

Appointment Scheduling

Scheduling a Recurring Appointment

Open the Scheduling Appointment Book application, click the Appointment tab, and fill out the accept formats fields the same as in previous examples. Press the MOVE button to move the information to the WIP. Remember to Uncheck the resources in the "Attributes Window" go to resource tab after choosing the orders.

Click the **Recur** button. The Recurring Frequencies window will display.

Within the Recurrence pattern area, you have many different options to choose from when selecting the frequency of the appointment. You may choose to pick every Monday and Wednesday, every other week, etc. You also have the option to select which day of the week the patient should be scheduled.

In the Range of Recurrence area, select the date which you would like the appointments to begin and how many instances of the appointment needs to be scheduled.

The Allow Multiple Recurring Frequencies option allows you to select different types of frequencies for different days of the week. For example, you might choose to schedule the appointment for every Monday, but only want to schedule the appointment for every other Wednesday.

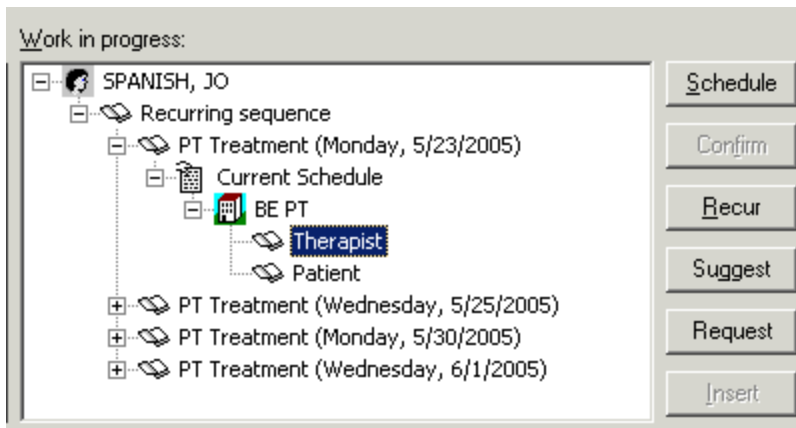
The screenshot shows the "PT Treatment - Recurring Frequencies" dialog box. It is divided into three main sections: "Time pattern", "Recurrence pattern", and "Range of recurrence".

- Time pattern:** The "Every" radio button is selected. The frequency is set to "1" hour(s). The "Begin time" is set to "0000" and the "End time" is set to "2355".
- Recurrence pattern:** The "Weekly" radio button is selected. The frequency is set to "1" week(s). The days of the week are checked as follows: Monday, Tuesday, and Wednesday. There are also "All days" and "Weekdays" buttons.
- Range of recurrence:** The "Start Date" is set to "05/23/2005". The "End after" radio button is selected, and the number of instances is set to "4".

At the bottom of the dialog, there is a checkbox for "Allow multiple recurring frequencies" which is unchecked. "OK" and "Cancel" buttons are located at the bottom right.

Once you have made your selections, press the OK button.

The information for all instances of the recurring appointment will display in the WIP.

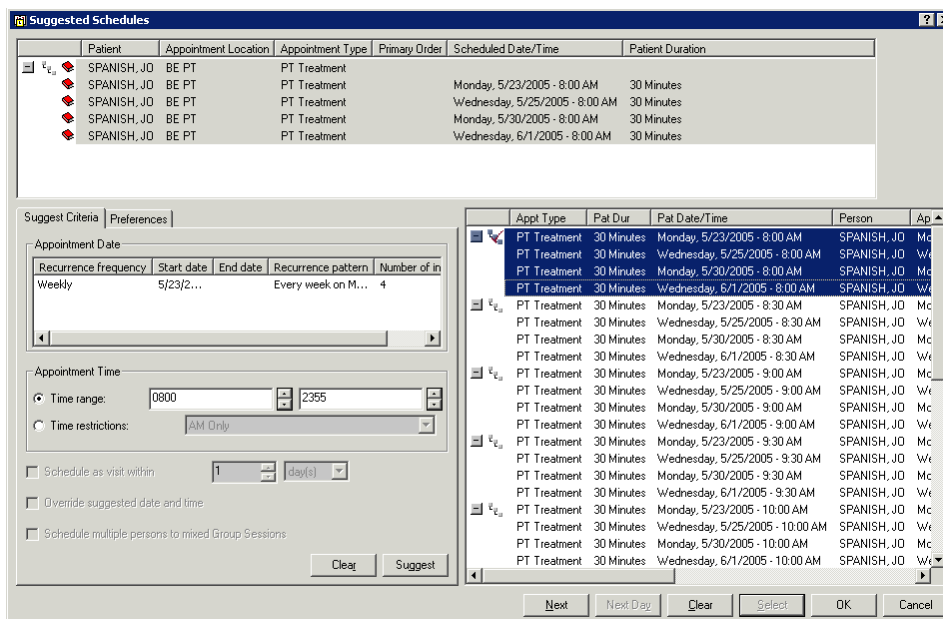


Suggested Scheduling is the best method for finding available appointment times for multiple appointments at once. Press the Suggest button.

All appointments will display in the top portion of the Suggested Schedules window. Press the Suggest button.

Available appointment options will display on the right portion of the screen. Notice that the response included available appointment times for all appointments within the recurring series.

Highlight one of the options and press the SELECT button. A red check mark will display next to the select appointment times.



The system will typically return an option which has all appointments within the recurring series occurring at the same time of day for each of the appointment dates. In the example above, the suggestion was 8:00 am. You have the option to search for an alternative time for one or multiple components within the recurring series.

In the upper section of the Suggested Schedules window, select one component of the recurring series.

Suggested Schedules						
	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration
	SPANISH, JO	BE PT	PT Treatment			
	SPANISH, JO	BE PT	PT Treatment		Monday, 5/23/2005 - 8:00 AM	30 Minutes
	SPANISH, JO	BE PT	PT Treatment		Wednesday, 5/25/2005 - 8:00 AM	30 Minutes
	SPANISH, JO	BE PT	PT Treatment		Monday, 5/30/2005 - 8:00 AM	30 Minutes
	SPANISH, JO	BE PT	PT Treatment		Wednesday, 6/1/2005 - 8:00 AM	30 Minutes

Press the SUGGEST button again. This time the system will return appointment suggestions only for the highlighted appointment. Highlight a different time option and press the SELECT button.

	Appt Type	Pat Dur	Pat Date/Time	Person	Appt Date
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 8:00 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 8:30 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 9:00 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 9:30 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 10:00 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 10:30 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 11:00 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 11:30 AM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 12:00 PM	SPANISH, JO	Monday, 5/23/2005
	PT Treatment	30 Minutes	Monday, 5/23/2005 - 12:30 PM	SPANISH, JO	Monday, 5/23/2005

You will notice that the appointment time has now changed for just that particular component of the recurring series.

Suggested Schedules						
	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration
	SPANISH, JO	BE PT	PT Treatment			
	SPANISH, JO	BE PT	PT Treatment		Monday, 5/23/2005 - 9:00 AM	30 Minutes
	SPANISH, JO	BE PT	PT Treatment		Wednesday, 5/25/2005 - 8:00 AM	30 Minutes
	SPANISH, JO	BE PT	PT Treatment		Monday, 5/30/2005 - 8:00 AM	30 Minutes
	SPANISH, JO	BE PT	PT Treatment		Wednesday, 6/1/2005 - 8:00 AM	30 Minutes

Press the OK button. All appointments will appear in a Pending status within the WIP.

Work in progress:

- SPANISH, JO
 - Recurring sequence
 - PT Treatment (Monday, 5/23/2005)
 - Current Schedule
 - BE PT
 - Therapist
 - Patient
 - PT Treatment (Wednesday, 5/25/2005)
 - PT Treatment (Monday, 5/30/2005)
 - PT Treatment (Wednesday, 6/1/2005)

Press the CONFIRM button and the Confirmation window will display with all appointment's information. Press the OK button to close the Confirm window.