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Module 1 – Overview of Schedules

There are two types of provider schedules - Master schedules and **Daily Schedules**. The master schedule is used as a model to create daily schedules and cannot be used for booking appointments.

The provider can have several different master schedules. For example, a provider may see patients every Monday and Friday at the MSU Physicians Building and on Thursday at the Children’s Hospital. Two different master schedules would be created.

The daily schedules are used for booking patient appointments. The location, number, times and types of visits allowed for each day are displayed.

The chart below outlines the process by which Daily Schedules are developed:
Maintenance activities

*Edit Daily Schedules:*

The *Edit Daily Schedules* activity is used to make permanent changes to the provider’s schedule on a specific day.

*Template Activities:*

Template activities are used to create a day or make changes to several days at one time.

*Daily Schedules vs. Templates*

<table>
<thead>
<tr>
<th>Update Daily Schedule</th>
<th>Create/Apply Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>One day at a time when...</td>
<td>To a day or range of days when...</td>
</tr>
<tr>
<td>• The provider wants to make an unusual change to a specific day (s) i.e. block off 2 hours of the morning schedule for a conference that happens once a year</td>
<td>• The provider is taking time off for a vacation. Create and store a vacation template and apply it to the appropriate dates as needed</td>
</tr>
<tr>
<td>• The provider is making an exception and would like to add a 1/2 an hour at the end of a session on a particular day</td>
<td>• The provider has meeting at a standard time/day (i.e. 9:00 on Monday), but it is only scheduled on an as needed basis. Create and store a template and apply to dates as needed</td>
</tr>
<tr>
<td>• The provider has frozen slots on a day and you need to thaw them to make them available for patients</td>
<td>• The provider’s Friday schedule is different every 4 weeks. Create a template and apply it to the appropriate “Friday” dates</td>
</tr>
<tr>
<td>• You would like to add a date specific Session Comment</td>
<td>• You would like to make the same “schedule change” apply to a range of dates</td>
</tr>
</tbody>
</table>
Module 2 – Creating Templates/Template Activities

There may be times when you will need to make alterations to several days at one time. Rather than edit each daily schedule individually, you can create a template that includes any common changes and apply it to the daily schedule on those dates. In addition, a template can be used to create a day(s) that does not exist or does not follow any sequential pattern. You can even copy a master schedule into a template and distribute it to days that are not part of the provider’s normal schedule.

Once a template is distributed to a day the changes take place immediately even if there are appointments scheduled on that day. If the template visit types do not coincide with the appointments booked for the day, the visits are bumped.

Accessing Add/Edit Templates

From the Scheduling Function Screen

1. Enter Function 8 - Operations
2. Enter Activity 1 - Daily Schedules
3. Enter Activity 4 - Schedule Template Activities

Type a “?” at the Select Activity: prompt.

The following screen appears

Activity 1: Add/Edit Templates

Add/Edit Template is used to add a new template or edit an existing template for a provider. The first page contains prompts to identify the provider and the template you want to create.

Select Activity 1 from Template Activities Menu. The following screen will appear.
1. Enter the name of the provider who you wish to create a template for.

2. The provider’s department will default into this field. If a department does not display, the provider has schedules in more than one department. Press (?) or F12 and perform a look-up to find the right department.

3. Enter NEW to create a new template; the system assigns the template a unique number.

4. Enter a template Description that defines the use of this template. This can be up to 30 characters of free text.

5. Add a comment about this schedule. This comment displays on the header of some reports.

   NOTE: Session comments cannot be added until you have created a schedule on the Template Detail Screen.

Press <Page Down> or <F7> <P> to access page two, the Add/Edit Provider Templates Detail Screen.
Add/Edit Provider Templates Detail Screen.

There are two sections to the Detail Screen. The top section lists the provider’s schedule and the bottom section allows you to enter commands to edit the times and add visit types.

Use the <Tab> key or the <arrow up><arrow down> keys to move around the top area of the screen.

An explanation of the above fields are listed below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>These fields automatically default from the previous page</td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Template #</td>
<td></td>
</tr>
<tr>
<td>End:</td>
<td>The end time of the corresponding session.</td>
</tr>
<tr>
<td>Loc:</td>
<td>The location where the provider will be seeing his patients in each session.</td>
</tr>
<tr>
<td>Time:</td>
<td>The time of the visit.</td>
</tr>
<tr>
<td>Type:</td>
<td>The short name of the visit type.</td>
</tr>
<tr>
<td>Dur:</td>
<td>The length of a particular type of visit</td>
</tr>
<tr>
<td>------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Al:</td>
<td>The number of appointment(s) the provider will see in that time slot</td>
</tr>
<tr>
<td>Act:</td>
<td>Short for Action. Entering commands at this prompt allows you to edit or display the schedule.</td>
</tr>
<tr>
<td>P:</td>
<td>The page of the session being viewed. If the daily schedule is too large to fit on one page, enter the page # you wish to view, or press &lt;F&gt; and &lt;Enter&gt; to move forward or &lt;B&gt; to move backward.</td>
</tr>
</tbody>
</table>
Daily Schedule Edit Commands

Below is a list of the different commands you can enter at the **Act:** prompt. If you forget which action command to use when editing a daily schedule, simply press the <Shift><F5> (twice) and the system will list the different commands available.

A  Add a regular, super or non-clinic slot.

AT,#  Add the visit type to a super slot

D,#  Delete a slot

D,#-#  Delete a group of slots or an entire session

D,ALL  Deletes the entire session

C,#  Change a slot

F,#  Freeze a slot

F,#-#  Freeze a range of slots

T,#  Thaw a slot

T,#-#  Thaw a range of slots

F,#,$  Freeze a slot with an automatic future thaw (the #0 is a same day schedule thaw)

F,#-#,$  Freeze a range of slots with an automatic future thaw

FTD  View Freeze/Thaw Detail Screen

DET  Display the Daily Detail Screen

F  Scrolls sessions forward one page

B  Scrolls sessions backward one page

#  Jumps to a page #
Adding Appointment Time Slots

Time Slot Descriptions

Before we begin the process of creating a template, it is important to understand the three different types of slots used to create and edit a template. There are Regular, Superslots and Non-Clinic Slots. Each serves a different function.

1. **Regular Slots** are individual time slots defined for a specific visit type. For example, if a provider is seeing a NEW patient at 9:00-9:30 and a RETURN from 9:30-9:45 a regular slot is used.

   Regular slots do not use up time, therefore they can be used to overlap other regular slots. For example, a regular slot can be used if a provider has a NEW visit with a duration of one hour at 1:00 p.m. and a RETURN scheduled at 1:15 p.m. A regular slot, however, cannot overlap a Superslot or Non-clinic slot.

2. A **Superslot** is a specified range of time in which the provider will see different visit types, Superslots allow greater flexibility when booking—they allow you to mix visit types and to specify how many of each type of visit can be scheduled within the given time range.

   Superslots can also be set up to:
   - allow “ANY” of the provider’s visit type to be booked within a range,
   - offer one visit type or another,
   - exclude particular visit types,
   - allow only a certain type of visit.

3. **Non-Clinic Slots** are used to block out time on the schedule when the provider is not available to see patients. Non-clinic time can be used to indicate time set aside for meetings, conferences, lunch, etc.
Adding a Regular Slot

To add a regular slot you must be on the Add/Edit Provider Template Detail Screen.

All Edit Commands must be entered at the Act: prompt.

+ **Note:** When adding a regular slot, take notice of the End: time. If you are extending the provider’s work hours, you also must extend the end time. Remember the end time is the time the provider will finish in that particular session. It is not the last appointment of the session.

Scenario: Your Provider would like to work Saturday and Sunday for the next month. We will need to create a Special Day Template to accommodate. In the am he/she will see 1 new at 8, 2 returns at 8:15, 1 return at 8:30 and 8:45.

Because the provider is asking for appointments at specific times first thing, regular slots must be added to the morning session.

To add a regular slot:

1. At the Act: prompt, enter the <A> command in the AM session.

2. Enter the start time of the slot you are adding.

3. Indicate the abbreviated visit type the provider would like to see at this time. If you do not know the abbreviations, type a <?> to view a list of the provider’s visit types.

4. At the Alloc: prompt, enter the number of appointments the provider will see at the specified time. For example, in our scenario the provider will see one visit at 8:00 a.m.

5. Press <ENTER> to accept the default of <Y> at the OK: prompt. The system will add the regular slot to the schedule. If you type <N> at the OK: prompt, the time slot will not be added to the schedule.
Adding a Regular Slot

After the regular slot is added to the schedule, the cursor returns to the Time: prompt. At the Time: prompt you can add your next slot to the schedule or press <ENTER> to move the cursor back to the Act: prompt. Our example continues so we will stay at the time prompt.

Adding a Superslot

To continue on our Special Day Template
From 9-11 your provider will see 2 patients every time slot, all return patients.

We will now add a Superslot.

1. In the Time: field enter the start time of the superslot followed by a dash and the end time (i.e. 9a-11a). The end time must not exceed the end time of your session.

2. At the Repeat: prompt enter the number of patients the provider will see at one time. This field is used in conjunction with the interval prompt. For example, if a superslot is set for 60 minutes and you enter a repeat of 2 with an interval of 30 minutes, the provider will see 2 patients every 30 minutes.

3. The Interval is the smallest time period in which the provider will schedule patients. The interval must be a multiple of 5 (i.e.: 5, 10, 15, 20). This field is only used for superslots. The interval should be equal to the smallest duration
of any visit type included in the superslot. In our above scenario the interval will be 15 minutes, allowing all appointments to be booked on the quarter hour.

4. At the **Superslot Type, Alloc:** prompt, enter a valid visit type followed by a comma and the number of visit types allowed within this time range. Entering a `<>` or pressing `<F12>` will list the provider’s visit types. Since we have only Return visits in our example—we would enter OVR,16. This would indicate that the provider will see a maximum of 16 returns--two every 15 minutes within the superslot time range.

5. The **Sup. List** field is display only. It lists the visit type and the allocations you have just added.

6. After pressing <Enter> the cursor jumps to the OK: Y prompt. Press <Enter> to add the slot to the schedule. Enter “N” and press <Return> to avoid adding the slot:

---

**Adding a Regular Superslot**

```
Add/Edit Provider Templates
PROV: DAIGNEBULT MC,JOHN Dept: ORT Template #: 5
End: 12:00 N Loc: SFO
AM Time Typ Dur Al | PM Time Typ Dur Al | EVE Time Typ Dur Al
1 0800A NEW 15 1   | 1                  | 1
2 0815 RET 15 2    | 2                  | 2
3 0830 RET 15 1    | 3                  | 3
4 0845 RET 15 1    | 4                  | 4
5 0900A-1100A 2 15 | 5                  | 5
6 RET 15 16        | 6                  | 6
7                  | 7                  | 7
8                  | 8                  | 8
9                  | 9                  | 9
Act: P 1           | Act: P 1           | Act: P 1

Time: Superslot Type, Alloc: Comment: Repeat: Interval: OK: Y
Sup.List: F7Q-Quit F7F-Page F10-OK <Shift>F4-Major <Shift>F5-Help <Shift>F3-More keys
```

Adding Either /OR Superslots

From 11am-12noon, your provider will see either 4 returns or 2 new appointments.

1. At the Act: prompt, key in <A> to add the time. Follow steps from previous lesson.

2. At the Superslot Type Alloc:, type <NEW,2> and press <Enter>.

3. The entry will now appear in the Sup-List field and the cursor will remain in the superslot.

4. Type Alloc: field. Enter <OVR,4>. Press <Enter>. The entry will again display in the Sup-List.

   + **Note:** If there are visit types that exceed 15 minutes in duration, such as a 30 minute NEW, the system will take two 15 minute slots when scheduling the appointment, but still will allow that appointment to be booked where there are 30 minutes available within the superslot.

After pressing <Enter> the cursor jumps to the OK: Y prompt. Press <Enter> to add the slot to the schedule. Enter “N” and press <Return> to avoid adding the slot:

---

**Adding an Either/Or Superslot**

<table>
<thead>
<tr>
<th>AM</th>
<th>Time</th>
<th>Typ</th>
<th>Dur</th>
<th>Al</th>
<th>PM</th>
<th>Time</th>
<th>Typ</th>
<th>Dur</th>
<th>Al</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0900</td>
<td>NEW</td>
<td>15</td>
<td>1</td>
<td>2</td>
<td>0915</td>
<td>RET</td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>0930</td>
<td>RET</td>
<td>15</td>
<td>1</td>
<td>4</td>
<td>0945</td>
<td>RET</td>
<td>15</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>0900A</td>
<td>2</td>
<td>15</td>
<td>1</td>
<td>6</td>
<td>1015</td>
<td>RET</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>7</td>
<td>1100A</td>
<td>1</td>
<td>15</td>
<td>1</td>
<td>8</td>
<td>NEW</td>
<td>15</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>RET</td>
<td>15</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Act:** F 1 **Loc:** SPO

---

<table>
<thead>
<tr>
<th>AM</th>
<th>Time</th>
<th>Typ</th>
<th>Dur</th>
<th>Al</th>
<th>PM</th>
<th>Time</th>
<th>Typ</th>
<th>Dur</th>
<th>Al</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1000</td>
<td>NEW</td>
<td>15</td>
<td>1</td>
<td>2</td>
<td>1015</td>
<td>RET</td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>1030</td>
<td>RET</td>
<td>15</td>
<td>1</td>
<td>4</td>
<td>1045</td>
<td>RET</td>
<td>15</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>1000A</td>
<td>2</td>
<td>15</td>
<td>1</td>
<td>6</td>
<td>1115</td>
<td>RET</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>7</td>
<td>1200A</td>
<td>1</td>
<td>15</td>
<td>1</td>
<td>8</td>
<td>NEW</td>
<td>15</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>RET</td>
<td>15</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Act:** F 1

---

<table>
<thead>
<tr>
<th>Time:</th>
<th>Type:</th>
<th>Dur:</th>
<th>Alloc:</th>
<th>Repeat:</th>
<th>Interval:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Superslot Type, Alloc:</td>
<td>Comment:</td>
<td>OK: Y</td>
<td>Sup.List:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Adding “Any” Superslots

In the PM of our Special Day, your provider will see from 1-3 any visit type, 1 at each time slot.

At the Act: prompt tab over to the afternoon session.

1. Enter an end time.

   + **Note**: If entering afternoon sessions be sure to add a <p> at the end of the time (i.e. 3p or 3:30p). The system assumes A.M. unless otherwise indicated.

   In our example, the clinic end time will be 5 p.m. It is important to remember to include the duration of the last appointment when calculating the end time of the session.

2. If the provider has only one location, it will default into this field. However, if a provider has more than one location, enter the first letter of your department and <?> or hit <F12> to look up the appropriate location.

3. At the Act:: prompt, type an <A> to add the time. Use the steps as if setting up a regular superslot. At the superslot type alloc: prompt, type in ANY,#. The number indicates the maximum number of slots allowed in this time range.

   + **NOTE**: When creating an ANY superslot, the allocation of the visit type ANY will be based on the intervals of time between appointments. If patients are seen every 15 minutes, calculate how many 15 minute intervals there are from the start time to the end time of the superslot. In our example, the superslot will be 2 hours long. The provider wants an appointment available every 15 minutes. This means an appointment will be available every 15 minutes for ANY type of visit to a maximum of 8 appointments.

   If there are visit types that exceed 15 minutes in duration, such as a 30 minute NEW visit, the system will take two 15 minute slots when scheduling the appointment, but a 30 minute appointment can be booked anywhere where 30 minutes is available within the superslot.

4. After pressing <Enter> the cursor jumps to the OK: Y prompt. Press <Enter> to add the slot to the schedule. Enter “N” and press <Return> to avoid adding the slot.
Adding “Any” Superslot

Using an exclusive superslot prevents specific visit type(s) from being booked into a superslot.

+ Note: This is extremely useful when a provider has multiple visit types and needs to exclude only those visit types within a time range.

To set up an exclusive superslot, complete the following process:

1. From the Act: prompt type <A>. Follow the steps to set up a regular superslot.

2. At the Superslot Type, Alloc prompt, enter <*ANY,#> with the number of visits allowed. The asterisk always indicates an exclusion.

3. Press <Enter>. The * ANY, __ allocation: prompt is displayed the Sup.List field

4. The cursor remains at the Superslot Type Alloc: prompt. Enter the visit type you wish to exclude from the superslot. Press <Enter>

5. You can repeat the previous step if there are other visit types you wish to exclude.
6. After pressing <Enter> the cursor jumps to the OK: Y prompt. Press <Enter> to add the slot to the schedule. Enter “N” and press <Return> to avoid adding the slot.

Adding a Non-Clinic Slot

The provider would like it on the schedule that from 12:00 to 1:00 p.m. he/she will be unavailable for scheduling appointments due to lunch.

A non-clinic slot is added in much the same way that a regular slot is added.

At the Act: prompt enter <A> to bring the cursor down to the Time field.

1. **Time:** Enter the start time of the non-clinic slot.

2. **Type:** Enter the non-clinic visit types. (IE-CIS, Unavailable) If you do not know the abbreviations, type  <?> or <F12> to view a list of the provider’s visit types.

3. **Dur:** Enter the amount of time in minutes like to make unavailable. Using our scenario, the non-clinic slot would be for 60 minutes.

4. **Comment:** A comment can be entered in this field and will appear under the non-clinic time slot on the scheduling screen. Press <Enter>

5. After pressing <Enter> the cursor jumps to the OK: Y prompt. Press <return> to add the slot to the schedule. Enter “N” and press <Return> to avoid adding the slot:
Adding a non-clinic slot

<table>
<thead>
<tr>
<th>AM</th>
<th>Time</th>
<th>Loc</th>
<th>PM</th>
<th>Time</th>
<th>Loc</th>
<th>EVE</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0800A</td>
<td>NEW</td>
<td>1</td>
<td>1200N</td>
<td>UNA</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>0815</td>
<td>RET</td>
<td>1</td>
<td>LUNCH</td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>0830</td>
<td>RET</td>
<td>1</td>
<td>0100P-0300P</td>
<td>1</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>0845</td>
<td>RET</td>
<td>1</td>
<td>ANI</td>
<td>15</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>0900A-1100A</td>
<td>2</td>
<td>15</td>
<td>0300P-0500P</td>
<td>1</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>RET</td>
<td>15</td>
<td>16</td>
<td></td>
<td></td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>NEW</td>
<td>15</td>
<td>2</td>
<td>(NEW)</td>
<td></td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>RET</td>
<td>15</td>
<td>4</td>
<td></td>
<td></td>
<td>9</td>
<td></td>
</tr>
</tbody>
</table>

Now that we have completed the Special Day template, we will save and file the template.

1. Press F10 to file the template.
2. The following prompt will appear: “Are you sure you want to file this Template?
   NO:
3. If you would like to file the template, type “Y” and press <Enter>.

*If you press <Enter> without keying in yes the system will not save the template.*

**Summary**

- A regular slot is used to add a time slot to a schedule when a provider wants to see a particular type of visit at a particular time.
- Superslots are used when the provider will see a variety or number of visits within a specified time range.
- Non-clinic slots are used when a provider wants to block a particular time within the schedule.
Session Comments

Session Comments can be added. They are extremely useful in relaying special instructions to the scheduler.

**Note:** You must have appointment slots (Templates Detail Screen) added to the template before a session comment can be added. It is recommended that you limit the number of session comments. Remember, if you use eight lines of information the scheduler will see eight lines of text when viewing the summary screen before seeing the provider's schedule.

Above is an example of how the Add/Edit Provider Template screen now appears:
Distributing Templates to blank days:

How to distribute a template to a blank day:

**F8 / A1 / A4 / A7 – Distribute Template to Blank Day** allows you to distribute a template to a day where the provider did not originally have a schedule. By using this activity, you can actually create a schedule from the provider’s template.

1. At the **Provider:** prompt, enter the provider whose template needs to be distributed.

2. At the **Which Template?:** prompt, enter the number of the template you wish to distribute.

   **Note:** If you are unsure of the template number, type `<>` to display the list of templates.

3. At the **Display Template?:** prompt, enter `<Y>` to display the template or press `<Enter>` if you do not want to display the template.

4. At the **Distribute Template to Date?:** prompt, enter the date to which you wish to distribute the template. **Note:** date must be one where no daily schedule exists. This prompt will repeat, allowing you to enter several dates. Press `<Enter>` when you are finished entering the dates to distribute the template.

5. The system will display the template description and prompt you with **Ok to Distribute?:**. Enter `<Y>` to distribute the template. Enter `<N>` if you do not want to distribute the template.

   If you entered `<Y>` to distribute the template, the system confirms the dates the template was transferred. The **Which Template? (by #)** prompt reappears, select another template to distribute or press `<Enter>` to exit this activity.

 Fucking Make some appointments on your new Special Day!
Unavailable Day/Blocked Day Schedule

Your provider will not be able to work on Sundays this month after all. We need to create a template to block those days.

An Unavailable Day consists of time that has been closed for appointments.

An Unavailable Day can be created by means of a Template or it can be done through the Edit Daily Schedule Screen using the Unavailable CIS (Change in Schedule) non-clinic visit type.

The only way a scheduler can book appointments on this type of day is by placing an S - Specific Day Search, in front of the date field on the Scheduling Criteria screen.

**How to create an Unavailable Day with a Template:**

1. **F8 / A1 / A4**

   The following screen appears:

   ![Screenshot of scheduling template activities screen]

   - **Select Activity:**
     1. Add/Edit Template
     2. Display Template
     3. Transfer Template
     4. Copy Template
     5. Delete Template
     6. Create Template from Master
     7. Distribute Template to Blank Day
     8. Transfer Template from Discrepancy Report

   **Select Activity:** 1

2. **At the Select Activity:** prompt, enter 1 - **Add/Edit Template**

3. **Press <Enter>**.
The following screen appears:

Add/Edit Provider Templates Screen

4. In the Provider field, enter the provider name or number. Press <Enter>.

5. The Department: field will Autofill. Press <Enter>.

6. In the Template: field, enter the Word NEW. Press <Enter>.

The system will replace the word New with a Template Number:

9. In the Template Description: field, enter 'Unavailable Day'. This is a free-text field used to describe the template and will appear in the template look-up when distributing or transferring templates.

10. In the Schedule Comment: field, enter comments such as: Unavailable Day, Vacation Day, Dr. Not Here, etc.
11. In the **AM and PM Session Comment**: fields, enter a comment. Use your own discretion (see example in diagram). This comment will show within the Scheduling Screen and reduces the chances of appointments being booked on this day.

12. Press `<Page Down>` to get to the next screen.

The following screen appears:

**Add/Edit Provider Templates (Detailed) Screen:**

![Add/Edit Provider Templates Screen](image)

13. In the **End Time**: field, enter the end time of AM session. Press `<Enter>`.

14. The **Location**: field will autofill. Make sure this is the correct location. If not, type over the text with the correct location or perform a look-up. Press `<Enter>`.

15. In the **Act**: field, enter A to add. Press `<Enter>`.

The Cursor is now in the Time field:
17. In the **Time:** field, enter the start time of the AM session.

18. In the **Type:** field, enter UNA (or any other non-clinic visit type).

19. In the **Dur:** (duration) field, enter the number of minutes to block AM session. Calculate from start time to end time.

20. In the **Comment:** field, enter a free-form comment that will appear within the scheduling screen. (optional field)

21. In the **OK?: Y** field, press <enter> to accept the default of yes. If any information within the fields is incorrect, enter <N> for No. The fields will clear of all data and the cursor returns to the **Time:** field.

22. In the **Time:** field, press <enter> to return to the **Act:** field.

**Add/Edit Provider (Detailed) Templates:**

23. <Tab> or <arrow> to the PM session and follow the same instructions for the PM session as the AM session. (Please see example screen).
24. Press `<F10>` to save the AM and PM sessions.

25. At the **Are you sure you want to file this template? No==>** prompt, enter `<Y>` to file template or press `<Enter>` to accept the default of No and press `<Enter>` to return to the Act: field.
Transfer Templates over existing dates

Now that we have created an Unavailable/Blocked day, we need to transfer the template over the existing day(s) to block.

**F8/ A1/ A4 / A3 – Transfer Template** will apply the contents of a template to one or more existing daily schedules. If a session is not defined in a template, the corresponding session in the daily schedule is left unchanged.

The following explains what will happen once a template is distributed on days where appointments are booked.

- **If** a template is changing the scheduling location, the system gives the option of updating the locations of all the appointments already booked into the schedule.

- **Any** template comments (daily schedule comments, slot comments, daily schedule comments) will override any comments on the daily schedule. If, however, you do not enter a template comment, the system will retain the daily schedule comment.

- **Template** transfers can bump appointments. This occurs if the appointment slots in the template conflict with the slots on the daily schedule it overlays.

  For example, if a vacation template is transferred into a daily schedule where appointments are booked, the system automatically bumps these appointments. If a template transfer causes appointments to be bumped a “B*” appears after the date in the “Initiating…” message.

- **If** you transfer a template into a schedule that has appointments, and these appointments are not affected by the transfer, an asterisk (*) will appear next to the “Initiating…” message.

- **Transferring** templates with session end times that differ from the daily schedule can also delete slots. For example, if the end time of the daily schedule is 12 noon and a template is transferred to this daily schedule with a new end time of 11 a.m, the slots between 12 noon and 1:00 p.m. will be overridden by the template. Appointments booked in these slots will be bumped.
How to transfer a template to a daily schedule:

1. Enter the provider’s last name whose template you wish to transfer.

2. The provider’s department should autofill, otherwise, enter the department.

3. At the **Which Template?**: prompt, enter the number of the template or `<?>` to view a list of templates.

4. Enter `<Y>` to display the template or `<Enter>` to accept the default of No at the **Display Template?**: prompt.

5. The **Transfer template to date?**: prompt appears. Enter the date of the daily schedule you want the template to overlay. The system displays the date and day of the week specified. The template’s contents are copied into the specified daily schedule. This prompt repeats, allowing you to transfer the template to multiple dates. Press `<Enter>` when finished entering the dates.

6. After all the dates to transfer have been entered, the system displays the template description and prompts you to verify this is the correct template and dates.
7. At the **Ok to transfer:** prompt, press `<Enter>` to accept the default of Yes. **Note:** If you enter `<N>`, the template will not be transferred to the dates you have previously selected.

8. After the transfer is complete, the system will prompt you to select the next template to transfer. Enter the template number or press `<Enter>` to exit the transfer template activity.

**REMEMBER:**
- The purpose for the Unavailable feature is to prevent schedulers from booking appointments.
- The normal process of searching for an appointment should occur **without the S in front of the date field.**
- By excluding the S in front of the date, the Unavailable dates will not be included in the search for available appointment slots.

The Appointments we made on our Special Day have been bumped. Let's review rescheduling from the Bump List.
Rescheduling Bumped Appointments

When a day or specific time(s) within a provider’s schedule is made unavailable (blocked) or deleted through the scheduling maintenance activities, the system will automatically remove the appointments scheduled in those timeslots and place them on a bump list.

Persons performing maintenance activities should always print a list of the bumped appointments. The Bump List should then be given to the person in charge of rescheduling these patients.

“Bumped” appointments can be rescheduled automatically by using **Function 1: Schedule an Appointment.**

1. At the **Patient:** prompt press **<F9>**. Action codes will appear at the bottom of the screen.

2. Type **<B>** Bump List. The Bump List Selection Screen will appear.
A bump list can be generated either by the appointment date or the date the appointments were bumped.

+ **Note:** To change the default, arrow up to the “Appointment Date or Bumped Date: “ prompt. Key in an “A” and press <Enter>. The Bumped Date will change to Appointment Date.

3. Enter the date the appointments were bumped or the appointment date depending how you have ordered the list (see step 3). A range of dates can be selected by indicating a through date. Normally this would be used when generating a list by appointment date. Press <Enter>.

4. Enter <N> at the **All Departments:** prompt. Enter your department. Press <Enter>.

5. At the **All Providers in Dept?:** prompt, type <Y> to include all or <N> to select the specific provider(s) to display – you will be prompted with one name at a time. Press <Enter>.

The cursor returns to the All Departments prompt.

6. Press <Enter>.

7. At the **All Locations?** prompt, type <Y> if you would like to include all locations for that provider or <N> if you would like to specify a particular location. If selecting <N> enter the location. Press <Enter> and <F10>. The system will display a list of the bumped appointments and prompt you to select the appointment to reschedule.
8. Highlight the appointment to be rescheduled. Press <Enter>. A diamond will appear in front of the patient’s name. Type <S> Reschedule action code.

*Note:* Action Codes listed on the bottom of the screen can be used to view detailed information. A BUMP LIST can also be printed from this menu by selecting action “T” for print and requesting the report.

9. The system returns to the Schedule criteria screen. Information associated with the appointment will auto-fill. Enter the date to begin searching and reschedule the appointment.

*Note:* All information collected at the time of the original appointment will transfer to the rescheduled appointment.

12. Once the appointment has been rescheduled, the system returns to the BUMP LIST. The rescheduled appointment will no longer display on the list and the next appointment can be selected and rescheduled.

If you wish to exit the Bump List, press <F7> <Q>. Appointments that have not been rescheduled will remain on the bump list and can be retrieved anytime by using action code B on the scheduling criteria screen.

*Note:* When you display or view the rescheduled appointment, both the “bumped” appointment status (BMP) and the “rescheduled” appointment status (RSC) will display.
Off-Day Schedule

Sometimes your provider would like to work on a day that they don’t normally see patients. To accommodate this for Schedulers, you will make an OFF Day Schedule.

An off-day is created to add appointments on days the provider has no schedule. This day will not be available when performing a regular 'Search for an Appointment', unless specifically requested by placing the letter <S> in front of a specific date desired in the From Date: field.

The appearance of the Off-Day within the scheduling screen is somewhat different from most regularly scheduled days within a schedule. (A sample screen has been provided in this documentation).

Exercise:

1. Use the same instructions that were given for creating an Unavailable Day, paying special attention to minor differences in the creation process.

2. After completing this screen, press <Page Down>.

The following screen appears:
3. Set the schedule **Start Time** and **End Time** using a small duration of time and the Unavailable (UNA) non-clinic visit type.

**Note:** You can still book any visit type in the provider's schedule.

4. Complete the following fields:
   - End Time
   - Time (begin time)
   - Type: UNA
   - Dur (remember to keep it 15 min)
   - Comment (optional)

5. Once the template is filed, distribute the template to the days desired.

   Remember: Distribute a template to a blank day (one that does not exist)-
   - Transfer a template to a day that does exist (putting it on top of the existing schedule).

**To Search for an appointment on an off day:**

1. Complete the criteria screen, placing an <S> in front of the specific day you wish to schedule
2. F10 to search
3. Use Action Code X –Add time to book the appointment in the desired time slot.
Copy Templates

**F8 / A1 / A4 / A4 - Copy Templates** allows you to copy templates from one provider to another if they are in the same department and have the same visit types. This allows you to create one template and use the same template for many providers.

The following prompts will appear:

1. At the Copy From Provider: prompt, enter the provider whose template you wish to copy.

2. At the Which Template?: prompt, enter the template number you want to copy. If you are unsure of the template number, type a <?> to display a list of the provider's templates.

3. To display the template, type <Y> at the Display Template: prompt. Press <Enter> to accept the default of N (no).

4. At the Copy to Provider: prompt, enter the provider's name to whom you want to copy the specified template.

5. The system will display a “...Copied” message confirming the template has been copied. The Copy to Provider: prompt reappears, enter another provider’s name or press <Enter> if you do not wish to copy this template to another provider. Type <STOP> to exit this activity.
Delete Template

**F8 / A1 / A4 / A5  Delete Template** activity lets you to delete templates that are out of date or no longer needed.

The following prompts will appear

1. Enter the provider whose template you wish to delete.
2. The provider’s department should default in, otherwise, enter the department.
3. The Which Template?: prompt appears. Enter the number of the template or <?> to view a list of templates.
4. To accept the default of NO at the Display Template?: prompt, press <Enter>. Enter a <Y> to display the template.
5. At the Okay to delete this template? prompt Enter <Y> and the system displays a …Deleted message Enter <N> if you decide not to delete the template
6. The system repeats the “Which Template # prompt”, allowing you to delete more templates. If you are through deleting templates, press <Enter> to exit this activity.
Create a Template from Master

**F8 / A1 / A4 / A6 Create Template from Master** allows you to copy a provider’s master schedule to a template. This feature saves time when creating a new day for the provider or a template that is only slightly different from the master schedule. Instead of entering the entire template from the beginning you can copy the master schedule to a template and then edit the slot(s) that need to be modified. You can create a template from a provider’s own master schedule, or from another provider, as long as the provider is in the same department and use the same visit types.

Note: You cannot create a template from a master schedule that contains frozen slots.

To Create a Template from a Master, enter the following functions and activities from the Scheduling Application.

Function 8 – Operations

Activity 1 – Daily Schedules

Activity 4 – Schedule Templates Activity

Activity 6 – Create Template from a Master

The following prompts will appear
1. At the Copy From Provider: prompt, enter the provider whose master schedule you wish to copy.

2. The provider’s department should default in, otherwise, enter the department.

3. At the Effective Date key in a <?> and choose the master schedule you wish to copy and indicate <Y> at the Is this correct? prompt.

4. Enter the provider who will receive a copy of this schedule.

5. To copy the schedule to a template, either type in <Y> at the Are you sure? prompt. If you do not want to copy, enter in <N> and <Enter> back to the menu.

6. The system will ask for another effective date. If you do not wish to copy additional schedules, press <Enter> to exit this activity.
Module 3 – Editing Templates

In both the “Add/Edit Template” and “Edit Daily Schedules” activity there are edit codes that are used to make changes. You can add time to the schedule, make time unavailable, edit selected fields or change the existing schedule.

Daily Schedule Edit Commands

Below is a list of the different commands you can enter at the Act: prompt. If you forget which action command to use when editing a daily schedule, simply press the <Shift><F5> and the system will list the different commands available.

A
Add a regular, super or non-clinic slot.

AT,#
Add the visit type to a super slot

D,#
Delete a slot

D,#-#
Delete a group of slots or an entire session

D,ALL
Deletes the entire session

C,#
Change a slot

F,#
Freeze a slot

F,#-#
Freeze a range of slots

T,#
Thaw a slot

T,#-#
Thaw a range of slots

F.,$,#
Freeze a slot with an automatic future thaw (the #0 is a same day schedule thaw)

F.,#-#,$
Freeze a range of slots with an automatic future thaw

FTD
View Freeze/Thaw Detail Screen

DET
Display the Daily Detail Screen

F
Scrolls sessions forward one page

B
Scrolls sessions backward one page

#
Jumps to a page #
Making changes to Time Slots

<C> is the edit code used to change an existing time slot.

At the ACT: on screen 2 – Detail screen enter C followed by a comma and the line number that corresponds to the slot you wish to change (i.e. C,#)

☞ Note: Time and Intervals cannot be changed. Slot must be deleted.

Regular Slot

Fields that can be changed in a regular slot:

| TYPE: | The visit type |
| ALLOC: | Number of visits allowed at each time slot |
| COMMENTS: | Comment can be edited or added |

To change a regular slot, enter C,# at the ACT:prompt. The number is the line notated to the left of the Regular Time slot you wish to change. The system displays the slot's information in the lower part of the screen where you can change the following field:
Type: (EX: NEW to RET) Alloc: (EX: 1 to 3) Comments: (Free text comment) After making the desired changes, your cursor jumps to the OK:Y prompt. Press <Enter> to make the change or “N”o to avoid making the change. Once completed press F10 to file the updated Template.

Practice:
Pull up your special day template:
➢ Change the 8:45am slot to a NEW visit type.
➢ Change the allocation to 3 visits on the 8:15 time slot.
➢ Add the comment “Do Not Overbook” to the 8:00am NEW visit.

Superslot

Fields that can be changed in a superslot.

| REPEAT | # if visits per timeslots |
| VISIT TYPE,ALLOC | Visit type and # of visit type allowed in superslot |
| COMMENTS: | Comment can be edited or added by timeslot |

There are three parts to a superslot

<table>
<thead>
<tr>
<th>COMPONENTS OF A SUPERSLOT</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Header 1:00p-4:00p 1 15</td>
</tr>
<tr>
<td>(2) Visit Type Alloc RET 15 12</td>
</tr>
<tr>
<td>NEW 15 12</td>
</tr>
<tr>
<td>(3) Time Slots 1:00</td>
</tr>
<tr>
<td>1:15</td>
</tr>
<tr>
<td>1:30</td>
</tr>
<tr>
<td>1:45</td>
</tr>
</tbody>
</table>
How to edit a superslot:

(1) **Header** -
- To **change** the **number of visits** per slot, type `<C,1>` in the **ACT**: field. The cursor jumps to the **REPEAT**: field. Enter the new number of visits per slot.

(2) **Visit Type Alloc** -
- To **change** the **visit type and number allowed** in a superslot, type `<C,2>` in the **ACT**: field. The cursor jumps to the **Superslot Type, Alloc**: field. Change the visit type and # allowed in the superslot (ie RET,8).
- To **add** a visit type to a superslot, type `<AT,1>` in the **ACT**: field. The cursor jumps to the **Superslot Type, Alloc**: field. Add the new visit type and # allowed (POP,12).

(3) **Time Slots** -
- To **add or change a comment** for a time slot in a superslot, key `<C,3>` in the **ACT**: field. The cursor jumps to the **Comment**: field. Enter or change comment. Note: adding or changing a comment can only be done in the Edit Daily schedule Activity.

After making any of the above changes, your cursor jumps to the **OK**:Y prompt. Press <Enter> to make the change or type “N”o to avoid making the change.

Once completed press **F10** to file the updated Template.

---

**Practice:**
Pull up the Special Day template created in class:
- Change the number of visits in the 9am Superslot to 3 patients every time slot.
- Change the number of NEWs allowed in the 11am Superslot to 4.
- Add 2 POP visits to the 11am Superslot.
Non-Clinic Slot

Fields that can be changed in a non-clinic slot

<table>
<thead>
<tr>
<th>Visit Type</th>
<th>Visit type can be changed to a clinic visit type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration</td>
<td>The duration can be modified for the non-clinic timeslot.</td>
</tr>
<tr>
<td>COMMENTS:</td>
<td>Comment can be edited or added by timeslot</td>
</tr>
</tbody>
</table>

- To change a visit type or the duration in a non-clinic slot, type `<C,#>` in the ACT: field. The cursor jumps to the Type: field. Enter the new visit type in the Type: field or enter the new duration in the Dur: field.

Practice
Pull up the Special Day Template:
- Change the Visit Type from UNA to LUNCH
- Change the Lunch duration to 30 minutes
- Change the comment to “Do not book into Lunch”

Note: Always press F10 to save any changes that you have made. If you do not want to save your changes press F7 Q.
Deleting Time Slots

Deleting a timeslot - enter D,# at the Act: prompt. After you press <Enter>, the slot is removed from the schedule and the remaining slots “scroll up”.

Deleting a range of timeslots - You can delete a range of slots by entering D,#-# at the Act: prompt (#-# indicates the first line and last line in sequence) The range can include any combination of time slots: non-clinic, regular or superslots. By selecting the line number of the superslot header you can delete the whole superslot.

Deleting a visit type within a superslot – You can delete a visit within a superslot by entering D,# of the corresponding line containing the visit type to delete from the superslot
Note: If there is only 1 visit type in the superslot, delete the whole superslot using the superslot header.

Deleting a Session - You can delete an entire session by entering D,ALL at the Act: prompt below the session you want to delete.

+ Note: Use care when deleting an entire session. It’s always a good idea to print the screen prior to using this edit code. Important Reminder:

If you have accidentally deleted slots you did not mean to delete, do not panic!! Simply press <F7><Q> to quit without saving your deletions.

Practice:
Pull up the Special Day Template
- Delete the 8am time slot
- Delete the entire PM session.
Freeze and Thaw:

Freezing a slot prevents it from being found by the system as available during a First Available Appointment search. Freezing is useful when a provider is unsure if he/she will be available for a portion of a particular day or days. For example, if a provider wants to attend an all day seminar, but is not sure he/she will be able to attend, you might want to keep the day intact just in case the seminar does not take place. However, you would like to be able to restrict additional appointments from being booked until the cancellation of the day is confirmed. Freezing slots is a good method to use in this situation.

You may freeze entire sessions or a single slot. When a provider's plans are more certain, the slots can be thawed or modified if necessary.

+ **Note:** You can freeze slots in a master schedule and daily schedules. Any slot frozen in a master schedule will also be frozen in a daily schedule that is created from the master. 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. For example, a practice may want to have an hour slot “frozen” each day to use for emergency visits only.

Freezing a Regular Slot or Superslot

Scenario: Pull up your Special Day template. Your provider would like to close off her 8:15 - 8:45 a.m. time slots. She **may** have to attend a conference and would not be able to start seeing patients until 9:00 a.m. on that day.

**Freezing a regular or superslot:** Enter F,# at the Act: prompt. When you freeze a superslot, the entire slot is frozen. Individual portions of a superslot cannot be frozen. The system displays an F next to the slot’s time.

**Freezing a range of timeslots** – A range of slots can be frozen by entering F,#-# at the Act: prompt ( #-# is the range of sequence lines you want to freeze). The example below illustrates that the 8:00 a.m. and 8:45 a.m. slots are frozen...
Thawing a Regular or Superslot

Scenario: Your provider will not be attending the conference and would like the time reopened to see patients.

Thawing a frozen slot - To thaw any type of slot, enter T,# at the Act: prompt.

Thawing a range of frozen slots - You can also thaw a range of slots by entering T,#-# where # is the range of sequence numbers of the slots you want to thaw.

The system immediately thaws the slot and removes the “F” prefix from the slot’s time.

Freezing with Future Thaw

Scenario: Your provider would like to hold some time for post-ops patients and would like to make these available two days prior to the date of the clinic. Add a POP visit to your Special Template at 8am. Freeze the slot with a 2 day thaw.

A future freeze/thaw prevents a slot from being booked until a specified number of days before the appointment date.

To use a future freeze/thaw, enter F,#,$ at the Act: prompt on the Daily Schedule Detail screen where # is the sequence number of the slot you want to freeze and $ is the number of days before the schedule date to thaw the slot.

You can future freeze/thaw a range of slots by entering F,#-#,$ at the Act: prompt where # is the range of sequence numbers of the slots you want to freeze and $ is the number of days before the schedule date to thaw the slot.

The system places a future freeze/thaw on the first slot and displays an “*F” next to the slot’s time.

+ Note: Many practices freeze with a future thaw for urgent care visit types. In the case of an urgent care visit types, the appointment is usually searched on the same day. To enter a same day thaw for your frozen slots, at the Act: prompt on the Daily Schedule Detail Screen, enter F,#,0. The 0 indicates a same day thaw.

View Freeze/Thaw Detail

To view the freeze/thaw detail, enter FTD at the Act: prompt on the Daily Schedule Detail Screen below the session you want to view. The system displays the detail of the session, including any future thaw information about slots frozen with future freeze/thaw.
Summary

- Freezing a time slot makes the time unavailable when searching for an appointment.
- If a slot is frozen in the master schedule, it will be frozen on the daily schedule.
- To freeze a slot use prefix “F” with the desired line number at the Act: prompt.
- Freezing a slot with a future thaw allows you to specify the time when that appointment should become available.
- In summary search the frozen slot will appear. The scheduler must override the prompt in order to schedule the appointment.
Module 4 - Edit Daily Schedules

Edit Daily Schedules Activities

The Edit Daily Schedules activity is used to make permanent changes to the provider’s schedule on a specific day.

+ NOTE: Only an existing day can be edited. It is recommended that you have the date(s) of the sessions you wish to edit on hand prior to entering this activity.

You can add time to the schedule, make time unavailable, edit selected fields or change the existing schedule. The edit codes in the Edit Daily Schedule and Template activities are the same.

- Add/Edit a schedule comment
- Add/Edit a session comment
- Change an end time/location for the day
- Delete a regular, non-clinic or super slot
- Change a regular, non-clinic or super slot

- Add a new regular, non-clinic for super slot
- Add a visit type to a super slot
- Freeze a regular or super slot
- Thaw a regular or super slot
- Freeze a slot to thaw within a specified time

On the first screen in the Edit Daily Schedule the # of pages booked for each session is on top of each session. The total # booked appear on the upper right hand of the screen. If the day had been previously edited the responsible person’s net id and the date/time will appear above the number booked.
The Second Page of the Edit Daily Schedule will give more detail and list individual slots. If you key in DET at the ACT: and press enter.

A more detailed look at the daily schedule will appear listing timeslots and booked patients.

In both the "Add/Edit Template" and "Edit Daily Schedules" activity there are edit codes that are used to make changes. You can add time to the schedule, make time unavailable, edit selected fields or change the existing schedule.
Block time within a superslot
(All examples same provider, different day supplied by trainer)

Exercise: Provider would like to block 2pm-3pm for a conference.

Using the Edit Daily Schedule Screen, <Tab> or <arrow> down to PM session
At ACT: prompt, type D,#  (line number of superslot header that corresponds to the superslot header)

When deleting a superslot with patients, a screen will appear asking if you would like to BUMP the appointment. Because you are blocking a portion of the superslot, enter <N> until you have finished editing the session.

The following appointments are affected:
'*D'* indicates time slot(s) that have been deleted.

*D*01:00PM RET 15 SMALL,CARL A
*D*01:30PM RET 15 TEST,ANTHEMBLUECARE
*D*02:15PM RET 15 BOAG,CLIFFORD
*D*03:45PM RET 15 HOBS,NINZETTER

Bump these appointments? 

The system returns to the previous screen where you can now add your time to the session.
In our exercise, two superslots and a non-clinic time will have to be created in order to block the hour between 2pm-3pm.

Press <F10> to save and say Y to file the day once your edits are complete.

The system will bump only those appointments that no longer fit into the new schedule.

In our exercise, the 2:15 appointment was the only one bumped. All other appointments fit back into the time slots.

The following appointments have no time in the edited schedule:
`*D*` indicates the deleted slot.

*D* 02:15PM RET 15 BOAG,CLIFFORD

Bump these appointments? [Y]

Print bump list for provider SASCL in department SUR? No=> Y

When printing your Bump list be sure to enter your device with "S" at the end for condensed print.
Module 5 - How to work a discrepancy report

When a master schedule is modified and distributed, the system will only distribute the newly revised schedule to the daily schedules where there are no edits.

IDX defines edits as follows:
- Sessions with patients scheduled
- Sessions where timeslots have been blocked
- Sessions where any changes have been made through maintenance activities (i.e. frozen slots, change in session comments, etc).

A report listing the dates that the new schedule did not distribute (or update) is called a **MASTER SCHEDULE DISCREEPANCY REPORT**. This report is compiled each time a master schedule is modified. A unique number is assigned to each report.

**Scenario:**
The provider Mary Numa wants to make a permanent change to her schedule. Your instructor will walk you through completing a Maintenance Request Form. She will demonstrate on the classroom overhead how the change is made in IDX to the Master Schedule and how the Discrepancy Report is compiled. Master schedule changes are always done by system's staff. You will not have access to this functionality.

The class will then print a copy of the Discrepancy Report that was just compiled. Together with the instructor you will work the report. (Decide to leave days as is, update individual day using daily schedule activities or create template from master and transfer to multiple days. If appointments are bumped, work bump list.)

_I. PRINTING A MASTER SCHEDULE DISCREEPANCY REPORT_

The report is generated from the Standard Report Activity.

<table>
<thead>
<tr>
<th>Function Activity</th>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;7&gt; Activity</td>
<td>Daily Reports</td>
</tr>
<tr>
<td>&lt;1&gt; Activity</td>
<td>Standard Reports</td>
</tr>
<tr>
<td>&lt;14&gt; Activity</td>
<td>Master Schedule Discrepancy Report</td>
</tr>
</tbody>
</table>
On the request screen

♦ Enter through all fields.
♦ Stop at Number of Copies: Enter # of copies to print. Press Enter
♦ A bottom form appears. SELECT “2” PRINT. PRESS ENTER

A listing of all the discrepancy reports that have been compiled will be listed.

♦ Cursor down to the desired report (a report number will be provided by PFS Staff responsible for making the revisions to the master schedule). Press ENTER
♦ A diamond will appear by the selected report selected
Press F10 until you reach the DEVICE prompt.
Select your printer device # and add a “S” on the end (condensed portrait i.e. LD301S).

**Note:** When you request a change to your provider’s Master Schedule, system’s staff will supply you with the Discrepancy Report number to print. You should print this ASAP as the reports do fall off when new reports replace them.

Clinic Staff must
- Review report for dates that did not update with new schedule and why they did not update. (Already patients booked into schedule/maintenance performed)
- Determine if overlaying the new schedule will cause scheduled patients to be bumped. Discuss with provider/department if these should be updated or not.
- Decide whether listed days need to be updated with new master schedule.
  - Copy template from Master and distribute to days on report to update with new schedule.
  - Days previously updated through Maintenance (EX-MD on vacation etc) you may decide to leave as is and not update.
Module 6 - Useful reports for Maintenance:

There are some standard reports that are helpful when performing maintenance for your department.

- Bump List Report-Prints a bump list by appointment date or bumped date.
- Master Scheduled-Prints a hard copy of your provider’s master schedules.
- Provider Work Load-Useful to see the big picture. Will show blocked days, and times. Great way to make sure the daily schedules are correct for your provider.
- Templates-To print copies of all of the templates you have created for your providers.

**To access all:**

<table>
<thead>
<tr>
<th>Function</th>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>2</td>
<td>Reporting</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>Standard Reports</td>
</tr>
</tbody>
</table>

And then:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>To print Bump List. Tag an “L” at the end of Device to print this report landscaped.</td>
</tr>
<tr>
<td>3</td>
<td>To print a Master Schedule.</td>
</tr>
<tr>
<td>37</td>
<td>To print a Provider Workload. Tag an “L” at the end of Device to print this report landscaped.</td>
</tr>
<tr>
<td>25</td>
<td>To print Templates.</td>
</tr>
</tbody>
</table>