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## Printing

### How do I print a schedule?

- Select **Scheduling** from Thrive UX > Select **Print Schedule** from action bar > Choose parameters wanted (Date range, include Demographics, include Comments, etc.) > Select the resources (locations) to print (to select multiple resources, press and hold the control key and the select each desired resource) > select PDF or CSV on the action once all parameters have been selected and the report is ready to print
  - **NOTE:** *The only resources that are available to select/print are the resources that the user has listed on the users' My Schedule List.*

### Does the schedule print blocked times?

- Yes, users are able to print the closed and blocked times that are listed on the schedule.

## Table Maintenance

### What is Max simultaneous vs. Max per day?

- Max simultaneous – defined as the maximum number of patients that can be put within a time slot.
- Max per day – defined as the maximum number of patients that can be seen in one location in a day.

### How can I create Locations?

- Thrive UX > Tables > Patient Intake > Locations

### How can I create Tasks/Procedures?

- Thrive UX > Tables > Patient Intake > Tasks/Procedures

### How can I add a resource to Task?

- Thrive UX > Tables > Patient Intake > Tasks/Procedures > choose task > Select (Drop down) > Select Resources

### How can I assign a color to a task?

- Thrive UX > Tables > Patient Intake > Tasks/Procedures > choose task > Select Color to show color wheel > choose color > update

### What is a Category?

- A category is used to link task(s)/procedure(s) together for sorting purposes only within the task table.

### Can I add instructions?

- Yes. Instructions can be added to the Tasks/Procedures table and linked to a specific task.
- There two types of instructions that may be created: patient and scheduler.
  - These instructions will display when scheduling a patient for an appointment.
  - They can also be viewed or printed.

### Can two people have the same schedule?

- Yes. As long as the schedule is marked "Public" in the tables, anyone that has access to scheduling can see and use that schedule.



## How many schedules can I have in my list?

- You can have quite a few; however, the recommendation is to limit your schedule list to 20.

## How many locations can I have in each schedule?

- We have not limited this; however, it is recommended to use less than 20 per schedule.

## How to specify a clinic location from a Hospital location?

- Thrive UX > Tables > Patient Intake > Locations > Check mark (clinic)
- Check in - Patient has to be linked to an account to be checked in and to place them on the tracking board. Also, the screen will allow the user to place them in a room when taken to the Patient Location Maintenance Screen.
  - **NOTE:** *When a scheduled task/procedure is linked to an account and open charts is used, users will be taken directly to that chart for the account linked. If the account is not linked the user will receive a list of accounts for that profile to choose from.*