Updated Scheduling FAQs

Who can schedule?
- This depends on the Role and Security Set up. Anyone can schedule as long as they have the security access to do so.

What are the steps to create a schedule for yourself?
- From the Grid > Schedule Options > Add > highlight schedule > Insert > arrow to Grid

How do you put a patient on the schedule?
- From the Grid > Select a blank space > Search for Patient > Choose Task > Fill out all necessary fields on the event screen > Update.

How do you change an existing task to something different?
- After selecting patient name to detail screen > highlight task line > Select change task type > choose different task > update.

What are the steps to edit an event?
- Select patient from Grid or look up from Patient Appointments > Select event button > make corrections > UPDATE

How do you link and unlink an account?
- Select patient name or look up from Patient Appointments > Highlight appointment line > select Link choose account from list
- If already linked, highlight then select Unlink

How do you check in a patient?
- Patient must have account number linked > Highlight appointment on grid > select check in.
- If clinic location, patient will go to the tracking board and Thrive will ask them to be placed in a room.

How do you change the duration of a task that has been scheduled?
- Select a patient name to detail screen > highlight task line > select change Duration > Type in different duration time > update.

What basic security should be given to schedulers?
- See Your IT department for Role Information.

How do you block a location for a meeting from the grid?
- (Security Needed) – Highlight empty slot > select Block > set up elements for block > Update

How do you unblock a location?
- When a location is showing as “blocked” via a grey space, the user can select the block > select Block > select “Remove Block”

What does the “previous version appts.” button indicate?
- This will indicate previous appointments from the “OLD” EWS platform (if used)

To Reschedule Patient
- From Grid > Select the Scheduled Patient > Reschedule

Add Patient to Wait List
- Select Cell > select a Scheduled Patient > WaitList

Schedule a Group Task
- Select Cell > Search Patient > Select Group Task

Double > Book Patient
- (Security Is needed) Select Gutter > Search Patient > Select Task > Update

What is view only?
- When users are in the System Administrator or Scheduling roles, there are default settings that will allow them to access the schedule and schedule appointments as necessary.
- For users who are not in the System Administrator or Scheduling roles, they will have limited view only access to certain areas of the Scheduling application.
- The behavior control of “Create Appointments” will allow users to schedule or modify patients. Without this behavior control users will have view only access and will be unable to make changes.

How to attach an image to an appointment?
- Images may be attached to a patient’s appointment from the Appointment Event screen or the Appointment Detail screen.
- To attach an image from the Appointment Event screen:
    - Thrive UX > Scheduling > select Date and Time > Schedule > select Patient > select Task > Schedule > select Images > Add > select title > select file to attach > Import > Save > this attaches the image to the appointment.
- To attach an image from the Appointment Detail screen:
    - Thrive UX > Scheduling > select Scheduled Appointment > select Images > Add > select title > select file to attach > Import > Save > this attaches the image to the appointment.
- ***NOTE:*** *Once the appointment is linked to the account the image will pull to Electronic File Management (EFM).*

How to make image tittles show when scheduling?
- Setup in the Titles table is required if images will be uploaded through the Updated Scheduling application.
    - Thrive UX > Tables > Business Office > under Images > select Titles > select desired image title > check “Scheduling” at the bottom of the page > Save