



To: System Users
From: WRS Development Team
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Re: Scheduler User Guide



Scheduler – Setup / Elements



Filters / Scheduler View



Rescheduling



Appointment Details



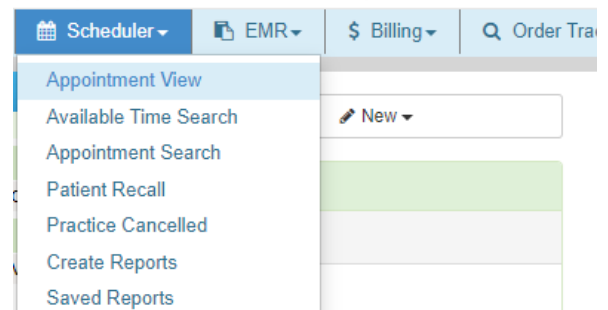
Appointment Hover Box

Scheduler Setup / Elements

This change will not affect any of your scheduler templates, settings, or user preferences.

When creating your provider's schedules, you can designate any and all appointment types to certain dates / times. Appointment Types are listed within each available appointment slot.

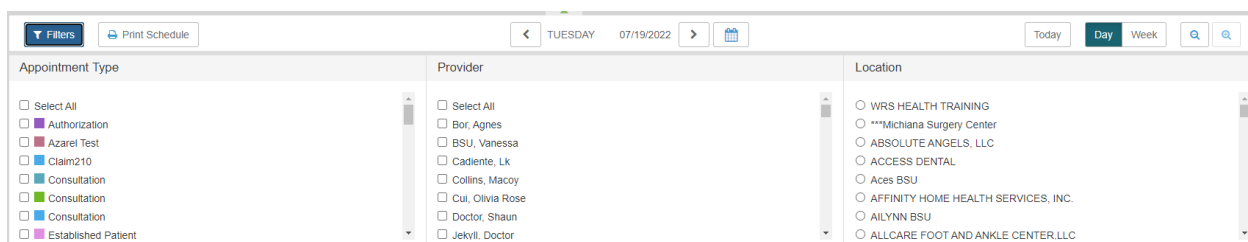
Calendar and Print Icons have been added to the scheduler window. Pressing these icons allow you to quickly navigate to an upcoming date and print the current schedule view.



Scheduler - Elements

1. Colors: Each appointment type has a designated color associated. To make changes to these colors, go to Administration > Scheduler Setup > Practice Appointment Types. Select the appointment type you would like to assign a new color to and make any applicable changes. Click save.
2. Exception & Double-Booked Indicator: A red triangle in the corner of appointment boxes allows you to quickly identify when there is an exception or a double booking
Note: The system allows practice users to double book appointments only when the user has double booking permission enabled.
3. Provider Initials: A small flag placed in the lower right-hand corner of the appointment box on the scheduler shows the initials of the provider the appointment is with.

Filters / Scheduler View



Any combination of Provider and Non-Human Resource schedules can be viewed in the Daily and Weekly Views.

- Schedules can be filtered by Appointment Type, Resource, and Practice Location.

Workflow:

1. Toggle between views using the Day, Week, and Current Week buttons in the Header Bar
2. Open and collapse your options by clicking on Filters.
3. Select your desired criteria.

Appointments can be scheduled in a variety of ways:

Drag and Drop Workflow:

1. Click on a recently viewed patient in the bottom of the Today's Appointment List
2. Drag the patient's name onto the scheduler
3. Drop it into the preferred time slot
4. It will then pop open the new appointment box where you can make changes or modifications on the time, location, resource, patient's name, and appointment type.
5. Select "Book appointment" to save.
6. "Send email notification" will allow a patient to receive an email and text message with the appointment details.

7. To confirm an appointment: hover over the patient's name, click on the view appointment detail, click confirm. Then you will see that the patient's name has turned to bold. The number found beside the patient's name on the Today's Appointment List, which is one, refers to the workflow. The patient is in the first step of the workflow which means an appointment has been made.

You may also select the date time on the scheduler and right click. Select "add appointment" and then enter in the correct information, such as time, location, resource, patient's name, and appointment type.

SCHEDULING FOR RECURRING TYPES OF APPOINTMENT:

Go to SCHEDULER > AVAILABLE TIME SEARCH

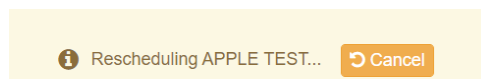
- Set your filters then click search to see all available schedules.
- Search the patient
- Select and set up a recurrence pattern.
- Click submit.
- To view all appointments for a specific patient, search the patient and go to the *Patient Management page and select the Appointment search.*

Rescheduling:

A Reschedule function has been added. This allows rescheduling of an appointment in a single process.

Workflow:

1. Click on an appointment within the scheduler; a pop-up box will appear.
2. Select Reschedule. A pop up will appear at the top of the scheduler view, signifying that a user may now proceed with rescheduling.



3. Within the schedule, select a new appointment time and date. You can easily toggle by using the calendar icon to select the month and day.

4. Make any other changes in the pop-up box and select Reschedule

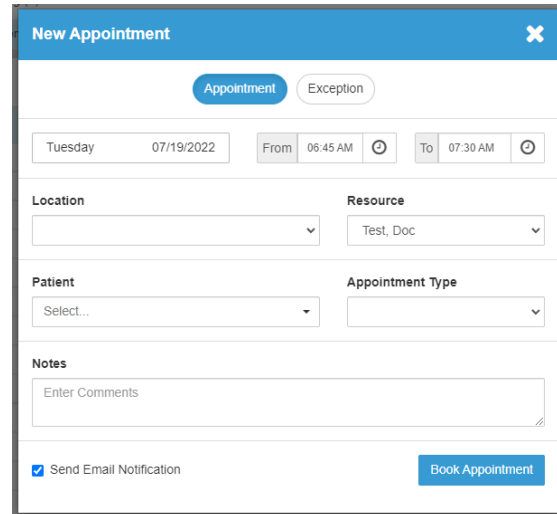
Note: If a user needs to reschedule within the same week, they can skip the workflow above and utilize drag and drop feature.

Appointment Details:

Essential dialogs have been designed to accommodate your workflow needs and allow for easy access to commonly needed functions

Workflow:

1. View the new dialog boxes by clicking on a scheduled patient
2. The Appointment Details Box will appear
3. View or edit the details including name, date & time, location, provider, and notes. From here, you can also Reschedule and Cancel appointments

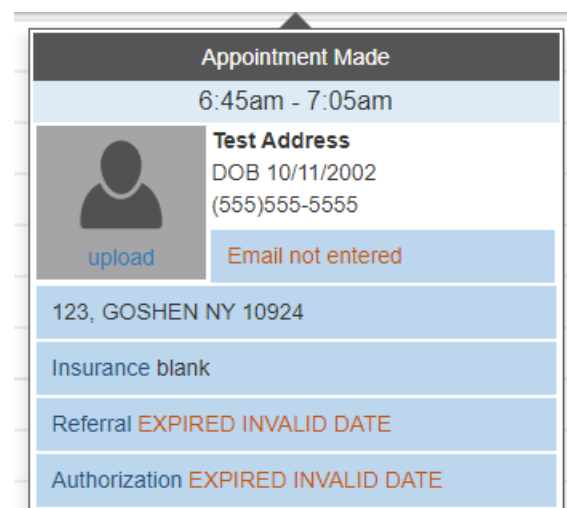


Appointment Hover Box

This appointment-specific hover box allows the user to quickly view and collect key data. This is a user-level preference, not a practice setting. To disable this feature, go to Preferences>Scheduler Preferences and deselect Enable Scheduler Popup.

Users can display:

- Patient Photo
- Appointment Status and Time
- Key Demographics
- Insurance Card & Co-Pay
- Referral
- Authorization
- Notes



Customizing Your Appointment Hover Box Workflow:

1. Go to: Preferences>Scheduler Preferences
2. Select the elements to be displayed
3. Preview to view your customized box
4. Select Save
5. Go to Scheduler View to see the box in your schedule