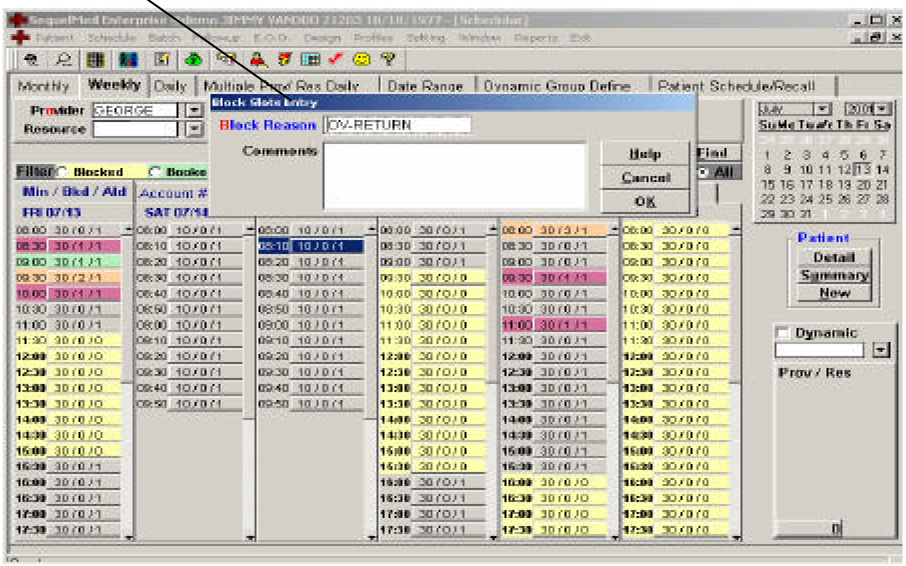
This option in Schedule opens up the Batch Slot Utility window. This window allows you to see all the time slots of the selected provider(s) and/or resource(s). If a provider/resource is not selected then SequelMed will show all the time slots of all the providers/resources. This window allows user to select more than one time slots at a time by clicking on them one after another in the form of a batch and then block, unblock or delete them with one click of button.



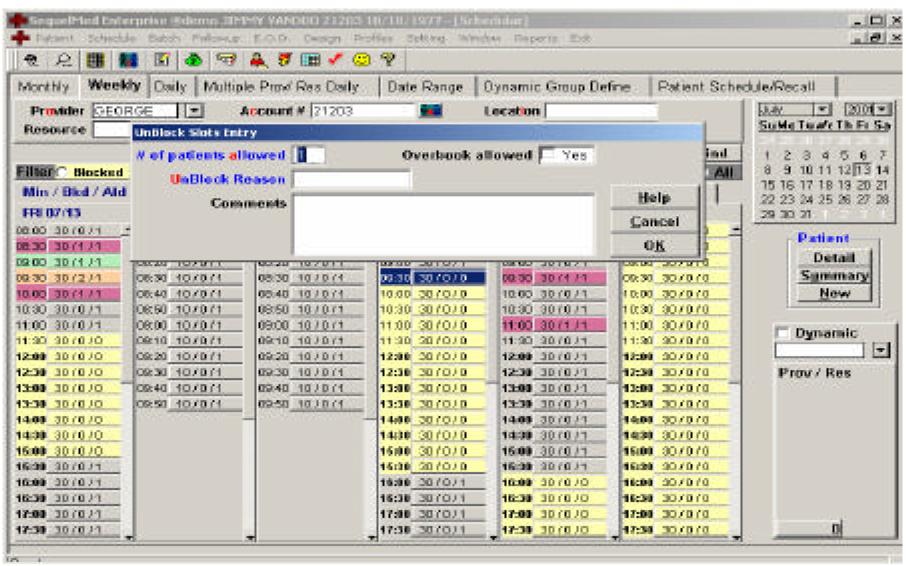

| **Field** | **Description** |
|---|---|
| **Provider/Resource** | **Provider short name** |
| **Practice** | **Practice short name** |
| **Location** | **Location short name** |
| **From Date** | **The date from which you want to see the slot(s) information** |
| **To Date** | **The date to which you want to see the slot(s) information** |
| **From Time** | **The time from which you want to see the slot(s) information** |
| **To Time** | **The time to which you want to see the slot(s) information** |
| **Days** | **Allows you to select the desired day. If you would like to see slot information for all days, select All** |
| **Filter** | **Allows you to select the desired slot: Blocked, Booked, Over Book, Full, Open, All** |
| **Select All** | **Checking this box will select all the entries found** |

| **Button** | **Description** |
|---|---|
| **Find** | **Finds the desired information** |

**Block** Blocks the selected slot(s) for a specified reason. When you click on the Block button, it will open up a window titled “Block Slots Entry,” in which you have to enter the ‘Block Reason’. You can press the ‘Home’ key on your keyboard to get the list of Reasons. Pressing the ‘Home’ key opens up the ‘Find Reason’ window, from which you can select a reason by highlighting it. This will put the highlighted reason in the ‘Block Reason’ field. You may then enter the description (i.e. descriptive name of the selected reason), if necessary and then press ok. This will complete the blocking process and the selected slot(s) will appear yellow.




**UnBlock**




UnBlocks the selected slot(s) for a specified reason. When you click on the UnBlock button, it will open up a window titled “UnBlock Slots Entry,” in which you have to enter the ‘UnBlock Reason’, “# of Patients Allowed”, whether overbooking is allowed (if yes, then check this box), and any ‘Comments’ if necessary. You can press the ‘Home’ key on your keyboard to get the list of Reasons. Pressing the ‘Home’ key opens up the ‘Find Reason’ window, from which you can select a reason by highlighting it. This will put the highlighted reason in the ‘UnBlock Reason’ field. You may then enter the descriptive name of the selected reason, if necessary and then press ok. This will complete the unblocking process.

| | |
|---|---|
| Delete | Deletes the selected slots. The slots for any particular provider deleted in this window will no longer appear in any schedule window. This means that even if the provider’s/resource’s schedule exists in the provider/resource schedule window but deleted here will no longer be active |
| Print | Allows you to print specified information |
| Exit | Lets you exit out of the current window |