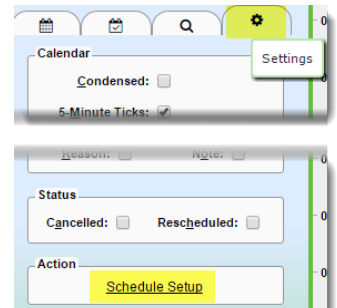
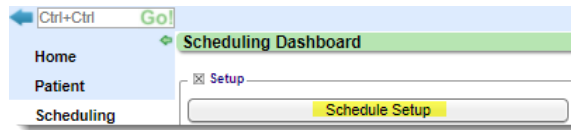


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Where do I find the scheduling setup?

Click 'Scheduling' in the sidebar > [Scheduling Setup]

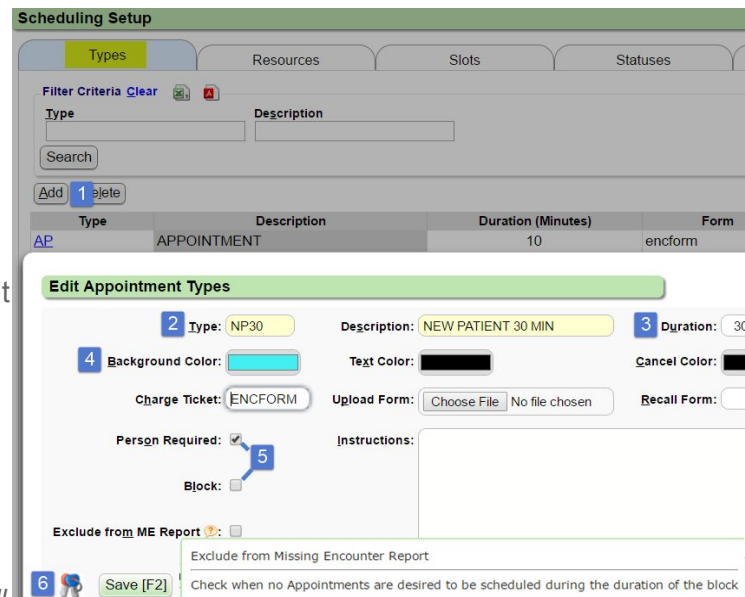


From the Calendar > Click Settings tab > under Action > Click hyperlink 'Schedule Setup'. Schedule Setup can be used as a wizard. Use the Tabs for Types, Resources, Slots, Statuses, Build; from left to right.

How do I create appointment Types?

Scheduling in the sidebar > [Schedule Setup] > Types

1. Click [ADD]
2. Type ID and Description
3. Duration: this can be overwritten when booking
4. Choose a color. If the color is very dark choose a light 'Text color'
5. Person Required - Un-Check for appointments such as Block, Lunch and others that do not require a patient. 'Block' -check for 'on the fly' appointment blocking such as Meetings or Out of office
6. [SAVE]

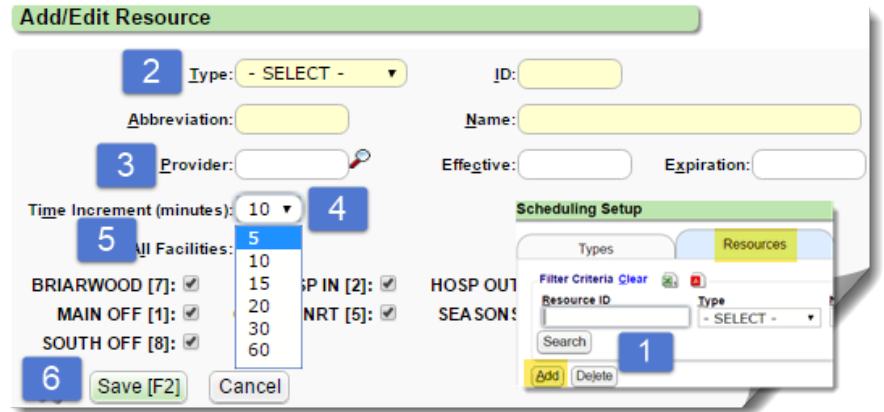


If you are currently using EHR and the Scheduler and you will continue to do so with your new PM then you should create appointment types that are IDENTICAL to the existing appointment types in the EHR. Check with your EHR or trainer to see if this step is necessary.

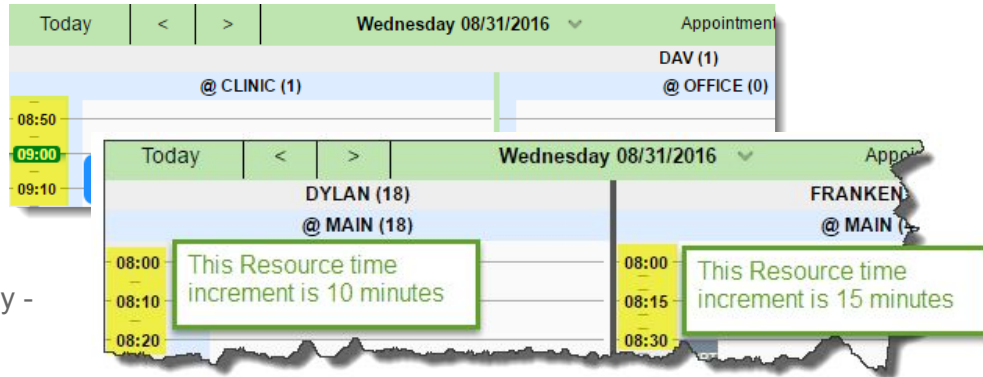
How do I add a Resource (Provider) to the Calendar?

Go to Scheduling in the sidebar > [Schedule Setup] > Resources tab

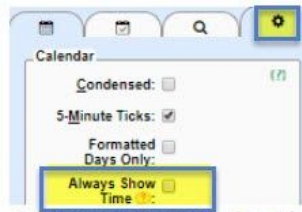
1. Click [Add]
2. Choose Type - Person, Equipment, Room or Group
3. You may choose to link with a specific Provider from the Billing/Rendering library
4. Set minimum time increments
5. Choose Facilities where this Resource is available for appointments
6. [SAVE]



If there is only one time increment chosen for all Resources, i.e. 10 min, then only ONE time column will display. If different time increments are chosen for Resources, and are displayed together, multiple time columns will display - one for each Resource.



If an individual user prefers to change the view, use the 'Always Show Time' checkbox on the sidebar in the calendar.

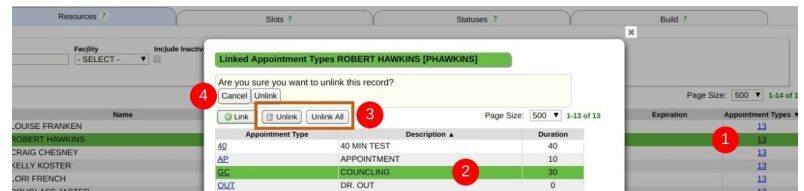


Regardless of this setting, time columns will always show if two or more Resources have different Time Increments

How do I attach or link specific appointment types to specific Resources?

From the Resources tab under [Scheduling Setup]

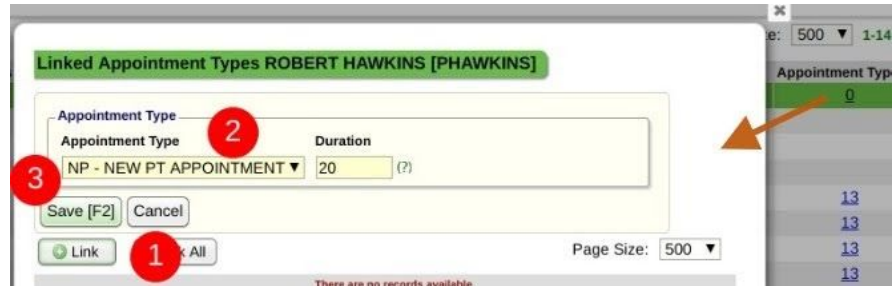
1. Appointment Type column > Click hyperlink number
2. In the popup > to unlink one at a time > highlight the appointment (you may skip this step if not needed)
3. Click [Unlink] or [Unlink All]
4. [Unlink]



How do I Link appointment type to a specific Resource?

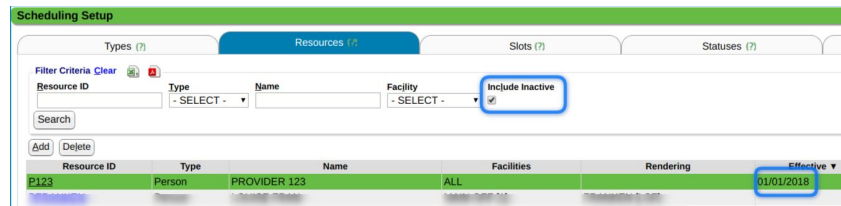
From the Resources tab under [Scheduling Setup] > Appointment Type column > Click hyperlink number

1. [Link]
2. Choose from 'Appointment Type'
3. [Save]



How do I view all resources?

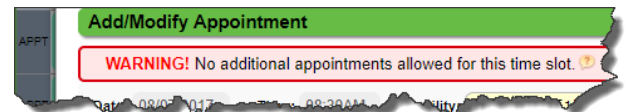
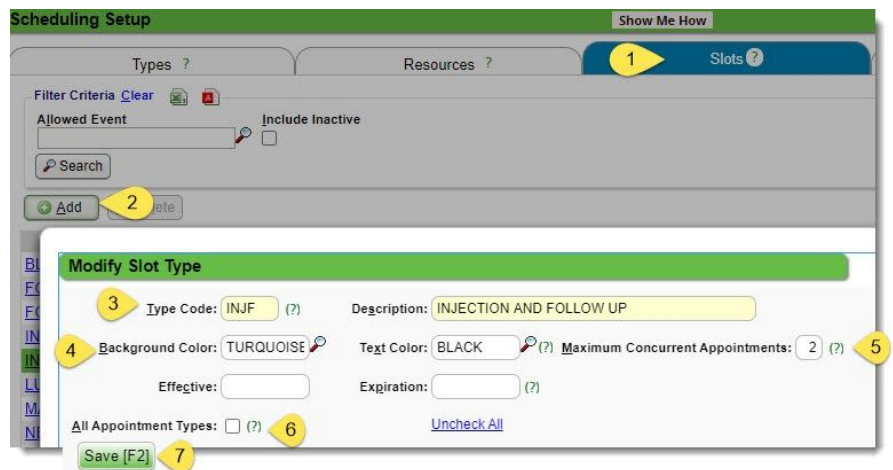
Use the checkbox 'Include Inactive' to view resources that are not currently active.



How do I create Slot Types?

[Schedule Setup] >

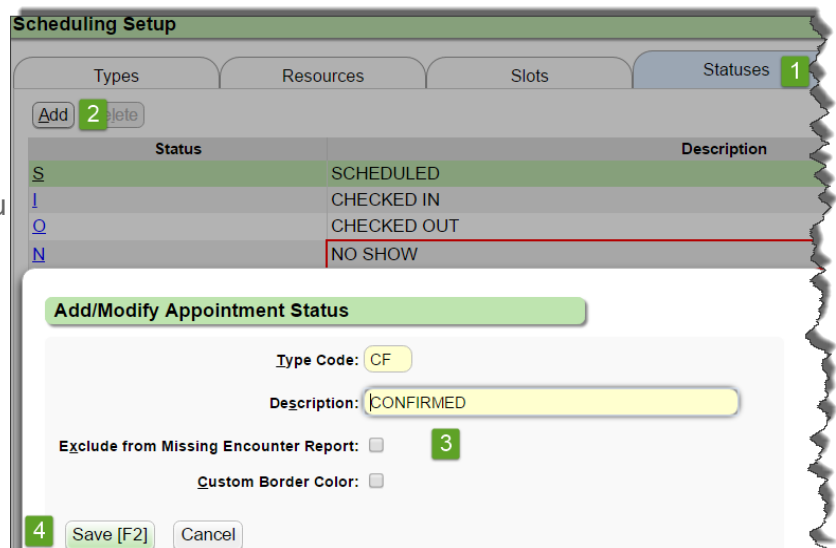
1. Slots tab
2. [Add]
3. Type code (which displays on the calendar next to the time of day) and description
4. Background and Text Color
5. Maximum concurrence appointment - this number is the maximum number of appointments that can be booked in this slot
 - o Once the max has been achieved the user gets this warning. The user may overbook based on their permission
6. Un-check 'All appointment types' to limit what appointment can be booked during this slot
7. [SAVE]



How do I Add an Appointment Status

Go to Scheduling in the sidebar > [Schedule Setup] >

1. Status tab
2. Click [Add]
3. Fill out > Status > description fields, choose if this status shows on the Missing Encounter Report and if you would like, Add a Custom Border Color to visually indicate Status
4. [SAVE]



How do I add a Scheduling Build?

Go to Scheduling in the sidebar > [Schedule Setup] >

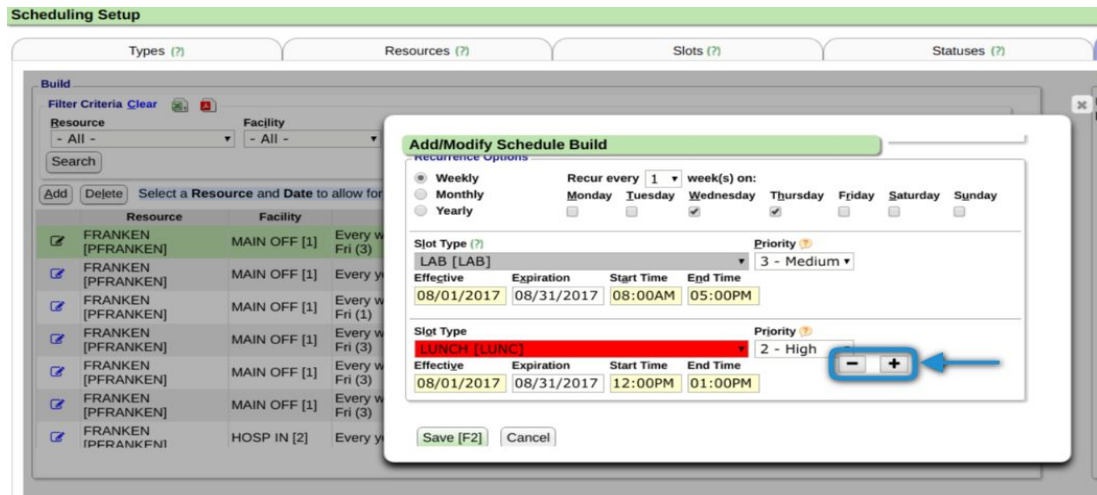
1. Build tab
2. Click [Add]
3. Check all the Resources, Facilities
4. Choose Recurrences options' Weekly, Monthly, Yearly
5. Select the 'Slot Type'



6. Select the Priority
 - o Determines which slot type will be displayed on the calendar if there is a conflict
 - o We system deliver 3- Medium
7. Choose Effective Date, Expiration is not required
8. Start Time, End Time
9. [SAVE]

You have the ability to add multiple Slots to the Build at one time. Click + to add a Slot, or - to remove one. You are able to add up to 50 slots at a time.

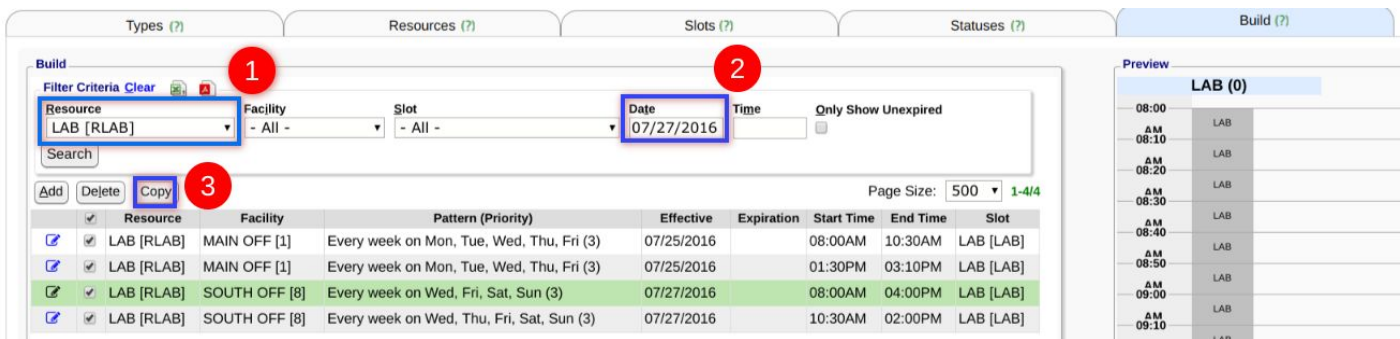
Please note that even though you are saving multiple Slots in one Build, you are still able to edit the Slots individually once they are saved.



Schedule Build - Copy Day

It is possible to Copy a Schedule Build from one Resource/Facility and apply it to other Resources/Facilities using the filters for:

1. Resource/facility



2. Date
3. Click [Copy]

If you only want to copy part of a day, *un-check* the slots you do not want to copy