

# Front Desk Scheduling Part 1



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# Appointment Types

Appointment types may differ depending on department needs.

Example include:

## Primary Care Appointment Types

<b>MDM</b>	<b>Medium Visit</b> non-Medicare physical exams
<b>NOV</b>	<b>New Office Visit</b> new patient initial visit
<b>OVN</b>	<b>Office Visit Nurse</b> non-MD nurse visits only
<b>REG</b>	<b>Regular Visit</b> established appointments
<b>SDV</b>	<b>Same Day Visit</b> same day scheduled appointments
<b>TMV</b>	<b>Telemed Visit</b> telephone/video office visits

Name	Synonym	Duration
ANNUAL WELLNESS VISIT	AWV	20 mins
CONFIDENTIAL VISIT	CVT	20 mins
HIERARCHICAL CONDITION CATE	HCC	20 mins
MEDICARE INITIAL PHYSICAL EXA	MPE	40 mins
MEDIUM VISIT	MDM	20 mins
NEW OFFICE VISIT	NOV	20 mins
NEW WELLNESS EXAM	NWE	40 mins
OFFICE VISIT NURSE	OVN	5 mins
POST HOSPITAL NEW	PHN	20 mins
REGULAR APPOINTMENT	REG	20 mins
SAME DAY VISIT	SDV	20 mins
TELEMED VISIT	TMV	10 mins
TELEMEDICINE VIDEO VISIT	TVV	20 mins

## Specialty Appointment Types

<b>CON</b>	<b>Consultation</b> new patient initial visits
<b>OFV</b>	<b>Office Visit</b> established appointments

Name	Synonym	Duration
CONSULTATION	CON	30 mins
INITIAL WORK COMP VISIT	IWC	30 mins
OFFICE VISIT	OFV	15 mins
OFFICE VISIT NURSE	OVN	5 mins
PERMANENT & STATIONARY 1	WPS	60 mins
PHYSICIAN HOLD	MDH	15 mins
RECHECK VISIT	RCK	15 mins
WORK COMP REPORTS	WRP	30 mins
WORK COMP VISIT	WCV	15 mins

**Note:**

“**Established Patients**” = Patients that have seen an SRS provider within the last **3 years**

“**New Patients**” = seeing an SRS provider for the first time or are reestablishing care if they have not been seen within the past **3 years**.

# How to Schedule

## First Available View

1. Pull up patient using PatientSecure or standard patient lookup
2. Press Tab
3. Pull up the provider by last name or provider number. Press Tab
  - o The department will auto-populate

**MEDICARE, ABN** SHC#: 103-398-758 IFD: ACIN Facility: SRS  
DOB: 11/28/1969 HMO: BAF: BAD ADDRESS  
A-S: 46 years-M H Phone: 619-446-1616 BGAF:

**New Appointment**

Patient: MEDICARE, ABN Reg Category: [Search]  
Appt Reason: [Search] Appt Type: [Search]  
Provider: LIGHT MD, CYRIL SB [Search] [Camera] Duration: [Search] From Date: 12/01/2015 [Calendar]  
Department: FAMILY MEDICINE [Search] Location: [Search]  
Team: [Search] Search: First Available [Settings] [Pt Pref]

Profile Comments | Links | Ancillaries/Resources | Resource - Primary\_Link | Appointment Set

Message(s) for: P

Scheduling Information

Primary msg(s) [P]  
Patient: MEDICARE, ABN

Department: \*\*\*DO NOT BOOK DMV PHYSICALS, PLEASE DIRECT PATIENT TO THE OCC MED DEPARTMENT.\*\*\*

Provider: \*\*SEES 6+\*\*

Last Refreshed: 01:08PM

Appts Filter Refresh

Patient's Appointment List

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No
07/23/2015	THU	09:20AM	CAN	REG	LIGHT MD, CYRIL SB	FP	SM	20	
07/09/2015	THU	08:00AM	CAN	WAL	ADAIR NP, VANESSA NICI	FP	DTM	20	
07/09/2015	THU	09:30AM	CAN	WAL	ADAIR NP, VANESSA NICI	FP	DTM	20	
07/09/2015	THU	10:00AM	CAN	WAL	ADAIR NP, VANESSA NICI	FP	DTM	20	
07/09/2015	THU	11:00AM	CAN	WAL	ADAIR NP, VANESSA NICI	FP	DTM	20	
05/20/2015	WED	11:30AM	CAN	NOV	MASTER PROVIDER	MAS	MM	15	
05/20/2015	WED	02:00PM	CAN	NOV	MASTER PROVIDER	MAS	MM	15	
05/20/2015	WED	02:30PM	CAN	NOV	MASTER PROVIDER	MAS	MM	15	

Links Actions Appt Actions Appt Set Next Cancel

**Note:** the preview pane will explain information related to the department and provider scheduling preferences.

4. Click the magnifying glass at **Appt Type** to list available appointment types (or free type into the field)

**New Appointment**

Patient: MEDICARE, ABN Reg Category: [Search] Preview Inst

Appt Reason: [Search] Appt Type: REGULAR APPOINTMENT [Search] Message(s) for:

Provider: LIGHT MD, CYRIL SB [Search] [Camera] Duration: [Search] Location: [Search]

Department: FAMILY MEDICINE [Search] Search: [Search]

Team: [Search]

Profile Comments | Links | Ancillaries/Resources | Resource - Primary\_Link | App

Name	Synonym	Duration	
ANNUAL WELLNESS VISIT	AWV	20 mins	T
CONFIDENTIAL VISIT	CVT	20 mins	T
HIERARCHICAL CONDITION CATE(HCC)	HCC	20 mins	T
MEDICARE INITIAL PHYSICAL EXA MPE	MPE	40 mins	T
MEDIUM VISIT	MDM	20 mins	T
NEW OFFICE VISIT	NOV	20 mins	T
NEW WELLNESS EXAM	NWE	40 mins	T
OFFICE VISIT NURSE	OVN	5 mins	T
POST HOSPITAL NEW	PHN	20 mins	T
REGULAR APPOINTMENT	REG	20 mins	T
SAME DAY VISIT	SDV	20 mins	T
TELEMED VISIT	TMV	10 mins	T
TELEMEDICINE VIDEO VISIT	TVV	20 mins	T

Patient's Appointment List

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur
------	-----	------	--------	------	----------	------	-----	-----

5. Choose the **appointment type** and Press Tab.

# How to Schedule

Once you select the *Appointment Type*, the application will always bring you to the **Copay Screen** (unless there is no insurance on file).

## 6. Generate a Co-payment

**Copay Screen**

New Appointment - Referral/Copay

Appointment ( 1 of 1 )

Provider	Team/Cat	Dept	Type	Dur	Loc	Req	Sequencing
GRANT MD,JOHN J		FP	REG	15		Y	Appointment

Insurance: NEW-PPO  All Insurances

HMO:  
Effective: Term:  
Plan: No MCA plan  
PCP:

Plan Sched Comment:

Referral No.: ... Missing Referral Type:

Copay: 15.00  Authorization No.:

◀ Prev Appt. **OK** ▶

**Note:** Copays must be generated for all applicable appointments.

Non-generated copay amounts produce a report that will require you to reschedule these appointments.

- Click the **magnifying glass** to generate the copay or **type G**
- Click **OK**

# How to Schedule

Once you generate the copay, you will be brought back to the **New Appointment Screen** to finish inputting the Appointment Criteria.

**New Appointment**

Patient: MEDICARE,ABN Reg Category: [ ]  
Appt Reason: [ ] Appt Type: REGULAR APPOINTMENT  
Provider: LIGHT MD,CYRIL SB Duration: 20 From Date: 12/01/2015  
Department: FAMILY MEDICINE Location: [ ]  
Team: [ ] Search: First Available Settings Pt Pref

Profile Comments Links Ancillaries/Resources Resource - Primary Link Appointment Set

Last Refreshed: 01:08PM

**Patient's Appointment List** Apts Filter Refresh

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
07/23/2015	THU	09:20AM	CAN	REG	LIGHT MD,CYRIL SB	FP	SM	20		206856353	CIV
07/09/2015	THU	08:00AM	CAN	WAL	ADAIR NP,VANESSA NIC	FP	DTM	20		206796100	CV
07/09/2015	THU	09:30AM	CAN	WAL	ADAIR NP,VANESSA NIC	FP	DTM	20		206796111	CV
07/09/2015	THU	10:00AM	CAN	WAL	ADAIR NP,VANESSA NIC	FP	DTM	20		206796122	CV
07/09/2015	THU	11:00AM	CAN	WAL	ADAIR NP,VANESSA NIC	FP	DTM	20		206796126	CV
05/20/2015	WED	11:30AM	CAN	NOV	MASTER PROVIDER	MAS	MM	15		206126665	CV
05/20/2015	WED	02:00PM	CAN	NOV	MASTER PROVIDER	MAS	MM	15		206126664	CV

7. Select the **From Date**
  - This will filter the search results beginning with the date you choose
8. Verify the Search field is set to **First Available**
  - This will affect how you see the provider's schedule

**New Appointment**

Patient: SRSTEST,FERRIS Reg Category: [ ]  
Appt Reason: [ ] Appt Type: [ ]  
Provider: [ ] Duration: [ ] From Date: 09/07/2018  
Department: [ ] Location: [ ]  
Team: [ ] Search: Schedule Settings Pt Pref

Profile Comments Links Ancillaries/Resources Resource - Primary Link Appointment Set

Last Refreshed: 10:39AM

**Patient's Appointment List** Apts Filter Refresh

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
11/20/2018	TUE	11:40AM	CAN	REG	TRUE MD,WAYNE S	FP	SA	20		214366901	C\$
11/09/2018	FRI	10:00AM	CAN	REG	TRUE MD,WAYNE S	FP	SA	100		214368368	CV\$
11/02/2018	FRI	02:00PM	PEN	REG	CAO MD,MICHELLE	FP	SA	20		214367403	C\$
10/30/2018	TUE	11:40AM	PEN	REG	TRUE MD,WAYNE S	FP	SA	20		214366900	C\$
10/25/2018	THU	04:00PM	PEN	REG	TRUE MD,WAYNE S	FP	SA	20		214368367	C\$
10/19/2018	FRI	08:40AM	CAN	REG	TRUE MD,WAYNE S	FP	SA	20		214076564	C\$
10/17/2018	WED	08:20AM	PEN	REG	ABOLA MD,AMY SUGGS	FP	RB	20		214369672	C\$
10/17/2018	WED	08:40AM	PEN	REG	TRUE MD,WAYNE S	FP	SA	20		214076563	CW\$

Links Actions Appt Actions Appt Set Next Cancel

9. Click **Next**

# How to Schedule

All appointments listed meet the scheduling criteria that was entered on the New Appointment Screen.

Appointments are listed in chronological order.

## First Available Screen

**New Appointment - First Available Search**

Appointment Being Scheduled

Patient	Provider	Dept	Cat/Team	Type	Loc
MEDICARE,ABN	LIGHT MD,CYRIL SB	FP		REG	

Choose Time

Date	Day	Pt Pref	Time	Type	Provider	Location	Conflict
12/01/2015	TUE		01:20PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/01/2015	TUE		01:40PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/01/2015	TUE		02:00PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/01/2015	TUE		02:40PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/17/2015	THU		09:00AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/17/2015	THU		04:40PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/18/2015	FRI		02:20PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/18/2015	FRI		03:40PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/21/2015	MON		10:20AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/21/2015	MON		10:40AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/21/2015	MON		12:20PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/21/2015	MON		12:40PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/21/2015	MON		04:20PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/21/2015	MON		04:40PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/21/2015	MON		06:20PM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/23/2015	WED		08:20AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/23/2015	WED		08:40AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/23/2015	WED		09:00AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/23/2015	WED		09:20AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	
12/23/2015	WED		10:40AM	REG	LIGHT MD,CYRIL SB	SORRENTO MESA	

Preview Instructions

Message(s) for: P

Scheduling Information

Primary msg(s) [P]  
Patient: MEDICARE,ABN

Department: \*\*\*DO NOT BOOK DMV PHYSICALS, PLEASE DIRECT PATIENT TO THE OCC MED DEPARTMENT.\*\*\*

Provider: \*\*SEES 6\*\*

Appointment Type: BOOK OFFICE VISIT S. \*\*\*BOOK ABDOMINAL PAIN BEFORE 300PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY WANT THE PATIENT TO COME IN EARLIER\*\*

Show Detail Conflict Info Patient Appts Back Next Cancel

**Remember:**  
Review the preview pane before selecting a timeslot

10. Select an appointment by **clicking on it** (it will highlight and turn blue)

11. Click **Next**

# How to Schedule

Once you select an appointment you will be brought to the **Appointment Data Form**.

Enter information about the appointment such as **reason for visit**, referring provider, etc.

ADF Screen

**Appointment Data Form - General**

Patient: MEDICARE,ABN      FSC: MED      H: 619-446-1616  
EMRN: 12-45-78-96      AGE: 47      COL:      W: 858-499-4000

Date	Day	Time	Stat	Type	Dur	Appt#
12/28/2016	WED	8:40A	PEN	REG	20	

Provider: LIGHT MD,CYRIL SB      Dept: FP      Loc: SM

Comment1: COUGH

Comment2:

OM #:      Case #:      Patient Condition Related to: NONE

Ordering Prov.:      Actual Prov.: LIGHT MD,CYRIL SB

Referring Prov.:      PCP: TEST MD,MYSHARP

Chart Tracking Loc: SM FAMILY PRACTICE      Copay: 00.00      Override Copay:

Bill Prov.: LIGHT MD,CYRIL SB      Bill Loc: DOCTORS OFFICE

Bill Area: SORRENTO MESA      Alternate Insurance:

Next      Save      Cancel

12. Enter the **reason for visit** in **Comment 1**

13. Click **Save**

## Pt. Condition Related To Field

- This field auto-populates to **NONE**.
  - Follow site specific guidelines for updating this field

# How to Schedule

**Two screens** will display after the Appointment Data Form (ADF) when scheduling an appointment within 10 days of the check-in date.

## 1. Visit Insurance Screen will display first

*At this point, verify with the patient that the insurance on file is correct.  
If the patient is in front of you, ask for their insurance card to verify.*

Patient: MEDICARE,ABN MRN: 12-45-78-96 DOB: 11/28/1969 Age: 47 Sex: M  
Patient: MEDICARE,ABN MRN: 12-45-78-96 DOB: 11/28/1969 Age: 47 Sex: M  
Adm #: 210519287 Adm Dt: PTP: ZZZ REV FSC: 24 Prog: SRSNA  
This visit has never been Verified

PR	Plan	Company Name	Plan Description	FSC
1	F024	MEDICARE-PALMETTO GBA	MEDICARE	24
2	Z99		AUTO ASSIGNED SELF PAY	1

**A** Add Plans...      **K** Link Actions      **S** Swap Plan Order  
**D** Delete Plan      **L** Wipe Clean, AutoAsgn Plns      **T** Audit Trail  
**F** Edit Follow-ups      **M** Move Plan      **U** View All Follow-ups  
**G** Eligibility Status Edit      **O** Documents      **V** View a Plan  
**I** Patient Inquiry      **R** Referral/Authorizations      **W** Warnings

Actions ▼ **OK** Cancel

- Click **OK**

**Note:** If the insurance on file is not current, verify new insurance with patient and contact the Site BSR for assistance

# How to Schedule

2. **The Alerts Screen** will display if there are any registration or insurance issues on the patient's account. Alerts must be corrected before continuing scheduling the appointment. To correct an alert:

Alerts are classified into two categories:

- 1) **Registration (Y7)** and  
All PSRs are responsible for correcting
- 2) **Insurance follow up (IF).**  
BSRs can correct these alerts (as well as Y7 alerts)

**Alerts** Hold Bill/Claim Selector Screen

Patient: MEDICARE,ABN MRN: 12-45-78-96 Visit No: 210519426  
VTYP: ZZZ Adm Dt: Dis Dt:  
Conf Comm:

Flag Description	User	Date	Exp Date	AC
AVMP-RETURN MAIL ADDR L1	SYSTEM	12/28/2016		Y7

A Add a Flag E Edit a Flag S Select Action  
C Action Code I Inquire U User View/Show All  
D Delete a Flag R Reevaluate

Actions **OK** Cancel

- Click the appropriate alert
- Click Action Code
- Update the Address field, Adr Status and LOR fields
- **Click OK**

*Hold Bill screen will display any remaining alerts on the patient's account.*

Hold Bill 30 - SHARP REES STEALY AVM GROUP 30

Hold Bill/Claim Selector Screen

Patient: MEDICARE,ABN MRN: 12-45-78-96 Visit Dis  
VTYP: ZZZ Adm Dt: Dis Dt:  
Conf Comm:

Flag Description	User	Date	Exp Date
AVMP-RETURN MAIL ADDR L1	SYSTEM	12/28/2016	

A Add a Flag E Edit a Flag S Select Action  
C Action Code I Inquire U User View/Show All  
D Delete a Flag R Reevaluate

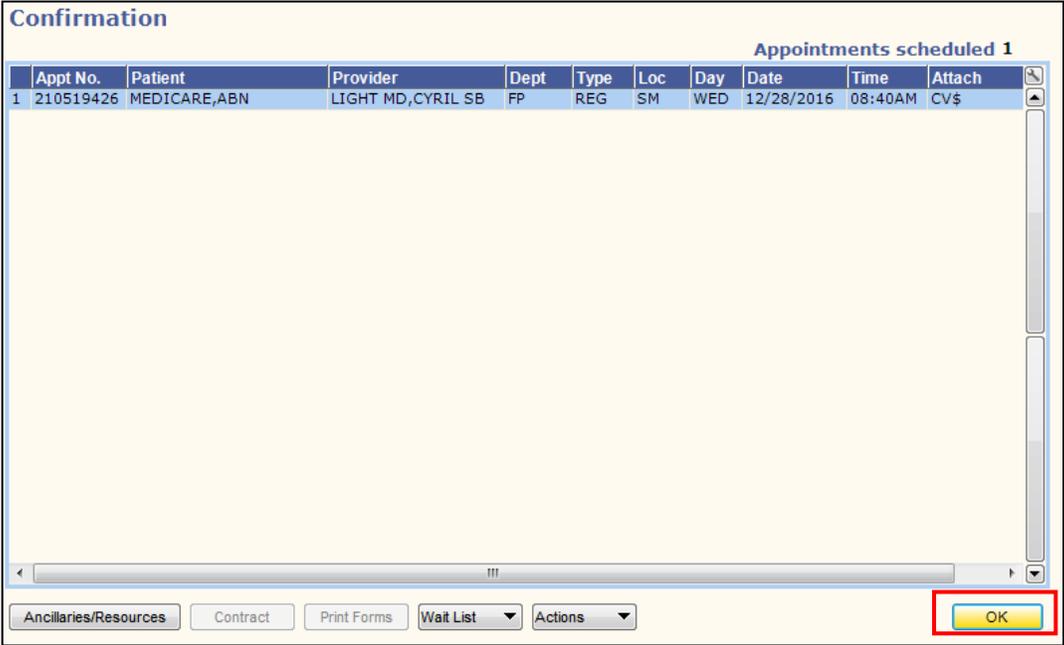
Actions **OK** Cancel

**Note:** If the alert you just corrected still displays on the Hold Bill screen, **click Reevaluate** to refresh the screen and the alert should disappear.

# How to Schedule

At this point, your appointment **has been successfully scheduled**. Ask patient if they would like an appointment reminder card, or for you to write down the appointment information for them.

## Confirmation Screen



- Click **OK**

**Note:**  
**ONLY** write down the appointment information.  
**NOT** patient information.

# How to Schedule

## Schedule View

### Reasons to schedule an appointment using schedule search.

- Overbook or Doublebook into a timeslot
- Schedule into a different appointment type
- Schedule into a Frozen timeslot (non-available slot)
- Add Time (for clinical staff and providers)

The screenshot shows a medical scheduling software interface. The top navigation bar includes 'PSR AW Menu', 'Break Link', 'Hide VTB', 'Tools', 'Help', and 'Logout'. The main header area displays patient information: 'MEDICARE, ABN', 'SHC#: 103-398-758', 'IFD: ACIN', 'Facility: SRS', 'DOB: 11/28/1969', 'HMO: BAD ADDRESS', 'A-S: 46 years-M', 'H Phone: 619-446-1616', and 'BGAF:'. Below this is the 'New Appointment' form with fields for 'Patient', 'Appt Reason', 'Provider', 'Department', 'Team', 'Category', 'Appt Type', 'Duration', 'From Date', and 'Location'. The 'Search' dropdown is set to 'Schedule'. A 'Next' button is highlighted in red. Below the form is a 'Patient's Appointment List' table with columns for Date, Day, Time, Status, Type, Provider, Dept, Loc, Dur, Set No., Appt No., and Attach. The table lists several appointments for the patient. At the bottom right, there are 'Next' and 'Cancel' buttons, with 'Next' highlighted in red.

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
07/23/2015	THU	09:20AM	CAN	REG	LIGHT MD,CYRIL SB	FP	SM	20		206355353	CIV
07/09/2015	THU	08:00AM	CAN	WAL	ADAIR NP,VANESSA NICI	FP	DTM	20		206796100	CV
07/09/2015	THU	09:30AM	CAN	WAL	ADAIR NP,VANESSA NICI	FP	DTM	20		206796111	CV
07/09/2015	THU	10:00AM	CAN	WAL	ADAIR NP,VANESSA NICI	FP	DTM	20		206796122	CV
07/09/2015	THU	11:00AM	CAN	WAL	ADAIR NP,VANESSA NICI	FP	DTM	20		206796126	CV
05/20/2015	WED	11:30AM	CAN	NOV	MASTER PROVIDER	MAS	MM	15		206126665	CV
05/20/2015	WED	02:00PM	CAN	NOV	MASTER PROVIDER	MAS	MM	15		206126664	CV
05/20/2015	WED	02:30PM	CAN	NOV	MASTER PROVIDER	MAS	MM	15		206126667	CV

- Complete the first steps of the scheduling process (**Patient, Provider, Appt Type, Copay, From Date**)
1. Change the Search field to **Schedule**
  2. Click **Next**



# How to Schedule

## Schedule Search – Buttons

**New Appointment - Schedule Search**  
 Appointment being scheduled: ( 1 of 5 )

**Show Appointments** [Filter] [Print] [Refresh]

MEDICARE, ABN

AM	SM	Bkd/Total
>	08:20A	0/1 REG...
>	08:40A	1/2 REG
>	09:00A	1/1 MDM
>	09:20A	1/1 NOV
>	09:40A	1 per slot...
>	10:00A	0/1 REG...
>	10:20A	0/4 REG
>	10:40A	0/1 MDM
>	11:00A	1 per slot
>	11:20A	S: 5 ANY
>	11:40A	
>	12:00N	0/1 ANY...
>	12:20P	0/0 LUN

**Patient Appointments** | **Actions** | **Sched Detail** | **Back** | **Next** | **Cancel**

**Preview** | **Instructions**

Message(s) for: P

**Scheduling Information**

**Primary msg(s) [P]**  
 Patient: MEDICARE, ABN

**Department:** \*\*BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN THE EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY WANT THE PATIENT TO COME IN EARLIER.\*\*

**Provider:** \*\*SEES 6+\*\*

**Appointment Type:** BOOK OFFICE VISITS. \*\*\*BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY WANT THE PATIENT TO COME IN EARLIER\*\*\*

**A Show Appointments**  
 Allows you to change viewable schedule information.

**B Patient Appointments**  
 Displays the Patient Appointments screen.

**C Actions**  
 Displays a dropdown list of tasks.

**Actions** [Dropdown] | **Sched I**

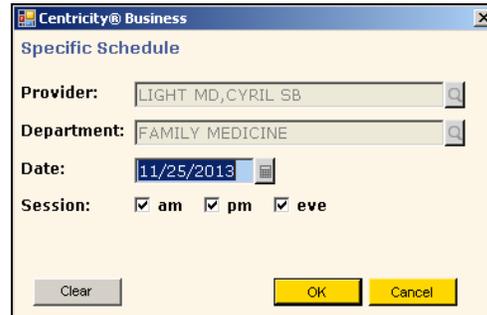
- Specific Schedule
- Add Time
- Add Comments
- View Conflicts
- View Resources
- Patient List
- Customize Tool Tips
- View Legend

# How to Schedule

## C Actions Button

### Specific Schedule –

Allows you to search for a specific provider schedule by changing to a different date.



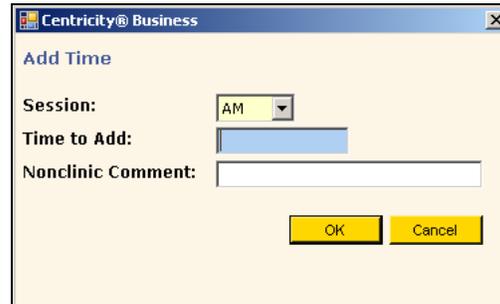
Centricity@ Business  
Specific Schedule

Provider: LIGHT MD,CYRIL SB  
Department: FAMILY MEDICINE  
Date: 11/25/2013  
Session:  am  pm  eve

Clear OK Cancel

### Add Time –

To add a time slot onto the appointment schedule of a provider.



Centricity@ Business  
Add Time

Session: AM  
Time to Add: [text box]  
Nonclinic Comment: [text box]

OK Cancel

### Add Comments –

Allows you to specify a comment for a time slot.



Centricity@ Business  
Add/Edit Timeslot Comment

Comment to Add: [text box]

OK Cancel

### View Conflicts – View conflicts for appointment.

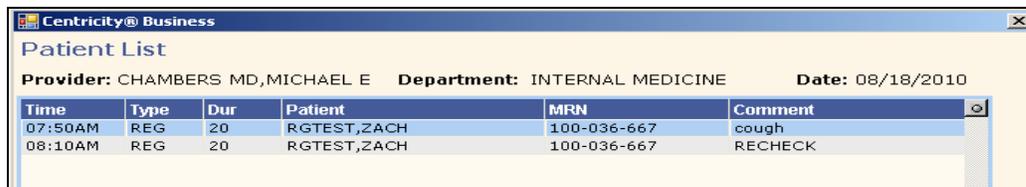


Centricity@ Business Alert

 Patient has future appointment in this department, remind patient. (SQL Custom rule: MULT APPTS SAME DEPT - INTERNAL MEDICINE).

OK

### Patient List – View a list of scheduled patients for the selected day.



Centricity@ Business  
Patient List

Provider: CHAMBERS MD,MICHAEL E    Department: INTERNAL MEDICINE    Date: 08/18/2010

Time	Type	Dur	Patient	MRN	Comment
07:50AM	REG	20	RGTEST,ZACH	100-036-667	cough
08:10AM	REG	20	RGTEST,ZACH	100-036-667	RECHECK

# How to Schedule

## D Sched Detail

Allows you to view additional information about the provider's schedule and the patient.

- You may view additional information under the Session Details tab, the Slot details tab and the Appt – Patient tab.

New Appointment - Schedule Search  
Appointment being scheduled: ( 1 of 1 )

MEDICARE,ABN  
LIGHT MD,CYRIL SB  
FAMILY MEDICINE  
11/25/2013 Monday 17#

AM SM	Bkd/Total	Avl	Dur
01:20P	0/0 LUN	-	60 LUNCH
02:20P	0/1 TMV...	1	20
02:40P	0/1 MDM...	-	20 BEVERAGE,MICHAEL 68 Y REG 20
03:00P	0/1 ANY...	1	20
03:20P	1/1 REG...	-	20 JONES,HARRY L 90 Y REG 20
03:40P	1/1 REG...	-	20 ESPINOSA,ALBERT 73 Y REG 20
04:00P	1/1 REG...	-	20 WAHL,DENNIS L 69 Y REG 20
04:20P	1/1 REG...	-	20 ZAMORA,ANGELES L 52 Y REG 20
04:40P	0/1 REG...	1	20
05:00P	1/1 REG...	-	20 ESPINOZA,ISAAC 23 Y REG 20
05:20P	0/1 ANY...	1	20
05:40P	0/1 REG...	-	20 LAINE,MARILYN 85 Y TMV 20

Hide Detail

Session Detail  
LIGHT MD,CYRIL SB  
FAMILY MEDICINE  
17 Booked appointments  
73 % Booked slot time  
Schedule Comment  
SM AM/PM  
PM session in Location:  
SORRENTO MESA  
7 Booked appointments  
63 % Booked slot time  
Session Comment

Message(s) for: P  
Scheduling Information  
Primary msg(s) [P]  
Patient: MEDICARE,ABN  
Department: \*\*BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN THE EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY WANT THE PATIENT TO COME IN EARLIER.\*\*  
Provider: \*\*SEES 6+\*\*  
Appointment Type: BOOK OFFICE VISITS. \*\*\*BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY

- Click Hide Detail to return to the previous view.

# How to Schedule

## Scheduling an Appointment in **Schedule**

Review the Preview Pane before selecting a timeslot

Diagram illustrating a callout box for a timeslot. The callout box contains the following information:

- MEDICARE, ABN
- LIGHT MD, CYRIL SB
- FAMILY MEDICINE
- 11/25/13 M
- SM AM/PM
- 17#
- AM SM Bkd/Total
- 01:20P 0/0 LUN

Annotations:

- Location abbreviation (ex. SM = Sorrento Mesa) points to the "SM" in "SM AM/PM".
- Number of patients scheduled. points to the "17#" in the callout box.

Screenshot of the "New Appointment - Schedule Search" interface. The interface displays a grid of appointment timeslots for five different dates. The first date, 11/25/13 M, is highlighted in red. The timeslot 04:40P 0/1 REG... is also highlighted in red. The "Next" button is highlighted in red. The "Preview" pane on the right shows the following information:

- Message(s) for: P
- Scheduling Information
- Primary msg(s) [P]
- Patient: MEDICARE, ABN
- Department: \*\*BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN THE EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY WANT THE PATIENT TO COME IN EARLIER.\*\*
- Provider: \*\*SEES 6+\*\*
- Appointment Type: BOOK OFFICE VISITS. \*\*BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY

- Select an appointment time by **clicking on the timeslot**.
  - **Remember: Green Slots = Available to book**
- Click **Next**
- Continue the scheduling process until you reach the **Confirmation Screen**.
  - **Appointment Data Form**
  - **Insurance Page**
  - **Alerts Page**
  - **Confirmation Screen**

# Detail Search

**Detail Search** allows you to view a provider's schedule in detail.

- To view a single session detail of a provider's schedule

**New Appointment**

<b>Patient:</b>	MEDICARE, ABN	...	Reg	<b>Category:</b>			
<b>Appt Reason:</b>				<b>Appt Type:</b>	REGULAR APPOINTMENT		
<b>Provider:</b>	LIGHT MD, CYRIL SB	Q		<b>Duration:</b>	30	<b>From Date:</b>	11/22/2013
<b>Department:</b>	FAMILY MEDICINE	Q		<b>Location:</b>			
<b>Team:</b>		Q		<b>Search:</b>	Detail	Settings	Pt Pref

**New Appointment - Schedule Search**  
Appointment being scheduled: ( 1 of 1 )

RGTEST, ZACH

**CHAMBERS MD, MICHAEL E**  
INTERNAL MEDICINE  
08/19/2010 Wednesday 4#

AM	CV	Bkd/Total	Avl	Dur		
06:00A		0/0 XXX...	-	20	RGTEST, ZACH 31 Y	REG 20
07:50A		3/6 ANY	-	20	RGTEST, ZACH 31 Y	REG 20
08:10A		3 REG	-	20	RGTEST, ZACH 31 Y	REG 20
08:30A		1 per slot	-	20	✓ RGTEST, ZACH 31 Y	REG 20
08:50A			1	20		
09:10A			1	20		
09:30A			1	20		
09:50A		0/6 ANY	1	20		
10:10A		1 per slot	1	20		
10:30A			1	20		
10:50A			1	20		
11:10A			1	20		
11:30A			1	20		
11:50A		0/1 ANY...	1	20		
12:10P		0/1 ANY...	1	20		
12:30P		0/0 LUN	-	60	LUNCH	

**Session Detail** Slot Appt - Patient

CHAMBERS MD, MICHAEL E  
INTERNAL MEDICINE

4 **Booked appointments**  
17 **% Booked slot time**

**Schedule Comment**

CV AM/PM

AM **session in Location:**  
CHULA VISTA

4 **Booked appointments**  
28 **% Booked slot time**

**Session Comment**

← Back Next → Cancel

- A** Schedule detail
- B** Session, Slot, and Patient Appointment details
- C** Buttons to move back and forth through provider schedules

# Department Search

Displays the soonest available appointment by **department**.

**New Appointment**

Patient: RGTEST,ZACH  Category:

Appt Reason:  Appt Type: CONSULTATION

Provider:   Duration: 30 From Date: 02/12/2011

Department: DERMATOLOGY Location:

Team:  Search: Schedule

- Enter the **Department** (skip the Provider field)
- Enter the **appointment type**
- **Select preferred location if applicable**
- Change Search field to **Schedule**
- Click **Next**
- Select the appropriate appointment and click Next

**New Appointment - Schedule Search**

Appointment being scheduled: ( 1 of 1 )

RGTEST,ZACH

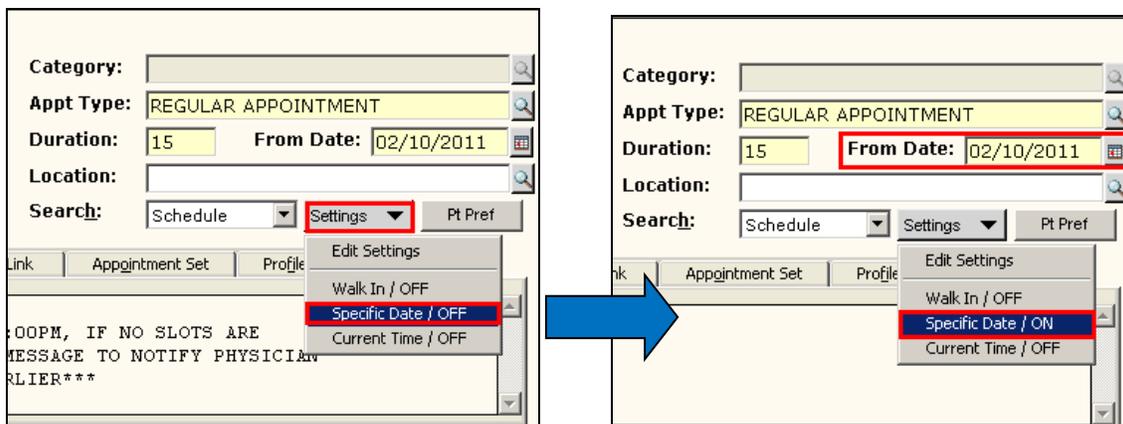
THORNTON MD,CAROLINE DERMATOLOGY 02/14/2011 Monday OTAY AM/PM					KUWAHARA MD,RAYMOND TAKASHI DERMATOLOGY 02/14/2011 Monday LMW AM/PM					LEONHARDT MD,JANIE M DERMATOLOGY 02/14/2011 Monday LMW AM/PM				
AM OR	Bkd/Total	Avl	Dur	0#	AM LMW	Bkd/Total	Avl	Dur	0#	AM LMW	Bkd/Total	Avl	Dur	0#
08:30A	0/1 SRM	1	15		08:00A	0/1 OFV	1	15		07:45A	0/1 OFV	1	15	
08:45A	0/1 NOV	1	15		08:15A	0/1 OFV	1	15		08:00A	0/1 OFV	1	15	
▶ 09:00A	0/1 CON	1	30		08:30A	0/1 OFV	1	15		08:15A	0/1 OFV	1	15	
09:30A	0/1 OFV	1	15		08:45A	0/1 OFV	1	15		08:30A	0/1 OFV	1	15	
09:45A	0/1 OFV	1	15		▶ 09:00A	0/1 CON	1	30		08:45A	0/1 OFV	1	15	
10:00A	0/1 MDH	1	15		09:30A	0/1 MDH	1	15		▶ 09:00A	0/1 CON	1	30	
10:15A	0/1 OFV	1	15		09:45A	0/1 RCK	1	15		09:30A	0/1 MDH	1	15	
10:30A	0/1 NOV	1	15		10:00A	0/1 OFV	1	15		09:45A	0/1 RCK	1	15	
10:45A	0/1 OFV	1	15		10:15A	0/1 NOV	1	15		10:00A	0/1 OFV	1	15	
11:00A	0/1 OFV	1	15		10:30A	0/1 RCK	1	15		10:15A	0/1 NOV	1	15	
11:15A	0/1 MDH	1	15		10:45A	0/1 NOV	1	15		10:30A	0/1 RCK	1	15	
11:30A	0/1 MSR	1	60		11:00A	0/1 MDH	1	15		10:45A	0/1 NOV	1	15	
-	-	-	-		11:15A	0/1 RCK	1	15		11:00A	0/1 MDH	1	15	
📅 12:30P	0/0 LUN	-	60	LUNCH	11:30A	0/1 OFV	1	15		11:15A	0/1 MSR	1	60	
-	-	-	-		11:45A	0/1 MSR	1	45		-	-	-	-	
-	-	-	-		📅 12:30P	0/0 LUN	-	60	LUNCH	📅 12:15P	0/0 LUN	-	45	LUNCH
-	-	-	-		-	-	-	-		-	-	-	-	
PM OR	Bkd/Total	Avl	Dur		-	-	-	-		PM LMW	Bkd/Total	Avl	Dur	
▶ 01:30P	0/1 CON	1	30		-	-	-	-		-	-	-	-	

# Specific Day Search

A **Specific Day Search** is used when an appointment ***has*** to be scheduled on a particular date.

The screenshot shows the 'New Appointment' form with the following fields: Patient: RGTEST,ZACH; Appt Reason: (empty); Provider: GRANT MD,JOHN J; Department: FAMILY MEDICINE; Team: (empty); Category: (empty); Appt Type: REGULAR APPOINTMENT; Duration: 15; From Date: 02/10/2011; Location: (empty); Search: Schedule, Settings, Pt Pref. The 'Settings' dropdown menu is open, showing options: Edit Settings, Walk In / OFF, Specific Date / OFF (highlighted), and Current Time / OFF. Below the form, there are tabs: Pre-Sched Msg, Links, Ancillaries/Resources, Resource - Primary Link, Appointment Set, and Profile. The 'Appointment Type Messages' section contains text: 'BOOK OFFICE VISITS. \*\*\*BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE AVAILABLE BOOK PATIENT IN EARLIEST SLOT AND SEND A MESSAGE TO NOTIFY PHYSICIAN AS THE PHYSICIAN MAY WANT THE PATIENT TO COME IN EARLIER\*\*\*'.

- At the From Date specify the date
- Click on **Settings** and Click **Specific Date** to enable



# Special Circumstances in the ADF

## Authorization Field in ADF

**The Auth: field** should be populated if patients are **Self-pay** or have an **Outside HMO**:

### SELPAY

- Ask the patient if they have insurance.
- Verify Visit Notes for additional information.
- If no insurance, inform the patient about the correct deposit amount and document 'SELPAY VERIFIED' in the Auth field.

**Appointment Data Form - General**

Patient: MEDICARE,ABN      FSC: MED      H: 619-446-1616  
EMRN: 12-45-78-96      AGE: 47      COL:      W: 858-499-4000

Date	Day	Time	Stat	Type	Dur	Appt#
12/28/2016	WED	8:40A	PEN	REG	20	

Provider: LIGHT MD,CYRIL SB      Dept: FP      Loc: SM

Comment

Comment1: COUGH      **Auth:** SELPAY VERIFIED

Comment2:      OVN Arr Time:      Package ID:

OM #:      Case #:      Patient Condition Related to: NONE

Ordering Prov.:      Actual Prov.: LIGHT MD,CYRIL SB

Referring Prov.:      PCP: TEST MD,MYSHARP

Chart Tracking Loc: SM FAMILY PRACTICE      Copay: 00.00      Override Copay:

Bill Prov.: LIGHT MD,CYRIL SB      Bill Loc: DOCTORS OFFICE

Bill Area: SORRENTO MESA      Alternate Insurance:

### Outside HMO (OHM) patients with a referral: "authorization number"

- Authorization numbers are found on referrals for outside HMO patients.
- Do not use symbols or punctuation in the Auth: field.

**Appointment Data Form - General**

Patient: MEDICARE,ABN      FSC: MED      H: 619-446-1616  
EMRN: 12-45-78-96      AGE: 47      COL:      W: 858-499-4000

Date	Day	Time	Stat	Type	Dur	Appt#
12/28/2016	WED	8:40A	PEN	REG	20	

Provider: LIGHT MD,CYRIL SB      Dept: FP      Loc: SM

Comment

Comment1: COUGH      **Auth:** 12345678

Comment2:      OVN Arr Time:      Package ID:

OM #:      Case #:      Patient Condition Related to: NONE

Ordering Prov.:      Actual Prov.: LIGHT MD,CYRIL SB

Referring Prov.:      PCP: TEST MD,MYSHARP

Chart Tracking Loc: SM FAMILY PRACTICE      Copay: 00.00      Override Copay:

Bill Prov.: LIGHT MD,CYRIL SB      Bill Loc: DOCTORS OFFICE

Bill Area: SORRENTO MESA      Alternate Insurance:

# Special Circumstances in the ADF

## Referring Provider

**Appointment Data Form - General**

**Patient:** MEDICARE,ABN      **FSC:** MED      **H:** 619-446-1616  
**EMRN:** 12-45-78-96      **AGE:** 47      **COL:**      **W:** 858-499-4000

Date	Day	Time	Stat	Type	Dur	Appt#
01/17/2017	TUE	3:30P	PEN	CON	30	
<b>Provider</b>	WRIGHT MD, CHERYL D		<b>Dept</b>	RHE	<b>Loc</b>	RB
<b>Comment</b>						

**Comment1:** BACK PAIN      **Auth:**   
**Comment2:**       **OVN Arr Time:**   
**OM #:**       **Case #:**       **Package ID:**   
**Patient Condition Related to:** NONE

**Ordering Prov.:**       **Actual Prov.:** WRIGHT MD, CHERYL D  
**Referring Prov.:** LIGHT MD, CYRIL SB      **PCP:** TEST MD, MYSHARP  
**Chart Tracking Loc:** RB RHEUMATOLOGY      **Copay:** 00.00      **Override Copay:**   
**Bill Prov.:** WRIGHT MD, CHERYL D      **Bill Loc:** DOCTORS OFFICE  
**Bill Area:** RANCHO BERNARDO      **Alternate Insurance:**

1. When scheduling certain appointments, the referring provider must be entered on the ADF
2. Complete the **Referring Provider** field
  - *The Ordering Provider field will auto-populate with the same provider*
3. Click Save

## ADF Key Terms

<b>Actual Provider</b>	The provider who is providing the service
<b>Ordering Provider</b>	The provider who is ordering the test
<b>Referring Provider</b>	The provider who referred the patient. Primarily used when scheduling consultations (CON)
<b>Billing Provider</b>	The provider who receives credit for the visit

**Note:** The **Actual, Ordering, Referring** and **Billing Provider** are not always the same. This information is vital for gathering statistical data and production of reports.

# Special Circumstances in the ADF

## Alternate Financial Status Classification (FSC)

### Appointment Data Form - General

<b>Patient:</b> MEDICARE,ABN	<b>FSC:</b> MED	<b>H:</b> 619-446-1616
<b>EMRN:</b> 12-45-78-96	<b>AGE:</b> 47	<b>COL:</b> W: 858-499-4000

Date	Day	Time	Stat	Type	Dur	Appt#
01/17/2017	TUE	3:30P	PEN	CON	30	
<b>Provider</b>	WRIGHT MD,CHERYL D		<b>Dept</b>	RHE	<b>Loc</b>	RB

**Comment**

<b>Comment1:</b> RESEARCH	<b>Auth:</b>	
<b>Comment2:</b>	<b>OVN Arr Time:</b>	
<b>OM #:</b>	<b>Package ID:</b>	
<b>Case #:</b>		
<b>Patient Condition Related to:</b> NONE		
<b>Ordering Prov.:</b>	<b>Actual Prov.:</b> WRIGHT MD,CHERYL D	
<b>Referring Prov.:</b> LIGHT MD,CYRIL SB	<b>PCP:</b> TEST MD,MYSHARP	
<b>Chart Tracking Loc:</b> RB RHEUMATOLOGY	<b>Copay:</b> 00.00	<b>Override Copay:</b>
<b>Bill Prov.:</b> WRIGHT MD,CHERYL D	<b>Bill Loc:</b> DOCTORS OFFICE	
<b>Bill Area:</b> RANCHO BERNARDO	<b>Alternate Insurance:</b> RES	

Next Save Cancel

- The FSC indicates a mnemonic for the **patient's insurance/billing method**.
- When a patient is scheduled for an appointment that **requires a FSC other than their primary insurance**, the user should select the correct FSC code to alternate. (i.e. RES for research patients or VSP for vision insurance)
- Complete the Appointment Data Form (ADF).
- **Click Save.**

**Note:** Your department(s) will go over which Alternative FSC codes to use.

# Overbooking a Provider's Schedule

**Overbooking** is when an appointment is scheduled into a slot that is either:

- Already booked
- Frozen

The system will **display a message** when a scheduler tries to book an appointment into a slot that is not available.

New Appointment - Schedule Search  
Appointment being scheduled: ( 1 of 1 ) Show Appointments

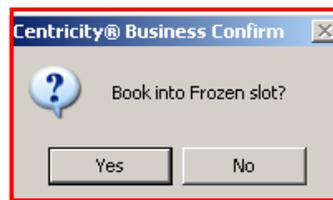
RGTEST,ZACH

AM	CV	Bkd/Total	Avl	Dur	
06:00A		0/0 XXX...	-	20	REG 20
07:50A		3/6 ANY	-	20	REG 20
08:10A		3 REG	-	20	REG 20
08:30A		1 per slot	-	20	✓ REG
08:50A			1	20	
09:10A			1	20	
09:30A			1	20	
09:50A		0/6 ANY	1	20	
10:10A		1 per slot	1	20	
10:30A			1	20	
10:50A			1	20	
11:10A			1	20	
11:30A			1	20	
11:50A		0/1 ANY...	1	20	
12:10P		0/1 ANY...	1	20	
12:30P		0/0 LUN	-	60	LUNCH

Centricity@ Business Confirm  
This may overbook. Do you want to continue?  
Yes No

Back Next Cancel

## Booking into a Frozen Slot



- **Select** the overbooked slot or frozen slot
- Click **Yes**
- Click **Next**

**Note:** Permission to overbook or schedule into a frozen slot should be documented on Comment Line 2:

**Ok to overbook per Dr.**

# Overriding Visit Duration

An appointment's duration can be changed in the **Duration** field if the provider requests it.

**New Appointment**

Patient:	SRSDDT,BEN	Reg	Category:	
Appt Reason:			Appt Type:	REGULAR APPOINTMENT
Provider:	LIGHT MD,CYRIL SB		<b>Duration:</b> 40	From Date: 10/27/2014
Department:	FAMILY MEDICINE		Location:	
Team:			Search:	Schedule Settings Pt Pref

- When overriding visit type durations, the system will not add or subtract time
- Change the duration of a 20 minute REG to 40 minutes by typing 40 in the **Duration field**
- **The ADF will show the patients 40 minute appointment time**

**Appointment Data Form - General**

Patient: SRSTEST,JIM      FSC: BCC      H: 123-456-7890  
EMRN: 04-80-77-22      AGE: 26      COL:      W:

Date	Day	Time	Stat	Type	Dur	Appt#
08/03/2018	FRI	10:00A	PEN	REG	40	

Provider: LIGHT MD,CYRIL SB      Dept: FP      Loc: SM

Comment1: PHYSICAL EXAM  
**Comment2: OK TO OVERRIDE DURATION PER DR. LIGHT**

Auth:      OVN Arr Time:      Package ID:      Case #:      Patient Condition Related to: NONE

Ordering Prov.:      Actual Prov.: LIGHT MD,CYRIL SB  
Referring Prov.:      PCP: SACKS,ANTHONY H  
Chart Tracking Loc: SM FAMILY PRACTICE      Copay: 20.00      Override Copay:      Bill Prov.: LIGHT,CYRIL SB      Bill Loc: DOCTORS OFFICE  
Bill Area: SORRENTO MESA      Alternate Insurance:      OM #:      Case #:

Next      Save      Cancel

**Note:** Permission to override a visit duration should be documented on Comment Line 2.

**Ok to override duration per Dr. \_\_\_\_\_**

# Scheduling an Office Visit Nurse (OVN)

A **Nurse Visit** is scheduled when a patient needs to see the nurse or medical doctor. Scheduling examples include

The 'Add Time' dialog box shows the following fields:

- Session: AM
- Time to Add: 07:30AM
- Nonclinic Comment: (empty text box)

Below the dialog box is a table of visit types:

Name	Synonym	Duration	
ANNUAL WELLNESS VISIT	AWV	20 mins	T
CONFIDENTIAL VISIT	CVT	20 mins	T
HIERARCHICAL CONDITION CATEC	HCC	20 mins	T
MEDICARE INITIAL PHYSICAL EXA	MPE	40 mins	T
MEDIUM VISIT	MDM	20 mins	T
<b>OFFICE VISIT NURSE</b>	<b>OVN</b>	<b>5 mins</b>	<b>T</b>
POST HOSPITAL NEW	PHN	20 mins	T
REGULAR APPOINTMENT	REG	20 mins	T

- Schedule **OVN** visits before or after the provider's schedule by adding time (example: schedule 7:30 if the provider starts at 8:00)

**SPEES MD, DAVID N**  
**FAMILY MEDICINE**  
**10/01/2018 Monday**  
 RB AM/PM

AM RB	Bkd/Total	Avl	Dur	
07:40A	1/1 REG...	-	20	VECNAC, TWO 66 Y TEST REG 20
08:00A	0/3 REG	1	20	
08:20A	0/1 MDM	1	20	
08:40A	1 per slot...	1	20	
09:00A	0/4 REG	1	20	
09:20A	1 per slot	1	20	
09:40A		1	20	
10:00A		1	20	
10:20A	0/1 ANY...	1	40	
11:00A	0/1 SDV...	1	20	
11:20A	0/1 ANY...	1	40	
12:00N	0/0 LUN	-	60	LUNCH
-				
-				
PM RB	Bkd/Total	Avl	Dur	
01:00P	0/1 REG	1	20	

At the bottom, the 'Actions' dropdown menu is open, showing 'Add Time' selected.

**Note:**  
 You can only add time **before** or **after** the provider's schedule

- Add time by clicking actions and add time



- Input time before or after provider's schedule
- Click ok
- Click next

Comment1:  Auth:   
Comment2:  OVN Arr Time:   
• Include the patient's arrival time in the scheduling comment line 1 and in the OVN Arr Time field

Appointment will now appear as overbooked

AM RB	Bkd/Total	Avl	Dur	
07:30A	0/0 XXX...	-	5	SRSTEST, RON 25 Y OVN 5
07:40A	1/1 REG...	-	20	VECNAC, TWO 66 Y REG 20
08:00A	0/3 REG	1	20	
08:20A	0/1 MDM	1	20	
08:40A	1 per slot..	1	20	
09:00A	0/4 REG	1	20	
09:20A	1 per slot	1	20	
09:40A		1	20	
10:00A		1	20	
10:20A	0/1 ANY...	1	40	
11:00A	0/1 SDV...	1	20	
11:20A	0/1 ANY...	1	40	
12:00N	0/0 LUN	-	60	LUNCH
-				
-				
-				
PM RB	Bkd/Total	Avl	Dur	

ist

• In the s... rbooked slot

The **Appointment List** can be viewed from the *New Appointment* screen as well as the *Appointment List* screen.

- From Scheduler, click on **Appointment List on the HTB** to access a larger view of the the patient's appointments.
- Perform tasks using the buttons at the bottom of the screen

**Scheduler** | New Appointment | **Appointment List** | Provider Schedules | Bump List | Wait List | Front Desk | Financial Cor

**Scheduler** | Patient Services | Front Desk | Sched Archive | Send Email | Credit Card | OWA Email | Dict View | Reminder List

**RGTEST, ZACH** | SHC: 100-036-667 | IFD: | Facility: SRS | XID: 36767  
 DOB: 06/17/1979 | HMO: | BAF: CURRENT | UPI: 10003  
 A-S: 31 years-M | H Phone: 619-446-1678 | BG AF:

**Appointment List** | Last Refreshed: 11:39AM

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
<input type="checkbox"/>	03/15/2011	TUE	10:00AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30122770	CVW\$
<input type="checkbox"/>	03/08/2011	TUE	10:00AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30122769	CVW\$
<input type="checkbox"/>	03/01/2011	...	...	REM	REG	GREEN MD,STEVEN A	FP	MM	20	30103108	C\$
<input type="checkbox"/>	03/01/2011	...	...	REM	REG	GRANT MD,JOHN J	FP	GEN	15	30104989	C\$
<input type="checkbox"/>	03/01/2011	TUE	09:30AM	CAN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30122768	CV\$
<input type="checkbox"/>	02/23/2011	WED	08:00AM	PEN	REG	CONNER MD,JULIUS S	IM	RB	20	36369907	CV\$
<input type="checkbox"/>	02/23/2011	WED	09:30AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30123430	CV\$
<input checked="" type="checkbox"/>	02/23/2011	WED	03:00PM	PEN	REG	CONNER MD,JULIUS S	IM	RB	20	36369905	CV\$
<input type="checkbox"/>	02/21/2011	MON	08:00AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30122767	CV\$
<input type="checkbox"/>	02/16/2011	WED	01:00PM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30123429	CV\$
<input type="checkbox"/>	02/15/2011	TUE	09:30AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30122765	CV\$
<input type="checkbox"/>	02/11/2011	FRI	08:30AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30121659	CV\$
<input type="checkbox"/>	02/11/2011	FRI	10:50AM	PEN	REG	MORGAN MD,JAMES F	IM	DT	20	30119406	V\$
<input type="checkbox"/>	02/10/2011	THU	08:30AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30121658	CV\$
<input type="checkbox"/>	02/10/2011	THU	08:50AM	PEN	REG	MORGAN MD,JAMES F	IM	DT	20	36369833	CVL\$
<input type="checkbox"/>	02/09/2011	WED	01:00PM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30123428	CV\$
<input type="checkbox"/>	02/07/2011	MON	09:30AM	PEN	REG	MORGAN MD,JAMES F	IM	DT	20	36369350	CVL\$
<input type="checkbox"/>	02/04/2011	FRI	07:00AM	ARR	CON	GARAY MD,ALON A	ORT	SDM	20	36369454	CIV\$
<input type="checkbox"/>	02/04/2011	FRI	08:00AM	ARR	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30121657	CIV\$
<input type="checkbox"/>	02/04/2011	FRI	08:00AM	ARR	REG	GREEN MD,STEVEN A	FP	MM	20	36369488	CIV\$
<input type="checkbox"/>	02/04/2011	FRI	09:40AM	PEN	CON	ALBERTON MD,GREGOF	ORT	SR	20	36369451	CV\$
<input type="checkbox"/>	02/03/2011	THU	08:30AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30121656	CV\$
<input type="checkbox"/>	02/02/2011	WED	08:00AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30123427	CV\$
<input type="checkbox"/>	02/01/2011	TUE	11:00AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30122764	CV\$
<input type="checkbox"/>	01/31/2011	MON	07:00AM	PEN	TXT	NAVA MSPT,NOE DAMIE PT	OR	30		30121655	CV\$

Appt Detail | Arrive | Cancel/Rsc | Noshow | Actions

Patient appointments from the past 18 months will display. Appointment information is displayed in reverse chronological order.

## Appointment Status and Definitions

- **Arrived (ARR)** An appointment that has occurred
- **Pending (PEN)** An upcoming appointment
- **Cancelled (CAN)** Appointment was cancelled by the patient
- **Bumped (BMP)** Appointment was cancelled by the provider
- **No-Show (NOS)** Patient did not show for their appointment

## Patient Appointment List

- **Reminder (REM)** Information for a future appointment

## Appointments Filter

- Search for appointments that match a certain set of criteria
- Reduce the number of entries displayed on the screen

**Appointment List** Last Refreshed: 09:27AM

Appts Filter Refresh

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
<input type="checkbox"/>	03/01/2011	...	...	REM	REG	GREEN MD,STEVEN A	FP	MM	20	30103108	C\$
<input type="checkbox"/>	12/01/2010	...	...	REM	REG	GONZALEZ MD,MARCO	FP	MM	20	30102979	C\$
<input type="checkbox"/>	10/01/2010	...	...	REM	REG	GREEN MD,STEVEN A	FP	MM	20	30103107	C\$
<input type="checkbox"/>	09/15/2010	WED	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20	30104963	CV\$
<input type="checkbox"/>	09/13/2010	MON	09:50								
<input type="checkbox"/>	09/01/2010	...	...								
<input type="checkbox"/>	09/01/2010	WED	09:50								
<input type="checkbox"/>	08/30/2010	MON	09:50								
<input type="checkbox"/>	08/27/2010	FRI	11:30								
<input type="checkbox"/>	08/24/2010	TUE	04:00								
<input checked="" type="checkbox"/>	08/18/2010	WED	06:00								
<input type="checkbox"/>	08/18/2010	WED	07:50								
<input type="checkbox"/>	08/18/2010	WED	08:10								
<input type="checkbox"/>	08/18/2010	WED	08:30								
<input type="checkbox"/>	08/18/2010	WED	10:30								
<input type="checkbox"/>	08/16/2010	MON	11:15								
<input type="checkbox"/>	08/13/2010	FRI	07:00								
<input type="checkbox"/>	08/13/2010	FRI	11:00								
<input type="checkbox"/>	08/13/2010	FRI	11:30								
<input type="checkbox"/>	08/13/2010	FRI	12:15								
<input type="checkbox"/>	08/10/2010	TUE	08:10								
<input type="checkbox"/>	08/10/2010	TUE	08:30AM	PEN	REG	LIN MD,CHENG-I	FP	OK	20	30104904	CV\$

**Centricity® Business** Appointment Search

Department:  Status:

Provider:  Add +

Location:  Remove -

Date:

Clear OK Cancel

## Refresh

- Click the Refresh to manually refresh Advanced Web screen

**Appointment List** Last Refreshed: 09:35AM

Appts Filter Refresh

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
<input type="checkbox"/>	03/01/2011	...	...	REM	REG	GREEN MD,STEVEN A	FP	MM	20	30103108	C\$
<input type="checkbox"/>	12/01/2010	...	...	REM	REG	GONZALEZ MD,MARCO	FP	MM	20	30102979	C\$
<input type="checkbox"/>	10/01/2010	...	...	REM	REG	GREEN MD,STEVEN A	FP	MM	20	30103107	C\$
<input type="checkbox"/>	09/15/2010	WED	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20	30104963	CV\$
<input type="checkbox"/>	09/13/2010	MON	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20	30104961	CVL\$
<input type="checkbox"/>	09/01/2010	...	...	REM	MDM	GREEN MD,STEVEN A	FP	MM	20	30102978	C\$
<input type="checkbox"/>	09/01/2010	WED	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20	30104960	CV\$
<input type="checkbox"/>	08/30/2010	MON	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20	30104959	CV\$

## Using the Appointment Actions Button

The **Appt Actions** button on the New Appointment screen provides access to additional activities associated with appointments on the patient appointment list, displayed at the bottom of the screen.

**Arrive:** Do not use. (Use **Appointment Overview** to arrive patient)

Appt Actions Appt Set

- Arrive
- Cancel/Reschedule
- Noshow
- Appointment Detail
- Appointment Data Form
- Appointment Overview
- Link Appointment
- Print Forms
- Print Grid
- View Legend
- Followup Appointment
- Reschedule Bumped Appointment

# Patient Appointment List

## How to Cancel/Reschedule:

Use this action to cancel or reschedule an appointment from the patient's appointment list.

1. At the **Cancellation Reason:** field type a **?**, and press **TAB** or click the icon
2. Choose a cancellation reason from the dictionary
3. At the **Cancellation Comment field:** enter an explanation for canceling appointment

4. The **check box** may be checked to **Reschedule** the cancelled appointment
  - o The information from the cancelled appointment will auto-populate in the scheduling process

### **Noshow (NOS):**

Allows the user to change the status of the appointment highlighted on the patient's appointment list to NOS. No show patients may be charged a \$25 fee.

# Patient Appointment List

## Appointment Detail:

Allows you to view details about the highlighted appointment on the patient's appointment. Displays appointments that were scheduled, cancelled, and no-showed.

From this screen you have a [hyperlink](#) to the Appointment Data Form and can view attachments associated with the appointment.

Appt Actions ▼ Appt Set ▼

- Arrive
- Cancel/Reschedule
- Noshow
- Appointment Detail**
- Appointment Data Form
- Appointment Overview
- Link Appointment
- Print Forms
- Print Grid
- View Legend
- Followup Appointment
- Reschedule Bumped Appointment

**Appointment Detail**

[Appointment Data Form](#)

**Provider:** GREEN MD,STEVEN A      **Date:** FRI 09/17/2010  
**Department:** FAMILY MEDICINE      **Time:** 10:30AM  
**Appt Type:** REG      **Duration:** 20  
**Location:** MIRA MESA      **Status:** Pending

**History for Appointment Number 30106798**

Appointment made on: 09/10/2010 at 01:18PM by POPCH

## Appointment Data Form (ADF):

Allows you to view and edit information entered in the ADF for the appointment.

You can also get to this screen by clicking on the [time hyperlink](#) within the patient's Appointment List.

Appt Actions ▼ Appt Set ▼

- Arrive
- Cancel/Reschedule
- Noshow
- Appointment Detail
- Appointment Data Form**
- Appointment Overview
- Link Appointment
- Print Forms
- Print Grid
- View Legend
- Followup Appointment
- Reschedule Bumped Appointment

**Appointment Data Form - General**

**Patient:** MEDICARE,ABN      **FSC:** MED      **H:** 619-446-1616  
**EMRN:** 12-45-78-96      **AGE:** 47      **COL:**      **W:** 858-499-4000

Date	Day	Time	Stat	Type	Dur	Appt#
12/28/2016	WED	8:40A	PEN	REG	20	

**Provider:** LIGHT MD,CYRIL SB      **Dept:** FP      **Loc:** SM

**Comment1:** COUGH      **Auth:** \_\_\_\_\_  
**Comment2:** \_\_\_\_\_      **OVN Arr Time:** \_\_\_\_\_  
**OM #:** \_\_\_\_\_      **Case #:** \_\_\_\_\_      **Package ID:** \_\_\_\_\_

**Patient Condition Related to:** NONE

**Ordering Prov.:** \_\_\_\_\_      **Actual Prov.:** LIGHT MD,CYRIL SB  
**Referring Prov.:** \_\_\_\_\_      **PCP:** TEST MD,MYSHARP

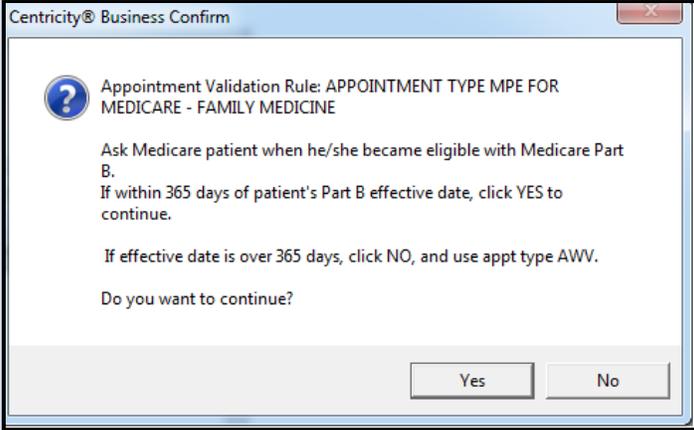
**Chart Tracking Loc:** SM FAMILY PRACTICE      **Copay:** 00.00      **Override Copay:** \_\_\_\_\_

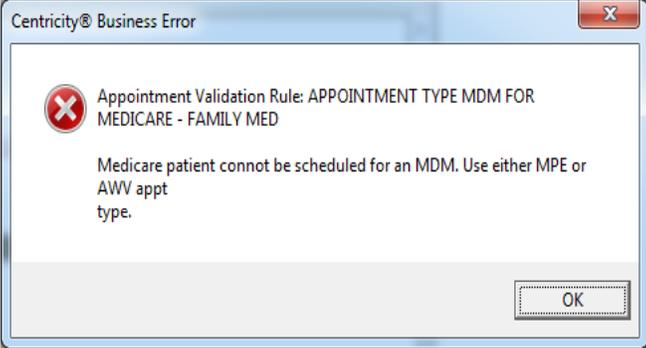
**Bill Prov.:** LIGHT MD,CYRIL SB      **Bill Loc:** DOCTORS OFFICE  
**Bill Area:** SORRENTO MESA      **Alternate Insurance:** \_\_\_\_\_

Next      Save      Cancel

# Medicare Preventative Wellness Visit

## MPE AWW Initial (Annual Wellness Visit) – Annual Exam Each Year

MPE Medicare Initial Physical Exam	
 <p>Centricity® Business Confirm</p> <p><b>?</b> Appointment Validation Rule: APPOINTMENT TYPE MPE FOR MEDICARE - FAMILY MEDICINE</p> <p>Ask Medicare patient when he/she became eligible with Medicare Part B.</p> <p>If within 365 days of patient's Part B effective date, click YES to continue.</p> <p>If effective date is over 365 days, click NO, and use appt type AWW.</p> <p>Do you want to continue?</p> <p style="text-align: right;">Yes      No</p>	
<b><u>Actions:</u></b>	Ask patient when they became eligible with Medicare Part B.
	If within 365 days, click YES and proceed with scheduling <b>MPE</b> visit.
	If >365 days, click NO and schedule appt type <b>AWW</b> instead.

MDM-Annual Physical Exam	
 <p>Centricity® Business Error</p> <p><b>×</b> Appointment Validation Rule: APPOINTMENT TYPE MDM FOR MEDICARE - FAMILY MED</p> <p>Medicare patient cannot be scheduled for an MDM. Use either MPE or AWW appt type.</p> <p style="text-align: right;">OK</p>	
<b><u>Action:</u></b>	GE/Advanced Web will not allow visit type <b>MDM</b> for Medicare patients.

# Medicare Preventative Wellness Visit

## **Why is it important to use an appropriate Appointment Visit Type?**

- ✓ The visit type helps to inform the physician on why the patient is coming in for their visit. It also guides the physician on what note to use in Touchworks, and acts as an alert to follow the correct guidelines for that defined visit.

## **What are the preventive visit types available to schedule a Medicare patient?**

- ✓ **MPE- "Welcome to Medicare" preventive visit:**

This introductory visit is allowed only **within the first 12 months** of when a patient becomes eligible with Part B. This one-time visit includes a review of medical and social history related to the patient's health and education, as well as counseling about preventive services.

- ✓ **AWV- Yearly "Wellness" visits:**

If the patient has had Part B for **longer than 12 months**, you can use this visit type. The patient has an opportunity to develop or update a personalized prevention plan with their physician in order to prevent disease and disability, based on health and risk factors. There must be at least 365 days between MPE and/or AWV visits.

## **Why is the MDM visit unavailable?**

- ✓ It is not a benefit under the Medicare program. There are other visit types that are considered more appropriate.