

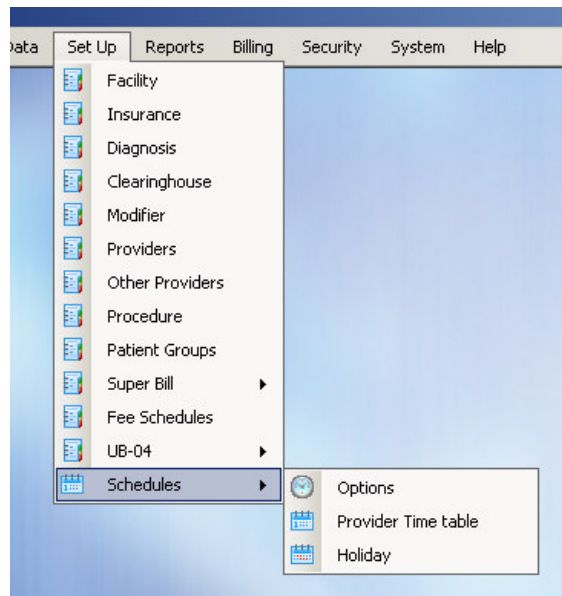
## 4B. (13) Software Set Up - Schedules

**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 set up the look and feel of the Scheduler Module, From the top navigational Menu, select “**Set Up**”, then “**Schedules**”.



### 1 Setting Up The Scheduler Options

Click on “**Options**” to open the **Options** screen. The top section labeled “**Working Time**” allows you to select the days of the week in which the office is normally open for business by clicking the boxes in front of each day.

- A In the **First Day of the Week** field, use the menu provided in this field and select **Monday** (or whichever day is more appropriate) as the first day of the work week for your office.
- B In the **Time Block** field, use the menu provided in this field and select the minimum increment of time (between 1 minute and 60 minutes) you want the Scheduler to block when a Patient is scheduled. The shorter the time period selected the more patients you can book.
- C In the **From** field, select your work day start time from the menu provided.
- D In the **To** field, select your work day end time from the menu provided.
- E In the **Break From** field, select your break (lunch) start time from the menu provided.
- F In the **To** field, select your break (lunch) end time from the menu provided.
- G Click the box labeled **Holidays** if you want to show holidays (Christmas, New Years, Memorial Day, etc.) as work days when scheduling.

**Colored Labels Options:**

The section labeled “**Color Labels**” allows you to create 14 different labels, with colors from a full color palette, to customize the scheduler so that you can quickly tell what the Patient is coming in for.

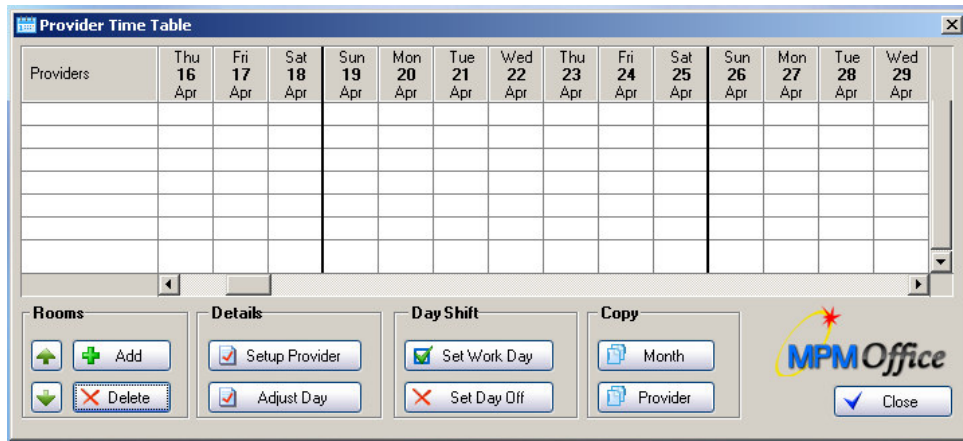
- A From the box to the right (containing the name of a color), left click on a box to change the color to one you would like to use from one of three color palettes (**Custom**, **Web**, or **System**) by double-clicking on the color itself.
- B In the box to the left marked **<label>**, left click inside the box and type the name of what this color will represent. For example: Red – Emergency, Blue – Follow Up, Green – First Visit, Yellow – Labs, etc.

**Note: We discourage the use of the colors Tan, Grey, and Pink as the system uses those colors to represent an available time slot (Tan), the provider being off that day (Grey), and a completed visit (Pink).**

- C When done with this section, click the “Save” button located on the bottom right hand side of this screen.

## 2 Setting up the Provider Time Table

Click on “Provider Time Table” to open the **Provider Time Table** screen as shown below:



The Provider(s) which were added to the MPM Office program as part of the Software Set Up will be listed under the “**Providers**” column. This column is also used for Rooms that you may have to schedule Patients in (such as an ASC, Exam Room, X-Ray, Lab, etc). Follow the instructions for each option (**Setup Provider**, **Day Adjust**, **Set Day Off**, and **Set Work Day**) as explained below:

### Option: Rooms – Placement

- A **Up Arrow:** Use the **Up Arrow** to move a Provider or Room upwards on the **Provider Time Table** if you have more than one Provider or Room listed by left clicking on the Provider or Room to select him or her and clicking on the Up Arrow.
- B **Down Arrow:** Use the **Down Arrow** to move a Provider or Room downwards on the **Provider Time Table** if you have more than one Provider or Room listed by left clicking on the Provider or Room to select him or her and clicking on the Down Arrow.

### Option: Rooms – Add/Delete

- A **ADD Button:** If you want to add a new room or an additional Provider, click

on the **ADD** button. In the opened **Edit New Room Data** screen, enter a **CODE** (up to 8 characters) in the **CODE** field that will assist you in knowing whom this Provider is or what the Room is being used for. In the **NAME** field, enter the **NAME** (up to 35 characters) of this Provider or of the Room created. Click the **SAVE** button when done.

- B **DELETE Button:** If you want to delete a Room or Provider created, click on the **DELETE** button. In the opened Delete Physician screen, select YES if you are sure you want to delete it.

**Note:** When attempting to delete an entry made, should a message appear stating “*Cannot Delete. Data in Use*”, click the “**Ok**” button to close the message window. Because the Provider or Room is in use, you will need to **DISABLE SCHEDULING** in order to not use it. (Please refer to the section titled “**Options: Details – Setup Provider**”).

### Option: Details – Setup Provider

To Disable Scheduling for a Provider/Room, or to set up the available work time for a Provider/Room created (or previously created) from within the Provider Time Table (either using the previously set time schedule or a specific time schedule for a particular day), take the following steps:

The screenshot shows a dialog box titled "Setup provider Smith, John," with a close button (X) in the top right corner. It contains three radio button options: "Disable Scheduling", "Use default settings" (which is selected), and "Setup Provider". Below these are four rows of time selection fields. The first row is "Work time" with a checked checkbox, followed by "from" and "to" dropdown menus showing "09:00 AM" and "06:00 PM". The second row is "Break 1" with a checked checkbox and empty "from" and "to" dropdowns. The third row is "Break 2" with an unchecked checkbox and empty "from" and "to" dropdowns. The fourth row is "Break 3" with an unchecked checkbox and empty "from" and "to" dropdowns. At the bottom of the dialog, it displays "Hours per day: 9.00 , per week: 45.00". There are "Save" and "Cancel" buttons at the bottom right, with a green checkmark icon next to "Save" and a red X icon next to "Cancel".

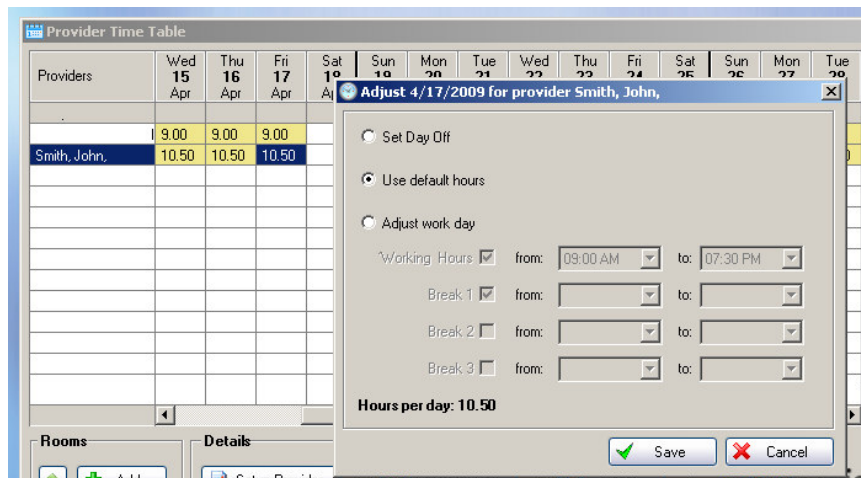
- A To permanently **Disable Scheduling** for a Provider/Room in the **Provider Time Table** (either because the Provider is on vacation, or no longer a part of your office, or out temporarily, etc.), left click on the Provider/Room you want to disable scheduling for and click the **SETUP PROVIDER** button. In the opened **Setup Provider** screen, click on the **Disable Scheduling** option, and then click on the **SAVE** button.
- B To have this Provider/Room use the previously created work time (initially set

under “**OPTIONS: WORKING TIME**” earlier in this section), left click on the Provider/Room and click the **SETUP PROVIDER** button. In the opened **Setup Provider** screen, click on the **Use Default Settings** option, and then click on the **SAVE** button.

- C To have this Provider/Room use a different work time than the others, left click on the Provider/Room and click the **SETUP PROVIDER** button. In the opened **Setup Provider** screen, click on the **Setup Provider** option and manually configure their working hours (similar to how the main working time was set up under the section “**Setting Up The Scheduler Options**”). Click on the **SAVE** button when done.

### Option: Details – Adjust Day

To adjust a time schedule for a particular day for a Provider/Room, left click on the time slot under the specific day you want to change and on the same line as the corresponding Provider/Room, then click on the **ADJUST DAY** button, and take the following steps:



- A To not be able to schedule anyone on this day, in the opened **Adjust MM/DD/YYYY** screen, select the **SET DAY OFF** option and click the **SAVE** button when done.
- B To have this Provider/Room use the previously created work time (initially set under “**OPTIONS: WORKING TIME**” earlier in this section), click on the **Use Default Hours** option, and then click on the **SAVE** button when done.
- C To have this Provider/Room use a different work time than the others, click on the **Adjust Work Day** option and manually configure their working hours (similar to how the main working time was set up under the section “**Setting Up The Scheduler Options**”). Click on the **SAVE** button when done.

### Option: Day Shift

- A To schedule a Provider/Room for a non-previously scheduled day, left click on the time slot under the under the specific day you want use and on the same line as the corresponding Provider/Room, then click on the **SET WORKDAY** button. This will make that day usable and the work hours for that day will default to the previously created work time (initially set under “**OPTIONS: WORKING TIME**” earlier in this section).
- B To turn a previously available work day into a day off, left click on the time slot under the under the specific day you want change and on the same line as the corresponding Provider/Room, then click on the **SET DAY OFF** button. This will make that day unusable.

### **Option: Copy - Month**

In order to make it easier for you to prepare the schedule in advance on a monthly basis, take the following steps:

- A Create a month’s worth of scheduled dates for the Provider/Room with the start/end and break times you want to use.
- B Left click on the Provider/Room, and click the **MONTH** button.
- C In the opened **SELECT MONTH** screen, use the drop-down menu in the **Select Month** field, to select the month that you want to copy (for example: if the month of June is similar to the month of April, select April from the drop-down menu).

*Note: When copying the month, MPM Office will start from the first Monday of the selected month, and copy the next 4 weeks from there.*

- D Click the **OK** button when done.

### **Option: Copy - Provider**

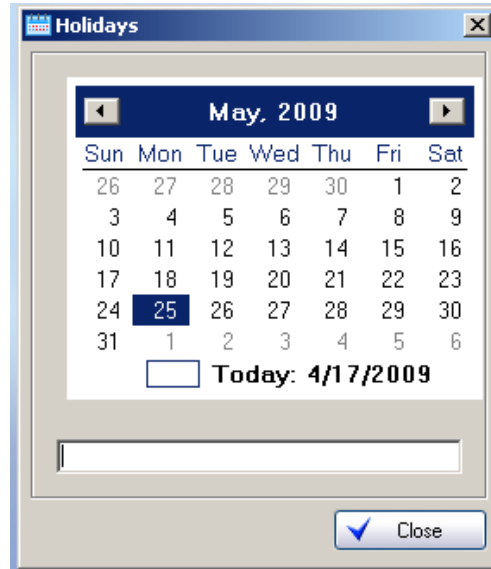
Once you have the schedule for a Provider/Room set, you can copy it for each new Provider/Room you add (if they will all follow the same schedule) by taking the following steps:

- A First you need to create the new Provider/Room on the scheduler following the instructions under the section titled “**Option: Rooms – Add/Delete**” in the sections above.
- B Next, click on the **PROVIDER** button and in the opened **SELECT PROVIDER** screen, choose the Provider/Room whose schedule you want to copy from drop-down menu found in the **PROVIDER** field.
- C In the **TO PROVIDER** field, select the Provider/Room whom you want to have the same schedule as the Provider/Room selected in the **PROVIDER** field.

D Click the **OK** button when done.

### 3 Setting up Holidays

Click on “**Holiday**” to open the **Holidays** screen as shown below:



- A To change the current month, left click on the **Month** at the top of the screen and click on the correct month you want to use. Clicking on the **left and right arrows** will move you month-to-month forwards or backwards on the calendar.
- B Left click on the **calendar date** you want to set as a Holiday so that it is highlighted (as shown in the picture above).
- C In the **empty field** below, enter the name of the Holiday. In this example, you would enter MEMORIAL DAY in the blank field.
- D Continue to take the above steps to enter all of the Holidays your office acknowledges.
- E Click on the **CLOSE** button when done.

Note: The MPM Office program does not include any Holidays in its scheduler program because not all Providers acknowledge all Holidays, and because each State may observe their own Holidays which may be different than those in other States. The MPM Office program leaves it up to the user to add in Holidays into the scheduler.