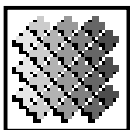


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## The Avanta Advantage



**AVANTA**  
MEDICAL INFORMATION SYSTEMS

## Introduction

The Avanta Appointment Scheduler Seminar will review all of the Appointment Scheduler features including set-up, short-cuts, appointments and customizing features which will allow your office to run more effectively and efficiently. The Appointment Scheduler features include quick keys to patient's insurance, demographic, and ledger screens. Also, you will learn how to hook, copy, move, find available slots, a patient's next appointment, create a daily message, make a group from the scheduler, print a deletions report, and customize the print out and on screen display of your scheduler.

# Section One: Set-Up/Organization

## Foreword

Whether you are a regular Appointment user, or thinking about using it for the first time, this seminar will present some customizing, organization, and preference features that will help your office run more efficiently. Before any changes or modifications can be made to your appointment scheduler each user must be authorized to do so in Avanta Practice Security.

## Security

The Avanta Practice Security allows the administrator or office manager the ability to restrict any user's access to, or the ability to make changes in any section of the appointment scheduler.

1. Press **[C]** Special Functions from the Home Screen.
2. Press **[G]** Practice Security.
3. Enter the master password and press **[Enter]**. For security reasons, the master password will not display nor will the cursor move when you type.
4. Select **[3]** Change User Capabilities.
5. Select **[1]** User By Number, or **[2]** User By Name.

6. Select **[A]** Appointment Scheduling to **[Yes]** to allow any access into the scheduler, or **[No]** to not allow any access into the scheduler.
7. Any user who has initial **[Yes]** access to the appointment scheduler can be further restricted in any of the following categories: Add, Edit, Delete, Over-Book, View/Print Deleted, or Add/Edit Reserved Appointments. Access can also be restricted to Print Appointment Reports, Add/Edit Resources, Reasons, or Locations, Edit Scheduler Format, Display Order, or the Daily Message.

## **Schedule Format**

To begin setting up or modifying the format of your appointment scheduler, it is a good idea to start with the schedule format.

1. Press **[A]** Appointment Scheduling from the Home Screen.
2. Press **[Shift+F10]** to access the Scheduler Setup.
3. Press **[4]** Schedule Format.
4. The Schedule Format screen displays a valid range or options regarding the field currently selected on the bottom of your screen just above your Exit options. Refer to this line of information if there is any question as to the allowable range or options for each field.
5. Start Time: Select the time your appointment scheduler will start.
6. End Time: Select the time your appointment scheduler will end.
7. Minutes Per Cell: The time span or distance between appointment slots/cells.
8. Rows Per Appointment: The number of rows automatically designated for each appointment slot/cell.
9. Fixed Column Width: Set a permanent column width for each appointment scheduler column, or resource. If you do not enter a value in this field the system will automatically adjust the column width, unless you enter a fixed value in the Resource Set-Up.
10. Footer Rows: The number of rows designated for footer information to be displayed.
11. Bookings Per Cell: The maximum number of appointments that can be booked in each appointment slot, (i.e. double booking, triple booking, etc.).
12. Start Date: The first date that an appointment can be posted.

13. End Date: The last date that an appointment can be posted. This is one of the major changes from the prior non-Y2K compliant appointment scheduler. The End Date can be forwarded to the year 9999, allowing you to make appointments as far in advance as needed. If your appointment scheduler is not allowing you to make an appointment or access a date in the future, this End Date merely needs to be advanced.
14. Days Of Week To Be Displayed: Press **[Esc]** to select or de-select the days of the week that will be displayed or are available to the user. Press **[End]** to return to the Schedule Format screen.
15. Rows Between Cells: Select **[1]** to display a horizontal separating line between each cell. Select **[0]** if you do not want a separating line.
16. Columns Between Cells: Select **[1]** to display a vertical separating line between each cell. Select **[0]** if you do not want a separating line.
17. Reserved Appointment Text: Enter the text or symbols that will be displayed in the first cell of a reserved appointment. Each following cell will be filled with the [/] "forward slash" character, signifying a reserved appointment.
18. Press **[Ctrl+X]** to exit to the Scheduler Setup screen without saving your changes to the schedule format. Press **[End]** to exit and save the changes made to the Schedule Format, and exit to the Scheduler Setup screen. Press **[Home]** to save the changes made to the Schedule Format, and exit to the Home Screen.

## Locations

The appointment scheduler allows you to separate appointments in the scheduler by location and provides color options to be able to easily differentiate between locations.

1. Press **[A]** Appointment Scheduling from the Home Screen.
2. Press **[Shift+F10]** to access the Scheduler Setup.
3. Press **[3]** Locations. The Locations screen includes the Quick Code and Label of each location, as well as your options and navigation keys located on the bottom of your screen.

### To Add a Location:

1. Press **[Insert]** from the Locations screen.
2. Press **[1]** Add New Record (if the option displays).

3. The Add/Edit Location screen displays options or information regarding the field currently selected on the bottom of your screen just above your Exit options. Refer to this line of information if there is any question as to the allowable value or options for each field.
4. Quick Pick: Enter an abbreviation or symbolic value for the location label; this Quick Pick is used to select this location throughout the appointment scheduler.
5. Label: Enter the label or name that will display for this location.
6. Foreground Display Color: Select the color that the letters/text of the appointment made at this location will display in. This allows you to easily and quickly differentiate between the appointments at different locations. Terminals without color monitors will not be able to differentiate these colors.
7. Background Display Color: Select the color that the block surrounding the letters/text of the appointment made at this location will display in. This allows you to easily and quickly differentiate between the appointments at different locations. Terminals without color monitors will only be able to differentiate between black and any color, but not between two different colors.
8. Refer to your exit options at the bottom of the screen when you are done.

To Delete a Location:

1. Press **[Delete]** from the Locations screen.
2. Enter the Quick Code of the location you want to delete and press **[Enter]**.
3. Select **[Yes]** if you are sure you want to delete this location.

To Restore a Deleted Location:

1. Press **[Insert]** from the Locations screen.
2. Press **[2]** Restore Previously Deleted Record (if the option does not display, there are no previously deleted locations).
3. Select the location to restore by selecting the number or letter to the left of the deleted resource label. The location will automatically be reinserted into your list of locations.

## Reasons

The Appointment Scheduler allows you to enter an unlimited amount of appointment reasons to allow precise and specific scheduling of appointment reasons.

1. Press **[A]** Appointment Scheduling from the Home Screen.
2. Press **[Shift+F10]** to access the Scheduler Setup.
3. Press **[2]** Reasons (if the option displays).
4. The Reasons screen includes the Quick Code, Label, and Type for every reason, as well as your options and navigation keys located on the bottom of your screen.

### To Add a Reason:

1. Press **[Insert]** from the Reasons screen.
2. Press **[1]** Add New Record.
3. The Add/Edit Reason screen displays options or information regarding the field currently selected on the bottom of your screen just above your Exit options. Refer to this line of information if there is any question as to the allowable value or options for each field.
4. Quick Pick: Enter an abbreviation or symbolic value for the appointment reason, this Quick Pick is used to select this reason throughout the appointment scheduler.
5. Label: Enter the label or name, which will display for this reason.
6. Type: Allows you to assign a reason type. This can be an Appointment reason, a Deletion reason, or a Confirmation reason. Press **[Esc]** to list the reason types, or **[Space]** to toggle to the next value.
7. Minutes: Allows you to assign a specific length of time to the appointment reason. Enter the minutes to associate with this reason
8. Foreground Display Color: Select the color that the letters/text of the appointment made with this reason display in. This allows you to easily and quickly differentiate between the appointment reasons. Terminals without color monitors will not be able to differentiate these colors.

9. Background Display Color: Select the color that the block surrounding the letters/text of the appointment made with this reason display in. This allows you to easily and quickly differentiate between the appointment reasons. Terminals without color monitors will only be able to differentiate between black and any color, but not between two different colors.

**NOTE:** The color selected for locations will override the color selected for an appointment reason.

10. Refer to your exit options at the bottom of the screen when you are done.

#### To Delete a Reason:

1. Press **[Delete]** from the Reasons screen.
2. Enter the Quick Code of the reason you want to delete and press **[Enter]**.
3. Select **[Yes]** if you are sure you want to delete this reason.

#### To Restore a Deleted Reason:

1. Press **[Insert]** from the Reasons screen.
2. Press **[2]** Restore Previously Deleted Record.
3. Select the reason to restore by selecting the number or letter to the left of the deleted reason label. The reason will automatically be reinserted into your list of reasons.

## Resources

The Resources divide your appointment scheduler into separate columns; the column headings are referred to as your resources. Resources can be a Physician, Diagnostic Machine or Treatment, Physicians Assistant, an Exam Room, etc.

1. Press **[A]** Appointment Scheduling from the Home Screen.
2. Press **[Shift+F10]** to access the Scheduler Setup.
3. Press **[1]** Resources.
4. The Resources screen includes the Quick Code, Label and Default Location for every resource as well as your options and navigation keys located on the bottom of your screen.

### To Add a Resource:

1. Press **[Insert]** from the Resources screen.
  2. Press **[1]** to Add New Record (if the option displays).
  3. The Add/Edit Resource screen displays options or information regarding the field currently selected on the bottom of your screen above your Exit options. Reference this line of information if there is any question as to the allowable value or options for each field.
  4. Quick Pick: Enter an abbreviation or symbolic value for the column label or column heading, this Quick Pick is used to select this resource throughout the appointment scheduler.
  5. Column Label: Enter the column name or heading which will display above this column in the appointment scheduler.
  6. Custom Column Width: Allows you to set a permanent column width for each appointment scheduler column. If you do not enter a value in this field the system will automatically adjust the column width.
- NOTE:** This value will override the Fixed Column Width in the Scheduler Setup
7. Default Location: Allows you to automatically assign a location to all of the appointments created under this resource or column heading. Press **[Esc]** to list the office locations, **[Backspace]** to remove the current location assigned, **[End]** to make no changes, or select the quick code of the desired location for this resource.
  8. Refer to your exit options at the bottom of the screen when you are done.

### To Delete a Resource:

1. Press **[Delete]** from the Resources screen.
2. Enter the Quick Code of the resource you want to delete and press **[Enter]**.
3. Select **[Yes]** if you are sure you want to delete this appointment scheduler resource.

### To Restore a Deleted Resource:

1. Press **[Insert]** from the Resources screen.
2. Press **[2]** Restore Previously Deleted Record (if the option does not display, there are no previously deleted resources).
3. Select the resource to restore by selecting the number or letter to the left of the deleted resource label. The resource will automatically be reinserted into your list of resources.



## Display/Print Order

The appointment scheduler allows you to arrange the appointment display, footer, and print order independently of each other.

### To Edit Appointment/Footer/Print Order:

1. Press **[A]** Appointment Scheduling from the Home Screen.
2. Press **[Shift+F10]** to access the Scheduler Setup.
3. Press **[5]** Display/Print Order from the Scheduler Setup screen.
4. Press **[1]** Appointment Display Order, **[2]** Footer Display Order, or **[3]** Print Order.
5. The Edit Display/Print Order screen includes the item to be displayed, the order it will display in, and the maximum amount of characters allowed for this item to display, as well as your options and navigation keys located on the bottom of your screen.

### To Add an Item to display/print:

1. Press **[Insert]** from the Appointment Display Order, Footer Display Order, or Print Order screens.
2. The Add/Edit Display Item screen displays options or information regarding the field currently selected on the bottom of your screen just above your Exit options. Reference this line of information if there is any question as to the allowable value or options for each field.
3. Display Order: Enter the order number where you wish this item to display. You can always reorder the items from the Appointment Display Order screen.
4. Max Display Width: Enter the maximum amount of characters allowed for this item to display; an amount of "0" will not put any limit on the amount of characters allowed for this item to display.
5. Item To Be Displayed: Select the item to be displayed in your appointment scheduler. Press **[Esc]** to list the available display items, or **[Space]** to toggle to the next value.
6. Refer to your exit options at the bottom of the screen when you are done.

To Re-number the Display/Print Order:

1. Press **[R]** from the Appointment Display Order, Footer Display Order, or Print Order screens.
2. Select the item to change by pressing the number or letter to the left of the item description.
3. Enter the order number where you wish this item to be displayed. From the Add/Edit Display Item screen you can also change the Max Display Width, and the Item To Be Displayed.
4. Refer to your exit options at the bottom of the screen when you are done.

To Delete a Display/Print Item:

1. Press **[Delete]** from the Appointment Display Order, Footer Display Order, or Print Order screens.
2. Enter the number or letter of the item you want to delete and press **[Enter]**.
3. Select **[Yes]** if you are sure you want to delete this item.

**Examples/Notes**

# Section Two: Appointments

## Foreword

This section mainly deals with creating, confirming, deleting and copying reserved appointments, and finding available appointments slots.

## Navigation/View

The arrow keys allow you to navigate through one day of the appointment scheduler, and there are several ways to navigate throughout the calendar days in the appointment scheduler. The date being displayed is on the top right hand corner of the screen, noted as Viewing: **mm/dd/yyyy**.

**[.]** A "period" allows you to go directly to a specific date in the calendar. Press **[.]** and enter the desired date in a **mm/dd/yyyy** format.

**[+]** A "plus" allows you to select an amount of time to move ahead in the appointment scheduler. The appointment scheduler can be moved ahead in increments of **[D]ays**, **[W]eeks**, **[M]onths**, **[Y]ears**, or **[1]** will return you to today's calendar date. Press **[+]** and enter the amount of days, weeks, months, or years you would like to move ahead. For example, **1W** will advance the scheduler 1 week, **5D** will advance the scheduler 5 days.

**[-]** A "minus" allows you to select an amount of time to move back in the appointment scheduler. The appointment scheduler can be moved back in increments of **[D]ays**, **[W]eeks**, **[M]onths**, **[Y]ears**, or **[1]** will return you to today's calendar date. Press **[-]** and enter the amount of days, weeks, months, or years you would like to move back. For example, **3W** will retreat the scheduler 3 weeks, **1Y** will retreat the scheduler 1 year.

**[Tab]** Automatically forwards the Appointment scheduler date 1 day.

**[Shift+Tab]** Automatically retreats the Appointment scheduler date 1 day.

The Appointment Scheduler has three different views that can be toggled by pressing the **[Esc]** key. One view will display the entire schedule the second view will display half of the schedule with more detail, while the third view will display one column or resource in full detail.

## Create/Confirm

The Appointment Scheduler allows you to create and confirm appointments using the same screen, and also has an additional confirmation method for faster and easier use.

### To create an appointment:

1. Press **[A]** from the Home Screen.
2. Select the day and time you wish to make the appointment by placing the cursor on that date and time, or the date and time can be selected from the Add/Edit Appointment screen.
3. Press **[Enter]** to create an appointment.
4. Select **[1]** to process your current patient, **[2]** to Select Patient By Name, **[3]** to Select Patient By Record Number, or **[4]** to Process a New Patient. Option **[4]** is for creating new patients. All demographic and insurance information can be entered at this time. When you are finished creating the new patient, you can re-enter the appointment scheduler and create an appointment for him/her.
5. The Add/Edit Appointment screen includes the date/time this appointment was created, the user who created it, and the patient name/record number that it is being created for. This screen also displays options or information regarding the field currently selected on the bottom of your screen just above your Exit options. Refer to this line of information if there is any question as to the allowable value or options for each field.
6. Reasons: Allows you to enter up to 4 reasons for this appointment which can be selected by pressing **[Esc]** to list the available appointment reasons, or **[Space]** to toggle to the next value.
7. Appt. Length (mins): The minute length of the appointment is automatically calculated according to the reason or the total sum of reasons. If no time is assigned to your reasons, or if the value is not satisfactory, it can be manually changed.
8. Date: Enter the date on which to make the appointment. The system automatically defaults to the day the appointment scheduler was on.
9. Time: Enter the time at which to make the appointment. The system automatically defaults to the time the appointment scheduler was on.

10. Note: Allows you to enter one line of text for this appointment. This text will be displayed on the appointment screen when the appointment is selected.
11. Resource: Select the resource associated with this appointment. The system automatically defaults to the resource column the cursor was on before making the appointment. This will control which column or resource heading this appointment will be made for. Press **[Esc]** to list the available resources, or **[Space]** to toggle to the next value.
12. Location: Select the location that this appointment is associated with. Press **[Esc]** to list the available locations, or **[Space]** to toggle to the next value.
13. Refer to your exit options at the bottom of the screen when you are done.

To Confirm an Appointment:

1. Select the appointment you wish to confirm by placing the cursor on the appointment.
  2. Press **[Enter]** to select that appointment and view the Add/Edit Appointment screen.
  3. Confirmation Status: Select the confirmation status associated with this appointment. Press **[Esc]** to list the available confirmation reasons, or **[Space]** to toggle to the next value.
  4. Reference your exit options at the bottom of the screen when you are done.
- OR**
5. Select the appointment you wish to confirm by placing the cursor on the appointment.
  6. Press **[Shift+F4]** to confirm the appointment, select a confirmation status by selecting the quick code for the confirmation status and press **[Enter]**.

To Delete an Appointment:

1. Select the appointment you wish to delete by placing the cursor on that appointment date and time.
2. Press **[Delete]** to select the appointment for deletion.
3. Select the deletion reason associated with this appointment by typing the Quick Code and pressing **[Enter]**, or press **[Ctrl-X]** to return to the appointment scheduler without deleting this appointment.

## Reserved Appointments

Reserved Appointments can be made to block out time frames when a resource is not available for appointments. This will prohibit users from being able to make appointments during these time slots. Once the reserved appointment has been created it can then be copied to future dates. For additional help on copying reserved appointments review the Help Screen section below.

### To Create a Reserved appointment:

1. Press **[A]** Appointment Scheduling from the Home Screen.
2. Select the day and time you wish to make the reserved appointment for by placing the cursor on that date and time, or the date and time can be selected from the Add/Edit Appointment screen.
3. Press **[/]** to create a reserved appointment.
4. The Add/Edit Appointment screen includes the date/time the reserved appointment was created on, as well as the user who created it. This screen also displays options or information regarding the field currently selected on the bottom of your screen just above your Exit options. Refer to this line of information if there is any question as to the allowable value or options for each field.
5. Reasons: Allows you to enter up to four reasons for this reserved appointment, which can be selected by pressing **[Esc]** to list the available reasons, or **[Space]** to toggle to the next value.
6. Appt Length (mins): The minute length of the reserved appointment is automatically calculated according to the reason or the total sum of reasons. If no time is assigned to your reasons, or if the value is not satisfactory, it can be manually changed.
7. Date: Enter the date on which to make the reserved appointment. The system automatically defaults to the day the appointment scheduler was on.
8. Time: Enter the time at which to make the reserved appointment. The system automatically defaults to the time the appointment scheduler was on.
9. Note: Allows you to enter one line of text for this reserved appointment. This text will be displayed on the bottom of the screen when the reserved appointment is selected.

10. Resource: Select the resource associated with this reserved appointment. The system automatically defaults to the resource the cursor was under. This will control which column or resource heading this appointment will be made under. Press **[Esc]** to list the available resources, or **[Space]** to toggle to the next value.
11. Location: Select the location that this reserved appointment is associated with. Press **[Esc]** to list the available locations, or **[Space]** to toggle to the next value.
12. Refer to your exit options at the bottom of the screen when you are done.

#### To Copy a Reserved Appointment:

1. Select the reserved appointment you wish to copy by placing the cursor on that reserved appointment, or the date and time can be selected from the Add/Edit Appointment screen.
2. Press **[Shift+F5]** from the appointment scheduler.  
**NOTE:** All reserved appointments in the source period will be duplicated in the destination period.
3. Source Period: Select the source week from which to copy the reserved appointments from. The source period is the Sunday-Saturday range that includes your reserved appointment(s). Even though an entire source week must be entered, you can limit the copy to only your desired days and times. For example, to copy a reserved time slot from Monday 01/01/2001, select Sunday 12/31/2000 to Saturday 01/06/2001 as your Source Period. Then limit the days of the week to be copied to just Monday.
4. Destination Period: Select the destination period that the reserved appointments will be copied to. The destination period is the Sunday-Saturday range that will include a copy of the reserved appointments from the source period. For example, to copy a source period to the entire year, select Sunday 01/07/2001 to Saturday 01/05/2002 as your Destination Period. The system then automatically calculates the number of weeks in your destination period.  
**NOTE:** The source and destination period cannot overlap.
5. Days Of Week To Be Copied: Select the days of the week to be considered when copying your reserved appointments. Try to limit the days to be included as much as possible, because all reserved appointments in the source period will be duplicated in the destination period. Press **[Esc]** to list the available days.

6. Start Time: Select the time range of the reserved appointments to be considered for all of the days of the week selected.
7. Resource: Select the resources or columns to be considered. Press **[Esc]** to list the available resources, or **[Space]** to toggle to the next value. A **[\*]** will consider all Resources.
8. Remove Previously Entered Reserved Appts. From Destination Period?: Select **[Yes]** if you would like the system to remove all of the Reserved Appointments currently in the same destination period. Answering **[No]** will leave all previously entered reserved appointments untouched. The system will never allow overlapping of reserved appointments.
9. Press **[Tab]** to Begin Copying Reserved Appointments, or **[Ctrl+X]** to exit and not copy reserved appointments.

### **Find/Copy/Move**

The appointment scheduler has a find feature that allows you to locate open time slots without have to navigate through the scheduler. You can also copy and move a previously scheduled appointment without having to delete and recreate it.

#### **To find an open time slot:**

1. Press **[F8]** from the Appointment Scheduler screen.
2. Date Range: Allows you to select the date range to be considered for the available time slot. To search through one day, the start and end day should be the same.
3. Minimum Appointment Length: Enter the minimum time length needed for the appointment.
4. Days of the Week To Be Searched: Select the days of the week that are to be considered when searching for available appointments. Be sure that the days of the week selected are within the days entered in the Date Range above.
5. Start Time: Select the time range to be considered when searching for the available appointments.
6. Resource: Select the resources or columns to be considered. Press **[Esc]** to list the available resources, or **[Space]** to toggle to the next value. A **[\*]** will consider all resources.
7. Press **[Tab]** to Begin Searching for open slots, or **[Ctrl+X]** to exit and not search.



To Hook an appointment:

1. Select the appointment you wish to hook by placing the cursor on that appointment.
2. Press **[F5]** to hook the appointment.
3. The appointment text then becomes dim, signifying that the appointment is hooked and can now be copied or moved.

To Copy a hooked appointment:

1. Select the day and time you wish to copy your appointment to by placing the cursor on that slot.
2. Press **[F6]** to copy a hooked appointment to this slot.
3. The appointment will now exist in its previous slot as well as this new appointment slot.

To Move a hooked appointment:

1. Select the day and time you wish to move your appointment to by placing the cursor on that slot.
2. Press **[F7]** to move the hooked appointment to this slot.
3. The hooked appointment will now only exist in this new location. This appointment can be unhooked by hooking another appointment, hooking an open time slot, or exiting the appointment scheduler.

**Examples/Notes**

# Section Three: Short-Cuts/Features

## Foreword

The Appointment Scheduler has many short cuts or quick keys, which allow you to perform or enter most of the scheduler's features with only one keystroke.

## Quick Keys

The appointment scheduler allows access to other areas of the Avanta system by the simple push of a button to check a patient's demographic information existing balance, or next appointment.

**Patient's Demographic:** To access the patient's demographic screen, place the cursor on that patient's appointment slot, and press **[F1]**. Press **[Tab]** to access additional patient and insurance information, or press **[Home]** to return to the appointment scheduler.

**Patient's Insurance:** To access the patient's insurance screen directly, place the cursor on that patient's appointment slot, and press **[Shift+F1]**. Press **[Tab]** to access additional insurance or demographic information, or press **[Home]** to return to the appointment scheduler.

**Patient Ledger:** To access the patient's ledger screen, place the cursor on that patient's appointment slot, and press **[F3]**. The Post Payment/View Ledger screen can be viewed in reference by pressing **[Shift+F3]**, or press **[Home]** to return to the appointment scheduler.

**Reference View Ledger:** To access the patient's reference view ledger screen directly, place the cursor on that patient's appointment slot, and press **[Shift+F3]**. Press **[F3]** to access the Post Payment/View Ledger screen, or press **[Home]** to return to the appointment scheduler.

**Patient Balance:** To access the patient's balance screen, place the cursor on that patient's appointment slot, and press **[F4]**. Press **[Home]** to return to the appointment scheduler.

**Patient's Next Appointment:** To find when your current patient's next appointment is, or if your current patient is scheduled for an appointment, press **[Shift+F6]**. The system will list the Day, Date, Time, and associated resource of all of the patient's prior and next appointments. Select an appointment to jump directly to that date.

## Make Group

The appointment scheduler allows you to build a patient group from your patient's appointments. To build a group from the appointment scheduler:

1. Press **[Shift+F8]** from the appointment scheduler.
2. Date Range: Enter the Date Range to be considered for your appointment scheduler group.
3. Minimum Appointment Length: Enter a minimum appointment length to be considered. All appointments shorter than this appointment length will not be considered.
4. Days of Week To Be Searched: Select the days of the week to be considered, all appointments outside of this date range will not be considered.
5. Start Time: Select the time range to be considered. All appointments outside of this time range will not be considered.
6. Resource: Select the resources or columns to be considered. Press **[Esc]** to list the available resources, or **[Space]** to toggle to the next value. A **[\*]** will consider all resources.
7. Press **[Tab]** to build your appointment scheduler group. This group now becomes your current group that can be accessed through **[9]** Group Functions from the Home Screen.

## Daily Message

The appointment scheduler has 1 line (or 78 characters) allocated to enter any message for that day.

1. Press **[Shift+F7]** from the day in the appointment scheduler for which you would like to create a daily message for.
2. Enter the daily message and press **[Enter]** when complete. The daily message will display at the top of your screen for the day it was created.

## **Help Screen**

The appointment scheduler has a help screen which includes help topics on the function keys, the appointment colors, and how to copy reserved appointments.

1. Press **[F10]** from the appointment scheduler.
2. Select Help Topic **[1]** Keys, **[2]** Appointment Colors, or **[3]** Copy Reserved Appointments.
3. Keys: The Help Keys Topic includes a quick view of all of the appointment scheduler functions and quick keys including a brief explanation of what each key or key combination does.
4. Appointment Colors: The Appointment Colors topic includes an explanation of the display color of an appointment and how the color is determined when considering multi-color reasons or locations.
5. Copy Reserved Appointments: The Copy Reserved Appointments Topic includes an explanation of this feature, what it can be used for, and precautions to consider.

## **Examples/Notes**

# Section Four: Printing

## Foreword

The appointment scheduler contains a deletion report so that a hard copy record is available of all appointments that were deleted. In addition, the scheduler itself is printable with various options and formats.

## Print Reports

The Appointment Scheduler contains a deleted appointments report which includes all of the appointments that have been deleted by any or all of the users.

1. Press **[Shift+F9]** from the Appointment Scheduler.
2. Press **[1]** Deleted Appointments Report.
3. Select your printer information.
4. Date Range: Allows you to enter the date range for the deleted appointments to be printed. To print deletions for one day, the start and end day should be the same.
5. User ID (blank for all): Select the user ID to be considered for this report. All of the appointments deleted by only this user will be printed in this report. Leave this field blank to print deleted appointments for all users.
6. Days of the Week To Be Searched: Select the days of the week to be considered when searching for deleted appointments. Be sure that the days of the week are within the days entered in the Date Range above.
7. Start Time: Select the time range to be considered when searching for the deleted appointments.
8. Resource: Select the resources or columns to be considered. Press **[Esc]** to list the available resources, or **[Space]** to toggle to the next value. A **[\*]** will consider all resources.
9. Press **[Tab]** to Print the Deleted Appointments Report, or Press **[Ctrl+X]** to abort and exit to the appointment scheduler.

## Print Schedule

The Appointment Scheduler can be printed in a landscape or portrait format. Be sure the appointment scheduler is set to the desired view (by pressing **[Esc]**).

1. Press **[F9]** from the Appointment Scheduler.
2. Select your printer information.
3. Date Range: Allows you to enter the date range you wish to print. To print the scheduler for one day, the start and end day should be the same.
4. Days of the Week To Be Printed: Select the days of the week to be printed. Be sure that the days of the week are within the days entered in the Date Range above.
5. Appointment Start Times: Select the time range that is to be printed.
6. Resource: Select the resources or columns to be considered. Press **[Esc]** to list the available resources, or **[Space]** to toggle to the next value. A **[\*]** will consider all resources.
7. Rows Per Appointment: Select the number of rows to be allocated for each appointment. This will override the number of rows in the display, or the number of rows actually needed to print all information in the scheduler.
8. Press **[Tab]** to Begin Printing your Appointment Scheduler, or Press **[Ctl+X]** to abort and exit to the appointment scheduler.

## Examples/Notes