Scheduler

The scheduler has its own menu item

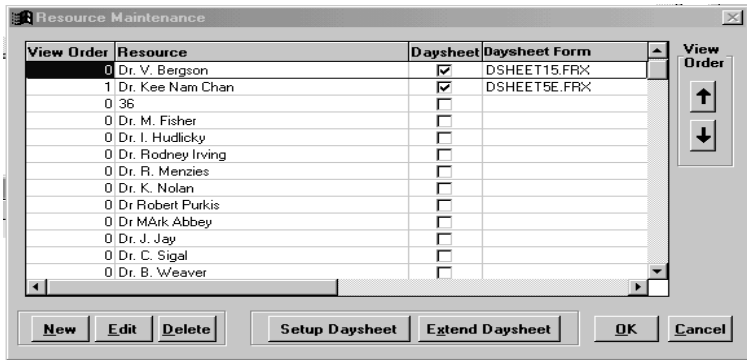
When you click on the menu item **Scheduler** you will get a menu which includes all the options and reports associated with the scheduler. If a menu item is greyed out, it means that those options are not available to you at that time- close your daysheet window and go back to the scheduler menu.

Daysheet; brings up the daysheet window to allow bookings
Calendar, brings up the standard 30 day calendar
Mini Calendar, brings up three month calendar
Resource Maintenance; for the creation and maintenance of the individual daysheets is done.
Visit codes, for the creation and maintenance of visit codes is done
Waiting List, Add a patient to wait list for a day already completely booked
Deleted Expired Wait List Appts.; deletes old wait list appointments
Bill from Scheduler does the billing from the booked appointments in the scheduler
Global Booking Codes; where you create the GBC
Global Booking Appointments, where you book practitioners appointments using GBC
Recurring Appointments, where you book patients recurring appointments
Extend Daysheets, adds more days to the daysheet
Delete old Appts.; deletes old appointments up to and including the date selected
Reports, Run and print reports designed for the scheduler
Options, set up defaults for the scheduler
Check Eligibility, uses Teleplan 4 to check MSP Eligibility
Export to Outlook, Exports appointments to MS Outlook not Outlook Express
Export to Auto Caller, Exports appointments to SmartSeries Auto Caller
Import Auto Caller; Confirmation; Imports Auto Caller results

Make DaySheet

Making a daysheet: each resource has its own daysheet within the daysheet window

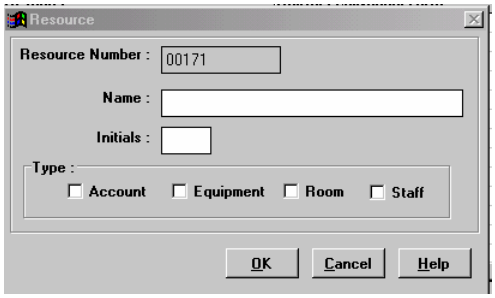
Resource Maintenance – This list displays all the resources currently available and gives you access to the day sheet setup for all resources. To access **Resource Maintenance** go to **Scheduler Menu** and **click** on **Resource Maintenance**. This will give you the following window.



Click on the **Resources** and **Click** on **Setup Daysheet**

Creating a Resource

Creating a resource will give you the following window



New Enter the name and initials of the resource you want to create. Next select the type of resource you want to create:

Account; for practitioners who will be the payee. If you select account it will pop the account edit window to set up the rest of the account information.

Equipment; for a piece of equipment multiple practitioners can be booked for an equipment daysheet

Room; for where a treatment will be performed, multiple practitioners can booked in a room

Staff: for a staff member who regularly performs treatment.

Edit- brings up the existing set up to edit for the selected resource.

Delete - deletes the selected resource.

Select the daysheets to be viewed by clicking in the daysheet box. If the box is checked on then the daysheet will be able to be viewed in the daysheet window. If no check mark exists then it will not show up in the daysheet window.

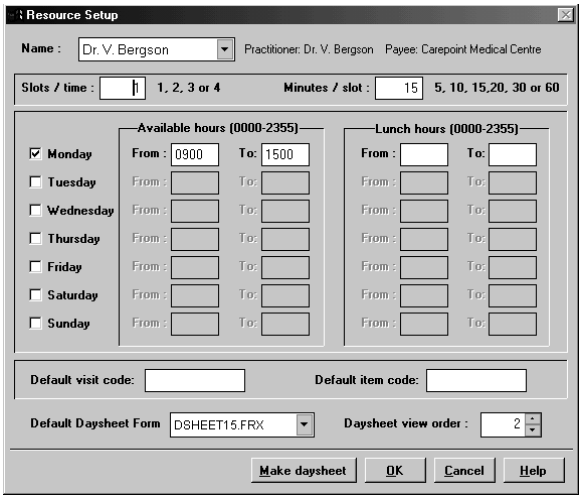
The setup will allow you to set up the number of slots per time, the default appointment time length, the days and time the resource(s) is available including the lunch time, default visit code, item code, default daysheet form and view order.

The daysheet printed form will default to dsheetvch.frx as a default on new resources, but you can choose any form you want.

View order is the order in which you want the resource's to show up in the daysheet window. The view order is assigned to the next available number and the user also has an option to select a different number. Switching the view order can also be done using the up and down arrows without having to edit each resource. Select the resource you want to move and then select up or down depending on where you want to move that resource to.

Once the set up is done, **click** on **Make daysheet**

Make daysheet, this will make a daysheet for this resource for 10 days.



Fill in the daysheet setup information:

Slots/Time is how many appointments you book at a time; **Minutes/Slot** is the appointment length. This is the smallest appointment you book;

Start Time is when the resource's day begins and the

End Time is when the resource day ends.

Select the days of the week the resource(s) work or the Room is open.

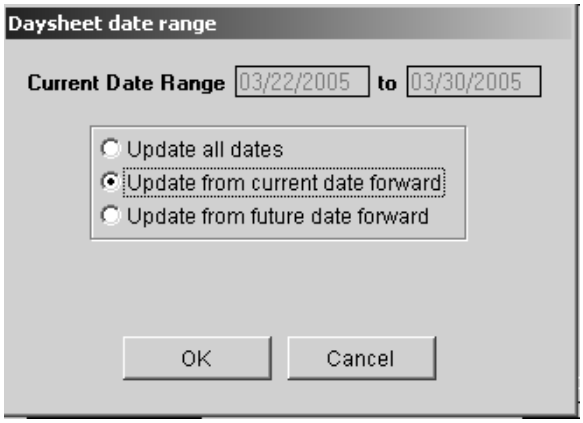
Fill out the lunch hour. The lunch hour is static.

If the resource always uses the same item code or visit code, fill these options out.

NOTE if these are filled out then every patient booked will have either the visit code or item code in the daysheet.

Then **click** on **OK**. If changing an existing resource's daysheet, you have the option to update the existing daysheet or overwrite. . **Overwrite** *will delete the old daysheet and all the appointments will be lost forever* **Update** will create new daysheet information and copy all the appointments over from the old daysheet, however, if there are any appointments that do not fit in with the new setup it will not book those

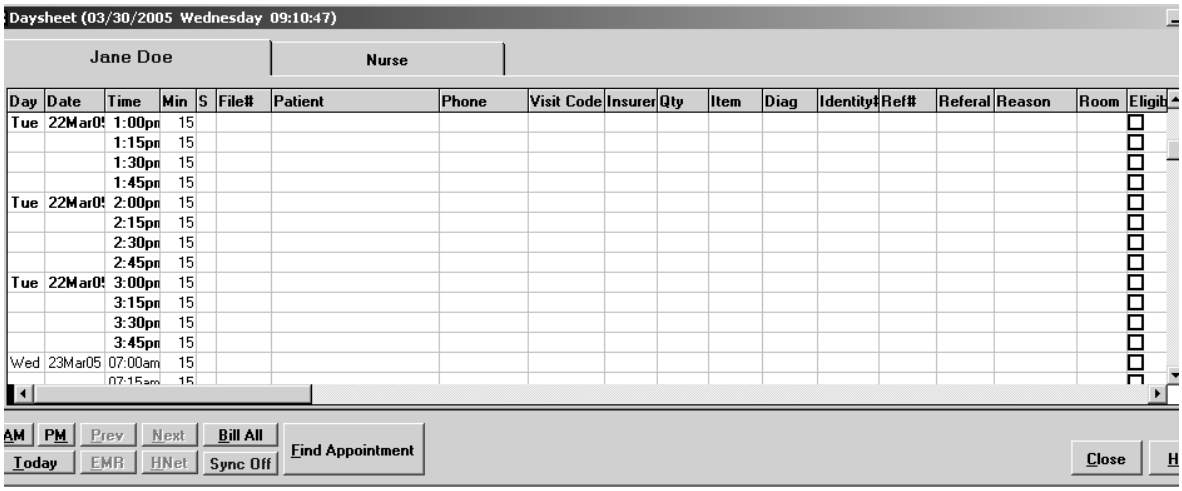
appointments but instead print out a report which shows which appointments will need to be rebooked manually.



Update all dates
Makes the changes you selected from the first date the daysheet was made.
Update from current date forward
Only makes changes to the daysheet from the current date forward.
Update from future date forward
You pick the date. The changes that you have selected are made from that date forward.

Daysheet Window

To bring up the daysheet window hit the **F12 key** on your keyboard or **click** on icon. If the daysheet window is left open when you close down SmartSeries then it will auto load the next time you open up SmartSeries.
Appointments are entered in the resource's daysheet in the daysheet window. To select the resource **click** on the Resource's Tab and that resource's schedule will appear



Tabs – run across the top of the window and show each resource which a daysheet is created.
Views – run across the right side and when clicked on will show all bookings for the resource which you have in daily, weekly or monthly view. The **daily view** shows all daysheet fields and the **Weekly** and **Monthly** views show all appointments booked for that particular time frame showing patients name/visit code/room. **Multi view** shows all daysheets for all resources. For Weekly, Monthly and Multi Views double booked appointments will show only one time slot with the information in the slot starting with '(2)' and then the first patient's name. The '(2)' indicates that there are two patients booked in that time slot.
AM/PM – **Am** takes you to the first appt. of the day in morning, **PM** takes you to the first appt. of the afternoon.
Today – takes you to the first appointment on the current date.
Prev/Next – only five resources' daysheets can be seen at any time to move to the next daysheet click on Next to move back click on Prev.
EMR - will load your Electronic Medical Records Programme
HNET – will take you to Pharmanet
Sync ON – When Sync is set to **on**, the daysheet window controls the other windows as you select booked appointment slots in the resources daysheet. The current patient changes to the patient in the appointment.
Sync OFF – When Sync is set to **off**, the current patient window controls the other windows.
Find Appointment – Finds the next appointment for the patient shown in the Current Patient Window.
Searching - Press Enter when in the Item, Diag, or Referring doctor # to search for a record using the Tables window

Daysheet Fields

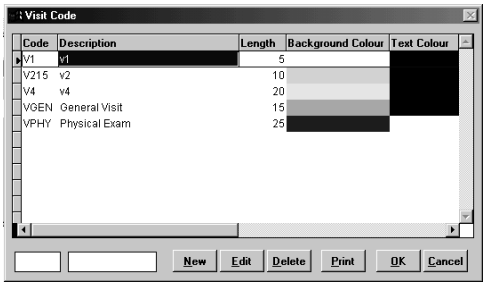
Day The day of the appointment
Date The date of the appointment
Time The starting time of the appointment
Min The length of the appointment in minutes
Status The status of the appointment (See Appointment Status)
File # Patient's file number
Patient The name of the patient
Phone Patient's phone number
Visit Code Categorizes type and length of appointment at a glance
Insurer Insurance being billed on for the visit
Qty The number of services being billed for that visit
Item The item code being billed for that visit
Diag The diagnostic code being billed for that visit
Identity Patients PHN
Ref # Referring doctor's MSP number
Referral Referring doctor's name
Reason The reason or description for the appointment or any note which you want to make for that patient's visit
Room The room where the service will take place
Eligibility Check for patient's Eligibility with MSP
Extra Billing To add two extra item codes and corresponding diagnostic codes which can be billed using the Bill All feature

Calendar

Click on the Calendar icon to bring it up. The calendar will automatically take you to the current date and closest current time on your computer. To select a different month, date, or year **click** on required field in the calendar and it will take the daysheet to that date

Mini Calendar – replaces the regular Smart calendar with a 3-month view calendar as shown below. To go back to the regular single month calendar just close the mini – calendar and open the calendar from the icon on the icon bar

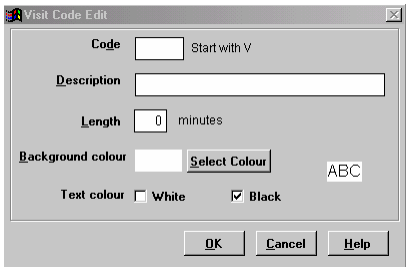
Visit Codes



This is where you create and maintain a list of visit codes to categorize appointment types, for quicker reference.
These codes are patient based and related to the type and length of appointment being booked, for example, you can create a visit code for a new patient called NP with an appointment time of 40 minutes. Every time you book an new patient you will use this visit code and at a glance you can see that you have a new patient booked and the length is 40 minutes. You can set up your visit codes with various background colours and based on the background colour you can select white or black for text colour.

To create a visit code

Go to **Scheduler Menu** and **click** on **Visit codes**,



1. Click on **New**
2. Type the visit code you want to create **Note:** <u>all visit codes have to start with the letter V</u>.
3. Type the description of the appointment, select your background and Text colour
4. Type the length in minutes of the appointment. Note, if the your daysheet has appointment time slots of ten minutes and your visit code is 20 minutes then two time slots will be used automatically.

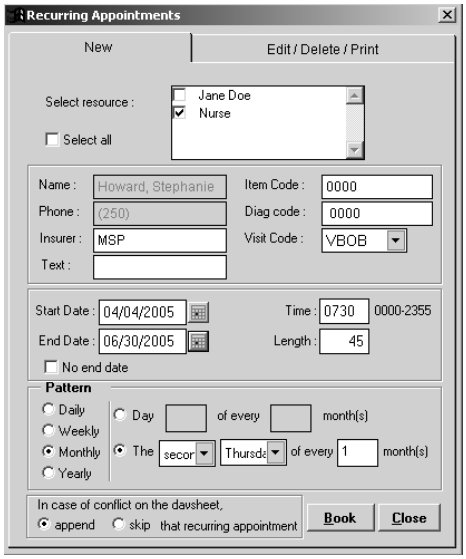
Visit codes continued

Edit; brings up the existing set up to edit for the selected resource. When you change the length of the visit code appointment it will only change for future appointments. However when you change the code, description or colour it changes all the appointments.

Delete; allows user to delete codes from this list if it is not in use for any bookings

Print; allows user to print a list of the codes in the database for quick reference, the colours will not print if you do not have a colour printer.

Recurring Appointments



Recurring Appointments are appointments that occur regularly for patients' visits. To book a recurring appointment

1. **F3** to **search** for the patient
2. **Go to Scheduler**, and **click** on Recurring Appointment
3. **Select** the resource

The patients name and phone number are already on the window. Insurer; Item, Diag, and Visit code are options for you to fill out.

4. **Start and End Date**, Time and Length of appointment will need to be filled out
5. **Pattern** – how often these appointments will occur (see explanation under Global Visits on page 8)
6. **In case of conflict** – see explanation under Global visits on page 8
7. **Book** – **click on book** to book the appointment

Right Click Menu

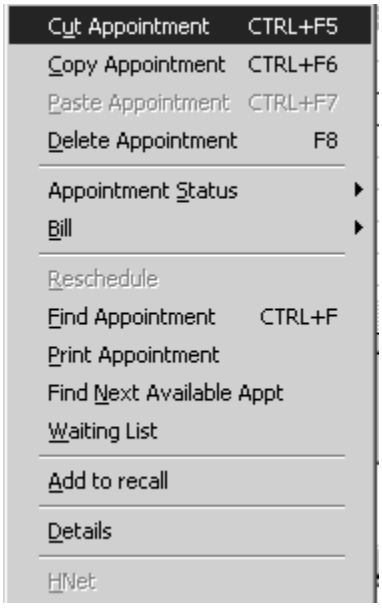
By **right clicking** on the patient field in the daysheet you will bring up a menu from which you can perform booking functions by **left clicking** on the menu item.

Right clicking on a blank appointment will bring up this menu;

1. You can book the current patient an appointment
2. Book your practitioner a Global Appointment
3. Find the next appointment(s) for the patient showing in the current
4. patient window
5. Add the patient showing in the current patient window to the Wait List

Right clicking on a booked appointment will bring up this menu;

1. ***Cut*** - Cut the current appointment to move it to another time slot
2. ***Copy*** - Copy the current appointment to move it another time slot
3. ***Paste*** - Paste the cut or copied current appointment into the new time slot
4. ***Delete*** - Delete the current appointment
5. ***Appointment Status*** - Adds the status of appointment to the daysheet see below
6. ***Bill*** - Bill the appointment
7. ***Find Appointment -*** Finds the next appointment for the booked patient
8. ***Print Appointment*** - Print the appointment for the patient
9. ***Find next available appt*** - Finds next available appointment for this patient
10. ***Wait List -*** Add the patient to the Wait List
11. ***Add to Recall*** - Add the patient to the Recall List
12. ***Details -*** Get the details on this patient's appointment
13. ***HNet*** - Go to HNet (Pharmanet) to get prescription details on this patient.



Appointment Status

You can use from the stock status' or you can create your own. Each status has a code (symbol) and description attached. To add a status to the appointment, **right click** on the appointment and **left click** on Appointment Status. The code will then show up in the status column on your daysheet in the 'S' field beside the patient

This menu will come up, **left click** on the status you want to show. To create your offices' own status' **click** on Custom then **click** on **new**. Assign a code (symbol) and a description.

The standard codes are

C	Confirm Appointment
V	Checked In
X	No Show
P	Chart Pulled
L	Late
*	Unregistered Patient
$	Invoiced for that appointment
S	Lunch
!	End of day marker- not seen in daysheet

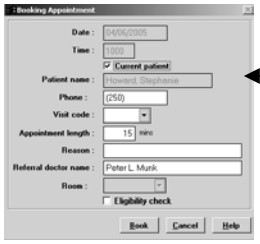
These codes can not be changed, edited or deleted.

Options

This menu sets some of the defaults which apply to booking a patient in the scheduler. These defaults are used in every resource's daysheet.

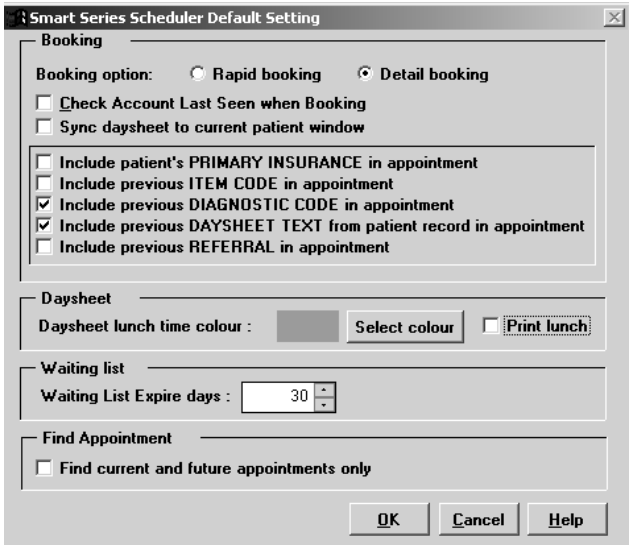
Booking

Booking Option:



Rapid Booking; books patient's appointment into the time slot with only the existing details and defaults

Detail Booking; Brings up the Appointment Window before booking the appointment where information can be added and changed. The Appointment Window shows the date, time and the patient's name for that appointment –these you can not change. You can add or change the phone number, visit code appointment length, reason and referring doctor name and check patient's eligibility



Include patient's Primary Insurance; Check this if you want SmartSeries to fill in the Daysheet Insurer field with the patient's primary insurance when you book an appointment.

Include previous Item Code; Check this if you want SmartSeries to fill in the Daysheet Item field with the patient's most recent item code when you book an appointment.

Include previous Diagnostic Code; Check this if you want SmartSeries to fill the Daysheet Diag filed with the patients most recent diagnostic code.

Include previous Referral; Check this if you want SmartSeries to always check your last billing for that patient's referring practitioner. If the patients has never been billed in SmartSeries before then the referring practitioner will be picked up from that patients insurance.

Daysheet

Daysheet lunch time colour; click on the Select Colour to change the viewed colour on the daysheet.

Print Lunch; Check this if you want the words Lunch to appear on the printed daysheet, please note the colour will not print if you do not own a colour printer.

Waiting List

Waiting List Expire days; this is how many days a patient can stay on the scheduler.

Find Appointment

Check this if you only want SmartSeries to check patient's current and future appointments only.

Booking an Appointment

Appointments can be booked for patients in your Current Patient Window, Patient List, or you can fill in an appointment time by simply typing in a patient name in the patient field.

Booking a Person not Registered as a Patient

A text appointment is an appointment that is typed directly into the daysheet and not booked from the Current Patient Window. You can use this option to book new patients who have not been previously seen by the office or the practitioner has an appointment with a non-patient such as a drug representative

1. **Select** the resource you want to book the appointment into by clicking on the Resources' tab
2. **Click** on the time slot you want to book by clicking on the patient field of the appointment time slot in the resource you want to book. Enter as much information as you need Identity & phone numbers, Insurer, Qty, and reason.

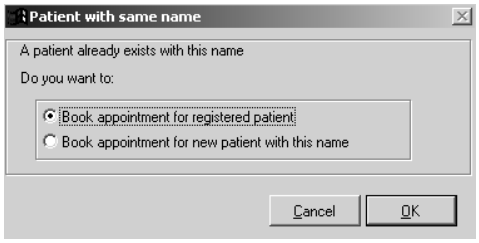
You will notice that the Status Column |S| has an asterisk * in it signifying that the appointed person is not registered as a patient.

Booking a Previously Registered Patient

1. **Select** the ***Current Patient*** by pressing F3 to display the ***Current Patient*** Window
2. **Select** the **Resource** you want to book for by clicking on the Tab at the top of the daysheet window with the resources name or description
3. **Select a time slot** on the daysheet by clicking on it once
4. **Press F4** or **right click** to bring up the booking menu. SmartSeries will activate the daysheet and book the current patient into the time slot selected

When the patient comes into the office you can register the patient by **selecting** the patient's appointment and hitting **F5** on the keyboard. SmartSeries will ask you if you want to register the patient **click on OK**.
SmartSeries will take you to the *Patient Demographic* Window where you can continue to add that patient's information. Any information already in the daysheet, such as telephone number identity number etc will be copied into the *Patient's Demographic* Window

When you type a persons name in the patient field and that exact name already exists as a patient SmartSeries will give you a prompt *Patient with the Same Name* you will need to decide is this a patient who has been seen in your office before, or is this a new patient and book the patient accordingly.
If you choose *Book Appointment for Registered Patient* and that patient has an appointment, SmartSeries will then prompt you to either go to that first appointment or allow you to book the second appointment.



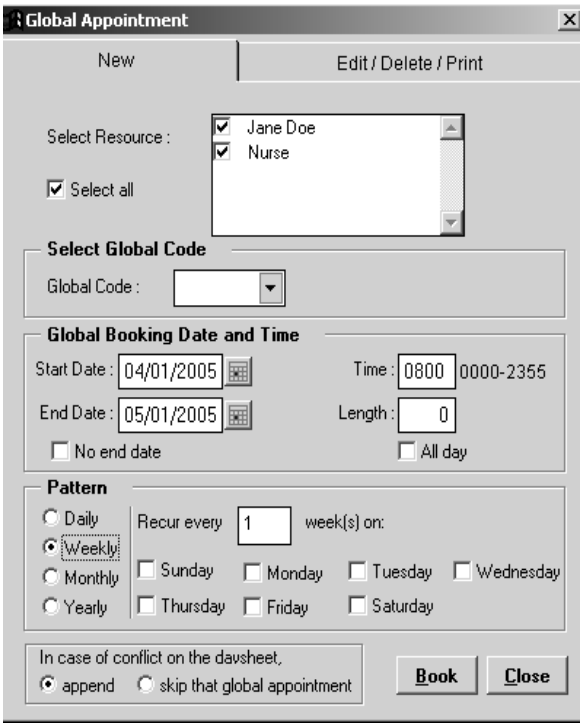
If you type in an unregistered patient and his or her PHN and that PHN already exists in your *Patient List* you will be given a warning and the opportunity to go to that registered patient

If there is already an appointment booked in the future for a patient, the *Scheduled Appointments* Window comes up to let you know about that scheduled Appointment. Select Continue Booking to book the new appointment or *Select Go to Appointment* to go the existing appointment.
If there are already an appointment booked in the time slot SmartSeries will bring up a prompt *Book an Appointment*:

Overwrite – overwrites the existing appointment completely and books the new appointment
Append – adds a time slot for the exact time and books the new appointment in that time slot
Cancel – cancels the booking

Global Appointments

These appointments are used to manage the non-patient related appointments or tasks within a clinic. These appointments are setup differently than the regular patient appointments. When you access this option it brings up the following window and you can maintain your list of global appointments from this window. There are two tabs on this window, one allows you to add a new global appointment and the other provides a list of all the existing appointments where you can edit and rebook the global appointment or delete it.



New Tab
allows you to create a new Global Booking.
Select Resource from the list of resources that have daysheets.

Global visit code*;* assigns the colour to the appointment based on the setup.

Global Booking date and time*;* can be set as desired.
Select the End Date (the last date that this appointment will occur), ***time*** which this appointment will begin and the ***length*** (how long the appointment will be) or **click** on All Day if the event will last the entire working day.

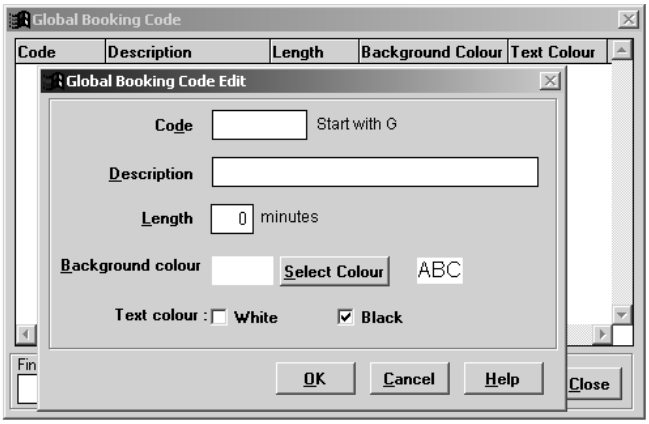
Select Global Code*;* length of the appointment is auto filled based on the global code but also could be modified to the users' desire. If *no end date* is selected, the program disables the end date and it becomes irrelevant.

Pattern is the recurring pattern, *daily, weekly, monthly or yearly*.
Daily – Select to schedule a booking which occurs every day, every other day, or at daily intervals.
Weekly - Select to schedule a booking which occurs every week, every other week, or at weekly intervals.
Monthly – Select to schedule an activity that occurs every month, every other month or at monthly intervals. This option allows you to select either every specific day of the month or every (1st, 2nd, etc) day (day of the week) for the so many months.
Yearly – Select to schedule an activity that occurs every year, every other year or at yearly intervals. This option allows you to select a specific month and date of that month and every (1st, 2nd, etc) day (day of the week) of the so many months.

In case of conflict on the daysheet - In case of conflict… is used so that the programme knows what it should do when an appointment already exists in one or more time slots where you want to book the global appointment.
Append will add the global appointment to an existing appointment.
Skip global appointment will not book the global appointment.
Once the information is filled in Clicking on Book will book those appointments and will be added to the list of global appointments. A record will be created for every resource selected.

Edit/Delete Tab - On the Edit/Delete tab it lists all the global appointment in the scheduler, to access for editing or deleting. Select an appointment on edit or delete. The edit brings up the details of the appointment for the user to change and then rebook. Delete removes the appointment from the list and the scheduler.

To create a global code



Go to Scheduler menu and **click** on global codes,

1. **Click** on ***New***
2. Type the global code you want to create **Note:** all global codes have to start with the letter G.
3. Type the description of the appointment; select your background and Text colour. Type the length in minutes of the appointment.

To change a global code **click** on *Scheduler* menu and **click** on *global codes*;

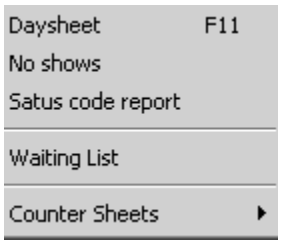
Edit*;* brings up the existing set up to edit for the selected resource. When you change the length of the global code appointment it will only change for future appointments. However when you change the code, description or colour it changes all the appointments.

Delete; allows user to delete codes from this list if it is not in use for any bookings

Print; allows user to print a list of the codes in the database for quick reference, the colours will not print if you do not have a colour printer.

Reports

This is where to find any reports relating to the scheduler.



Daysheet – Quick access shortcut is **F11.** This gives you an option to select the resource(s) to print the daysheet for and the date and time range for the daysheet to be printed. It uses the form setup for each resource. This report will give up the basic daysheets that shows the booked appointments and the available appointment at the time of printing.

No shows –This report will give a listing of all appointments within the options selected that have the status as no shows (X).

Status code report – This report counts the times a particular status is used such as * for unregistered patient. It is resource based with a date range and status option.

Waiting list – Same options as the print form the waiting list window.

Counter sheets – This gives an option to print two types of counter sheets. One is a Patient based listing and the other is a resource based listing of appointments for the day. These reports are useful in a multidisciplinary clinic where a patient would see more than one practitioner in the clinic in a day.

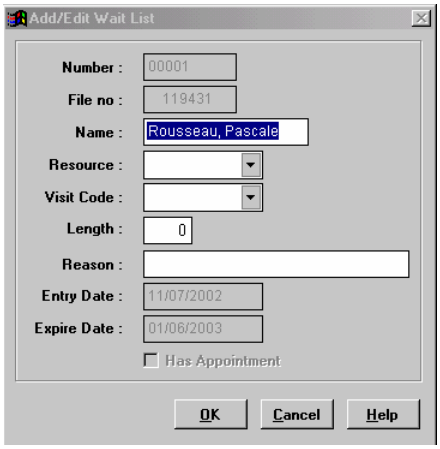
Patient Based – this report gives a listing of all appointments for all resources sorted by patient. For Example, if Patient A has an appointment with Dr. One at 10AM, Dr. Two at 9:30AM and Dr. Three at 11:00AM. It will print the Patient's 9:30 appointment with Dr. Two first in bold with the other two appointments after it in regular font and indented before printing the next patient.

Resource Based – This will print one report for each resource. On that report it will list all the appointments the resource is booked for that day. Immediately following an appointment it will list any appointments that patient has with any other resources in the clinic on that day.

Waiting List

This function allows the user to manage the list of patients waiting for an appointment. The list is sorted in entry order and only displays the active list. The user can see the expired list by checking the 'Show expired waiting list'. This window, as shown below, allows users to add, edit, delete and print out the waiting list entries.

Show Expired waiting list – if checked on, displays the expired entries along with the active ones otherwise only displays the active entries.



New – allows the user to add a new patient to the waiting list by filling out the following screen. The name is pulled in from the current patient and the user can select the resource, visit code and length of appointment. The entry date is always the day the entry was created and the expiry date checks for an appointment for this patient in the future. If there is an appointment for this patient, it puts a check mark in the 'has appointment' box and the appointment date as the expiry date otherwise calculates the expiry date based on the number of days set for expiry in the Options.

Edit – brings up the existing set up to edit the selected entry.

Delete – allows user to delete an entry from this list.

Print – Brings up the print report option for the waiting list as follows. The user selects what resource, current list or expired list or all, separate report per resource and preview options to print the report.

Extend Daysheets

This options allows you to extend the daysheet for 10, 30, 60 or 90 days at a time for all or selected group of doctors. Go to Scheduler menu and click on Extend daysheet, select the resources daysheets that you want to extend select the how many days and click ok.

Delete old appointments

This option allows you to delete old appointments for up to and including the date selected and the resources selected from the existing daysheets.

Check Eligibility –

This option allows you to check eligibility for all patients booked for the current date using MSP's Web Teleplan 4. Go to Scheduler and Check Eligibility, select the date and resources, click on ok, SmartSeries will then bring you to your MSP login and you will need to log in once the checking is finished SmartSeries will automatically print out a list of your patients and there coverage with MSP. This works best on an high speed Internet connection.

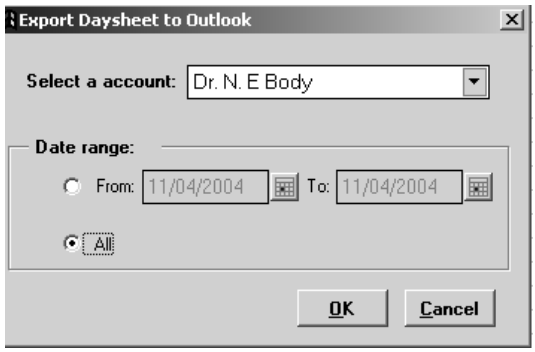
Export to Auto Caller

In Development. When this module is finished you will be able to export a file with your patients' appointment or recall information and have an auto caller place a confirmation call to your patient. This feature will require your office to purchase a specialized modem.

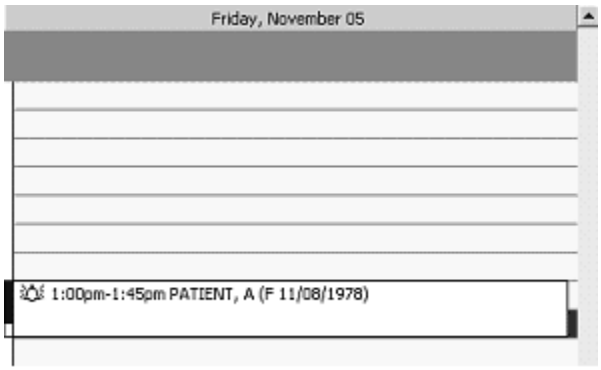
The Import Auto caller confirmation will import the results of the calls from the auto caller.

Exporting Daysheet to Microsoft Outlook

This feature will export your schedule for any day or number of days to Microsoft Outlook 2000 or greater. If any changes to resources daysheet take place afterwards you will need to re export the schedule. Also if the Outlook user adds information or new appointments to the Outlook Scheduler and re-import is done from SmartSeries of that same date range then the new appointments in the Outlook Scheduler will be overwritten. The export can only be done from SmartSeries to Outlook.



1. Click on Menu item Scheduler, select Export Daysheet to Outlook.
2. Select the account and date range to export to Outlook, Click on OK
3. SmartSeries will bring up a confirmation box with the total number of patient appointment transferred from SmartSeries into Outlook. Click on OK



Outlook will import patient; name, sex, birth date, and the start and finish time of the appointment. If practitioners' or patients' schedule changes and a new export is done from SmartSeries, Outlook will be updated with the new information.

Common Keystrokes in SmartSeries

F12-Brings up the Scheduler

F11-Searches for Current Patient's Appointment

F6- Adds a time slot this can be used at the beginning or end the of the day or anytime you want to add an extra time slot

F5-Creates an Invoice for appointment

F4-Books Current Patient's appointment

F3-Searchs for Patient in Current Patient in order to book appointment

Enter- Searches for Item code in Item field in scheduler
Diagnostic code in Diag field in scheduler
Visit code in Visit field in scheduler
Referring Doctor in Ref # field in scheduler

Min-In this field you can instantly change the length of an appointment by typing in the new desired length. For Example if you have a 15 minute appointment but your patient will need to be seen for ½ hour type in 30 and instantly that patient's appointment is booked for 30 minutes.

Visit- To instantly put a VCH code type the visit code in this field an your visit code with length of appointment and colour will be added to the appointment