

Front Desk Scheduling Part 2



TABLE OF CONTENTS

Linked Appointments	3-7
Recurring Appointments.....	8-12
Rescheduling Reminder Appointments	13
Provider Schedules	14-17
Wait List Functions	18-26
Scheduling an Appointment from the Wait List	21
Add Existing Appointments to Wait List.....	22-23
Add Stand Alone Appointments	24
Add a Note.....	25
Deleting an Entry	26
Scheduling from the Bump List	27-29
Print Forms (Labels).....	30-31

Linked Appointments

The **Link Function** in AW allows users to schedule more than one appointment for the **same patient**, while going through the schedule process **once**.

The **Link Function** allows users to schedule one appointment for **multiple patients**, while going through the schedule process **once**.

How to Schedule Linked Appointments:

Enter Patient #1's Information:

New Appointment

Patient: <input style="border: 1px solid red;" type="text" value="MEDICARE,ABN"/>	...	Reg	Category: <input style="border: 1px solid red;" type="text"/>
Appt Reason: <input type="text"/>			Appt Type: <input style="border: 1px solid red;" type="text" value="REGULAR APPOINTMENT"/>
Provider: <input style="border: 1px solid red;" type="text" value="LIGHT MD,CYRIL SB"/>		🔍	Duration: <input type="text" value="20"/> From Date: <input type="text" value="11/22/2013"/>
Department: <input type="text" value="FAMILY MEDICINE"/>		🔍	Location: <input type="text"/>
Team: <input type="text"/>			Search: <input type="text" value="Schedule"/> <input type="text" value="Settings"/> <input type="text" value="Pt Pref"/>

1. Identify the patient using PatientSecure or Standard Patient Lookup and press Tab
2. Select the **Provider** and **Appt Type**

Referral No.: <input type="text"/>	...	Missing Referral Type: <input type="text"/>
Copy: <input style="border: 1px solid red;" type="text" value="10.00"/>		Authorization No.: <input type="text"/>
<input type="button" value="◀ Prev Appt"/> <input style="border: 1px solid red;" type="button" value="OK"/> <input type="button" value="▶"/>		

3. Generate the **copy** by clicking on the Magnifying glass
4. Click **OK**

Patient's Appointment List												Appts Filter	Refresh
Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach		
03/15/2011	TUE	10:00AM	PEN	TXT	NAVA MSPT,NOE DAMIEN PT	OR	OR	30		30122770	CVW\$	⬆	
03/08/2011	TUE	10:00AM	PEN	TXT	NAVA MSPT,NOE DAMIEN PT	OR	OR	30		30122769	CV\$		
03/01/2011	...	...	REM	REG	GREEN MD,STEVEN A	FP	MM	20		30103108	C\$	
03/01/2011	...	...	REM	REG	GRANT MD,JOHN J	FP	GEN	15		30104989	C\$	
03/01/2011	TUE	09:30AM	CAN	TXT	NAVA MSPT,NOE DAMIEN PT	OR	OR	30		30122768	CV\$		
02/23/2011	WED	09:30AM	PEN	TXT	NAVA MSPT,NOE DAMIEN PT	OR	OR	30		30123430	CV\$		
02/21/2011	MON	08:00AM	PEN	TXT	NAVA MSPT,NOE DAMIEN PT	OR	OR	30		30122767	CV\$		
02/16/2011	WED	01:00PM	PEN	TXT	NAVA MSPT,NOE DAMIEN PT	OR	OR	30		30123429	CV\$	⬇	

Linked Appointments

5. Click on Links and select **Add Link**
6. Verify the first patient's appointment under the **Links** tab

New Appointment

Patient: RGTEST,ABC ... Reg **Category:**

Appt Reason: **Appt Type:** REGULAR APPOINTMENT

Provider: LIGHT MD,CYRIL SB Q **Duration:** 20 **From Date:** 11/22/2013

Department: FAMILY MEDICINE Q **Location:**

Team: Q **Search:** Schedule Settings Pt Pref

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

Patient Name	Provider	Department	Team/Cat	Appt Type	From Date	Location
MEDICARE,ABN	LIGHT MD,CYRIL SB	FAMILY MEDIC		REG	11/22/2013	

Enter Patient #2's information:

7. DO NOT CLEAR PATIENT #1

8. Identify the next patient by using PatientSecure or Standard Patient Lookup and press Tab

9. Select the **Provider** and **Appt Type**

Referral No.: ...

Copy: 10.00 Q

Missing Referral Type: Q

Authorization No.:

◀ Prev Appt **OK** ▶

10. Generate the **copay** by clicking on the Magnifying glass

11. Click **OK**

New Appointment

Patient: RGTEST,ABC ... Reg **Category:**

Appt Reason: **Appt Type:** REGULAR APPOINTMENT

Provider: LIGHT MD,CYRIL SB Q **Duration:** 20 **From Date:** 11/22/2013

Department: FAMILY MEDICINE Q **Location:**

Team: Q **Search:** Schedule Settings Pt Pref

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

Patient Name	Provider	Department	Team/Cat	Appt Type	From Date	Location
MEDICARE,ABN	LIGHT MD,CYRIL SB	FAMILY MEDIC		REG	11/22/2013	

Linked Appointments

13. Click Next

14. Select an available appointment in **each column**

15. Use the **Show Appointments** button to view appointments selected

The screenshot shows a 'New Appointment - Schedule Search' window. At the top, a table lists appointment details for two patients: MEDICARE,ABN and RGTEST,ABC. Below this, two side-by-side appointment grids are displayed for 'LIGHT MD,CYRIL SB FAMILY MEDICINE' on '01/10/2014 Friday'. Each grid shows a list of appointment times from 07:20A to 11:20A, with columns for AM/PM, SM, Bkd/Total, Avl, and Dur. The 07:40A slot is highlighted in both grids. To the right, a 'Preview' pane shows scheduling information, including a message for P,L1, patient name, department, and provider details.

16. Select both appointment times (*Cannot be at the same time*)

17. Click **Next**

Linked Appointments

18. Complete the ADF for the **first patient**

Appointment Data Form - General

Patient: MEDICARE,ABN

EMRN: 12-45-78-96

AGE: 47

FSC: MED

H: 619-446-1616

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

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

19. Click **Save**

20. Complete the ADF for the **second patient**

Appointment Data Form - General

Patient: MEDICARE,ABN

EMRN: 12-45-78-96

AGE: 47

FSC: MED

H: 619-446-1616

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

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

21. Click **Save**

Linked Appointments

Confirmation

2 Appointments have been Scheduled

	Appt #	Patient	Provider	Dept	Typ	Day	Date	Time	Loc
1	36369833	RGTEST,ZACH	MORGAN MD,JA...	IM	REG	THU	02/10/2011	08:00AM	DT
Department messages: FILL OUT APPT CARD BEFORE FILING.									
2	36369834	RGTEST,DEBI	MORGAN MD,JA...	IM	REG	THU	02/10/2011	09:10AM	DT
Department messages: FILL OUT APPT CARD BEFORE FILING.									

Actions

Confirm both patient appointments were scheduled

Click **Ok**

Recurring Appointments

The **Recurring Appointment** function saves time when you are scheduling a series of appointments with the same provider, department, and appointment type. You enter the same information as when you are scheduling a single appointment, but the system searches for & schedules the entire series of appointments all at once.

Appointments filed as recurring appointments are a group of single appointments and may be cancelled or rescheduled independently.

How to Schedule Recurring Appointments:

Scheduler: RGTEST, ZACH SHC: 100-036-667 IFD: Facility: SRS XID: 36767
Patient Services: DOB: 06/17/1979 HMO: BAF: UPI: 100036667
Front Desk: A-S: 31 years-M H Phone: 123-234-2354 BGAF:
Sched Archive: Select Patient ▼ i
Send Email: New Appointment
OWA Email: Patient: RGTEST, ZACH Reg Category:
MPV Portal: Appt Reason: Appt Type: ?
Dict View: Provider: MONTOYA MD, PERRY Duration: From Date: 08/19/2010
Department: INTERNAL MEDICINE Location:
Team: Search: First Available Settings Pt Pref

1. Complete the first steps of the scheduling process (**Provider, Appt Type, Copay, From Date**)

New Appointment
Patient: RGTEST, ZACH Reg Category:
Appt Reason: Appt Type: OFFICE VISIT NURSE
Provider: MONTOYA MD, PERRY Duration: 5 From Date: 08/19/2010
Department: INTERNAL MEDICINE Location:
Team: Search: Recurring Settings Pt Pref

Pre-Sched Msg Links Ancillaries/Resources Resource-Primary_Link Appointment Set Profile Comments
Appointment Type Messages:
BOOK PRIOR TO AM OR PM SESSION.

Last Refreshed: 11:23AM

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

Links Actions Appt Actions Appt Set Next Cancel

2. Change the Search field to **Recurring**
3. Click **Next**

Recurring Appointments

New Appointment - Recurring Appt Settings

Frequency

Daily

Every days

Weekly

Every weeks

Every week of each month

Number of appts within week:

Dates

From:

To:

Preferences

Appointment Time:

Days of week:

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

4. Enter the **Frequency**, **Dates**, **Preferences**, and click **Next**

New Appointment - Recurring Appt Search

Appointments Being Scheduled

Patient	Provider	Dept	Cat/Team	Type	Location
RGTEST,ZIPPY	MONTOYA MD,PERRY	IM		REG 20	

From Date: 11/25/2013 Frequency: 1W Preferred Time: 10:00AM
To Date: 12/25/2013 Day(s) of week: M

Select from the Following Appointment Times

Date	Day	Time	Provider	Location	Conflict
11/25/2013	MON	11:30AM	MONTOYA MD,PERRY	CHULA VISTA	

Appointment Choices

Date	Day	Time	Provider	Location	Conflict
------	-----	------	----------	----------	----------

Appts Selected: 0 Appts Skipped: 0

Preview | Instructions

Message(s) for: P

▼ Scheduling Information

▼ Primary msg(s) [P]
Patient: RGTEST,ZIPPY

Department: THE DEPT OF INTERNAL MEDICINE SEES PTS FROM THE AGE OF 18 AND ON UNLESS OTHERWISE SPECIFIED. **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.**

Provider: ***PROVIDER HAS NO SCHEDULING CONSTRAINTS**

Appointment Type: BOOK OFFICE VISITS. ***BOOK ABDOMINAL PAIN BEFORE 3:00PM, IF NO SLOTS ARE

5. Select the desired appointment time and Click **Add+**

Recurring Appointments

Schedule Detail Button

This can be used if the preferred day for a patient is unavailable.

- Click **Schedule Detail**

New Appointment - Recurring Appt Search

Appointments Being Scheduled

Patient	Provider	Dept	Cat/Team	Type	Location
RGTEST,ZIPPY	WRIGHT MD,CHERYL D	RHE		OFV 15	

From Date: 11/25/2013 **Frequency:** 1W **Preferred Time:** 10:00AM
To Date: 02/23/2014 **Day(s) of week:** M

Select from the Following Appointment Times

Schedule Detail Conflict Info Appt Counter: 1

Date	Day	Time	Provider	Location	Conflict
11/25/2013	MON	10:30AM	WRIGHT MD,CHERYL D	RANCHO BERNARDO	

Add + Skip

6. Click Specific Schedule

Centricity® Business

Schedule Details

WRIGHT MD,CHERYL D
RHEUMATOLOGY
11/25/2013 Monday 24#
RB AM/PM

AM	RB	Bkd/Total	Avl	Dur	Slot	Comment
		08:00A	5/6 ANY	-	15	
		08:15A	4 RCK	-	15	
		08:30A	1 OFV	-	15	
		08:45A	1 per slot	-	15	
		09:00A		-	15	
		09:15A		-	15	
		09:30A	0/1 MSK	-	15	
		09:45A	2 RCK...	-	15	
		10:00A	0/1 MDH...	-	15	
		10:15A	0/1 MDH...	-	15	
		10:30A	4/6 ANY	1	15	
		10:45A	3 RCK	-	15	
		11:00A	1 CON	-	15	
		11:15A	1 per slot	-	15	

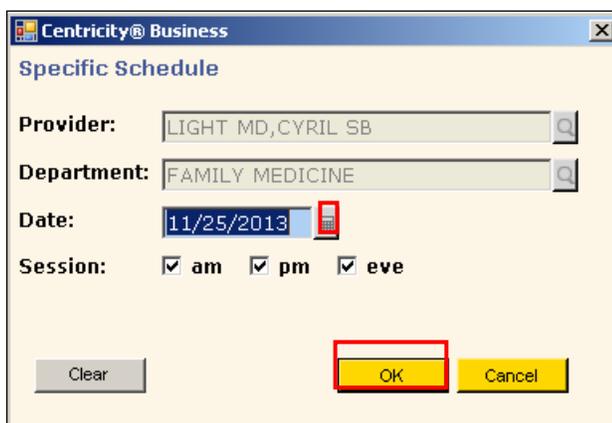
1 - Session Detail 2 - Slot Detail 3 - Appointment

Schedule
WRIGHT MD,CHERYL D
RHEUMATOLOGY
24 **Booked appointments**
93 **% Booked slot time**
RB AM/PM

Session
AM **session in Location:**
RANCHO BERNARDO
13 **Booked appointments**
93 **% Booked slot time**

Specific Schedule Select Done

Recurring Appointments



Centricity@ Business

Specific Schedule

Provider: LIGHT MD,CYRIL SB

Department: FAMILY MEDICINE

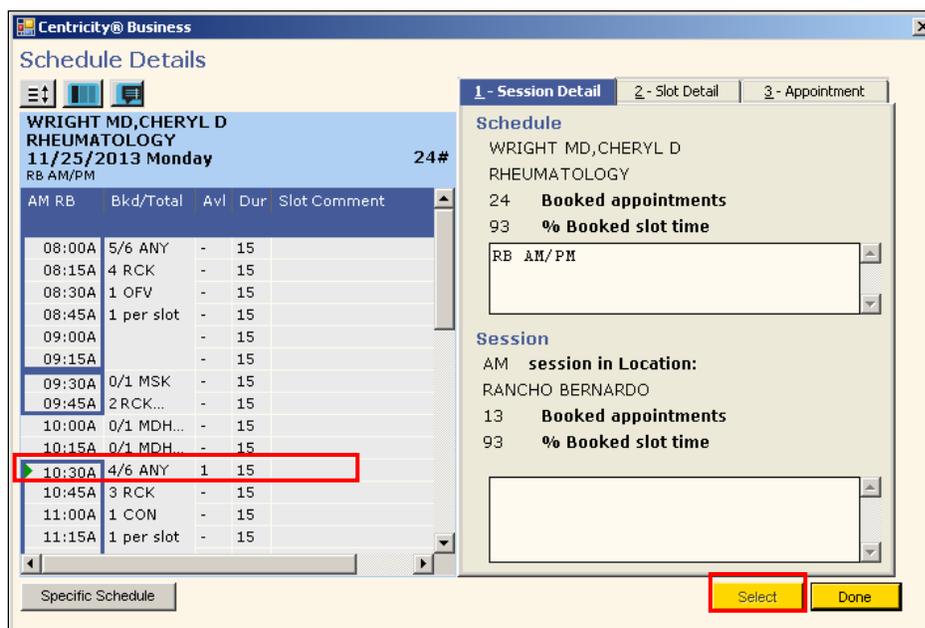
Date: 11/25/2013

Session: am pm eve

Clear OK Cancel

7. Click the **Calendar Icon** and **Select a new day**

8. Click **OK**



Centricity@ Business

Schedule Details

WRIGHT MD,CHERYL D
RHEUMATOLOGY
11/25/2013 Monday 24#
RB AM/PM

AM RB	Bkd/Total	Avl	Dur	Slot Comment
08:00A	5/6 ANY	-	15	
08:15A	4 RCK	-	15	
08:30A	1 OFV	-	15	
08:45A	1 per slot	-	15	
09:00A		-	15	
09:15A		-	15	
09:30A	0/1 MSK	-	15	
09:45A	2 RCK...	-	15	
10:00A	0/1 MDH...	-	15	
10:15A	0/1 MDH...	-	15	
10:30A	4/6 ANY	1	15	
10:45A	3 RCK	-	15	
11:00A	1 CON	-	15	
11:15A	1 per slot	-	15	

1 - Session Detail 2 - Slot Detail 3 - Appointment

Schedule

WRIGHT MD,CHERYL D
RHEUMATOLOGY

24 **Booked appointments**
93 **% Booked slot time**

RB AM/PM

Session

AM **session in Location:**
RANCHO BERNARDO

13 **Booked appointments**
93 **% Booked slot time**

Specific Schedule Select Done

9. Select the **new time**

10. Click **Select**

11. **Continue adding** each appointment until you reach the **ADF**

12. Complete the **ADF** and click **Save**

13. View **Confirmation Screen**

Recurring Appointments

How to Print Confirmation Screen:

RGTEST, SNOW WHITE

SHC: 106-001-361 IFD: SRS Facility: SRS XID: 4273910
DOB: 07/31/1988 HMO: SRS BAF: CURRENT UPI: 106-001-361
A-S: 23 years-F H Phone: 858-647-2872 BGAF:

Confirmation

6 Appointments have been Scheduled

	Appt #	Patient	Provider	Dept	Typ	Day	Date	Time	Loc
1	37470191	RGTEST, SNOW ...	NAVA MSPT, NO...	PT	TXT	WED	10/05/2011	07:00AM	OR
Provider messages: COMPLETE APPD CARD BEFORE FILING.									
2	37470192	RGTEST, SNOW ...	NAVA MSPT, NO...	PT	TXT	MON	10/10/2011	09:00AM	OR
3	37470193	RGTEST, SNOW ...	NAVA MSPT, NO...	PT	TXT	WED	10/12/2011	09:00AM	OR
4	37470194	RGTEST, SNOW ...	NAVA MSPT, NO...	PT	TXT	MON	10/17/2011	09:00AM	OR
5	37470195	RGTEST, SNOW ...	NAVA MSPT, NO...	PT	TXT	WED	10/19/2011	09:00AM	OR
6	37470196	RGTEST, SNOW ...	NAVA MSPT, NO...	PT	TXT	MON	10/24/2011	09:00AM	OR
7	Not Selected						10/26/2011		

1. Click on **Tools** located in the upper right corner
2. Select **Tear-off-Screen**
3. Be sure to include the provider, dept, type, day, date, time, and location of the appointment

Centricity@ Framework Tear-off Screen - Microsoft Internet Explorer pro

Print Close

Provider	Dept	Typ	Day	Date	Time	Loc
NAVA MSPT, NO...	PT	TXT	WED	10/05/2011	07:00AM	OR
RE FILING.						
NAVA MSPT, NO...	PT	TXT	MON	10/10/2011	09:00AM	OR
NAVA MSPT, NO...	PT	TXT	WED	10/12/2011	09:00AM	OR
NAVA MSPT, NO...	PT	TXT	MON	10/17/2011	09:00AM	OR
NAVA MSPT, NO...	PT	TXT	WED	10/19/2011	09:00AM	OR
NAVA MSPT, NO...	PT	TXT	MON	10/24/2011	09:00AM	OR

Note: Use the scrolls bars and resize the window to show **ONLY** the appointment information necessary.

Provider, Dept, Type, Date and Time

Reminder Appointments

Patients that call after receiving their reminder letter can be scheduled from the reminder appointment in the appointment list.

- Highlight the **reminder appointment**
- Click **Appt Actions**
- Click **Cancel/Reschedule**

Patient's Appointment List

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
11/01/2013	REM	REG	ABRAMOWITZ MD,BASIL	FP		20		202195539	C\$

Links Actions Appt Actions Appt Set

Next Cancel

Arrive
Cancel/Reschedule
Noshow

- Select **Reminder Letter** for Cancellation Reason
- Check mark the **Reschedule** box

Cancel/Reschedule

Date	Time	Prov	Dept	Type	Appt No.
11/01/2013	...	ABRAMOWITZ MD,BA	FP	REG	202195539

Cancellation Reason: REMINDER LETTER

Cancellation Comment:

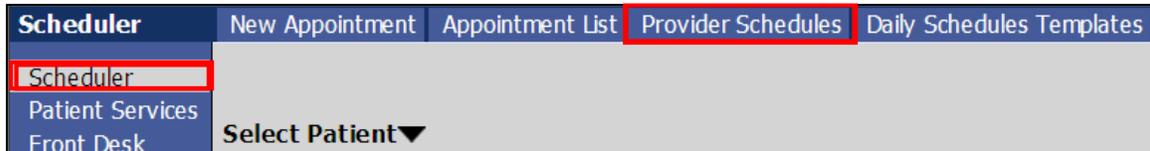
Reschedule

- Complete **the ADF** and save the appointment
- Verify the appointment in the appointment list

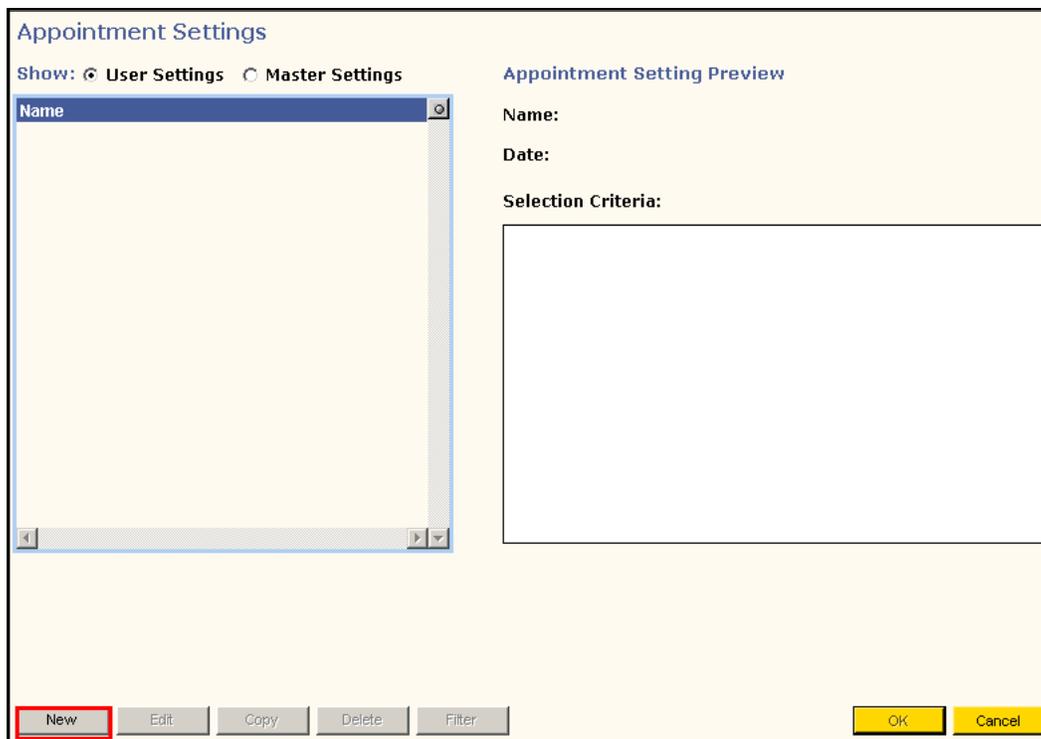
Provider Schedules

Provider Schedules helps you manage the schedules for a provider, a department, a group of providers, or a group of departments. Using Provider Schedules you can get a **quick overview** of booked and available appointment slots in a provider's schedule.

How to Create a Provider Schedule:



1. Click **Scheduler** (VTB).
2. Click **Provider Schedules** (HTB).



3. Click **New**.

Provider Schedules

4. Type the name of the view you are setting at the **Name** field (ex. MM Family)
5. Modify the **Show: __ Schedule(s)** to view **5 (providers)**

Appointment Settings - New

Name: MM FAMILY

Default Setting

Date: Today

Appointment Manager **Provider Schedules** Patient Tracking

Sessions: am pm eve

When I switch to Weekly Show Schedule(s)

Default Display

Show Schedule List

Sort By: Department

Show: Daily

Hide Columns

Show Slot Comment Column

Show: 5 Schedule(s)

Ignore White Space in Schedules

Selection Criteria

Dept/Prov Location

Location:

Include + Exclude + Remove -

Criteria

- Include
 - Department
 - FAMILY MEDICINE
 - Location
 - MIRA MESA

OK Cancel

Selection Criteria

Dept/Prov Location

Department: FAMILY MEDICINE

Provider:

Include + Exclude + Remove -

Selection Criteria

Dept/Prov Location

Location: MIRA MESA

Include + Exclude + Remove -

6. Under the **Selection Criteria** section, Type the department you wish to add and press **TAB**

7. Click **Include**

8. Click the **Location** radio button

9. Type the **Location**

10. Click **Include**

11. Click **OK**

Note: To view the Provider Schedule you created, click **OK**

Provider Schedules

Provider Schedules allows you to view a single provider's daily, weekly, or monthly schedule. You can also view schedules for multiple providers or an entire department.

You can determine how you view provider or department schedules using the **selection criteria**.

MM FAMILY
Select Settings▼

Provider Schedules Last Refreshed: 09:18AM

Sort By: Department | 11/22/2013 | Daily | Show: 5 | Setting: MM FAMILY | Refresh

AM	MM	Bkd/Total	Avl	Dur	
08:10A	1/1 REG...	-	20	✓	
08:30A	1/2 REG	1	20		
08:50A	0/1 MDM	-	20	✓	
09:10A	0/1 NOV	-	20	NWE	
09:30A	1 NWE...	-	20	✓	
09:50A	1/1 REG...	-	20	REG	
10:10A	4/3 REG	-	20	REG	
10:30A	1/1 MDM	-	20	REG	
10:50A	0/1 NOV	-	20	REG	
11:10A	1 per slot	-	20	REG	
11:30A	-	-	20	MDM	
11:50A	0/1 ANY...	1	20		
12:10P	1/1 REG...	-	20	REG	
12:30P	0/0 LUN	-	60	LUN	

Day | Show Detail | Appt Overview | Arrive | New Appt | Insert Schedules | Appt Actions | Actions | Day

A View control

B Forward and back navigation buttons

Provider Schedules



Task Buttons - buttons at the bottom can be used to schedule appointments or perform other tasks



Show Detail:

Allows you to toggle back and forth between the Schedule Detail and Provider Schedules.

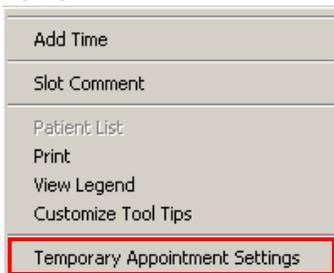
New Appointment:

Allows you to book an appointment directly into the timeslot selected. The system brings you to the New Appointment screen.

Insert Schedules:

Allows you to change the selected schedule to a particular date, provider, or department. Other schedule displays remain the same.

Actions:



Temporary Appointment Settings:

Allows you to temporarily add or remove department or provider schedule(s) to the current schedule view

6. Select the appointment date.
7. To add schedule select to search either by **Dept/Prov** or **Location**. Click the **radio button** next to the appropriate option
8. Click **Include**

To remove a schedule, click on the department or provider to remove

9. Click **Remove**
10. Click **OK**

Wait List

Wait List Functions

The Wait List is used to maintain a list of patients who want to be notified if a sooner appointment becomes available. Appointments are available if another patient cancels an appointment or if a provider's schedule is edited and more appointment times become available.

Stand-alone entry—The patient does not have a scheduled appointment, but is waiting for the first available appointment.

Stand-alone entries are assigned a date that drops the entry from the wait list once the date is passed.

Example: Patient calls on 2/6/14 asking if there is an appointment available within the next month. IF no appointment becomes available by 3/6/14, then they would like to be removed from the Waitlist.

Patient	Dt Entered	Appt/Del Dt	Time
SRS DT, BRUCE	02/06/2014	03/06/2014	

The patient will be automatically deleted from the Wait List on 3/06/14

Linked entry—The patient has a scheduled appointment, but wants to be notified if an earlier appointment becomes available. The existing appointment is linked to an appointment on the Wait List.

Linked entries automatically delete when the appointment date has passed.

Example: Patient schedules a future appointment for 3/25/14 at 11:00am, but would like to be notified if a sooner appointment becomes available.

Patient	Dt Entered	Appt/Del Dt	Time
SRS DT, DAMIAN	01/22/2014	03/25/2014	11:00AM

The patient will be automatically deleted from the Wait List on 3/25/14

Note: A Stand-Alone entry will not have a time in the entry. A linked appointment will have the time of the future appointment.

Wait List

Recap of the difference between entries:

With a stand-alone entry, the deletion date is one that you agree upon with the patient.

Ex. If the patient cannot be seen within the week, the patient will go to UC. The date you agree upon is the date that the entry will drop off the wait list.

With a linked entry, the deletion date is the future appointment date.

Ex. The patient has an appointment in 3 months on March 25th. If the patient cannot be seen before March 25th, the appointment will remain and the Linked entry on the wait list will drop off automatically on March 25th.

Patient	Dt Entered	App/Del Dt	Time	Type	Prov	Dept	Loc
RGTEST,PAPER	05/23/2018	08/01/2018	08:30AM	REG	TMM	FP	SM
RGTEST,PEN	05/23/2018	07/25/2018	08:30AM	REG	TMM	FP	SM
RGTEST,PENCIL	05/23/2018	06/20/2018	08:30AM	REG	TMM	FP	SM
RGTEST,RULER	05/23/2018	06/27/2018		REG	TMM	FP	SM
RGTEST,SHARPIE	05/23/2018	06/22/2018		REG	TMM	FP	SM
RGTEST,TEA	05/23/2018	08/23/2018		REG	TMM	FP	SM

Wait List

How to View a Wait List:

Note: There must be at least one patient on the Wait List in order for the Wait List view to exist

1. Click **Scheduler (VTB)** / Click **Wait List (HTB)**.

The screenshot shows the 'Wait List Settings' dialog box. The 'Wait List' tab is active. The 'Patient' field is empty. Under 'Selection Criteria', the 'Dept/Prov' radio button is selected. The 'Department' and 'Provider' fields are empty. The 'Include +' button is highlighted. The 'Criteria' list shows 'SACKS MD ANTHONY H in FAMILY MEDICINE'. 'OK' and 'Cancel' buttons are at the bottom.

2. Select the corresponding **Radio button** (Dept/Provider or Location) to match the filtering dictionary fields.
3. To view a provider's waitlist, type in the **Provider field** the provider's last name or click the magnifying glass for a list of providers
 - a. To view a department waitlist, type in the **Department field** the department name or click the magnifying glass to view a list of departments.

4. Click **Include**

5. Click **OK**

If there are patients on the provider's Wait List, the system will display a list of patients.

Patient	Dt Entered	Appt/Del Dt	Time	Type	Prov
RGTEST,ZACH	02/04/2011	02/18/2011		REG	JJG
RGTEST,FRODOE	02/09/2011	03/01/2011	07:30AM	REG	JJG

If no patients are on the provider's Wait List, the system will display:



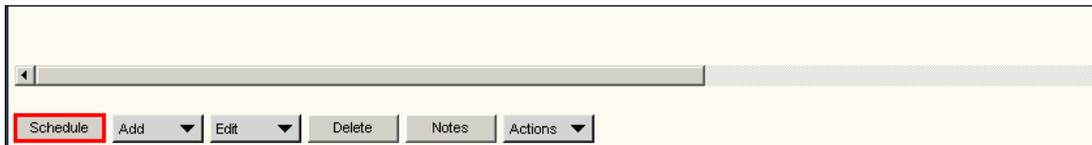
Wait List

Schedule Function

If there is an opening and the provider informs you to contact a patient from the Wait List, you can schedule the patient directly from the Wait List View.

How to Schedule an Appointment from the Wait List:

1. **Select the patient** from the wait list to schedule
2. Click **Schedule**



3. **Continue scheduling the appointment** (same as regular scheduling process)
 - If the patient is a **Linked Entry**, the appointment information will auto-populate while scheduling
- Some patients have preferences for schedule that may be time-sensitive
- **Verify Wait List Comments** before scheduling

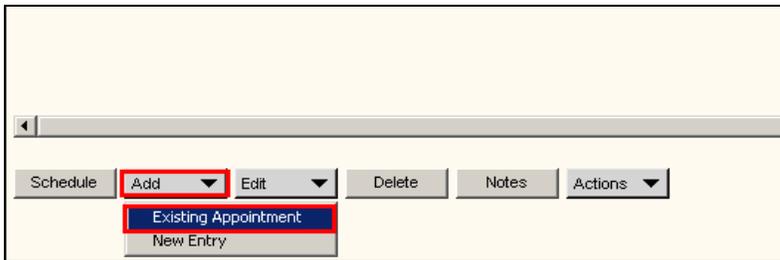
Wait List	
Comment	App
YRLY SKIN CK/858.858.8581	205
XEROSIS CRUTIS/858.858 858 4	205
WOULD LIKE SOONER APPT, ANYTIME/ANY DAY PREFERS SM LOC	205
WOULD LIKE SOONER APPT ON MONDAY OR FRIDAY	205
WOULD LIKE SOONER APPT ANYTIME ANY DAY SM LOC	205
WOULD LIKE SOONER APPT ANYTIME SM OR DT LOC	205
WOULD LIKE SOONER 619-755-8259	205
WOULD LIKE SOON AVAIL APPT W/ANY DR. SM LOC	205
would like SM/SR sooner	205
WOULD LIKE A SOONER APPT	205
wk 858-858-8588-cyst on back	205
tuesdays only 858 858 8581	204
TUES/THURS ONLY/858.858.8587	205
THURS APPT ONLY 760-715-4872	205

Wait List

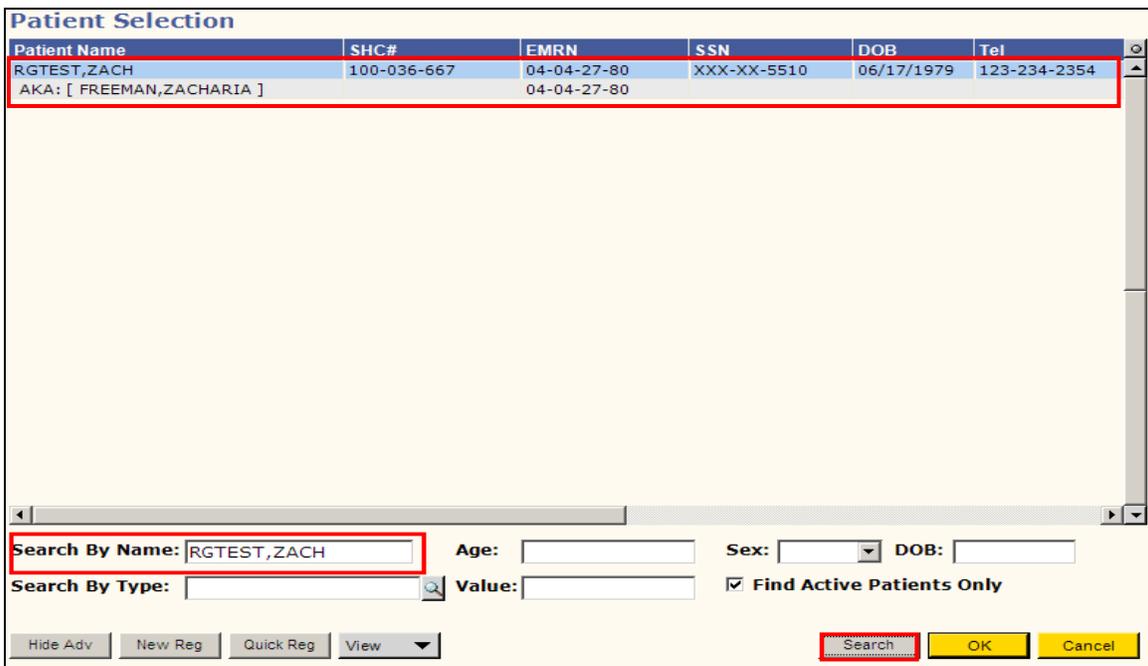
Linked Entry

This option is used when a patient already has an appointment scheduled, but wants to be added to the waitlist for a sooner appointment.

How to Add Existing Appointments to Wait List:



1. Click **Add, Existing Appointment**



2. Search for the **patient**
3. **Find the appointment** that the patient would like to be wait listed for.
4. Click **OK**

Wait List

Wait List - Add Existing Appointment Last Refreshed: 03:17PM

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
09/15/2010	WED	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20		30104963	CVW\$
09/13/2010	MON	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20		30104961	CVL\$
08/30/2010	MON	09:50AM	PEN	REG	CHAMBERS MD,MICHAEL	IM	CV	20		30104959	CV\$
08/27/2010	FRI	11:30AM	PEN	REG	GREEN MD,STEVEN A	FP	MM	20		30104933	CV\$
08/25/2010	WED	09:50AM	PEN	OVN	MONTOYA MD,PERRY	IM	CV	5		30104982	CV\$
08/24/2010	TUE	04:00PM	PEN	REG	GRANT MD,JOHN J	FP	GEN	15		30104926	CV\$
08/23/2010	MON	09:50AM	PEN	OVN	MONTOYA MD,PERRY	IM	CV	5		30104981	CVW\$

5. Add a **wait list comment** (ex. patient's preferred appointment/ Symptoms)

Add/Edit Wait List Entry

Patient: ...

Provider:

Department:

Location:

Appointment Type:

Date to Delete:

Wait List Comment:

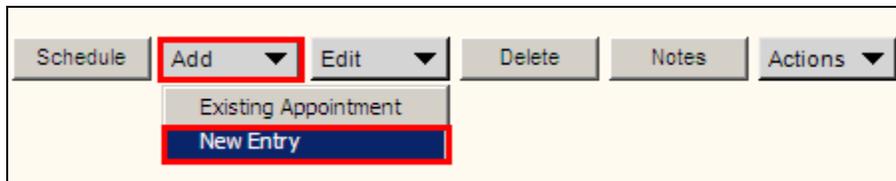
Note: You can add a patient to the Wait List during the scheduling process if the appointment is on or after 30 days.

Wait List

Stand Alone Entry

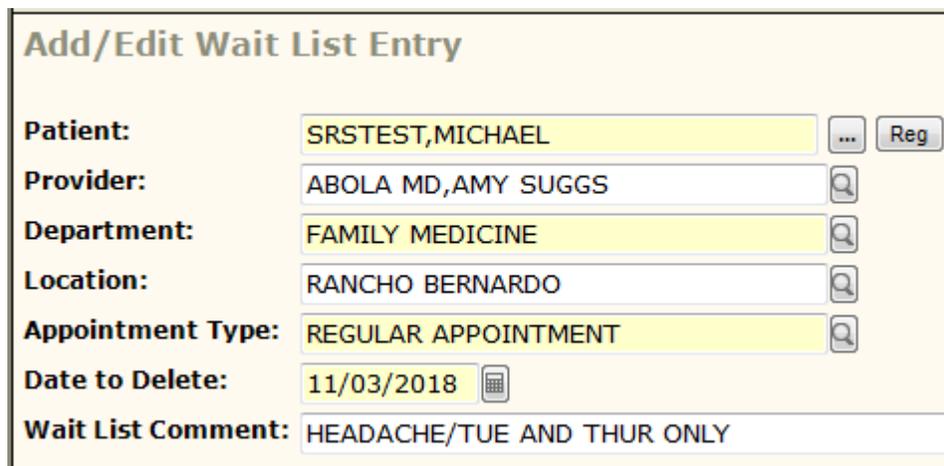
This option is used when the patient does not have an appointment scheduled, but wants to be added to the waitlist in case an appointment becomes available.

How to Add Stand Alone Appointments to Wait list:



A screenshot of a software interface showing a row of buttons: 'Schedule', 'Add', 'Edit', 'Delete', 'Notes', and 'Actions'. The 'Add' button is highlighted with a red box. Below it, a dropdown menu is open, showing two options: 'Existing Appointment' and 'New Entry'. The 'New Entry' option is highlighted with a blue box and a red border.

1. Click **Add, New Entry**



A screenshot of a form titled 'Add/Edit Wait List Entry'. The form contains several fields with the following values: 'Patient: SRSTEST,MICHAEL', 'Provider: ABOLA MD,AMY SUGGS', 'Department: FAMILY MEDICINE', 'Location: RANCHO BERNARDO', 'Appointment Type: REGULAR APPOINTMENT', 'Date to Delete: 11/03/2018', and 'Wait List Comment: HEADACHE/TUE AND THUR ONLY'. Each field has a search icon to its right. There are also '...' and 'Reg' buttons next to the Patient field.

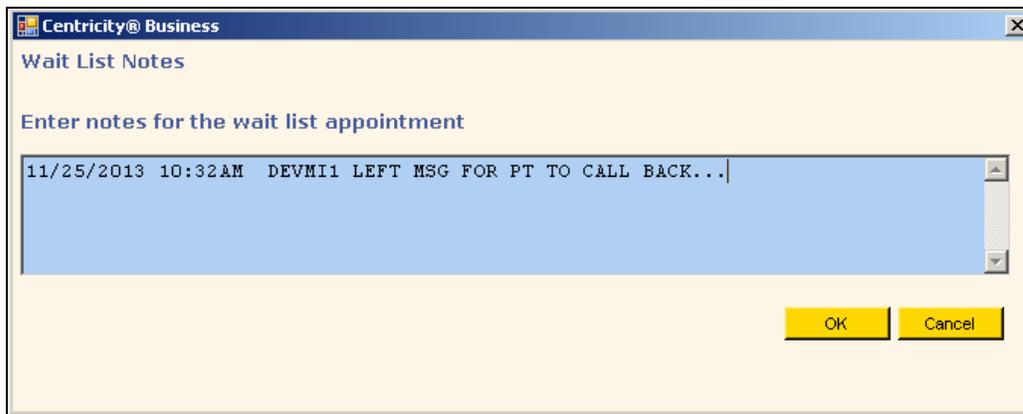
2. Complete **all fields**
3. Click **OK**

Wait List

Note Function

You can add a note to a Wait List entry by selecting an appointment and clicking the **Notes** button. The system automatically adds a date and time stamp with your username.

How to Add a Note to a Wait List Entry:



1. Select appointment from the Wait List
2. Click **Notes**
3. Type your comments
4. Click **OK**

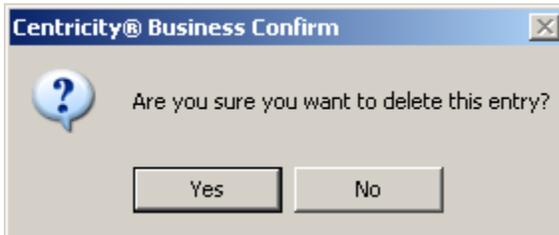
Wait List

Delete Function

The system automatically deletes appointments from the Wait List when the displayed dates have passed. You can also delete an appointment from the Wait List manually (i.e. if your patient wants to see another provider rather than wait for an appointment).

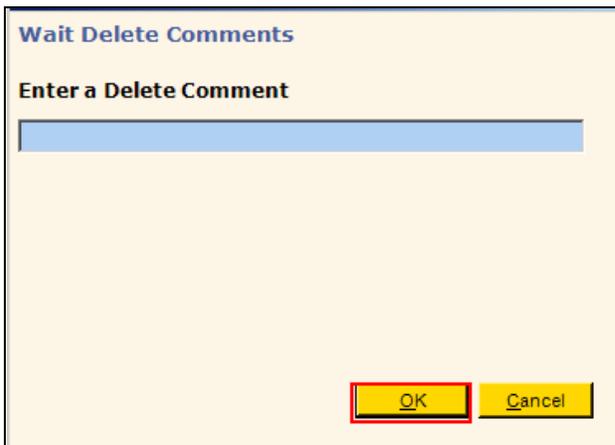
How to Delete an Entry from the Wait List:

1. Select appointment from the Wait List.
2. Click **Delete**.
3. Click **YES**, in the confirmation pop-up box



When deleting an **existing entry** from the Wait List, the system prompts you for an optional delete comment.

4. Enter **Delete Comment**.
5. Click **OK**.

A screenshot of a dialog box titled "Wait Delete Comments". It has a light yellow background. The text "Enter a Delete Comment" is displayed above a text input field. At the bottom right, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red border.

Note: Deleting a stand alone entry will not prompt you to add a delete comment.

Bump List

“**Bumped**” appointments are appointments that are cancelled by the provider.

Note: Patients are notified via FollowMyHealth once appointments are bumped.

“**Cancelled**” appointments are appointments that are cancelled by the patient.

The Bump List allows the schedulers to keep track of the bumped appointments that have not yet been addressed. Once a patient is contacted and the appointment is deleted from the Bump List, either manually or by rescheduling the appointment, it no longer appears on the Bump List.

How to Schedule from the Bump List:

Also known as the “Rescheduling List”

1. Click **Scheduler (VTB)** / Click **Bump List (HTB)**.

Bump List Settings Screen

New Appointment Appointment List Provider Schedules **Bump List** Wait List Front Desk Financial Comment

Bump List Settings

Date Range
 Bump Date Appointment Date

From Date: 06/10/2015
To Date: 11/25/2015

Selection Criteria
 Dept/Prov Location

Department:
Provider:

Criteria:

Filter!
Filter!
Filter!

Bump List

2. Use this screen to **filter the Bump List** by date, department, provider, location, or providers within a department.
3. Click **OK**

Bump List Last Refreshed: 09:10AM

Patient	Bump Dt	Appt Dt	Time	Type	Prov	Dept	Loc	Link	Appt No.	MRN	DOB	Home Tel
RGTEST,HERMIONE	02/14/2011	02/07/2011	08:00AM	REG	AES	FP	RB		30121041	106-001-295	06/05/1988	858-499-4
RGTEST,HARRY	02/14/2011	02/07/2011	08:15AM	REG	AES	FP	RB		36368164	106-001-293	08/01/1988	619-232-1
RGTEST,HARRY	02/14/2011	02/07/2011	08:30AM	REG	AES	FP	RB		30122492	106-001-293	08/01/1988	619-232-1
RGTEST,HARRY	02/14/2011	02/07/2011	08:45AM	REG	AES	FP	RB		30121291	106-001-293	08/01/1988	619-232-1
RGTEST,SEVERUS	02/14/2011	02/07/2011	09:00AM	REG	AES	FP	RB		36368649	106-001-297	01/01/1985	858-499-4
RGTEST,SEVERUS	02/14/2011	02/07/2011	09:15AM	REG	AES	FP	RB		30119787	106-001-297	01/01/1985	858-499-4
RGTEST,HARRY	02/14/2011	02/07/2011	09:30AM	REG	AES	FP	RB		30122479	106-001-293	08/01/1988	619-232-1
RGTEST,HERMIONE	02/14/2011	02/07/2011	09:45AM	REG	AES	FP	RB		36367360	106-001-295	06/05/1988	858-499-4
RGTEST,BOND J	02/14/2011	02/07/2011	10:15AM	REG	AES	FP	RB		30122327	106-001-274	10/01/1965	858-499-4
RGTEST,ALBUS	02/14/2011	02/07/2011	10:30AM	REG	AES	FP	RB		30122723	106-001-296	06/07/1942	619-446-1
RGTEST,WEASLEY	02/14/2011	02/07/2011	10:45AM	REG	AES	FP	RB		36368685	106-001-294	07/07/1988	858-616-2
RGTEST,FRODOE	02/14/2011	02/07/2011	11:00AM	REG	AES	FP	RB		36368275	106-001-884	08/11/1940	619-449-1
RGTEST,HARRY	02/14/2011	02/07/2011	11:15AM	REG	AES	FP	RB		36368047	106-001-293	08/01/1988	619-232-1
RGTEST,WEASLEY	02/14/2011	02/07/2011	11:30AM	REG	AES	FP	RB		30121209	106-001-294	07/07/1988	858-616-2
RGTEST,HARRY	02/14/2011	02/07/2011	11:45AM	REG	AES	FP	RB		36368940	106-001-293	08/01/1988	619-232-1
RGTEST,WEASLEY	02/14/2011	02/07/2011	12:00PM	REG	AES	FP	RB		30122502	106-001-294	07/07/1988	858-616-2
RGTEST,MIKE	02/14/2011	02/07/2011	01:30PM	MDM	AES	FP	RB		36369392	105-701-832	01/02/1968	858-644-6
RGTEST,HERMIONE	02/14/2011	02/07/2011	02:00PM	REG	AES	FP	RB	Y	36368499	106-001-295	06/05/1988	858-499-4
RGTEST,HARRY	02/14/2011	02/07/2011	02:15PM	REG	AES	FP	RB	Y	36368498	106-001-293	08/01/1988	619-232-1
RGTEST,MARSHA B	02/14/2011	02/07/2011	02:30PM	CVT	AES	FP	RB	Y	36369406	106-001-289	05/05/1955	619-644-6
RGTEST,THEM	02/14/2011	02/07/2011	02:30PM	CVT	AES	FP	RB	Y	36369407	106-001-292	09/01/1975	858-499-4
RGTEST,HARRY	02/14/2011	02/07/2011	03:00PM	REG	AES	FP	RB		36368796	106-001-293	08/01/1988	619-232-1
RGTEST,HARRY	02/14/2011	02/07/2011	03:15PM	REG	AES	FP	RB	Y	36368823	106-001-293	08/01/1988	619-232-1
RGTEST,WEASLEY	02/14/2011	02/07/2011	03:30PM	REG	AES	FP	RB	Y	36368824	106-001-294	07/07/1988	858-616-2
RGTEST,HERMIONE	02/14/2011	02/07/2011	03:45PM	REG	AES	FP	RB	Y	36368825	106-001-295	06/05/1988	858-499-4

From the Bump List you can perform the following actions:

Reschedule an appointment.

- You can reschedule an appointment from the Bump List by highlighting an entry from the grid and clicking Reschedule.

Delete

- You can delete an entry from the Bump List

Notes

- If you are unable to get a hold of the patient, use the Notes button to document how you attempted to contact the patient.

Centricity® Business

Bump List Notes

Enter notes for the bumped appointment

02/20/2014 08:47AM AWP SR11 LEFT MESSAGE FOR PATIENT TO CALL BACK...

Bump List

Actions

- View the Appointment Detail screen for the Bump List entry.
- Print Bump List.
- Filter the Bump List entries

Example of Bump List:

SCHEDULING 5.1									
Page: 1									
IDX BUMP LIST for THURSDAY 06/28/2018 Printed:06/28/2018 12:38Pm									
Sort by Department/Provider									
INTERNAL MEDICI / BROWN MD, DANIEL									
Patient Name	MRN	DOB	Hm Phone	Wk Phone	Apt Date				
Time	Bmp Date	Typ	Prov	Dept	Loc	RSC Date			
SRSTEST, CHANDLER	107-861-947	02/02/92	123-456-7890		06/28/20				
11:20AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: EAR INFECTION									
SRSTEST, HARRY	107-861-914	02/02/92	123-456-7890		06/28/20				
09:40AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: BACK PAIN									
SRSTEST, HERMIONE	107-861-913	01/01/91	619-123-4567		06/28/20				
08:00AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: LEG PAIN									
SRSTEST, HERMIONE	107-861-913	01/01/91	619-123-4567		06/28/20				
08:40AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, LEIA	107-861-920	02/02/92	123-456-7890	123-456-7890	06/28/20				
11:00AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, LUKE	107-861-919	01/01/91	555-123-3456	123-456-7890	06/28/20				
09:00AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, LUKE	107-861-919	01/01/91	555-123-3456	123-456-7890	06/28/20				
10:20AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, MARSHALL	107-861-932	02/02/92	123-456-7890		06/28/20				
08:20AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, MONICA	107-861-950	02/02/92	123-456-7890		06/28/20				
01:00PM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, RACHEL	107-861-949	01/01/91	123-456-7890	619-295-4441	06/28/20				
09:20AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, RACHEL	107-861-949	01/01/91	123-456-7890	619-295-4441	06/28/20				
01:00PM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, ROSS	107-861-946	01/01/91	123-456-7890		06/28/20				
10:20AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, ROSS	107-861-946	01/01/91	123-456-7890		06/28/20				
01:00PM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH OK TO OVERBOOK PER DR. BROWN									
SRSTEST, TED	107-861-931	01/01/91	123-456-7890	858-485-4600	06/28/20				
08:00AM	06/28/20	REG	DJB	INTE	PL				
Sch Comment: COUGH									
SRSTEST, TED	107-861-931	01/01/91	123-456-7890	858-485-4600	06/28/20				
10:20AM	06/28/20	REG	DJB	INTE	PL				

Note: It is important to not use the word “Bump” when speaking with patients.

Example: “Due to changes in the provider’s schedule, I would like to inform you that your appointment has been cancelled. Would you like to reschedule at this time?”

Print Forms (Labels)

This function is used to print extra forms and labels for patient appointments.

Patient's Appointment List

Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
04/02/2012	MON	08:30AM	ARR	REG	TEST MD,MYSHARP	FP	MM	20		38860023	CV\$

Links Actions Appt Actions Appt Set Next Cancel

- Arrive
- Cancel/Reschedule
- Noshow
- Appointment Detail
- Appointment Data Form
- Appointment Overview
- Link Appointment
- Print Forms**

- **Highlight** the correct patient's appointment.
- Click **Appt Actions** button.
- Click **Print Forms**.

Print Forms
08:30AM Monday, Apr 02 2012 Appt #: 38860023

	Device	Copies	Margin
<input checked="" type="checkbox"/> Encounter Form	5859	1	80
<input type="checkbox"/> EDM Form		1	80
<input type="checkbox"/> Form Letter		1	80
<input type="checkbox"/> Followup Slips		1	80
<input type="checkbox"/> Arrival Labels		1	80
<input type="checkbox"/> Embossed Cards		1	

- **Check mark** Encounter Form
- Verify the **printer device number**
- Type in the **number of copies** needed
- Click **OK**

Print Forms (Labels)

Encounter Form (label diagram)

Encounter forms are used throughout the clinics for patient identification on specimens, documents, etc.

Encounter forms are printed on **labels**.

