12. USING THE SCHEDULER

Note: You must have purchased the "Scheduler" feature (module) to be able to use this part of the MPM Office software.

The Scheduler Module was created taking into consideration all the aspects of the MPM Office program allowing the user to maneuver within the entire program without leaving the module.

Ideally, one can schedule a Patient, update their record, collect their monies, bill their claim, and reschedule their next visit all within a few clicks.

In this section you will learn how to use the Scheduler to make your workday easier.

I. Using the Schedules Module

Once you have completed the set up process, left click the "**Schedules**" icon found on the Left Navigational Menu (or, from the Top Navigational Menu, left click on "**File**" and then click on "**Schedules**").

A. MANEUVERING

Provider View

If more than one Provider has been set up for your office, each Provider's **ID Code** (created when the Provider information was first set up on this program) will appear as tabs along the top of the "**Schedules**" window. Clicking on each of those tabs will show you that Provider's schedule for that day.

Daily View

The Schedules Module automatically shows the current day's schedule.

Use the left and right arrows located on the either side of the calendar date (located on the top right hand side of the "**Schedules**" window) to select and view the daily schedule for a specific calendar date for the chosen Provider.

A left click on the calendar date itself opens a mini calendar view of the entire month from which you can also select a date. Once the date is selected click the "**Ok**" button which is located at the bottom right side of this window.

In the **Mini Calendar View**, clicking on the arrows on the left and right of the Month/Year heading to move to a chosen date (i.e.: the 5^{th}) on another month other than the one you are on. Once the date is selected click the "**Ok**" button which is located at the bottom right side of this window.

You can also left click on the name of the current **Month** to list all 12 months of the year and then left click on the name of the Month you want view.

B. SCHEDULING AN EXISTING PATIENT

Glancing at the daily sheet on the scheduler, the color **Tan** means that the time slot is available for scheduling, and **Grey** means that the Provider is off during that time period and you cannot schedule a Patient for him or her. The background color for a particular time slot will change once a Patient has been scheduled.

To quickly **find an available/open time slot**, take the following steps:

1. On the right hand side of the schedule, in the field to the right of the "**Find Open Slot**" label, select the day from the menu provided in this field.
2. Right below, in the field to the right of the "**Time**" label, select the time of day from the menu provided in this field.
3. Click the "**Find**" button and the scheduler module will find the next available slot matching the chosen criteria.
4. Double click in the slot to begin entering the details for this visit.

To **schedule a one-time visit** for an existing Patient, one that already appears in your database, take the following steps:

1. In the section labeled "**Patient**", left click on the button to the left of the word "**Patient**", then left click on the browser button (...) (to the right of the empty field) to find your Patient. Double click on the Patient to have the system enter their **Name**, **Phone**, **Work Phone**, and **Co-Pay** automatically information in the fields provided.
2. In the section labeled "Visit", in the field to the right of the word "**Notes**", enter a brief reason for the visit that will assist in remembering what the Patient is coming in for (i.e.: follow-up, labs, x-rays, referral).
3. Immediately below, select the "**Assigned From**" time and the "**To**" time for the visit from the menu provided in these two fields.
4. Click on the "**Save**" button when this section is finished to return to the main scheduling page.

If you would like to **schedule recurring visits** for this Patient (visits that will take place multiple times within the same week, month, year, etc), take the following steps:

1. Find an open/available time slot to schedule the Patient in, and double click on it to begin entering the details.
2. In the section labeled "**Patient**", left click on the button to the left of the word "**Patient**", then left click on the browser button ( ) (to the right of the empty field) to find your Patient. Double click on the Patient to have the system enter their **Name**, **Phone**, **Work Phone**, and **Co-Pay** automatically information in the fields provided.
3. In the section labeled "**Visit**", in the field to the right of the word "**Notes**", enter a brief reason for the visit that will assist in remembering what the Patient is coming in for (i.e.: follow-up, labs, x-rays, referral).
4. Immediately below, select the "**Assigned From**" time and the "**To**" time for the visit from the menu provided in these two fields.
5. Click on the "**Recurrence**" button to open the "**Appointment Recurrence**" window.
6. In the section labeled "**Appointment Time**", select the **Start** time and the **End** time for the visit from the menu provided in these two fields.
7. In the section labeled "**Recurrence Pattern**", select either "**Daily**" or "**Weekly**". If "**Weekly**", enter the number of weeks the Recurrence takes place in the field provided (labeled "**Recur every**") and then left click in the box in front of the day(s) of the week which this Patient will be in to see your Provider.
8. In the section labeled "**Range of Recurrence**", select the **Start** date from the menu provided in this field, then left click in the box in front of either "**No End Date**" (if these visits are to be ongoing for a long time), "**End After _____ Occurrences**" (if a number of visits have been determined, and enter that number in the field provided), or in front of the field "**End by**" if a specific date has been chosen (and select the date from the menu provided in this field).
9. Click on the "**Save**" button when this section is finished to return to the main scheduling page. The word "**Recurrence**" will appear in the field to the right of the Patient's name in the scheduled time slot.

To **Edit or Remove Recurring visits** previously scheduled:

1. Double-click on the Patient's name in the scheduled time slot.
2. Click on the "**Recurrence**" button to open the "**Appointment Recurrence**" window.
3. To **Edit** the recurring visits, simply make the necessary changes in the fields provided, then click the on the "**Save**" button to return to the main scheduling page.

4. To **Remove** the recurring visits, click on the "**Remove Recurrence**" button, and select "**Yes**" in confirmation box that appears. The current visit, and all future recurring visits previously scheduled, will be deleted and the time slot will become empty.

C. SCHEDULING A NEW PATIENT

Glancing at the daily sheet on the scheduler, the color **Tan** means that the time slot is available for scheduling, and **Grey** means that the Provider is off during that time period and you cannot schedule a Patient for him or her. The background color for a particular time slot will change once a Patient has been scheduled.

To quickly **find an available/open time slot**, take the following steps:

1. On the right hand side of the schedule, in the field to the right of the "**Find Open Slot**" label, select the day from the menu provided in this field.
2. Right below, in the field to the right of the "**Time**" label, select the time of day from the menu provided in this field.
3. Click the "**Find**" button and the scheduler module will find the next available slot matching the chosen criteria.
4. Double click in the slot to begin entering the details for this visit.

To **schedule a visit** for a NEW Patient, one whom has not been entered yet in your database, take the following steps:

1. In the section labeled "**Patient**", left click on the button to the left of the word "**New Patient**" and complete the following fields: **Last Name**, **First Name**, and **Contact Phone**.
2. In the section labeled "**Visit**", in the field to the right of the word "**Notes**", enter a brief reason for the visit that will assist in remembering what the Patient is coming in for (i.e.: follow-up, labs, x-rays, referral).
3. Immediately below, select the "**Assigned From**" time and the "**To**" time for the visit from the menu provided in these two fields.
4. Click on the "**Save**" button when this section is finished to return to the main scheduling page.

D. FINDING A SCHEDULED PATIENT

You can find a scheduled Patient in one of two ways: In the field marked "**Find**", either enter the first few letters of the Patient's Last Name, or choose the name of your Patient from the menu provided in this field (if the Patient has been previously entered in the scheduler, the patient's name will appear in the menu provided).

Once the Patient's name has been entered or selected, click on the "**Find**" button to begin your search from today's date forward, or click in the box labeled "**Find From Top**" to begin searching from the first time you began using this scheduler. The program will take you to the next date and time which the Patient was scheduled for.

If your Patient has been scheduled more than once, or if you believe that they may have been, continue to click on the on the "**Find**" button until you find the date and time you were looking for.

E. ADDING A CLAIM FOR A SCHEDULED PATIENT

Once the Patient's visit is over, you can create the claim for the services rendered from this module following the steps below:

2. **Find** the patient and double-click on his/her name to open a new window containing the Provider's complete name and the scheduled date across the top, and the Patient's information filled in.
3. In the "**Visit**" section of this window, find and single left click on the "**Add Claim**" button found on the right side of this section. A new window labeled "**Edit New Claims Data**" will open, and you can proceed to enter your claims.
4. Click on the "**Save**" button at the bottom right hand side of the newly opened screens when finished to exit out of the Patient's file and return you to the "**Schedules**" module.
5. Click on the box in the front of the label "**Visit Completed**" to place a check mark in it, and then click on the "**Save**" button at the bottom right hand side of this window when finished (the time slot will change colors to **Pink** indicating the service has been completed).

F. PRINTING DAILY/WEEKLY SCHEDULES

To print out the daily or weekly schedule for a Provider (or for all Providers), take the following steps below:

1. From the Top Navigation Menu, left-click on the "**Reports**" tab, and then select "**Schedules**" from the list provided.
2. To print a **Daily** schedule report, left click on the button to the left of the words "**Select Day**", and type in the field to the right the Month, Day, and Year of the date you want printed.

3. To print a **Weekly** schedule report, left click on the button to the left of the words "**Select Week**", and using the menu provided in the field to the right select the start date of the week you want printed (i.e.: to print the schedule for the week of 11/25/07 – 12/01/07, you would select 11/25/07 as the start date).
4. To choose an individual Provider (or to choose all of your Providers), use the menu provided in the field to the right of the labeled "**Select Provider**".
5. Click on the "**Ok**" button to generate a preview of the schedule prior to printing it. If it meets with your satisfaction, click on the "**Print**" button right hand side of the screen to select the number of copies to print and which printer you want to print to.
6. Click on the "**Close**" button at the bottom right hand side of the screen to return you to the "**Schedules**" module.