MASTER SCHEDULES
MANUAL

Centricity® Business 4.3

MSU HealthTeam Training and Education (M-F 8a – 5p)
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MSU Healthteam Training and Education

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What Creates the Appointment Book?

**Daily Schedule** – These are the specific dates and times of a provider’s schedule. A daily schedule is where the scheduler books the actual appointments.

**Template** – A mask used to overlay and redefine daily schedules for changes to the provider schedule over short periods of time. They provide flexibility for providers to schedule time out of clinic for vacations, conferences, sick time, etc.

**Master Schedule** – The over all guide for creation of daily schedules. They define the pattern(s) of hours, days and weeks for the provider’s schedule.

What is a Master Schedule and How Does It “Work”?

- Master schedules are used to create a provider's daily schedules.
- They use a combination of superslots and regular slots (clinic or non-clinic) to designate time slots as available or unavailable for patient appointments.
- Once a master schedule is created, it can be distributed to generate daily schedules, which are then used to book patient appointments.
- Master schedules can be created for providers and for resources. However, designing a Master Schedule for a resources differs slightly from designing a Master Schedule for a provider.
- The system reviews the Master Schedules in a provider’s file every night to determine what the next future daily schedule should look like. MSU HealthTeam does not recommend storing more than one update of each master schedules for any single provider or resource as it can cause database errors and interfere with the proper distribution of master schedules during night jobs.

The Building Blocks of a Master Schedule are:

- Sessions – The broad period of time that a provider will see patients, designated as AM, PM, or EVE
- Time Slots – The specific building blocks of time (within the session) the provider will be available or unavailable to see patients.
- Appointment Types – The kind of appointments that can be scheduled into time slots, such as New to Doctor (NTD), Office Visit Return (OVR), etc.

How a Master Schedule “works”

Master schedules are used to create a provider's daily schedules and templates are used to overlay a daily schedule when a provider needs to modify their schedule due to a temporary change. In addition, templates are used for providers without a set schedule pattern as a means of creating their daily schedules.

When a master schedule is created it becomes a guide for the system to use to create daily schedules. The master schedule is not available for the system to use until it has been distributed. Upon initial distribution of the master schedule the system will create new daily schedules for the pattern set in that master schedule (see understanding distribution rules on page 12). The system will create daily schedules continuously until it reaches the end date indicated on the master schedule or the number of days for distribution indicated in system set up.
– whichever comes first. Daily schedules are distributed either to blank days or they overwrite existing days not in conflict (see Conflict Lists on page 20). After it has been distributed, a master schedule is evaluated by the system each night to determine if it is the one that should be used to create the daily schedule for the next date the system is set to create.

When a master schedule is deleted this does not delete or affect any daily schedules that were already created by the master schedule (see Deleting a Master Schedule on page 26).

**Master Schedule Terms**

**Begin Date:** Specifies the date the Master Schedule will begin to be used to create daily schedules.

**End Date:** Specifies the last date the Master Schedule will be used to create daily schedules. An end date can be specified when a Master Schedule is created or added later.

- If an end date is specified at creation, the Master Schedule will not create any daily schedules beyond the specified end date.
- If an end date is added later, the system will stop using the master schedule as a guide on the date indicated. The system will not automatically remove daily schedules that have already been created beyond the end date. An End/Delete List will be displayed for the user to address those daily schedules that are beyond the added end date.

**Days:** the day(s) of the week for which this schedule is valid. The abbreviations are M, TU, W, TH, F, SA, and SU.

**Recurrence:** A pattern for the creation of daily schedules. Schedules have either a weekly (W) or a monthly (M) recurrence and can recur on one or multiple day(s) of the week (M, TU, W, TH, F, SA, SU). For example, a schedule can repeat every other week (W2), or on every third week of the month (M3).

The following rules apply to a schedule's recurrence:

- If you are editing an existing schedule, you cannot change its cycle.
- You can enter only one weekly cycle (up to every 99th week).
- You can enter a combination of monthly cycles. For example, you can specify that a schedule recur every first and third week of every month by selecting Every First Week and Every Third Week.
- The system will set the pattern of recurrence from the start date of the master schedule. For example, if you choose every other week for a Monday, it will create a daily schedule for the second Monday after the start date indicated on the master schedule and then skip the following Monday, distribute to the fourth Monday, skip the fifth Monday, etc.

**Sessions:** A period of time used to group appointments. Sessions contain time slots. There are three sessions that can be defined:

1. AM – begins at midnight the previous night; end time is specified when master schedule is created. Default end time is 12 Noon.
2. PM – begins at the end time of the AM session (or at midnight the previous night if not AM session is defined); end time is specified when master schedule is created. Default end time is 5 pm.
3. EVE – begins at the end time of the PM session (or at the end time of the AM Session if no PM session is defined; or at midnight the previous night if neither PM nor AM session is defined); end time is assumed by system to be midnight.

**Schedule Comment:** A comment that pertains to the overall schedule. Enter up to 70 characters of free text comment about this daily schedule. It can be used as a reference to the master schedule's time period or purpose (For example “Teaching fall semester” or “Monday rounds schedule”). The schedule comment is displayed in the following locations:

- in the Master Schedule Manager for reference about that schedule
- on the Master Schedule Delete screen as reference for remaining schedules that apply to dates beyond deletion
- on each daily schedule that is created from the master schedule
- on provider schedule report

**Session Comment:** A comment that pertains to the individual session (AM, PM, or EVE). Enter up to eight lines of 22 characters each as the free text comment about the sessions (For example “Do not overbook after 11am”). The text you enter here appears each time the session is displayed.

**Thresholds:** A function that allows schedulers to see when a provider’s schedule is booked beyond the desired capacity level for the timeframe involved. This function is a warning system only and does not block or prevent any scheduling activities. The threshold levels can be specified during master schedule creation and can change values for the daily schedule percentage booked as the date of the schedule approaches. For example one threshold value may state: From Today +3, To Today +7, the Threshold % = 95%. This means that when the date of the schedule is between 3 and 7 days from today, the schedule should only be up to 95% booked. If you are interested in setting up thresholds for your providers, please consult with MSU HealthTeam Operations.

**Time Slots:** A time slot is a period of time during which a provider sees patients or has nonclinic time. Time slots include specifications of time, duration, and appointment types. Time slots can be combined in many different ways to create provider and department schedules. There are two types of time slots: Regular Slots and Superslots.

**Regular Slots**

- A regular slot is a whole unit of time for one appointment type. (for example 8:00 slot for 15 minute return office visit)
- It is usually filled by a patient needing the defined appointment type (for example: a slot at 2:30 p.m. for a checkup).
- It can be filled with a conflicting appointment type using the Schedule or Detail search or by using the New Appointment button from Provider Schedules. Scheduling conflicting appointment types in regular slots should be the exception rather than the rule; common practice is to fill regular slots with the appropriate appointment type.

**Stacked booking:** Multiple regular slots can be created for the same time, each accepting one appointment type. This type of scheduling requires that the provider see more than one patient at a time. For example, you can set up a 2:00 p.m. regular slot to take a checkup and a second 2:00 p.m. regular slot to take a new patient appointment. This means that the provider sees two patients beginning at 2:00 p.m.

**Staggered booking:** Start times of regular slots can also be staggered so that visits overlap. For example: a 2:00 pm regular slot that holds a return patient visit that last 30 minutes and a
2:15 pm regular slot that holds a new patient that lasts 60 minutes. This type of scheduling might be used for a provider to see one patient while someone was prepping the next patient.

**Nonclinic Regular Slots:** Nonclinic slots are used for time periods when the provider does not intend to see patients. Examples of non-clinic regular slots include meetings, rounds, or research as well as vacations, holidays, or sick time for the provider.

When a patient is scheduled by **adding time** to a provider schedule, this time is also recorded as nonclinic, as the provider did not originally intend to see patients at that time.

Appointments can be scheduled into existing nonclinic slots by using the either Schedule or Detail search from the New Appointment screen or by using the New Appointment button from Provider Schedules. When booking an appointment into a nonclinic slot it results in the slot being overbooked. (An overbooked slot occurs whenever you book an appointment into a slot that is already full, or has a shorter duration than the appointment type you are trying to book, or was not intended for clinic/patient time.)

**Superslots**

- A superslot is designed to give more flexibility for scheduling various types of appointments within an overall range of time divided into smaller blocks of time. These smaller blocks must be able to accommodate each appointment type's duration. (For example if there are 15, 30 and 60 minute appointment types, blocks would be 15 minutes; if there are 15 and 20 minutes slots, blocks would be 5 minutes.)
- When an appointment type is booked into the superslot the system takes as many smaller blocks of time as is necessary to accommodate the appointment type's duration, causing an "either/or" situation. For example, in a two-hour superslot you can schedule either two Physical Exams of one-hour duration each, or eight Return Patient Visits of 15 minutes in duration each, or any combination thereof until the two-hour slot is filled.

There are 3 types of Superslots:

- **ANY** (any appointment type) or **WLK** (any appointment type booked in walk-in mode) superslots allow the scheduler to book any of the provider's appointment types into the slot provided the appointment type's duration doesn’t exceed the available time.
- **Exclusive ANY or WLK** superslots, which accept all of the provider’s appointment types except the particular types you specify. For example, you can set up a superslot to accept any appointment type except New Patient Appointments and Consultations.
- **SPECIFIC** superslots will accept only the appointment types you specify. This type of superslot can be used to Create an "either/or" slot where the duration of all of the appointment types assigned to the superslot exceeds the amount of time allocated for the superslot. This means that all of the appointment types cannot be booked into the superslot, unless you overbook.

When an appointment type is booked into the superslot the system takes as many time intervals as necessary to accommodate the appointment type's duration, causing the "either/or" situation. For example, in a two-hour superslot you can schedule either two Physical Exams of one-hour duration each, or eight Return Patient Visits of 15 minutes in duration each, or any combination thereof until the two-hour slot is filled.

**Appointment Types:** the type of appointment for which a patient is coming in to see the provider. Appointment types with defined durations are set up for each provider in the provider profile at the
system level. Examples of appointment types could be check-ups, new patient visits, or annual physicals.

**Freeze:** A way of keeping time in a provider’s schedule reserved. Freezing prevents the slot from being found by the system as available for booking; schedulers can book frozen slots from the Schedule Summary screen and the Detail screen.

**Thaw:** The thaw function is used on frozen slots. It makes available time in a schedule that was previously unavailable through freezing. Thawing can happen on demand or can be pre-defined for a certain amount of calendar days prior to the appointment date (when setting up a freeze). This action code is only available after a slot or superslot is added to the schedule.

**Switch:** The future appointment type switch feature enables the system to automatically change from one appointment type to another for a time slot in a future daily schedule. The switch is performed by Night Jobs.

**Definition rules** – The following is the list of rules that govern how you can define a future appointment type switch:

- Freeze/Thaw and Switch definitions cannot both be defined for a given slot.
- Switch definition is not allowed for non-clinic slots
- Switch definition is not allowed if the future appointment type duration overlaps a superslot or overlaps a non-clinic slot or extends beyond the session time.
- Switch definition is not allowed for today’s daily schedule (you should edit the daily schedule).

**Days prior** – The Future Appointment type Switch feature allows you to define the number of calendar days prior to the schedule date that you want the system to make the switch.

**Switch criteria** – Depending on what kind of slot is being switched, there are 3 types of switches that can occur:

**Regular slot** -

- Switch from one appointment type to any one other appointment type valid for the provider that fits within the definition rules above.
- Define the number of appointments (allocation) for the new appointment type. Note that appointment types of less duration and higher allocation will be scheduled at the same time. (For example if a 9:00 am 60-minute appointment is switched to two 30-minute appointments. Both 30-minute appointments will be available at 9:00, not at 9:00 and 9:30)
- Define the number of calendar days prior to the schedule date on which the switch is to occur.

**Switch Individual Types (Applies to Specific Superslot only)** -

- Switch one or more individual appointment type(s) to any other individual appointment type valid for the provider that fits within the definition rules above.
- Define the number of appointments (allocation) for each new appointment type. Note that appointment types of less duration and higher allocation will not be scheduled at the same time but will be scheduled in superslot as normal. (For example if a 9:00 am 60-minute appointment is switched to two 30-minute appointments. 30-minute appointment can be scheduled at 9:00 or 9:30)
• Define the number of calendar days prior to the schedule date on which the switch is to occur.

**Switch Whole Superslot (Applies to Specific, ANY or ANY Exclusive Superslots)** -

• Switch the entire superslot to one of the following types: ANY or ANY Exclusive (with or without walk ins).
• Define the number of appointments (total allocation) for entire superslot.
• The number of calendar days prior to the schedule date on which the switch is to occur.

**Night Jobs** – The system runs a number of tasks each night. During the night jobs processes the switch definition occurs automatically when the number of calendar days prior is reached.

**Master Schedule Distribution and Template Transfer** – When distributing a Master Schedule or applying a Template the system will look for a switch definition. If the **days prior** is previous to the date of the affected daily, switching is performed on the daily schedule as part of the Master Schedule Distribution or Template Transfer.

**Switch rules** - The MSU HealthTeam sets the provider defaults so that the switch will only occur if **no appointments** are booked within the slot at the time the switch is to take place.

**Slot Comment:** This comment can be entered at the provider schedule level and is attached to the slot not the appointment (so should an appointment be cancelled from that slot that has a comment, the comment will remain even though the appointment is gone). A slot comment can be viewed by hovering over note on the left of the slot in the provider schedule, or by viewing the slot comment column in the provider schedule, or by viewing the slot tab on detail schedule view page of the provider schedules.

**Pre/Post scheduling Messages:** Messages that are pertinent to Appointment Type, Provider, or clinic. These comments must be added through a request to Operations. For example if a clinic wanted all New Appointments (OVN) to be reminded at the time of scheduling to “come in 15 minutes early and bring picture ID and Insurance card,” this message could be programmed to display in the Pre Scheduling Message window.

**Resource:** Excluding the provider, a resource is anyone or anything that is required for an appointment: a room, a piece of equipment, a nurse, or a medical technician. Like providers, resources are listed in the Scheduling Providers dictionary (managed by MSU HealthTeam IT) and they can have schedules with time slots in which you book appointments.

**Resource Appointments:** There are two kinds of resource appointments that can be scheduled:

• A stand-alone resource appointment is time scheduled with a resource that is not connected with a specific primary appointment.
• A linked resource appointment is connected to a primary appointment. Resources are connected to a primary appointment through the appointment type. They are attached to appointment types if they are necessary or desirable for the appointment. You can have a maximum of five linked resources per appointment type.
Understanding Search Results

How a master schedule is defined will determine what schedulers find when doing appointment searches. Distribution timelines, start and end dates, as well as how slots are defined and positioned all work together, providing the framework for patient access, clinic flow, and ultimately clinic revenue generation. Think of the master schedule as a guide to which providers see which appointment types and at what intervals.

When looking for appointments the system attempts to make the first available exact match based on the appointment type, duration, and starting date that the scheduler has indicated. What providers can have which appointment types scheduled or when those appointment types are scheduled can be specified. For example, if a provider wants new patients seen at 10 am on Tuesdays and Thursdays, a schedule can be created that excludes new patient visits (NPV) from all superslots with a NPV in a regular slot at 10am. Specifying which providers can see new patients can also be done by adding or removing the NPV appointment type from the provider’s profile. Provider profiles are defined at the system level.

If a scheduler searches for an appointment type that isn’t in a provider’s profile or hasn’t been included in a defined slot in the provider schedule, the system will not offer an appointment for that provider. For example, say you have 5 providers in a department and all of them except one can see new evaluations (NPE). That one provider will not have NPE as an available appointment type in their profile. If all 5 providers have defined in their schedules ANY Superslots (slots that will except any appointment type in their profile), a search by department for NPE will only show available times for the 4 providers that can do the NPE.

Other limits and options can be placed on schedules by using features such as:

- freeze/thaw – used to reserve slots for future use
- thresholds – used to manage percentage booked and patient access
- switch – used to help maximize booking options and prevent unused time.

Schedulers can see available appointment results in different ways depending on how they set their search preferences.

**First Available Search** – shows a text listing of the first available exact matches to the search. This is beneficial for sick and emergency calls that need to be seen as soon as possible. The draw back to this kind of search is that the scheduler will not see what the balance of the provider or department day looks like and cannot make choices around load levels or other clinic booking strategies.

**Schedule and Detail Searches** – shows a view of up to 5 daily schedules depending on the settings. The system still indicates exact matches through the green arrows on the schedule but will allow the appointment to be scheduled into other slots if the scheduler forces that choice (in some instances, not all, the system will warn the scheduler that a forced slot choice was not meant for that appointment type). The scheduler can see information about the other appointments on that day and make choices about booking strategies.

**Providers, Departments, Teams & Categories** – Appointments can be searched by provider, department, team or category. Each provider is set up by IT with a profile that includes their department(s) and appointment types that they can see within each defined department. Teams and Categories require special set up through a consultation involving Operations and IT.
Understanding Distribution Rules

Each time you create a new master schedule, you must distribute it to create daily schedules that reflect the new master schedule. Similarly, when you edit an existing master schedule, you need to redistribute it so that the daily schedules reflect the edited master schedule.

Assuming no other variables, when a master schedule is distributed the system immediately uses it to create daily schedules as defined until it reaches the indicated number of distribution days, then each night the system will continue to create additional daily schedules as defined by that master schedule in order to maintain the indicated number of distribution days. Currently MSU HealthTeam has a standard of 500 distribution days.

Other master schedules that exist for the same provider and same day(s) of the week that have different specifications (start date, end date, pattern/recurrence or total number of days) can change the distribution. The system looks at all the master schedules stored for a provider to determine which master schedule will guide the creation of the new daily schedule. This occurs at both the initial distribution of the schedule and each night during night jobs.

General rules for distribution priority:

- **The new schedule is not distributed to daily schedules in conflict.** If, for example, a daily schedule already exists for one or more dates, and there are appointments scheduled or if the existing schedule has been or is being edited, the system leaves the original daily schedule as is. These daily schedules are said to be in conflict and are listed on the Master Schedule Distribution Conflicts screen.
- **The new schedule overlays existing daily schedules not in conflict.** If, for example, a daily schedule already exists for one or more dates, and there are no appointments on the daily schedule and the daily schedule has not been edited, the new daily schedule for that day overlays the old daily schedule for that day.
- **Monthly cycles overlay weekly cycles.** If, for example, there are two master schedules: one for Monday through Friday every week, and another for every second Monday of the month, when the schedules are distributed, the monthly Monday-only schedule overlays the Monday through Friday schedule for the second Monday of every month.
- **Higher cycle numbers overlay lower cycle numbers.** If, for example, there are two master schedules: one for Tuesdays every week, and another for Tuesdays every other week, when the schedules are distributed, the Tuesday schedule for every other week overlays the weekly Tuesday schedule.
- **Few days overlay several days.** If, for example, there are two master schedules: one for Monday, Tuesday and Wednesday, and another for Wednesday only, when the schedules are distributed, the Wednesday-only schedule overlays the Monday through Wednesday schedule.
- **Distant future overlays near future.** If, for example, there are two master schedules: one weekly Monday schedule with a begin date of 05/01/2009, and another weekly Monday schedule with a begin date of 06/01/2009, the system distributes the 05/01/2009 schedule but it is overlaid with the 06/01/2009 Monday schedule.

If more than one additional master schedule exists for the same day(s) and they have conflicting priority in evaluation, the system will become confused and will not create the new daily schedule(s).

If an end date on a more recent master schedule stops that master schedule from being used, the system will look at the remaining master schedules for the same day(s) and automatically start reusing the older schedule again.
Number of Days a Master Schedule Will Distribute

1. Distribute Master
   - YES: Has your department asked IT to override the standard 500 days to distribute?
     - NO: Is there an end-date indicated on the Master Schedule?
       - NO: Daily Schedules will be created up to the number of days the department had IT enter into the system.
       - YES: Is the end-date on the Master Schedule before the dept/system defined number of days for Master Distribution?
         - NO: Daily schedules will be created up to the End-Date defined on the Master Schedule.
         - YES: Is the end-date on the Master Schedule before the system standard of 500 days.
   - NO: Is there an end-date indicated on the Master Schedule?
     - NO: Daily Schedules will be created up to the number of days the department had IT enter into the system.
     - YES: Is the end-date on the Master Schedule before the system standard of 500 days.
Master Schedule Manager

The Master Schedules Manager is where activities for master schedules such as creating, editing, viewing and deleting can be accessed.

1. Click on Dailies/Masters on the vertical tool bar.
2. Access the Master Schedules Manager by clicking on Master Schedules on the horizontal tool bar.
3. At Provider, specify a provider.
4. Department will default if the provider is associated with only one department. If the provider is associated with more than one department, specify a department.

The system displays a list of master schedules for the provider in the Master Schedules Manager grid.
Displaying/Viewing a Master Schedule

To access master schedules for a provider:

5. Click on **Dailies/Masters** on the VTB
6. Access the Master Schedules Manager by clicking on **Master Schedules** on the HTB
7. At **Provider**, specify a provider.
8. **Department** will default if the provider is associated with only one department. If the provider is associated with more than one department, specify a department.

The system displays a list of master schedules for the provider in the Master Schedules Manager grid.

9. In the grid, select the schedule you want to view.
10. Select **Actions** and then select **View**.

The system displays the schedule.
Creating a Provider Master Schedule

To create a new master schedule:

1. Click on Dailies/Masters on the Vertical Tool Bar
2. Access the Master Schedules Manager by clicking on Master Schedules on the Horizontal Tool Bar
3. At Provider, specify a provider.
4. Department will default if the provider is associated with only one department. If the provider is associated with more than one department, specify a department.

The system displays a list of master schedules for the provider in the Master Schedules Manager grid. (See screenshot on previous page.)

5. Select New.
6. On the Distribution Criteria for Master Schedule popup screen, specify the Begin Date, End Date (as applicable), Day(s), and Weekly or Monthly recurrence.
7. Click OK to file the definitions.

![Master Schedule Criteria](image)
8. On the **Define Sessions/Comments** screen, enter the end time(s) and location(s) for the applicable session(s). (The system assumes end time of midnight – 12 am – for the EVE session.)

![Define Sessions/Comments](image)

9. Enter any Schedule or Session Comments

10. Select **OK**

The New Master Schedule screen appears.

![New Master Schedule](image)
11. Define Regular slots and Superslots as necessary for the schedule. [*See Master Schedule Action Codes, page 30*]

12. Specify Freeze, Switch, Thresholds and other schedule information as necessary. [*See Master Schedule Action Codes, page 30*]

13. Select **OK** to create the schedule.

14. Select **Yes** to confirm that you want to file the schedule.

15. Select **Yes** to distribute the schedule. (*See Distributing a Master Schedule, page 18.*)
**Distributing a New Master Schedule**

When a master schedule is created or edited the system prompts for distribution. The master schedule can be distributed at this time or it can be distributed at a later date from the Master Schedules Manager (see **Distributing a Master Schedule at a Later Date**, Page 22).

When distributing a master schedule the system shows the progress of distribution. Additionally, once the distribution is complete, the system displays the Master Schedule Distribution Dates screen. This screen has two main sections:

- The screen header displays information about the master schedule that was distributed: provider and department as well as the master distribution criteria (begin date, days of the week, and recurrence).
- The body of the screen consists of six columns alternately labeled as **Date** and **Days**. Reading from left to right, you can see all of the dates to which the system distributed the master schedule, and the system identifies the day of the week for each date.

The Master Schedule Distribution Dates Screen is used to view the distribution dates and determine that the master distributed to the appropriate dates. The system displays the screen every time a schedule is distributed. The screen appears only once during the distribution process and it cannot be accessed again once you leave the screen.

After the screen is filed the system displays the Master Schedule Conflict List screen, if applicable, so that any conflicts with the distribution can be resolved (see **Conflict Lists**, page 20). If there are no conflicts, the system returns to the Master Schedules screen.
To distribute a master schedule:

1. Answer Yes to the **Distribute?** pop up after filing the new master schedule. The system will flash the dates and then display the Master Schedule Distribution Dates screen.

2. Click **Ok** to file the Distribution Dates screen. If there are no conflicts you are returned to the Master Schedules Manager. If there are conflicts you are brought to the Master Schedule Distribution Conflicts screen. (See **Conflict Lists**, page 20)

3. On the Conflicts screen, deal with conflicts as applicable.
Conflict Lists

If after the master schedule is distributed there were conflicts, the Master Schedule Conflict List screen is displayed so that the conflicts can be reconciled. Or, the conflict list can be recalled at a later time using the Conflict List activity. (If there are no conflicts the Conflict List does not appear). The screen includes several options for addressing the days in conflict. You can: edit the daily schedule, view the master schedule, view the daily schedule, remove dates from the conflict list, or transfer the master to dates on the conflict list.

The Master Schedule Conflict List screen will indicate how many appointments are scheduled for the day in conflict in the Appts column. Also on the Master Schedule Conflict List screen, the Conflict column displays letters that correspond to a type of distribution conflict. There are four possible letters that can appear:

<table>
<thead>
<tr>
<th>Letter</th>
<th>Full Text</th>
<th>Description Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Scheduled Appointment</td>
<td>This daily schedule already has an appointment scheduled.</td>
</tr>
<tr>
<td>C</td>
<td>Daily Schedule Crashed</td>
<td>This daily schedule has crashed.</td>
</tr>
<tr>
<td>E</td>
<td>Previously Edited</td>
<td>Someone edited this daily, either by hand or by transferring a template.</td>
</tr>
<tr>
<td>I</td>
<td>Daily Schedule in Use</td>
<td>Someone is in the process of editing this daily or is scheduling an appointment</td>
</tr>
</tbody>
</table>

For each daily, as many letters can appear as there are conflicts. Therefore, if a daily schedule has an appointment scheduled and has been previously edited; the Conflict column displays A E. If the daily schedule has an appointment scheduled, has been previously edited, and the daily schedule is currently in use, the Conflict column displays A E I.

Master schedules with distribution conflicts are indicated on the Master Schedules manager screen with a Y in the Conflicts column. You can view the Master Distribution Conflicts screen for those schedules by selecting Conflict List from the Actions menu.

To edit a daily schedule from the Conflict List:

1. Access the Conflict List.
2. Select the daily schedule you want to edit.
3. Select Edit Daily and make your changes to the schedule.
4. Select OK to file your changes or Cancel to cancel out of the daily schedule without saving your changes and return to the Conflict List.

To view the master schedule from the Conflict list:

1. Access the Conflict list.
2. Select View and then select Master Schedule. The View Master Schedule screen appears.
3. Review the schedule as necessary. Select OK to file the screen and return to the Conflict list.

To view a daily schedule from the Conflict list:

1. Access the Conflict list.
2. Select the date of the schedule you want to view.
3. Select View and then select Daily Schedule. The View Daily Schedule screen appears.
4. Review the schedule as necessary. Select OK to file the screen and return to the Conflict list.
To remove dates from the Conflict list:

1. Access the Conflict list.
2. Select the date(s) you want to remove from the Conflict list.
3. Select **Remove.** The system prompts: **Are you sure you want to remove the selected entries from the conflict list?**
4. Select **Yes** to remove the dates from the Conflict list. The system removes the dates from the Conflict list without distributing the master schedule to those dates; the daily schedule remains unchanged.

To transfer the master schedule to dates in conflict:

1. Access the Conflict List.
2. Select the date(s) to which you want to apply the master schedule.
3. Select **Transfer.** The Conflict list Distribution Recap appears displaying information about the transfer including the number of bumped appointments or non-transfer reason.
4. Review the recap screen as necessary. Select **Done** to complete the process and return to the Conflict list.
5. Address bumped appointments through the **Bump List.**

You do not have to create a template from the Master Schedule to distribute to daily schedules with conflicts. The system automates the process to distribute a master schedule to daily schedules with conflicts through the Trans to Date(s) activity available on the Master Schedule Distribution Conflicts screen.

When all of the conflicts are resolved, the conflict list is removed from the system. If a master schedule is redistributed before the conflict list is resolved, new conflicts are added to the conflict list for the schedule. If a date is still in conflict, the conflict list reflects the most current conflict reason. In addition, conflicts from the previous distribution may automatically be removed from the conflict list, if the schedule successfully distributes to those dates during the new distribution.

**Conflict List Bump Notes:**

If the appointment type and duration on an existing appointment will fit into the corresponding time slot on the new schedule that is frozen, the system will not bump this appointment but will place it in the frozen slot and leave the slot frozen. (So if the appointment is later cancelled the slot will remain frozen until it is slated to thaw).

**How does it treat non clinic slots? What about slots where existing appointments extend beyond the new schedule time frame (a 30 minute appt at 4:45 when the new schedule ends at 5)?**
Distributing a Master Schedule At a Later Date

When you edit a master schedule the system will prompt you for distribution automatically. You can distribute the master schedule at this time or you can distribute a previously filed master schedule from the Master Schedules Manager.

To distribute a master schedule at a later date:

1. On the Master Schedules Manager, select a Provider and Department.
2. Select a schedule from the Master Schedules grid.
3. Select Distribute. The system will flash the dates and then display the Master Schedule Distribution Dates screen. (See screenshot on page 19.)
4. Click Ok to file the Distribution Dates screen. If there are no conflicts you are returned to the Master Schedules Manager. If there are conflicts you are brought to the Master Schedule Distribution Conflicts screen. (See Conflict Lists, page 20)
5. On the Conflicts screen, deal with conflicts as applicable.

Creating a Resource Master Schedule

Same as creating a provider master schedule (see page 15) but use only a combination of ANY/WLK superslots and nonclinic regular slots to designate availability; that is, you cannot add regular slots with clinic appointment types, or superslots with appointment types other than ANY or WLK to a resource's master schedule. For more information about setting up resources please consult with MSU HealthTeam Operations.

Editing a Master Schedule

Editing a master schedule should be done with caution. Once an edit has been filed, the original master schedule is no longer in existence. Be aware that the distribution of daily schedules from an edited master schedule will begin from the original start date. If it is not intended to change the schedule from the original start date, the master schedule should be copied first (which defines a new start date) and can then be edited.

The field, action code, and action definitions for the Edit Master Schedule screen are the same as the New Master Schedule screen with the exception of the Y-Add End Date action. This action will only display if you are editing a master schedule that does not have an end date already defined.

1. Click on Dailies/Masters on the Vertical Tool Bar 
2. Access the Master Schedules Manager by clicking on Master Schedules on the Horizontal Tool Bar 
3. At Provider, specify a provider. 
4. Department will default if the provider is associated with only one department. If the provider is associated with more than one department, specify a department.

The system displays a list of master schedules for the provider in the Master Schedules Manager grid. (See screenshot on page 13)

5. Select the schedule you want and select Edit. 
6. Change schedule information as necessary. (See Master Schedule Terms, page 5 and Master Schedule Action Codes, page 30)
7. Select OK to create the schedule. 
8. Select Yes to confirm that you want to file the schedule. 
9. Select Yes to distribute the schedule. (See Distributing a Master Schedule, page 18.)
**Copying a Master Schedule**

From the Master Schedules Manager users can save time by copying a master schedule to another provider (within the same department), another day or another recurrence.

The Copy Master Schedule activity only copies the scheduling comments, slot, and superslot definitions for the schedule. It does not copy the days and recurrence of the Master Schedule. The Copy Master Schedules screen allows you to specify the distribution information (days and recurrence) for the new copy of the master schedule.

If you copy the schedule from one provider to a different provider, you must navigate to the master schedules for the appropriate provider to view the copied schedule.

To copy a master schedule:

1. On the Master Schedule Manager, select a **Provider** and **Department**.
2. Select the master schedule to copy from the grid.
3. Select **Copy**.
4. On the Copy Master Schedules screen, specify the **Provider** to whom you want to copy the master schedule.
5. Specify a **Begin Date**, **End Date** (if applicable), and **Weekly** or **Monthly** recurrence for the new master schedule.
6. Select **OK** to create the copy. The new master schedule is added to the master schedule grid for the receiving provider without being distributed and the system returns you to the master schedule grid for the original provider.
7. In order to put the Master Schedule into service, you must distribute it using the Distribute Master Schedule function from the Master Schedule Manager. (See **Distributing a Master Schedule at a Later Date**, Page 22.)
Creating a Master Schedule from a Template

Sometimes a provider wants a template schedule to become their regular schedule or a provider adopts a set schedule and needs a master schedule just like their template schedule. The Create from Template action on the Master Schedules manager allows you to create a new master schedule from an existing template. This saves you time when you create a master schedule that is the same or only slightly different from a provider’s template schedule; instead of entering the entire schedule, you can create a new master from the template and then edit the slot(s) that need to be modified.

To create a new master schedule from a template:

1. On the Master Schedules manager, specify the provider and department.
2. Select Actions and then select Create from Template.

The Create Master from Template screen appears.
3. In the Templates grid, select the template from which you want to create the new master schedule.
4. In the Master Schedule Criteria area, specify a Begin Date and End Date for the master schedule, as applicable.
5. At Days, specify the days of the week to which the schedule applies.
6. Specify the recurrence for the schedule, either Week by Week or Week of Month.
7. Select OK to file the screen and create the new master schedule based on the template. The system prompts: Are you sure you want to create a new Master Schedule from this Template?

8. Select Yes to create the new master schedule. The Master Schedules manager appears. The new master schedule is added to the Master Schedules grid without being distributed.
9. Distribute the new schedule as appropriate. (See Distributing a master Schedule at a Later Date, Page 23)
Deleting a Master Schedule

When master schedule is deleted it no longer is available for the system to use to create any further daily schedules. Deleting a master schedule does not delete any daily schedules that were already created from that master schedule. The Delete Master Daily Evaluation screen is used to provide a list of daily schedules that were created from the master schedule beyond the deletion date.

To delete a master schedule:

1. On the Master Schedules Manager, specify a **Provider** and **Department**.
2. Select the master schedule to delete and select **Delete** from the list of **Actions**.
3. Click **Yes** to confirm the deletion. Then click **OK** when the system confirms the delete.
4. If there are daily schedules affected by the deletion of the master schedule, the **End/Delete List** appears. Review and handle the list as necessary (See Master **End/Delete List**, Page 27).
5. Select **OK** to complete the process.

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**Master End Date/Delete List**

When a master schedule is deleted a report is generated. It shows any days in the future to which the schedule has been distributed so the days can be reconciled. The report is a retrievable list accessed from the **End/Delete List** action listed on the **Actions** dropdown menu at the bottom of the Master Schedules manager screen. If the report is due to a deleted master schedule, the master schedule must be redisplayed on the master schedules manager by using the Show Deleted button at the bottom of the master schedules manager screen (see Show Deleted, Page 29). In addition to showing a list of days to which the master schedule was distributed past the deletion date, the Master End Date/Delete List provides editing actions to reconcile the dates (delete, edit, or template transfer) and allows the report to be printed.

**Master End Date/Delete List**

<table>
<thead>
<tr>
<th>Date</th>
<th>Day</th>
<th>Appts</th>
<th>Edited</th>
<th>Master Schedule Hierarchy</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/20/2009</td>
<td>Monday</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/27/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/03/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/10/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/17/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/24/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/31/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/07/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/14/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/21/2009</td>
<td>Monday</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Remove** – Select any dates to be kept in the provider’s schedule then click on Remove to remove the dates from the Master End Date/Delete List and leave the daily schedules unchanged.

**Daily** – Daily schedules can be deleted, edited or viewed by selecting the dates and choosing the appropriate option from the dropdown **Daily** menu. Daily schedules can not be deleted if they contain appointments. To bump any existing appointments, **Transfer a Template** blocking the day.

**To Transfer a Template to Days on the list:**

1. Select the daily schedules that are to be overwritten by a template to be chosen from the provider’s template list
2. Click on Trans Temp
   
   The bottom form will appear.

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3. Indicate the Template to be used and the Bump Reason. Check the box next to **Display Template?** to view the template before transferring it. Check the box next to **Update Appt location when Template/Daily locations don’t match?** to transfer to location indicated on the template to the daily schedule.

4. Click **Yes** to confirm the transfer.

5. The Template Transfer Recap screen appears. Use this screen to confirm transfers and handle and transfer errors. The bumped appointments will now show on the provider’s bump list.
Show Deleted

You can access an unresolved End/Delete List for previously deleted master schedules by using the Show Deleted button at the bottom of the Master Schedules manager screen. This button will only recall the information for a previously deleted master schedule if daily schedules that were created from the master schedule beyond the end date or delete date still exists. If all daily schedules beyond the end/delete date have been deleted, the Show Deleted action code will not be available.

To access the End/Delete list for a previously deleted Master Schedule:

From the Master Schedules manager screen
1. Select the Show Deleted button at the bottom of the screen.
   The deleted master schedule(s) with an End/Delete list will be added to the Master Schedules manager grid.
2. Select the master schedule with the list to be addressed.
3. From the Actions dropdown select the End Date/Delete List action
   The End Date/Delete List screen will appear.
4. Address list as appropriate. (see Master End Date/Delete List, page 27)
**Master Schedule Action Codes**

Several actions are available to create and amend the master schedule. Below are the three variations of the action codes, depending on how far along in creation the master schedule is.

This set of actions is available **before any slots are defined** on a master schedule:

- **Add/Edit Sessions**
- **Schedule Comments**
- **Add Regular Slot**
- **Add Superslot**
- **Thresholds**

The actions available expand **once slots have been defined**. This same list will be available after an end date has been added.

- **Add/Edit Sessions**
- **Schedule Comments**
- **Delete Slot(s)**
- **Edit Slot(s)**
- **Freeze Slot(s)**
- **Thresholds**
- **Select/Unselect Session**
- **Add Regular Slot**
- **Add Superslot**
- **Thaw Slot(s)**
- **Switch Actions...**
- **Expand/Contract**

The actions further expand to include the Add End Date action once the master schedule has been filed. The action code is removed from the selections if an end date has already been added.

- **Add/Edit Sessions**
- **Schedule Comments**
- **Delete Slot(s)**
- **Edit Slot(s)**
- **Freeze Slot(s)**
- **Thresholds**
- **Select/Unselect Session**
- **Add Regular Slot**
- **Add Superslot**
- **Thaw Slot(s)**
- **Switch Actions...**
- **Expand/Contract**
- **Add End Date**

Screenshots and instructions are on the following pages for each of the actions codes:

<table>
<thead>
<tr>
<th>Action</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Edit Sessions</td>
<td>31</td>
</tr>
<tr>
<td>Schedule Comments</td>
<td>32</td>
</tr>
<tr>
<td>Add/Edit Regular Slot</td>
<td>33</td>
</tr>
<tr>
<td>Add/Edit a Specific Superslot</td>
<td>34</td>
</tr>
<tr>
<td>Add/Edit an Any (WLK) Superslot</td>
<td>35</td>
</tr>
<tr>
<td>Add/Edit an Any Exclusive (WLK) Superslot</td>
<td>36</td>
</tr>
<tr>
<td>Edit Slot(s)</td>
<td>37</td>
</tr>
<tr>
<td>Delete Slot(s)</td>
<td>38</td>
</tr>
<tr>
<td>Freeze Slot(s)</td>
<td>39</td>
</tr>
<tr>
<td>Thaw Slot(s)</td>
<td>40</td>
</tr>
<tr>
<td>Switch Actions...</td>
<td>41</td>
</tr>
<tr>
<td>Select/Unselect Session</td>
<td>46</td>
</tr>
<tr>
<td>Thresholds</td>
<td>47</td>
</tr>
<tr>
<td>Expand/Contract</td>
<td>48</td>
</tr>
<tr>
<td>Add End Date</td>
<td>49</td>
</tr>
</tbody>
</table>
Add/Edit Sessions

Sessions are first defined during the initial creation of the master schedule (see page 16). For a definition of sessions see page 5. Things to remember:

- If the provider is associated with only one location the location field will auto-populate.
- If the provider has more than one location, choose the location from the list by clicking on the search icon to the right of the field.
- A session can be deleted or left undefined by removing the end time and location.

To add or edit sessions after the Define Sessions/Comments screen has been filed:

1. From the New Master Schedule screen or the Edit Master Schedule screen
2. Select the Add/Edit Sessions action code.
4. Define End Time and Location as appropriate.
5. Select OK to file the change.
Schedule Comments

The action code Schedule Comments allows editing of both Schedule and Session Comments. The comments are first defined during the initial creation of the master schedule (see page 16). For a definition of schedule comments and session comments see page 6. Things to remember:

- A schedule comment can be up to 70 characters
- A session comment can be 8 lines of 22 characters each

To add or edit schedule or session comments after the Define Sessions/Comments screen has been filed:

1. From the New Master Schedule screen or the Edit Master Schedule screen
2. Select the Schedule Comments action code.
3. The Define Sessions/Comments screen will appear.
4. Enter Comment (this is the schedule comment) as appropriate.
5. Enter AM, PM and EVE Session comments as appropriate.
6. Select OK to file the change.
Add Regular Slot or Edit Slot(s) for Regular Slot

From the New Master Schedule screen or the Edit Master Schedule screen
1. To add a regular slot, select the Add Regular Slot action code. (See Regular Slots, page 6) or
2. To edit an existing regular slot select the regular slot you want to edit by clicking on the check box to the left of the slot then select the Edit Slot(s) action code. (See Regular Slots, page 6)
The Regular Slot bottom form will appear at the bottom of the screen.
2. Define/edit the fields as appropriate.
   a. Session: Select AM, PM or EVE as defined in the Master Schedule
   b. Time: indicate start time for the slot (end time will be determined by duration). Time must be entered either in military time or with an am or pm designation. (examples: 1330 or 1:30p, 1500 or 3p)
   c. Type: indicate the appointment type for the slot. An appointment type can be entered as a number, a pneumonic or be chosen from a list of available Appointment Types. To access the appointment type search, click on the search icon to the right of the field – a pop up will appear showing the appointment types valid for the provider. Select the appropriate Appointment Type from the list.
   d. Duration: the duration associated with the visit type will default when the Type is entered.
   e. Allocation: indicate the number of patients to be seen for this appointment time.
   f. Comment: enter a slot comment of up to 22 characters as appropriate
3. Select OK to file the slot.
The system returns to the blank Regular Slot bottom form to allow additional slots to be defined.
4. Select OK to return to the schedule once all Regular Slots are defined.

Appointment Type Search

![Appointment Type Search](image)
Add Superslot or Edit Slot(s) for Specific Superslot

From the New Master Schedule screen or the Edit Master Schedule screen
1. To add slot select the Add Superslot action code.

or

1. To edit an existing superslot select the superslot you want to edit by clicking on the check box to the left of the slot then select the Edit Slot(s) action code.

The Add/Edit Superslot screen will appear. (See Superslots, Page 7)

2. Define/edit the fields as appropriate.

a. Session: Select AM, PM or EVE as defined in the Master Schedule

b. Start Time and End Time: indicate start time and end time for the slot. Time must be entered either in military time or with an am or pm designation (examples: 1330 or 1:30p, 1300 or 1p). End time is the time the last appointment in the slot will be over.

c. Interval: This is the increment of time that will be used to build appointment times. The number of minutes indicated should be able to be stacked into any of the available appointment durations. (For example if there are 15, 30 and 60 minute appointment types, blocks would be 15 minutes; if there are 15 and 20 minutes slots, blocks would be 5 minutes.)

d. Repeat: Indicate how many patients are to be seen at once.

e. Types to Include: Choose Specific from the drop down list.

f. Type: enter one or more appointment type(s) to be seen during the time indicated. An appointment type can be entered as a number, a pneumonic or be chosen from a list of available Appointment Types. To access the appointment type search, click on the search icon to the right of the field – a pop up will appear showing the appointment types valid for the provider. Select the appropriate Appointment Type from the list.

g. Dur: the system defaults the defined duration for the indicated appointment type.

h. Alloc: enter the maximum number of the associated appointment type that is to be seen during the overall time of this superslot.

3. Select OK to file the slot.

The system returns to the blank Add/Edit Superslot screen to allow additional slots to be defined.

4. Select OK to return to the schedule once all Superslots are defined.
Add Superslot or Edit Slot(s) for Any Superslot (WLK Superslot)

From the New Master Schedule screen or the Edit Master Schedule screen
1. To add slot select the Add Superslot action code.
or
1. To edit an existing superslot select the superslot you want to edit by clicking on the check box to the left of the slot then select the Edit Slot(s) action code.

The Add/Edit Superslot screen will appear. (See Superslots, Page 7)
2. Define/edit the fields as appropriate.
   i. Session: Select AM, PM or EVE as defined in the Master Schedule
   j. Start Time and End Time: indicate start time and end time for the slot. Time must be entered either in military time or with an am or pm designation (examples: 1330 or 1:30p, 1300 or 1p). End time is the time the last appointment in the slot will be over.
   k. Interval: This is the increment of time that will be used to build appointment times. The number of minutes indicated should be able to be stacked into any of the available appointment durations. (For example if there are 15, 30 and 60 minute appointment types, blocks would be 15 minutes; if there are 15 and 20 minutes slots, blocks would be 5 minutes.)
   l. Repeat: Indicate how many patients are to be seen at once.
   m. Types to Include: Choose Any from the drop down list.
   n. Total Allocation: The system enters the total maximum number of appointments that can be scheduled within the superslot based on the Interval and Repeat. This can be changed if appropriate. (For example if there are four 15 minute appointments available but the new resident is only going to see 2 patients per hour, a total allocation of 2 could be indicated.)
   o. Walk-ins: Click the check box if the slot is to allow walk-in appointments (doing this designates the superslot as a WLK)

3. Select OK to file the slot.
The system returns to the blank Add/Edit Superslot screen to allow additional slots to be defined.
4. Select OK to return to the schedule once all Superslots are defined.
Add Superslot or Edit Slot(s) for Any Exclusive (WLK Exclusive)

From the New Master Schedule screen or the Edit Master Schedule screen
1. To add slot select the Add Superslot action code.
   
   or
   
1. To edit an existing superslot select the superslot you want to edit by clicking on the check box to the left of the slot then select the Edit Slot(s) action code.

The Add/Edit Superslot screen will appear. (See Superslots, Page 7)
2. Define/edit the fields as appropriate.
   
   p. Session: Select AM, PM or EVE as defined in the Master Schedule
   
   q. Start Time and End Time: indicate start time and end time for the slot. Time must be entered either in military time or with an am or pm designation (examples: 1330 or 1:30p, 1300 or 1p). End time is the time the last appointment in the slot will be over.
   
   r. Interval: This is the increment of time that will be used to build appointment times. The number of minutes indicated should be able to be stacked into any of the available appointment durations. (For example if there are 15, 30 and 60 minute appointment types, blocks would be 15 minutes; if there are 15 and 20 minutes slots, blocks would be 5 minutes.)
   
   s. Repeat: Indicate how many patients are to be seen at once.
   
   t. Types to Include: Choose Any from the drop down list.
   
   u. Excluding: Enter appointment types that are to be excluded from this superslot. An appointment type can be entered as a number, a pneumonic or be chosen from a list of available Appointment Types. To access the appointment type search, click on the search icon to the right of the field – a pop up will appear showing the appointment types valid for the provider. Select the appropriate Appointment Type from the list.
   
   v. Total Allocation: The system enters the maximum total number of appointments that can be seen within the superslot based on the Interval and Repeat. This can be changed if appropriate. (For example if there are four 15 minute appointments available but the new resident is only going to see 2 patients per hour, a total allocation of 2 could be indicated.)
   
   w. Walk-ins: Click the check box if the slot is to allow walk-in appointments (doing this designates the superslot as a WLK Exclusive)

3. Select OK to file the slot.

The system returns to the blank Add/Edit Superslot screen to allow additional slots to be defined.
4. Select OK to return to the schedule once all Superslots are defined.
Edit Slots(s)

From the **New Master Schedule** screen or the **Edit Master Schedule** screen
1. Select the slot you wish to edit by clicking in the check box to the left of the slot.
2. Select the **Edit Slot(s)** action code.
3. See directions for slot type (Regular Slot see page 33, Superslot see pages 34-36)

---

### Edit Master Schedule

Provider: MONSON DO, CAROL L  
**Department:** DO-FAMILY MEDICINE  
**Day(s):**  
**Recurrence:** Every Week  
**Begin date:** 06/01/2009  
**End date:** 06/17/2009 04:56PM  
**Last Edit:** WHITETO

<table>
<thead>
<tr>
<th>Time</th>
<th>Type</th>
<th>Alloc</th>
<th>Dur</th>
<th>Comment</th>
<th>Frz/Thw/Sw</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00A</td>
<td></td>
<td>------</td>
<td>-----</td>
<td>--------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>08:30A</td>
<td>MTG</td>
<td>------</td>
<td>30</td>
<td>WEEKLY STAFF MTG</td>
<td></td>
</tr>
<tr>
<td>09:00A</td>
<td></td>
<td>------</td>
<td>-----</td>
<td>--- Interval=15, 1 per slot</td>
<td></td>
</tr>
<tr>
<td>10:00A</td>
<td></td>
<td>------</td>
<td>-----</td>
<td>--- Interval=15, 1 per slot</td>
<td>Freeze/Thaw</td>
</tr>
<tr>
<td>11:00A</td>
<td></td>
<td>------</td>
<td>-----</td>
<td>--- Interval=15, 1 per slot</td>
<td></td>
</tr>
</tbody>
</table>

---

**Actions**

- Add/Edit Sessions
- Schedule Comments
- Delete slot(s)
- Edit Slot(s)
Delete Slot(s)

To delete one slot or multiple slots:

From the **New Master Schedule** screen or the **Edit Master Schedule** screen
1. Select the slot(s) by clicking on the box to the left of the slot(s)
2. Select the **Delete Slot(s)** action code.
Freeze Slots(s)

Regular slots or superslots can be frozen in master and daily schedules and in templates. Any slot frozen in a master schedule or template will also be frozen in a daily schedule that is created from them. Freezing slots in a master schedule allows you to set up slots that will be frozen every day without having to edit every daily schedule. You can also enter a **future thaw date**, where a slot in a daily schedule is frozen and then automatically thawed by the system prior to the schedule date. This is useful if you want to “save” a slot for walk-in sick visits. A slot that already has a switch defined can not be frozen.

To freeze one slot or multiple slots:

From the **New Master Schedule** screen or the **Edit Master Schedule** screen
1. Select the slot(s) by clicking on the box to the left of the slot(s)
2. Select the **Freeze Slot(s)** action code.

The Define Thaw information bottom form will appear
3. Indicate that thaw information is to be defined by clicking in the check box
4. Enter the number of calendar days prior to the schedule date that the slot(s) will thaw and become available for scheduling.
5. Select OK to file the freeze.

The system returns to the **New Master Schedule** screen or the **Edit Master Schedule** screen and the freeze/thaw message shows in the column on the right of the slot.

---

### Add/Edit Master/Daily/Template Bottom Forms

<table>
<thead>
<tr>
<th>Provider: MONSIN DO, CAROL L</th>
<th>Day(s): M</th>
<th>Recurrence: Every Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department: DO-FAMILY MEDICINE</td>
<td>End Date: 06/17/2009 03:52PM</td>
<td></td>
</tr>
<tr>
<td>Begin Date: 06/01/2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Edit: WHITETO</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time</th>
<th>Type</th>
<th>Alloc</th>
<th>Dur</th>
<th>Comment</th>
<th>Frz/Thw/Sw</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00A</td>
<td>MTG</td>
<td>30</td>
<td>----</td>
<td>WEEKLY STAFF MTG</td>
<td></td>
</tr>
<tr>
<td>08:00A</td>
<td>WLT</td>
<td>2</td>
<td>----</td>
<td>Interval=15, 1 per slot</td>
<td></td>
</tr>
<tr>
<td>09:00A</td>
<td>STC</td>
<td>4</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:00A</td>
<td>OVR</td>
<td>4</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00A</td>
<td>ANY</td>
<td>4</td>
<td>15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Define Thaw information?** ✔️

Thaw **0** day(s) before schedule date.

[OK]  [Cancel]
Thaw Slot(s)

Frozen slots can be thawed by a future thaw date definition or they can be thawed on demand with the Thaw Slot(s) action code. Thawing a slot in a master schedule does not affect daily schedules that have already been created using the master schedule. To thaw active daily schedules on demand, the daily schedule must be edited.

To thaw one slot or multiple slots:

From the New Master Schedule screen or the Edit Master Schedule screen
1. Select the slot(s) by clicking on the box to the left of the slot(s)
2. Select the Thaw Slot(s) action code.

The freeze/thaw indicator in the right column of the slot(s) will be removed and the slot is no longer defined to freeze.
Switch Actions

Switch actions are used to change the appointment type(s) that are designated for a slot at a future date. The system will switch the slot from the original definition to the chosen switch definition during night jobs. A non-clinic slot cannot be switched. A slot that already had a freeze/thaw defined cannot also have a switch. (See Switch, page 8)

To set up a switch for a slot:

From the New Master Schedule screen or the Edit Master Schedule screen
1. Select the slot to be defined for a switch by clicking on the box to the left of the slot.
2. Select the Switch Actions… action code.
The switch actions bottom form will appear.
3. Select the Setup Appt Type Switch action code
   Step 4 depends on what type of slot was selected for the switch.
   Regular slot see page 33
   Specific Superslot that is being changed to other specific appointment types see page 34
   Superslot being changed to ANY or ANY Exclusive see page 35-36
Regular Slot Switch of Appointment Type

When switching regular slots one appointment type is being changed to one other appointment type. Steps 1-3 see page 41.

4. Indicate the appointment type and the number of patients to be seen (allocation). The system will warn that appointments of different duration or allocations of a different number could cause overbooking. Remember that allocations of more than 1 will allow multiple patients to be scheduled at the same time – a regular slot does not provide for spreading multiple allocations out over the entire period of time. (See Regular Slot under Switch on page 8)

5. Select OK to file the switch.
Specific Super Slot Switch of Specific Appointment Type(s)

Steps 1-3 see page 41.

4. Click in the checkbox next to **Switch Individual Types** to select this switch type
5. Enter the future appointment type in the **To Type** slot. (The search button to the right of the slot can be used to look up the available appointment types.) The system will warn of a possible overbook if an appointment type with a different duration from the original appointment type’s duration is selected.
6. Enter the number of appointments for the future appointment type in the **Alloc** slot. The system will warn of a possible overbooking risk if a different allocation from the original is indicated.
7. Enter the number of **Days Prior** to the appointment date that the switch is to occur.
8. Select **OK** to file the switch.
Entire Superslot (Specific, Any or Any Exclusive) Switch to ANY or ANY Exclusive

Steps 1-3 see page 41.

4. Click in the checkbox next to **Switch Whole Superslot** to select this switch type
5. Enter any appointment type(s) to be excluded in the **Excluding** slots. (The search button to the right of the slot can be used to look up the available appointment types.)
6. If appropriate edit the maximum number of appointments for the future superslot in the **Total Allocation** slot. (See page 35 for more detail on **Total Allocation**.)
7. If **Walk-ins** are to be allowed, click the check box
8. Enter the number of **Days Prior** to the appointment date that the switch is to occur.
9. Select **OK** to file the switch.

**Switch Superslot Types**

- Provider: MONSON, DO, CAROLL L
- Department: DO-FAMILY MEDICINE
- Begin date: 06/01/2009
- End date: 06/17/2009 03:52PM

**Switch Whole Superslot**

- To Types to Include: ANY
- From Excluding Types
- Total Allocation: 2
- Accommodate
- Walk-ins
- Days Prior: 5

**Switch Individual Types**

- To Type
- From Dur Alloc
- M 15 2
- NTD 2

**OK**  **Cancel**
Removing a Switch Definition

To remove a switch definition from a slot:

From the **New Master Schedule** screen or the **Edit Master Schedule** screen
1. Select the slot that has the defined switch by clicking on the box to the left of the slot.
2. Select the **Switch Actions…** action code.
The switch actions bottom form will appear.
3. Select the **Remove Switch(s)** action code
A pop up asks for approval to remove.
4. Click **Yes** to complete the remove action.
Select/Unselect Session

To complete any of the actions on an entire session, the session must first be selected. In order select the entire session:

1. Select any slot within the session
2. Select the Select/Unselect Session action
3. Proceed with the appropriate action to be enacted on the entire session.

This action is set up as a “toggle”. Clicking it once will select the session; clicking again will unselect the session. Check marks are present at all slots when the session has been selected. Check marks are removed when the session is unselected.
**Thresholds**

When using the Advanced Access process, the scheduler is expected to help manage the provider’s schedule. The scheduler is asked to "sell" certain appointment times to patients to keep schedules level and open for advanced access. For example, if a patient would be satisfied with either the day before or after a heavily booked day the scheduler would try to schedule the appointment for one of the lighter days.

To help those schedulers in this process, a threshold indicator has been added to the New Appointment schedule and first available searches to alert the scheduler of days that are getting too heavily booked. The threshold indicator is only a gauge; if the patient cannot be accommodated on an alternate day the scheduler can still book the appointment in the over-threshold day. The threshold is based on the number of days into the future for the daily schedule, and is set in Master Schedules and edited through the Daily Schedule.

### Clinics interested in utilizing Thresholds should consult with Operations prior to setting up this functionality.

To define Thresholds for a master schedule:

1. Select the Thresholds action code.
2. Define threshold days and % as appropriate.
3. Click Yes to file Thresholds.

This is an example of the screen the scheduler would see while doing a Schedule search for a patient appointment. Days that are over the defined Thresholds have the booked appointment load highlighted in orange. This cues the scheduler to accommodate the patient’s appointment request on a different day if possible.

The Threshold Indicator appears on:

- New Appt Schedule Search screen,
- New Appt Detail Search screen
- First Available search – detail display
- Provider Schedules screen

A Threshold Indicator (TI) column appears on:

- New Appt First Available Search screen
- New Appt First Available Search Links screen
- New Appt Recurring Search screen
- Provider Schedules List Grid
**Expand/Contract**

**Expand** the schedule to view more detailed information regarding the master schedule such as switch or freeze/thaw definitions.

1. Select any slot within the session
2. Select the **Expand/Contract** action code

This action is set up as a "toggle". Clicking it once will **expand** the schedule; clicking again will **contract** the schedule. See examples in the screen shots below.

![Schedule example](image-url)
Add End Date

Adding an end date to an open-ended master schedule makes it easy for you to stop the master schedule distribution and reconcile any daily schedules past the new end date. When an end date is added to a master schedule a report is generated. It shows any days in the future to which the schedule has been distributed so the days can be reconciled. The report is a retrievable list accessed from End/Delete List under actions on the Master Schedules manager. In addition to showing a list of days to which the master schedule was distributed past either the end date, the Master End Date/Delete List provides editing actions to reconcile the dates (delete, edit, or template transfer) and allows the report to be printed.

To add an end date to an open ended master schedule:

From the Edit Master Schedules screen
1. Select the Add End Date action code.
   The Add End Date bottom screen appears.
2. At End date, specify an end date or use the calendar lookup to select a date. The end date is the last date the master schedule will be used to create daily schedules.
3. Select OK to file your changes.
   If there are daily schedules past the end date, the End/Delete List appears. This list shows the daily schedules that have already been created past the end date that has been added.
4. Deal with End/Delete list as appropriate. (see Master End Date/Delete List, Page 27)