Table Maintenance - Patient Intake

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by TruBridge

Clear the way for care.

Table Maintenance - Patient Intake

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Chapter 1 Introduction

1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. TruBridge's Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on TruBridge’s interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client’s attestation, TruBridge bears no responsibility for attestation information submitted by the client.

1.2 What's New

This section introduces the new features and improvements for **Table Maintenance - Patient Intake** for release Version 22.01. A brief summary of each enhancement is given referencing its particular location if applicable. As new branches of Version 22.01 are made available, the original enhancements will be moved to the Previous Work Requests section. The enhancements related to the most current branch available will be listed under the main What's New section.

Each enhancement includes the Work Request (WR) Number and the description. If further information is needed, please contact the **Client Services** Support.

Rooms Table - Department of Health Fields -- FA-13618

DESCRIPTION: The New York Department of Health is requiring facilities to report on room availability every two hours, so that in the case of a mass emergency, the bed types and availability will be readily known. Three new fields have been added to the Rooms table to meet this requirement: Category, Classification, Designation. Each of these fields will have a look-up available to select the appropriate option.

DOCUMENTATION: See Rooms 47

Service Code Table - SNOMED Codes -- FA-14072

DESCRIPTION: A new SNOMED option has been added to the navigation panel of the Service Code table. This will allow SNOMED codes to be associated with a Service Code.

DOCUMENTATION: See Service Codes 51

Scheduling Tables - Report Option -- FA-11193

DESCRIPTION: A new Report option has been added to the action bar of the Tasks/Procedures table, Locations table and Personnel table to help identify all the records within those tables. The reports will also be available from the Report Dashboard.

DOCUMENTATION: See Tasks/Procedures 53, Locations 73 and Personnel 84.

Chapter 2 Overview

The Patient Intake tables enable the facility to customize the tables related to various applications in the system.

Table Maintenance settings are important tools used for specific applications within TruBridge EHR. Incorrect field settings may produce undesirable results. TruBridge strongly recommends checking with the TruBridge contact at the facility or calling a TruBridge Support Representative before making any table changes if the purpose of the field is not clear.

Select **Web Client** > **Tables** > **Patient Intake**

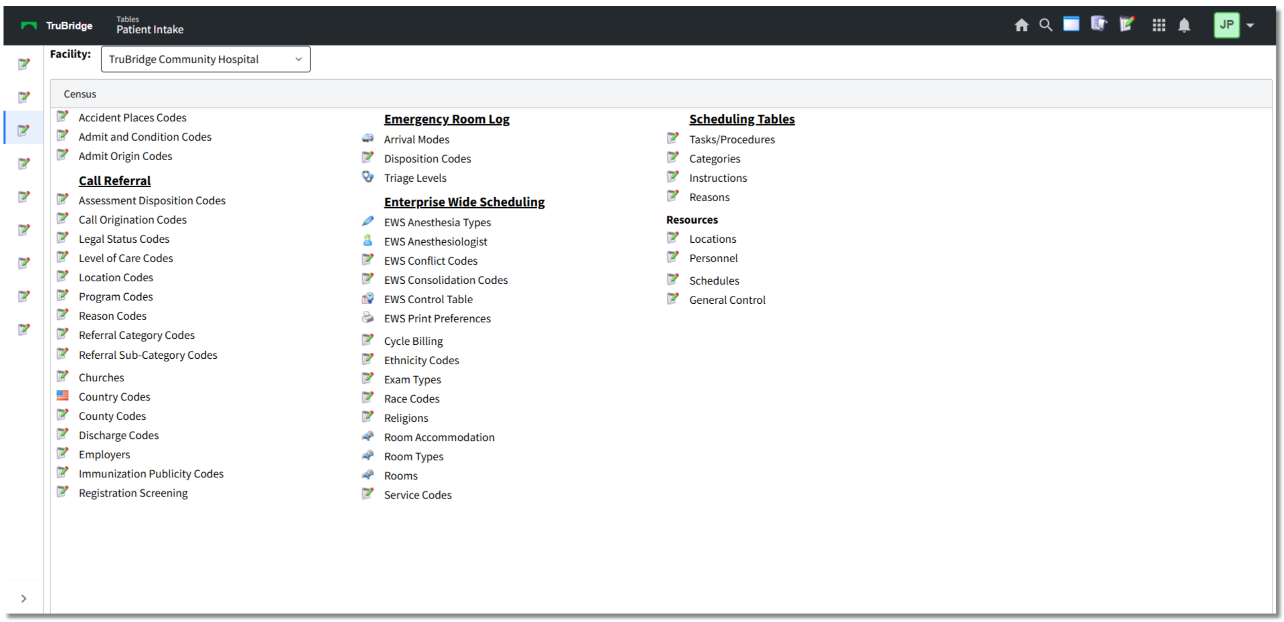


Table Maintenance Menu

NOTE: *Facilities outside of the United States may choose a date format of MMDDYY, DDMMYY or YYMMDD to be used on all date fields in the Patient Intake tables. Where four-digit dates display, a date format of MMDD, DDMM or MMDD, respectively, will be used. Whichever date format is selected will be reflected in all date fields and column displays throughout the tables. A TruBridge Representative should be contacted in order for the date format to be changed.*

NOTE: *Facilities outside of the United States may utilize a different address format within select Patient Intake Tables. The address may display the Province and Postal Code instead of the State and Zip Code when the Country Code field is set to another country code other than "US". A TruBridge Representative should be contacted for the foreign address fields to display.*

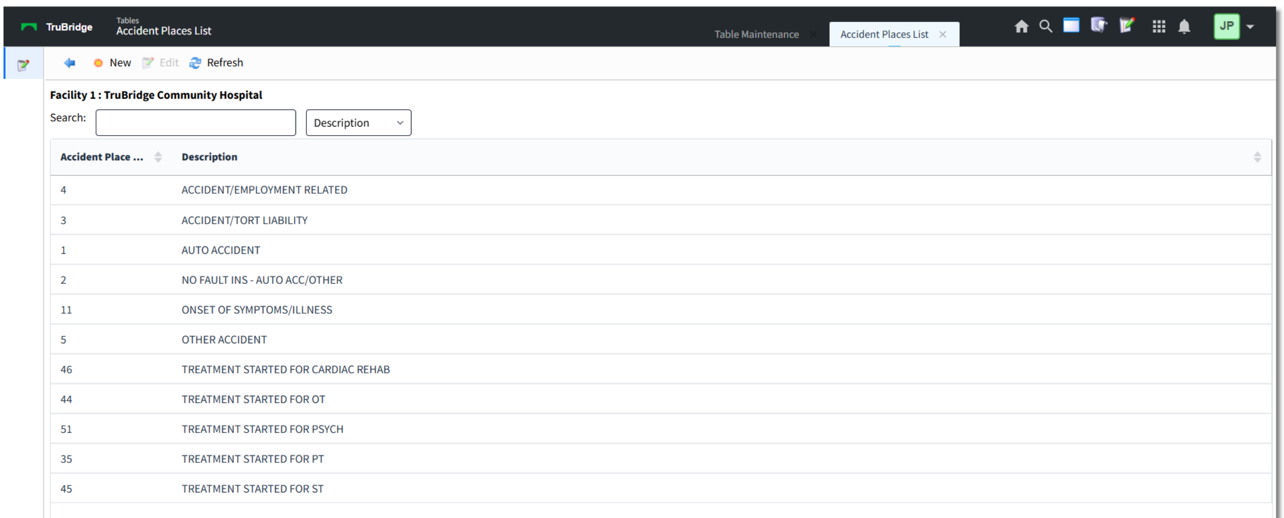
Chapter 3 Census

3.1 Overview

This chapter describes the Patient Intake tables that are maintained via Table Maintenance.

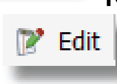
3.2 Accident Places Codes

Select **Web Client** > **Tables** > **Patient Intake** > **Accident Places Codes**



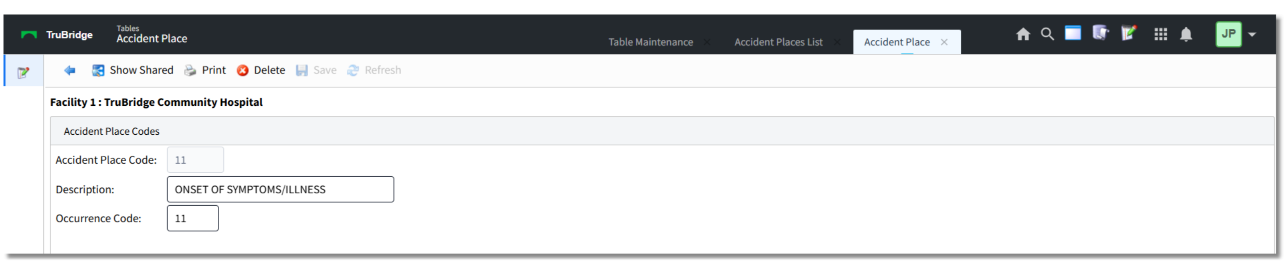
Accident Places List

Select 

New to enter a new accident place code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Accident Places Codes** > **Select a code**



Accident Places Maintenance

- **Accident Place Code:** Enter up to a 3-character alpha and/or numeric code.

- **Description:** Enter a specific Accident Description up to 35 characters in length. This description will display when using lookup option in the Place field on the Stay tab in the Registration and ADT screen.

- **Occurrence Code:** Enter a specific Occurrence Code that will be linked together with this Accident Code. The code must be a valid code, listed in the Occurrence Code table.

NOTE: *In regards to Workman's Compensation 1500 claims, occurrence code 04, will pull the following information to locator 10a, 10b and 10c on the 1500, regardless of the description loaded in the Accident Places table.*

Locator 10a:"Employment? Current or Previous" = ***Yes***
Locator 10b: "Auto Accident? State" = ***No***
Locator 10c: "Other Accident?" = ***No***

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.

- **Print**: Displays the table settings in Adobe

- **Delete**:Deletes the table settings

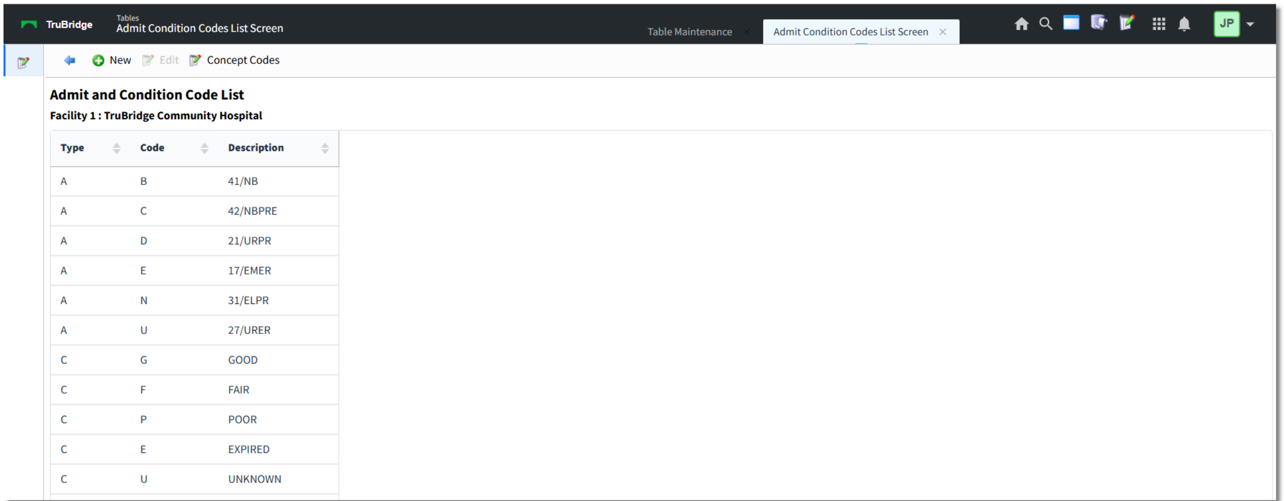
- **Save**: Saves changes made to the table settings

- **Refresh**: Allows changes to show immediately in the Accident Places list

Select  **Back Arrow** to return to the previous screen.

3.3 Admit and Condition Codes

Select **Web Client** > **Tables** > **Patient Intake** > **Admit and Condition Codes**



Admit Condition Codes table

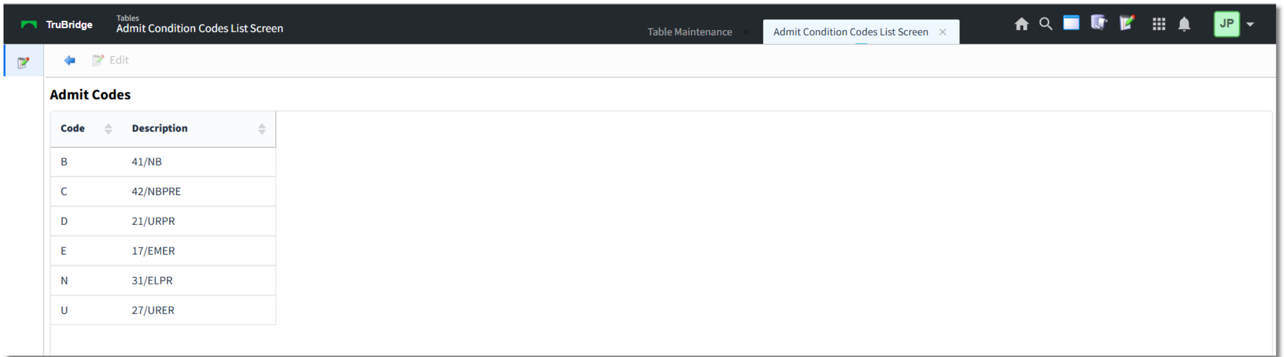
The Admit and Condition codes may be updated by selecting the code and then selecting **Edit**, respectively. To create a new Admit or Condition code select **New**.

The Admit or Condition may be edited/updated on the Admit and Condition Code Edit screen. Each code consists of a type (A for Admit or C for Condition), a single character code, and a description may be entered using up to eight characters. This table will allow a total of 50 codes to be entered.

The following options are available on the action bar:

- **Save**: Saves changes made to the table settings.
- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Delete**:Deletes the table settings
- **Concept Codes:** Select this option to add Concept Codes to the Admit Codes.

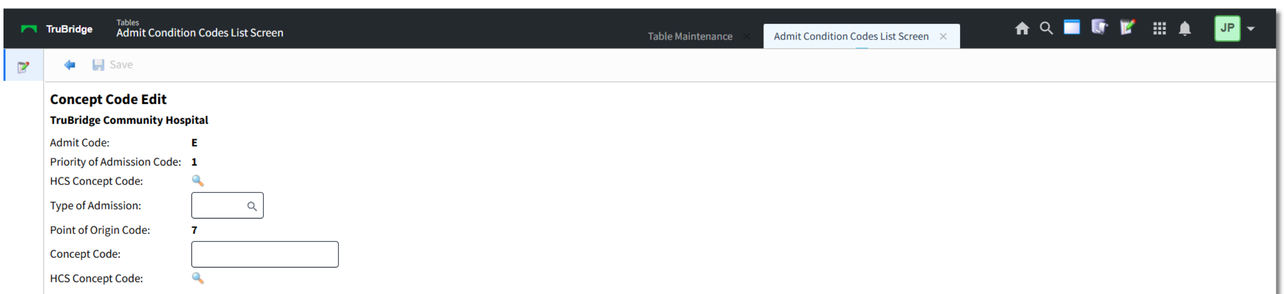
Select **Web Client** > **Tables** > **Patient Intake** > **Admit and Condition Codes** > **Concept Codes**



Admit Codes

Select the **Admit Code**.

Select **Web Client** > **Tables** > **Patient Intake** > **Admit and Condition Codes** > **Concept Codes** > **Selected Admit Code**



Concept Code Edit

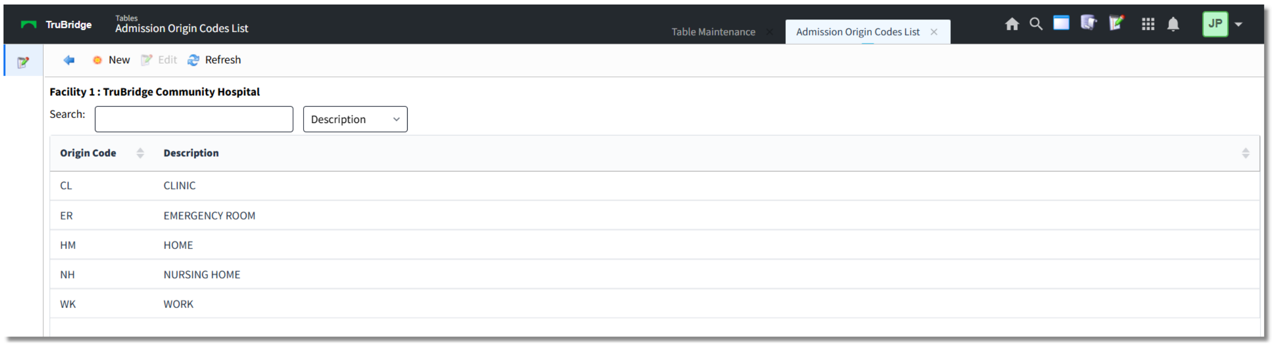
Below is an explanation of each field.

- **Admit Code:** The selected Admit Code
- **Priority of Admission Code:** The priority of the selected Admit Code.
- **HCS Concept Code:** Enter the Concept Code for the priority of admission. This field can accommodate up to 20 characters.
- **Type of Admission:** Use the magnifying glass lookup to select the type of admission for the Admit Code.
- **Point of Origin Code:** The point of origin of the selected Admit Code.
- **Concept Code:** Enter the Concept Code for the point of origin. This field can accommodate up to 20 characters.

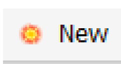
Select  **Back Arrow** to return to the previous screen.

3.4 Admit Origin Codes

Select **Web Client** > **Tables** > **Patient Intake** > **Admit Origin Codes**



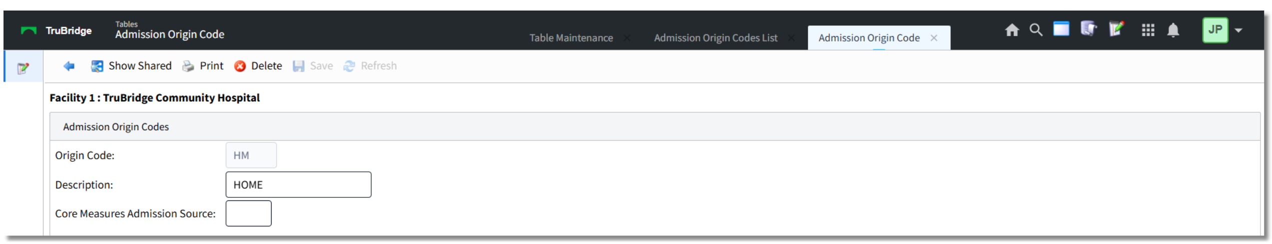
Admit Origin Codes List

Select 

New to enter a new admit origin code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Admit Origin Codes** > **Select a Code**



Admit Origin Codes Maintenance

- **Origin Code:** Enter a 2-character alpha and/or numeric code.
- **Origin Description:** Enter a specific Origin Description up to 20 characters in length. This description will display when using lookup option in the Origin field on the Stay tab in the Registration and ADT screen. Selecting **Delete** will delete the code.
- **Core Measures System Discharge Status:** Enter the code that is used to convert the Admit Origin Code information into the Core Measures System.

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.

- **Print**: Displays the table settings in Adobe

- **Delete**:Deletes the table settings

- **Save**: Saves changes made to the table settings

- **Refresh**: Allows changes to show immediately in the Admit Origin Codes list

Select  **Back Arrow** to return to the previous screen.

Chapter 4 Call Referral Tables

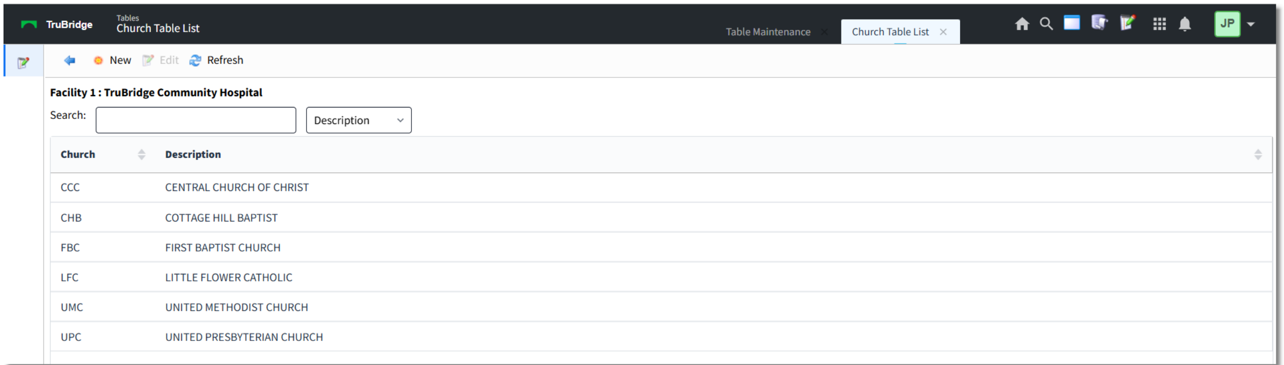
These tables should be set up prior to utilizing the Call Referral System, which is accessed through **Call Referral Registration** on the Hospital Base Menu.

The Call Referral tables each contain Code and Description fields. The Codes may be alpha and/or numeric and range from one to four characters. The Description field for each option is up to 25 characters in length, with the exception of the Assessment Disposition Table which is 20 characters in length.

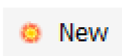
Enter the codes and descriptions in each of the nine tables listed under the Call Referral Tables section of the Patient tab.

Chapter 5 Churches

Select **Web Client** > **Tables** > **Patient Intake** > **Churches**



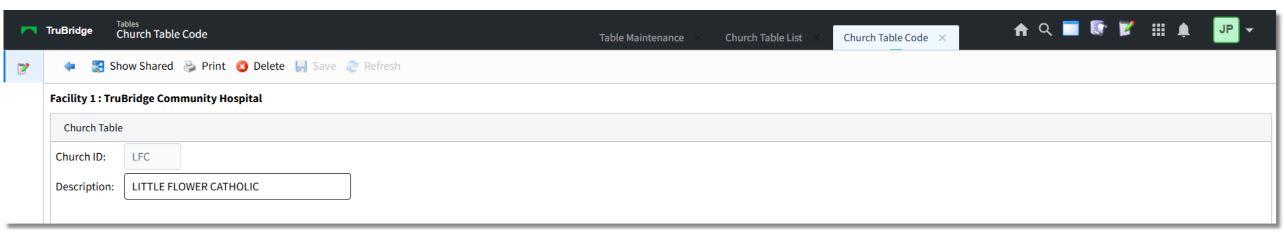
Church Code List

Select 

New to enter a new church code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Churches** > **Select a Code**



Church Code Maintenance

- **Church ID:** Enter a 3-character alpha and/or numeric code.
- **Church Name:** Enter a specific Church Name using up to 35 characters. This description will display when using lookup option in the Church field on the Patient tab in the Registration and ADT screen.

The following options are available on the action bar:

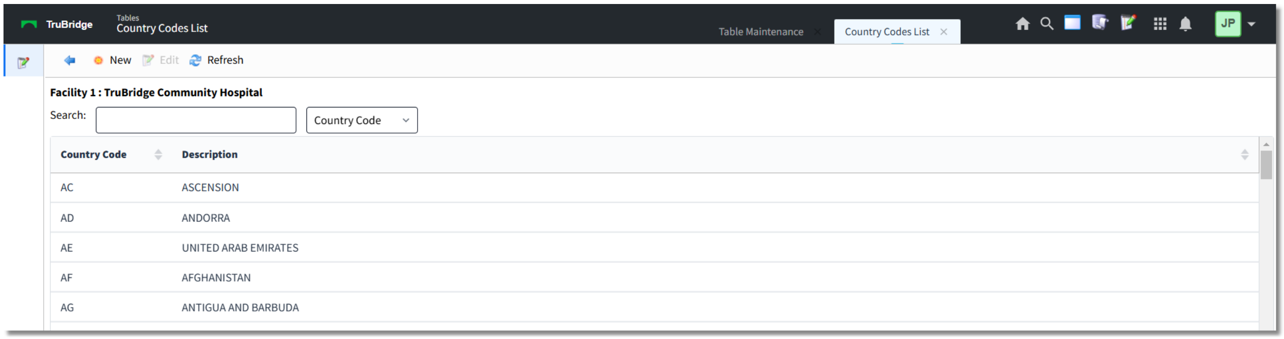
- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe

- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Churches Code list

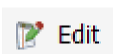
Select **Back Arrow** to return to the previous screen.

Chapter 6 Country Codes

Select **Web Client** > **Tables** > **Patient Intake** > **<u>Country Codes</u>**



Country Codes List

Select  **New** to enter a new country code or select an existing code from the list and select  **Edit**.

Select **Web Client** > **Tables** > **Patient Intake** > **Country Codes** > **<u>Select a Code</u>**

Country Codes Maintenance

- **Country Code:** Enter a 2-character alpha and/or numeric code.
- **Country Name:** Enter a specific country name. This name will display when using lookup option in the Country field on the Patient tab in the Registration and ADT screen.

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings

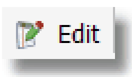
- **Refresh**: Allows changes to show immediately in the Country Codes table list

Select  **Back Arrow** to return to the previous screen.

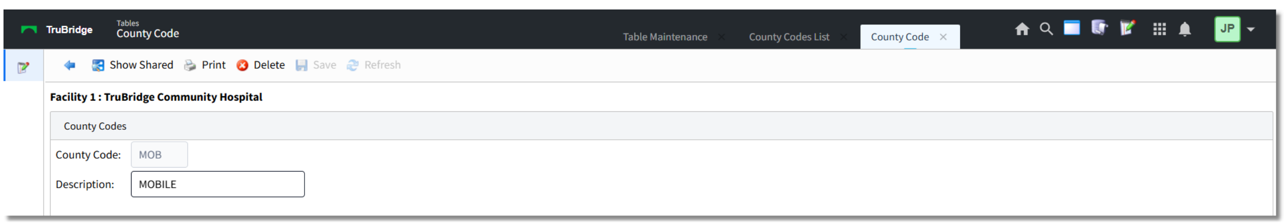
Chapter 7 County Codes

Select **Web Client** > **Tables** > **Patient Intake** > **County Codes**

County Codes List

Select  **New** to enter a new county code or select an existing code from the list and select  **Edit**.

Select **Web Client** > **Tables** > **Patient Intake** > **County Codes** > **Select a County Code**



County Codes Maintenance

- **County Code:** Enter a 3-character alpha and/or numeric code.
- **Description:** Enter a specific city or county name. This name will display when using lookup option in the County field on the Patient tab in the Registration and ADT screen.

The following options are available on the action bar:

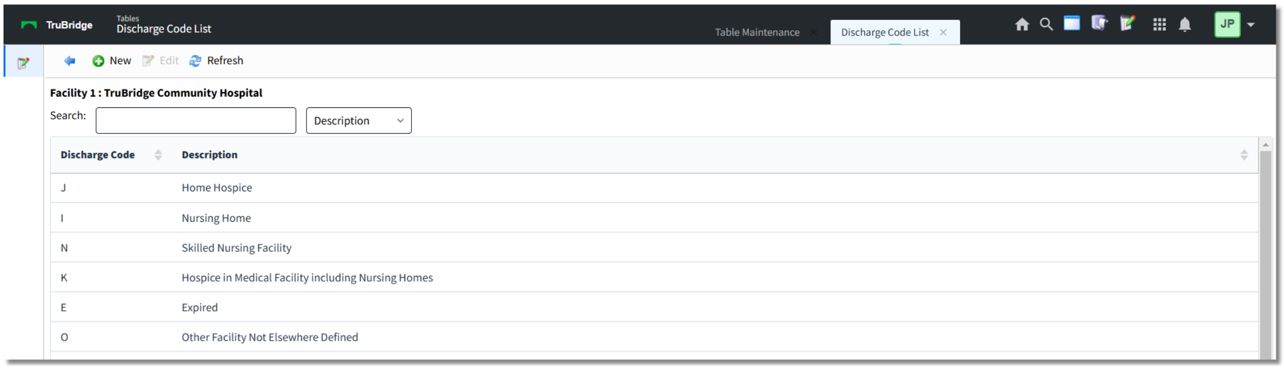
- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the County Codes list

Select **Back Arrow** to return to the previous screen.

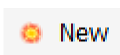
Chapter 8 Discharge Codes

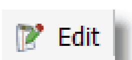
The Discharge Codes table is used to create a facility-defined listing of discharge codes used in patient registration and census functions.

Select **Web Client** > **Tables** > **Patient Intake** > **Discharge Codes**



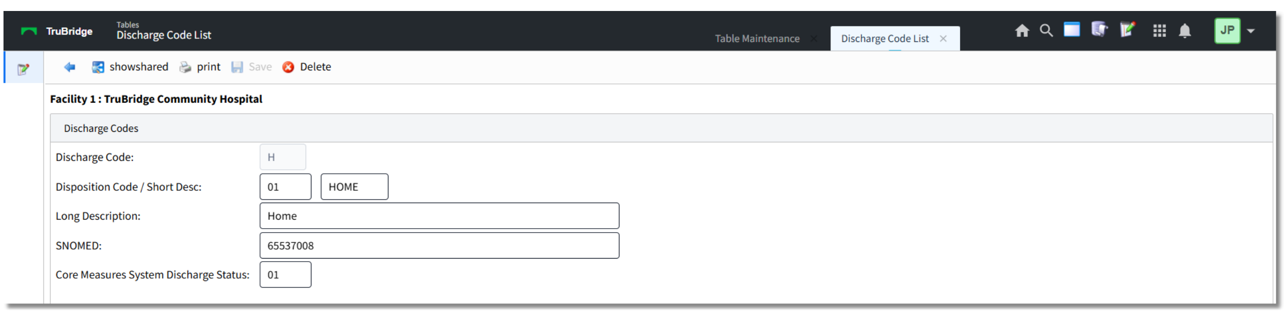
Discharge Code List

Select 

New to enter a new discharge code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Discharge Codes** > **Select a Code**



Discharge Code Maintenance

- **Discharge Code:** Enter the 1-character discharge code that will be chosen during Registration.
- **Disposition Code/Short Desc:** Enter the 2-character disposition code that needs to pull for billing and a 5-character short description of the discharge code.
- **Long Description:** Enter the full description of the discharge code. This may be up to 60 characters long and will display when using the lookup option.
- **SNOMED**: Enter the SNOMED code associated with the discharge disposition code. This may be up to 20 characters long.

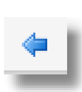
The following settings will be pre-loaded in the Snomed field:

Discharge Disposition Code	Snomed
01	65537008
02	306699001
05	306699001
06	10161009
07	445060000
20	371828006
40	371828006
41	371828006
42	371828006
43	306699001
50	428361000124107
51	428371000124100
61	306701001
62	433591000124103
63	306699001
65	306699001
66	306701001

- **Core Measures System Discharge Status:** Enter the code that is used to convert the discharge code information into the Core Measures System.

The following options are available on the action bar:

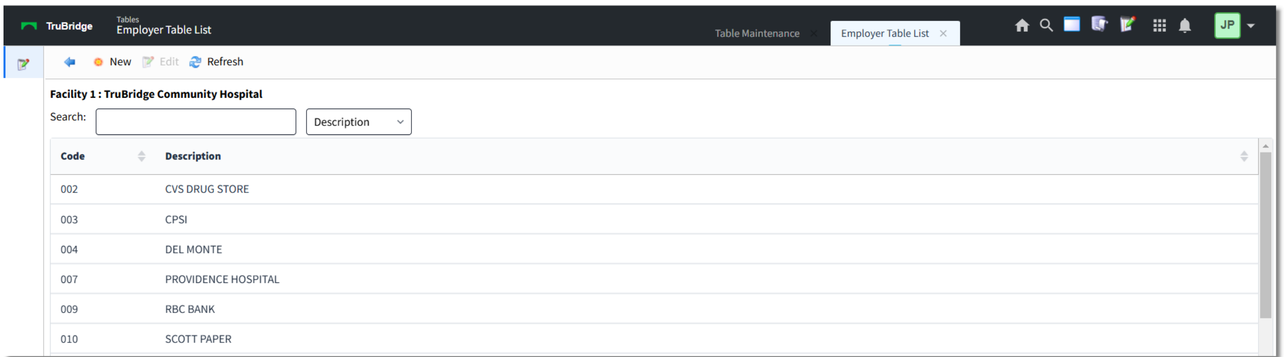
- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Save**: Saves changes made to the table settings
- **Delete**: Deletes the table settings

Select  **Back Arrow** to return to the previous screen.

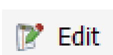
Chapter 9 Employers

To create a new employer code, enter a 3-character, alpha/numeric code and a description up to 25 characters in length. The Employers table stores the employer's name, address and phone number. The available options in the Employer table and their descriptions are listed below:

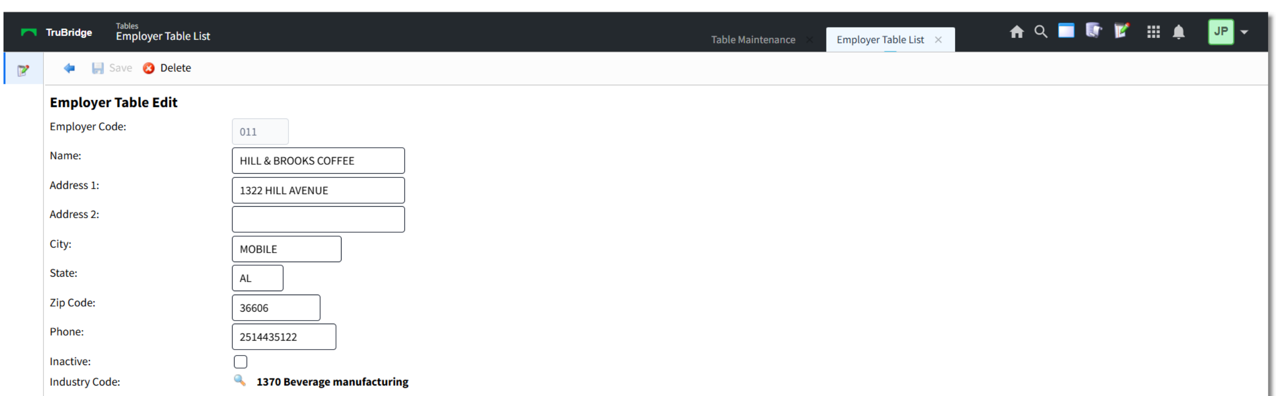
Select **Web Client** > **Tables** > **Patient Intake** > **Employers**



Employers Table List

Select  **New** to enter a new employer code or select an existing code from the list and select  **Edit**.

Select **Web Client** > **Tables** > **Patient Intake** > **Employers** > **Select Code**



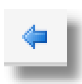
Employers Table Edit

- **Employer Code:** Enter a 3-character alpha and/or numeric code.
- **Name:** Enter the employer's name.
- **Address 1:** Enter the employer's street address or Post Office Box number.

- **Address 2:** Enter the employer's other address if applicable.
- **City, State, Zip Code:** Enter the City, State and Zip Code in which the employer is located.
- **Phone:** Enter the employer's area code and phone number. Do not separate numbers with any punctuation marks.
- **Inactive:** Selecting this field will disallow the Employer code to show in a lookup option or be entered in TruBridge EHR. This employer may be activated at anytime by deselecting this field.
- **Industry Code:** Using the magnifying glass lookup, select the Industry Code associated with the employer.

The following options are available on the action bar:

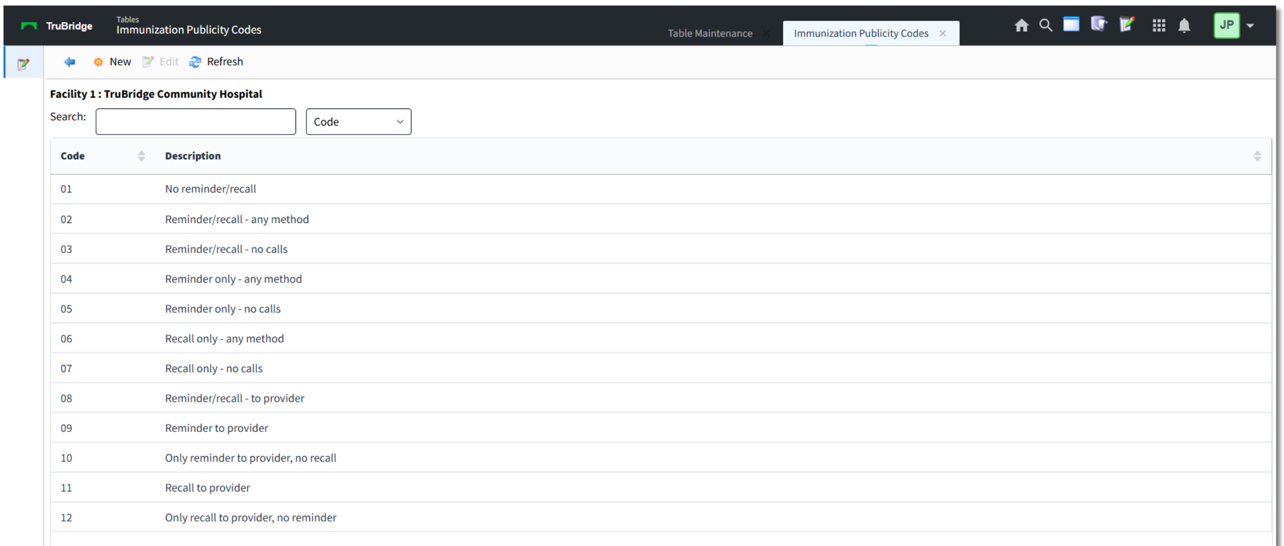
- **Save**: Saves changes made to the table settings
- **Delete**:Deletes the table settings

Select  **Back Arrow** to return to the previous screen.

Chapter 10 Immunization Publicity Code

The Immunization Publicity Code table provides a listing of HL7 immunization publicity codes that may be transmitted to the Immunization Registry. This table pulls to the Immunization Publicity Code field in Additional Demographics on the Person Profile.

Select **Web Client** > **Tables** > **Patient Intake** > **Immunization Publicity Code**



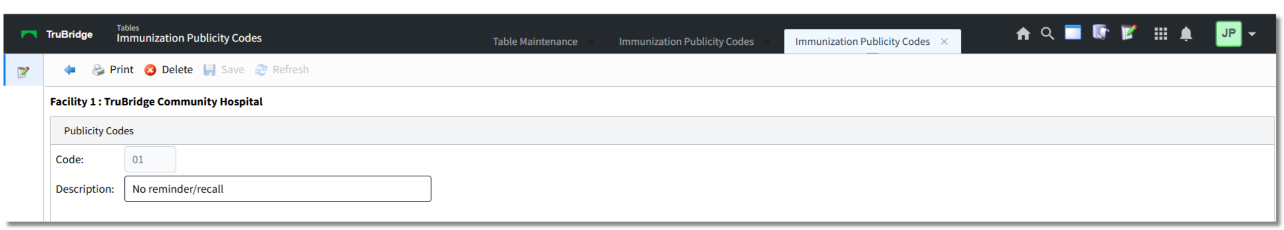
Immunization Publicity Code List

Select 

New to enter a new immunization publicity code or select an existing code from the list then select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Immunization Publicity Code** > **Select a Code**



Immunization Publicity Code Maintenance

- **Code:** Enter the 2-character publicity code
- **Description:** Enter the publicity code description. This may be up to 50 characters.

The following Immunization Publicity Codes will be pre-loaded in the system:

Code	Description
01	No reminder/recall
02	Reminder/recall - any method
03	Reminder/recall - no calls
04	Reminder only - any method
05	Reminder only - no calls
06	Recall only - any method
07	Recall only - no calls
08	Reminder/recall - to provider
09	Reminder to provider
10	Only reminder to provider, no recall
11	Recall to provider
12	Only recall to provider, no reminder

The following options are available on the action bar:

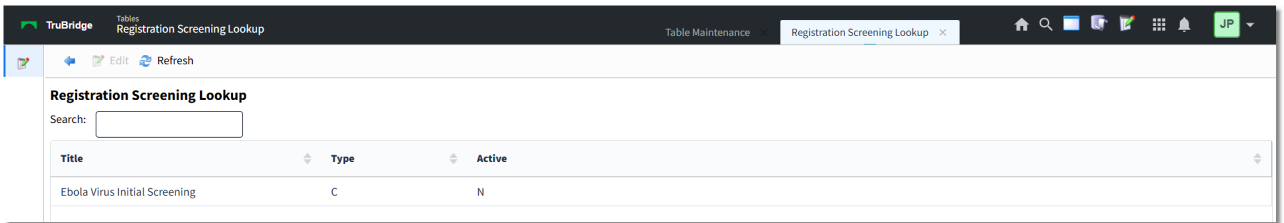
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Immunization Publicity Code list

Select  **Back Arrow** to return to the previous screen.

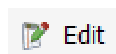
Chapter 11 Registration Screening

The Registration Screening table is used by facilities to enable the Ebola Virus Initial Screening questionnaire to display during registration. If set to Active, the questionnaire will display once a temporary visit, or hospital visit, has been created.

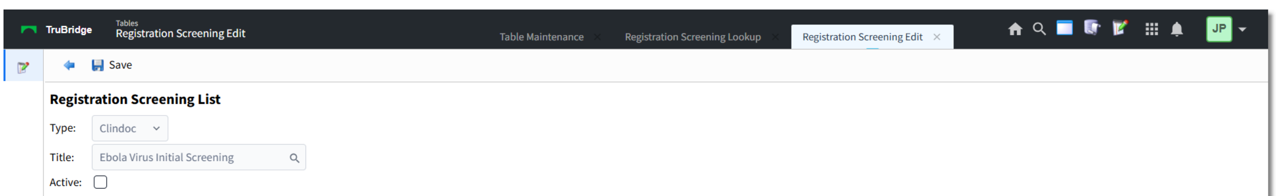
Select **Web Client** > **Tables** > **Patient Intake** > **Registration Screening**



Registration Screening Lookup

Select an existing title from the list then select  **Edit**.

Select **Web Client** > **Tables** > **Patient Intake** > **Registration Screening** > **Select Title**

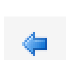


Registration Screening List

- **Type:** This field will display either Clindoc or Eform. If the facility is using the Documentation library, "Clindoc" will display, otherwise, it will display "Eform". This will determine where the questionnaire will pull from. This field may not be manipulated.
- **Title:** The field will display the title of the document. The only document that will display at this time is the Ebola Virus Initial Screening. This field may not be manipulated.
- **Active:** Select this field to activate the questionnaire so that it will display automatically during registration. If this field is set to inactive, the questionnaire will not display.

The following options are available on the action bar:

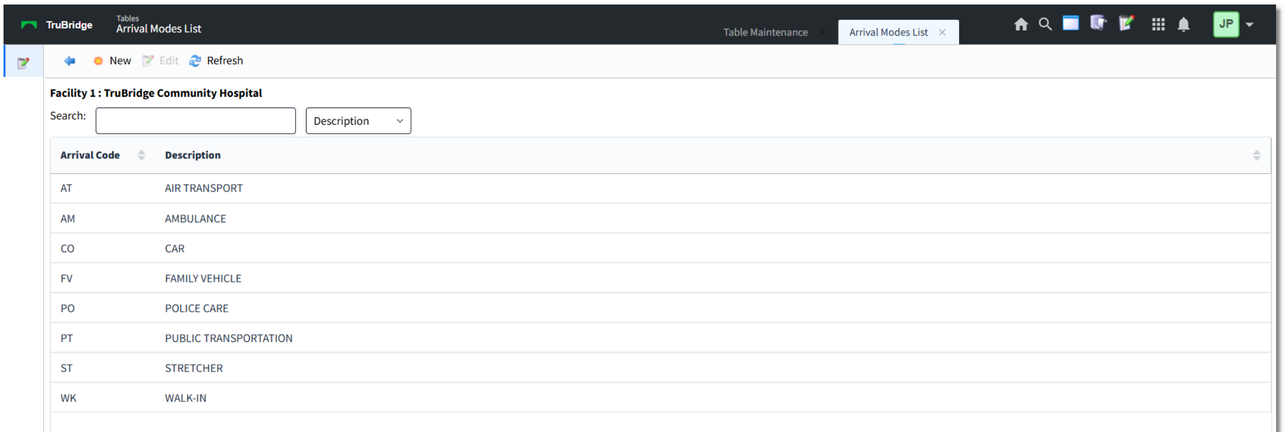
- **Save**: Saves changes made to the table settings

Select  **Back Arrow** to return to the previous screen.

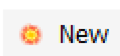
Chapter 12 Emergency Room Log

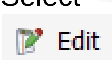
12.1 Arrival Modes

Select **Web Client** > **Tables** > **Patient Intake** > **Arrival Modes**



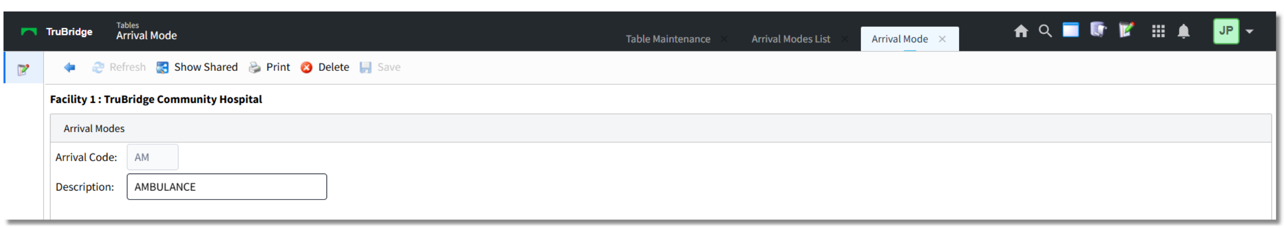
Arrival Modes List

Select 

New to enter a new arrival code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Arrival Modes** > **Select a Code**



Arrival Modes Maintenance

- **Arrival Code:** Enter a 2-character alpha and/or numeric code.
- **Description:** Enter the specific Mode of Arrival using up to 30 characters. This name will display when using the ER Log from the Registration and ADT screen in the Mode of Arrival field.

The following options are available on the action bar:

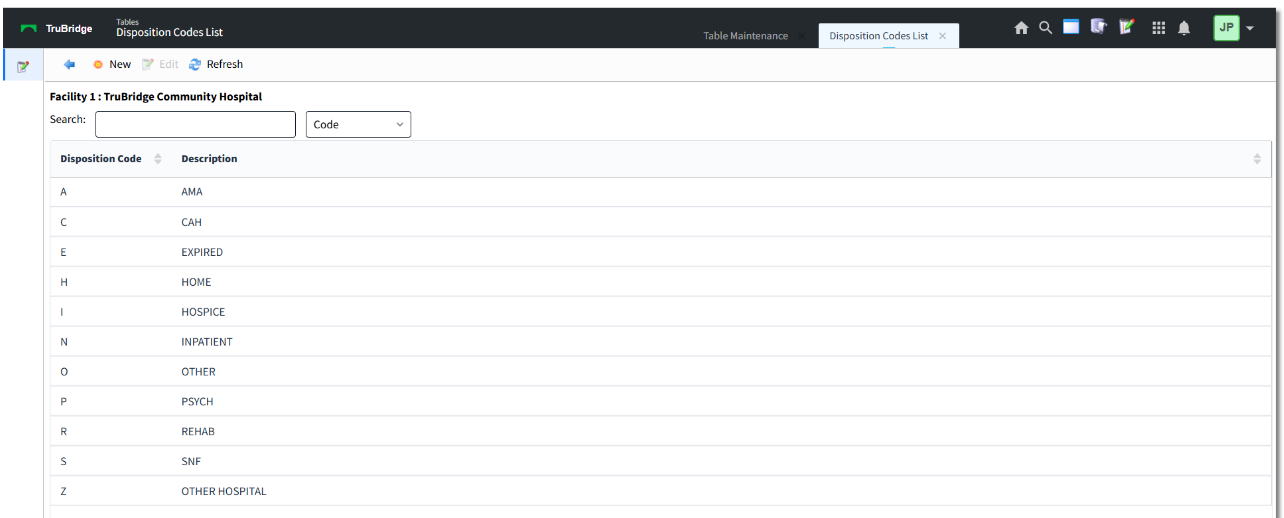
- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.

- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Arrival Modes list

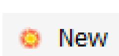
Select  **Back Arrow** to return to the previous screen.

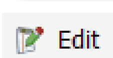
12.2 Disposition Codes

Select **Web Client** > **Tables** > **Patient Intake** > **Disposition Codes**



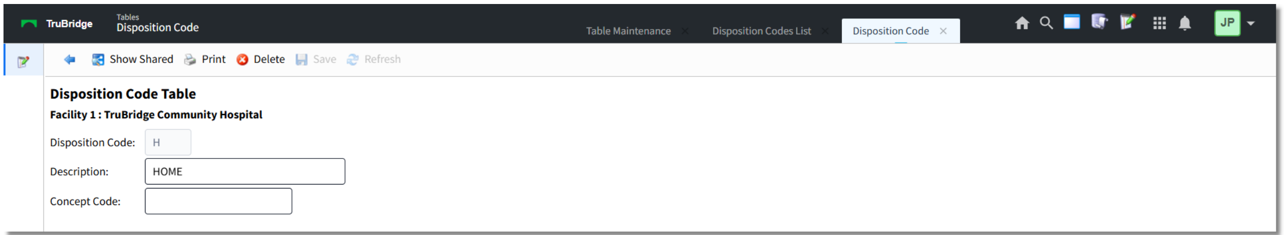
Disposition Codes List

Select 

New to enter a new disposition code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Disposition Codes** > **Select a Code**



Disposition Codes Maintenance

- **Disposition Code:** Enter a one-character alpha or numeric code.
- **Description:** Enter the specific Disposition Code using up to 30 characters. This name will display when using lookup option in the Disposition field on the ER Log.
- **Concept Code:** Enter the Concept Code using up to 20 characters. This field will be used for Meaningful Use.

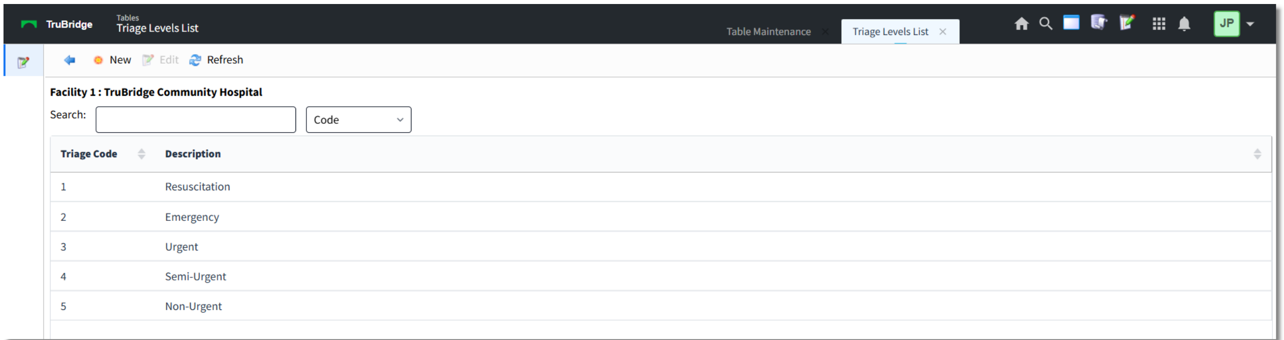
The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Disposition Codes list

Select  **Back Arrow** to return to the previous screen.

12.3 Triage Levels

Select **Web Client** > **Tables** > **Patient Intake** > **Triage Levels**



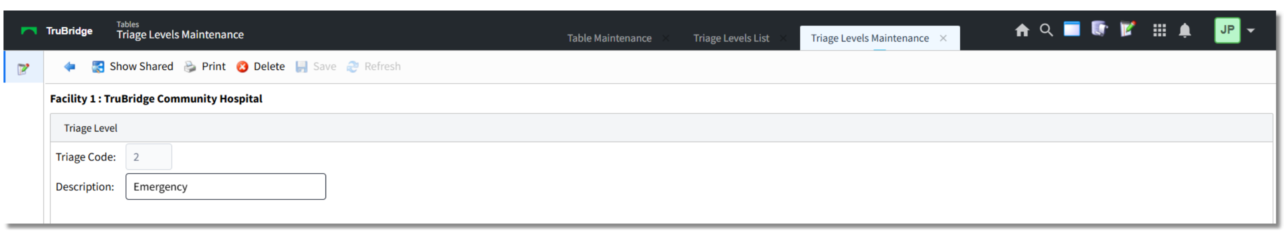
Triage Levels List

Select 

New to enter a new triage level code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake**> **Triage Levels** > **Select a Code**



Triage Levels Maintenance

- **Triage Code:** Enter a one-character alpha or numeric code.
- **Description:** Enter a specific Triage Level using up to 30 characters. This name will display when using lookup option in the Triage Level field in the ER Log.

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings

- **Refresh**: Allows changes to show immediately in the Triage Levels list

Select  **Back Arrow** to return to the previous screen.

Chapter 13 Enterprise Wide Scheduling Tables

13.1 EWS Anesthesia Types

This table is not used at this time.

13.2 EWS Anesthesiologist

This table is not used at this time.

13.3 EWS Conflict Codes

This table is not used at this time.

13.4 EWS Consolidation Codes

This table is not used at this time.

13.5 EWS Control Table

This table is not used at this time.

13.6 EWS Print Preferences

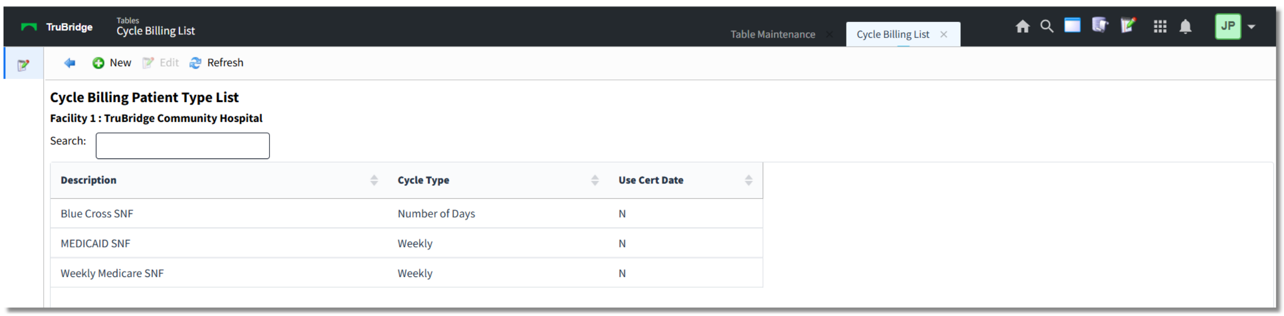
This table is not used at this time.

Chapter 14 Cycle Billing

Each Financial Class that will use Cycle Billing must have an entry in the Cycle Billing table. The Cycle Billing Table determines the frequency of each cycle based on patient type. Cycles may be defined using Financial Class, Stay Type, Sub Type and Service Code. Cycles containing the same combination of Financial Class, Stay Type, Sub Type and Service Code may not be made within the table.

To begin select **Cycle Billing** from the Patient Intake tables screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Cycle Billing**



Cycle Billing Patient Type List

The Cycle Billing Patient Type List will display. The following information displays for each existing cycle:

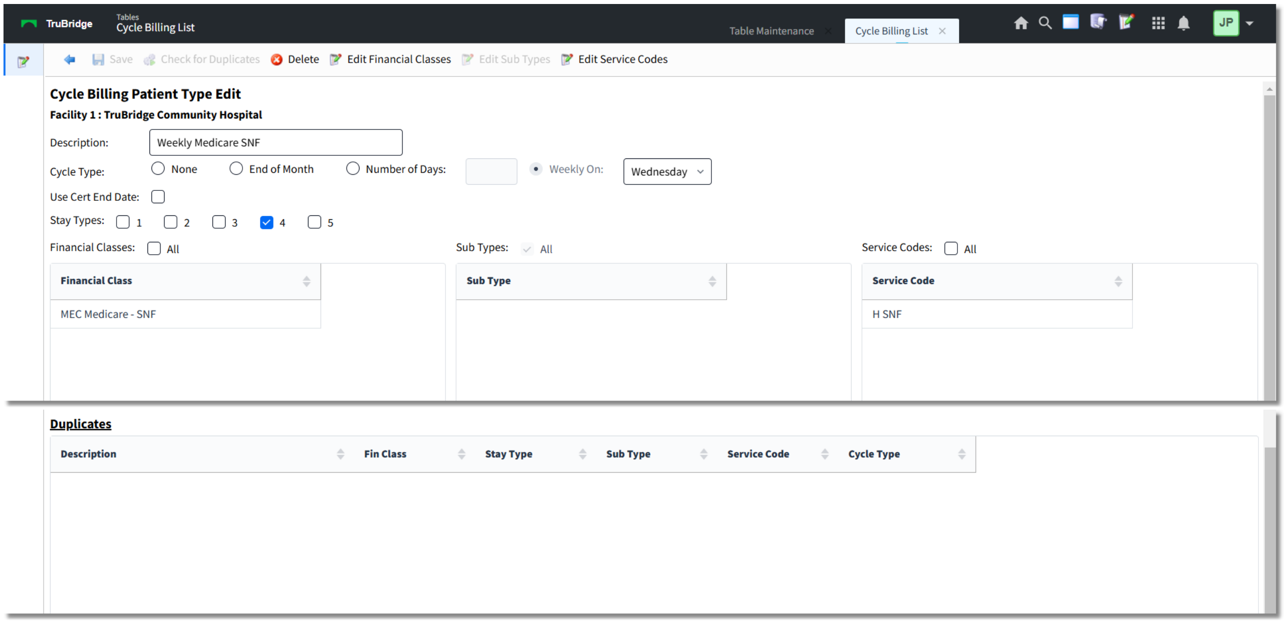
- **Description**: The name of the billing cycle.
- **Cycle Type**: The frequency of the cycle. This field will display either End of Month, Number of Days, Weekly, or None depending on the Cycle Type that was chosen for this cycle.
- **Use Cert Date**: This field will display a **Y** if Use Cert (Certification) Date was selected when the cycle was created. An **N** will display if this field was left blank.

The following options are available on the action bar:

- **Back Arrow**: Select this option to return to the Patient Intake table screen.
- **New**: Select this option to create a new billing cycle.
- **Edit**: Select an existing billing cycle from the list, then select Edit to update an existing billing cycle.
- **Refresh**: Select this option to update the Cycle Billing Patient Type List with recent changes.

Select **New** to create a new billing cycle.

Select **Web Client** > **Tables** > **Patient Intake** > **Cycle Billing** > **New**



Cycle Billing Patient Type Edit

- **Description**: Enter a name for the billing cycle. A name is required for each billing cycle.

- **Cycle Type**: Select how often claims should be generated for this cycle.
  - **None**: Select for billing cycles that will not use the other cycle types. For example, if a cycle should be run based on Pre-Certification dates and not based on End of Month, Number of Days, or Weekly cycle types.
  - **End of Month**: Select for billing cycles that should generate claims on the last day of the month.
  - **Number of Days**: Select for billing cycles that should generate claims for a specified number of days. If selected, the length (in days) of the cycle will need to be entered.
  - **Weekly**: Select for billing cycles that should generate claims weekly. If selected, the day that the cycle should end should be selected from the drop-down.

- **Use Cert End Date**: Select this option when the cycle should be based on the Pre-Certification End Date that is entered in the Pay Source table. This option may be used along with other cycle types. If no other cycle types will be used, then None should be selected as the Cycle Type.
  - **Example1**: If Use Cert End Date is selected and Cycle Type is set to None, then the cycle will be generated using the Pre-certification From and To Dates. For example, if the Pre-Certification From date is 06/01/18 and the Pre-Certification To date is 06/15/18 the billing cycle would begin on 6/1 and end on 6/15; one claim would be generated for the Pre-Certification period.
  - **Example 2**: If Use Cert End Date is selected and another Cycle Type is selected, then claims will generate based on the frequency designated by the Cycle Type, but claims will stop generating when the Pre-Certification To date is less than or equal to the Next Cycle End Date. For example, if the Pre-Certification To date is 06/10/18 and the Next Cycle End Date is 06/13/18, then a claim would not be generated because the Pre-Certification has expired for the billing period.

- **Stay Types**: Select the Stay Types that will use this billing cycle.

- **Financial Class**: This box identifies which financial classes will use this billing cycle. Select the **All** checkbox if all Financial classes will use this billing cycle or select **Edit Financial Classes** from the action bar to select specific financial classes. See below for details.

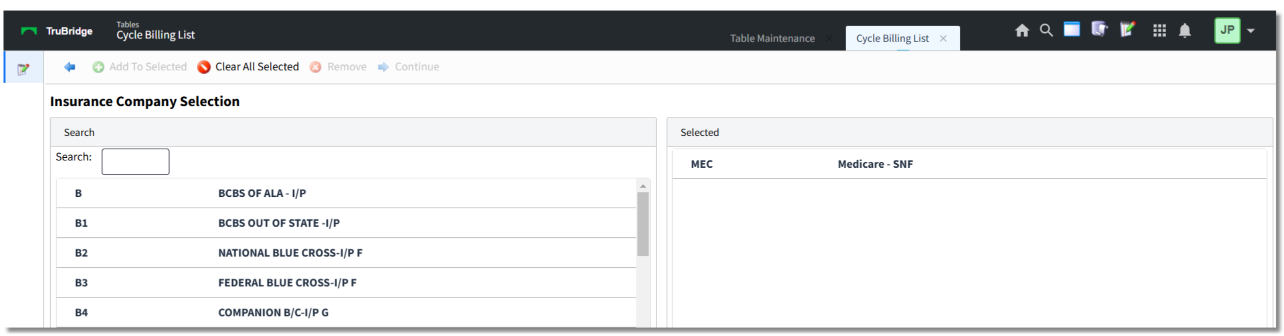
- **Sub Type**: This box identifies which Sub Types will use this billing cycle. Select the **All** checkbox if all Sub Types will use this billing cycle or select **Edit Sub Types** from the action bar to select specific Sub Types. See below for details.

- **Service Code**: This box identifies which Service Codes will use this billing cycle. Select the **All** checkbox if all Service Codes will use this billing cycle or select **Edit Service Codes** from the action bar to select specific Service Codes. See below for details.

***NOTE**: The Financial Class, Sub Type and Service Code fields must be answered; either the All box should be checked or the Edit options should be used to select specific codes. If these fields are not addressed, the **Check for Duplicates** option will not become active and the billing cycle cannot not be saved.*

To add specific Financial Classes, Sub Types or Service Codes to the billing cycle, select **Edit Financial Classes**, **Edit Sub Types** or **Edit Service Codes** to display the selection screen. This screen allows codes to be searched and added to the billing cycle.

Select **Web Client** > **Tables** > **Patient Intake** > **Cycle Billing** > **New** > **Edit Financial Classes**



Insurance Company Selection

The following options are available on the action bar:

- **Back Arrow**: Select this option to return to the Cycle Billing Patient Type Edit screen.

- **Add to Selected**: After selecting a code from the Search list, select this option to add the code to the Selected list.

- **Clear All Selected**: Select his option to remove all codes from the Selected list.

- **Remove**: After selecting a code from the Selected list, select this option to remove the code from the Selected list.

- **Continue**: Select this option once all codes have been added to the Selected list.

Once the Cycle Billing Patient Type Edit screen is completed, select **Check for Duplicates**. This will populate the Duplicates box at the bottom of the screen. If duplicate entries exist they will display here. If no duplicates exist it will say "No Duplicates Found."

No billing cycle may have the same combination of Financial Class, Stay Type, Sub Type and Service Code. For example, if Billing Cycle 1 has Stay Type **1**, Financial Class **M**, Sub Type **01**, and Service Code **P** and Billing Cycle 2 has Stay Type **1**, Financial Class **M**, Sub Type **01** and Service Code **ALL** - then a duplicate entry would exist because the Service Code **P** is included in both billing cycles.

Check for Duplicates must be selected before the Save option will become active. If duplicates entries exist, the Cycle Billing table will need to be modified before the billing cycle can be saved. If there are no duplicate entries, select **Save** to add the billing cycle to the Cycle Billing table. The **Delete** option will allow the billing cycle to be removed from the Cycle Billing table. Select the **Back Arrow** to return to the Cycle Billing Patient Type List screen.

Chapter 15 Ethnicity Codes

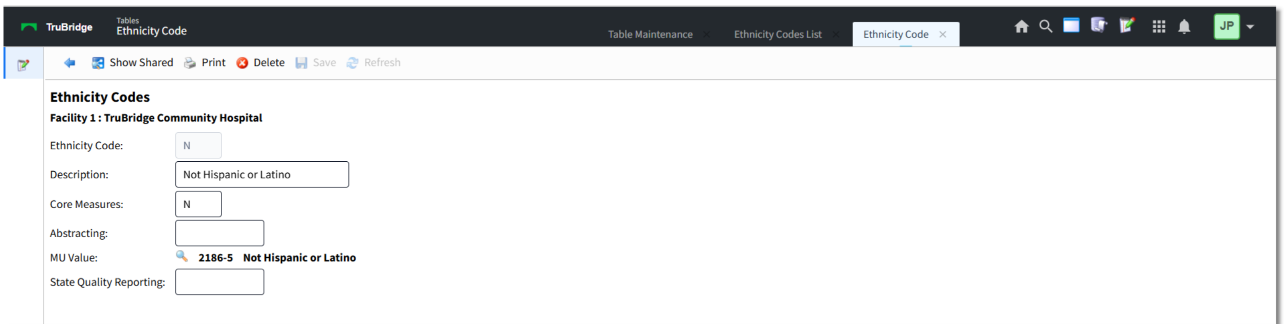
The Ethnicity Code table is used to create a listing of ethnicity codes used in patient registration and census functions.

Select 

New to enter a new ethnicity code, or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Ethnicity Codes** > **<u>Select a Code</u>**



Ethnicity Codes Maintenance

- **Ethnicity Code**: Enter the 1-character ethnicity code that will be chosen during Registration. The following ethnicity codes are pre-loaded:
  - **H-Hispanic/Latino**
  - **N-Non-Hispanic/Latino**
  - **U-Declined to Specify**

- **Description**: Enter the description of the ethnicity code. This may be up to 25 characters long and will display when using the lookup option.

- **Core Measures:** This field will default to **Y** for ethnicity code H-Hispanic/Latino, **N** for ethnicity codes N-Non-Hispanic and U-Declined to Specify. If a new ethnicity code is created, enter a **Y** for Hispanic ethnicity codes or a **N** for Non-Hispanic ethnicity codes.

- **Abstracting**: Enter the state abstracting value.

- **MU Value**: Using the magnifying glass lookup, select the MU Standard Value associated with the ethnicity code. Leave this field blank if there is not a code to match the ethnicity. The description of MU Value code loaded here will pull to the Ethnicity field on the CCD. The following MU Standard Values will be preloaded:
  - **2135-2 Hispanic or Latino**
  - **2186-5 Not Hispanic or Latino**

- **State Quality Reporting:** Enter the 9-digit code used for state quality reporting.

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected, the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete** :Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Ethnicity Code list

Select  **Back Arrow** to return to the previous screen.

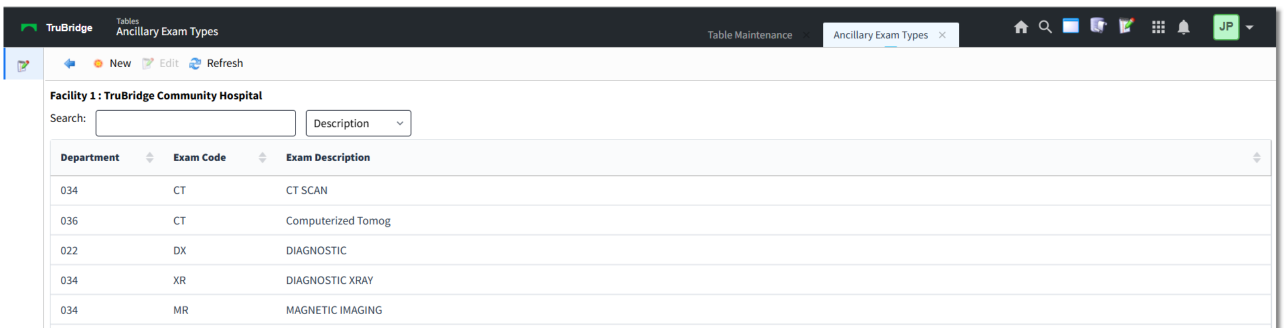
Chapter 16 Exam Types

The system uses Exam Types for the Radiology Schedule to determine which diagnostic imaging items appear on the schedule. Exam Type also allows the radiology schedule to be printed or sorted by exam type. Exam Types are required when printing the Composite Requisition.

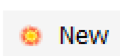
- For setup, the appearance of the Complete Schedule versus the Start/End Schedule is determined by **Use Start/End Schedule** field in the Radiology Control Table, page 2.
- An exam type code must be entered in the **Ancillary Exam Type** field in Item Order Entry Information.

Access to the Business Office and Charge/Inventory Tables are necessary to define Ancillary Exam Types. Notify the site contact or TruBridge for additions or changes to this option.

Select **Web Client** > **Tables** > **Patient Intake** > **Exam Types**



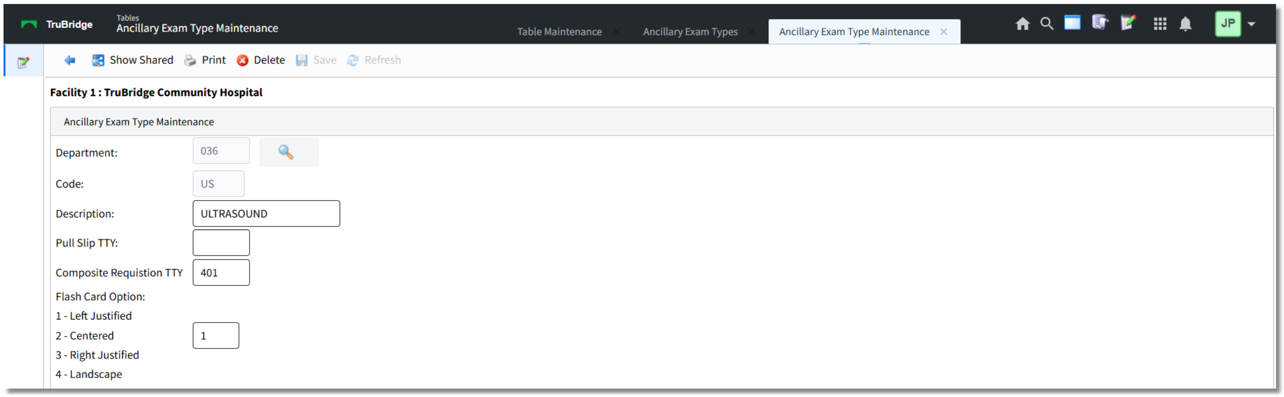
Exam Types

Select 

New to enter a new Exam Type or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Exam Types** > **Select an Exam Type**



Ancillary Exam Type Maintenance

- **Department:** Enter the three-digit department number for Radiology.
- **Code**: Enter a 2 character Exam Code. Example (XR=XRAY, NM=NUCLEAR MEDICINE, US=ULTRASOUND, MM=MAMMO).
- **Description**: Enter the description that corresponds to the exam code. This field allows the entry of up to 20 characters.
- **Pull Slip TTY**: Enter the TTY# to which the Pull Slip prints.
- **Composite Requisition TTY**: Enter the TTY# to which the Composite Requisition prints.
- **Flash Card Option**: Define orientation of Flash Card (Left Justified, Right Justified, Centered or Landscape).

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected, the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete** :Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Ethnicity Code list

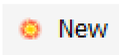
Select  **Back Arrow** to return to the previous screen.

NOTE: *The Pull slip and Composite Requisition may be printed to separate printers or to a multi-drawer printer with appropriate drawer designations defined in the Device Control Table. The hospital name and address information for the Pull Slip and Composite Requisition pull from page 4 of the Radiology Control Table.*

The positioning of the Composite Requisition may be adjusted via the Device Control Table.

Chapter 17 Race Codes

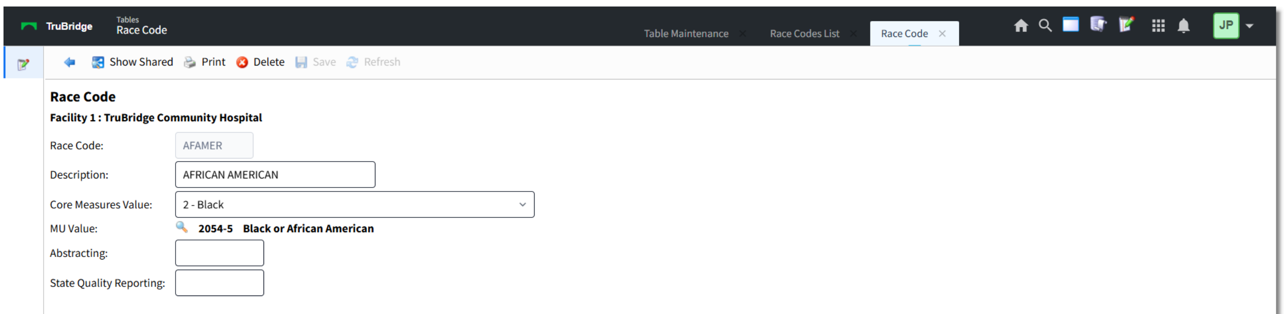
The Race Code table is used to create a listing of race codes used in patient registration and census functions.

Select 

New to enter a new race code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Race Codes** > **Select a Race Code**



Race Codes Maintenance

- **Race Code:** Enter the race code that will be entered during registration, this may be up to six characters.
- **Description**: Enter the description of the race code. This may be up to 30 characters long and will display when using the lookup option.
- **Core Measures Value**: Using the drop-down menu, select the code that is used to convert the race code information into the Core Measures System.
- **MU Value**: Using the magnifying glass lookup, select the MU Standard Value associated with the race code. Leave this field blank if there is not a code to match the race. The description of MU Value code loaded here will pull to the Race field on the CCD. The following MU Standard Values will be preloaded:
  - **1002-5 American Indian or Alaska Native**
  - **2028-9 Asian**
  - **2054-5 Black or African American**
  - **2076-8 Native Hawaiian or Other Pacific Islander**
  - **2106-3 White**
- **Abstracting**: Enter the state abstracting value.
- **State Quality Reporting:** Enter the 9-digit code used for state quality reporting.

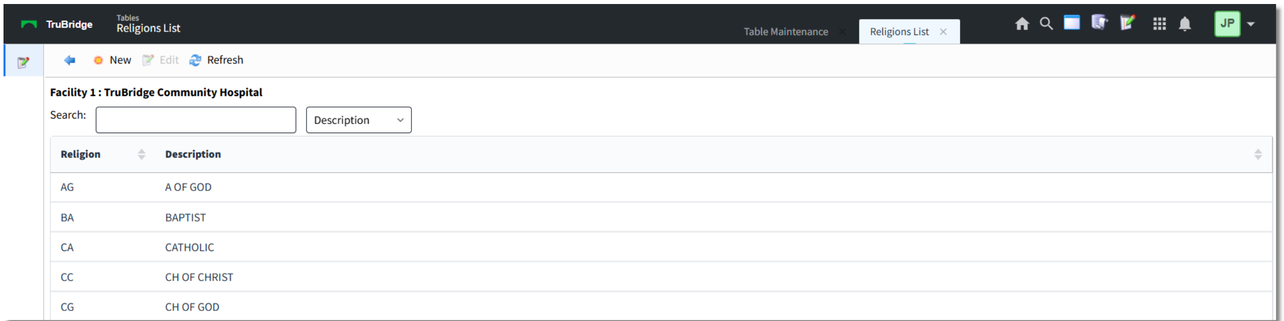
The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Race Codes list

Select  **Back Arrow** to return to the previous screen.

Chapter 18 Religions

Select **Web Client** > **Tables** > **Patient Intake** > **Religions**



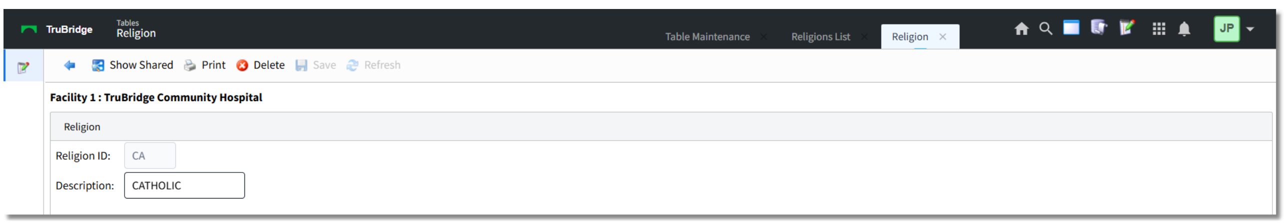
Religions List

Select 

New to enter a new religion code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Religions** > **Select a Code**



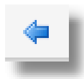
Religions Maintenance

- **Religion ID:** Enter a 2-character alpha and/or numeric code.
- **Description:** Enter a description. This description will display when using lookup option in the Religion field on the Patient tab in the Registration and ADT screen.

The following options are available on the action bar:

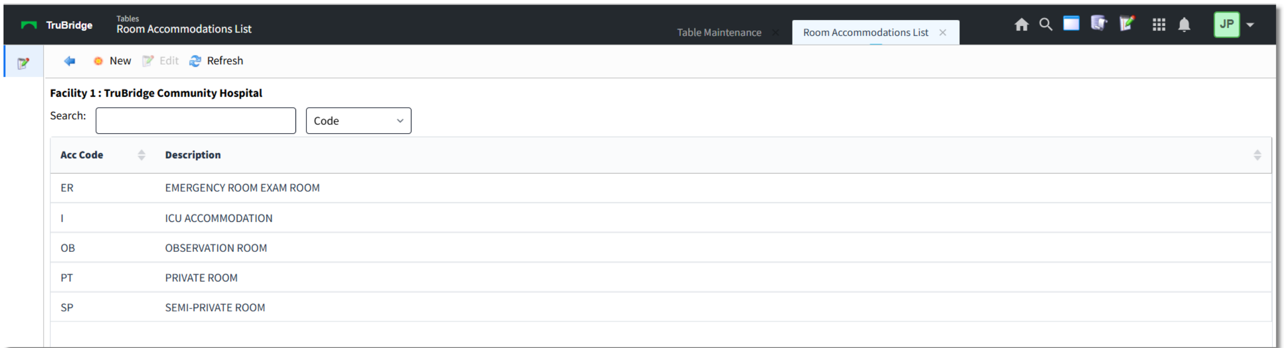
- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings

- **Refresh**: Allows changes to show immediately in the Religions list

Select  **Back Arrow** to return to the previous screen.

Chapter 19 Room Accommodation

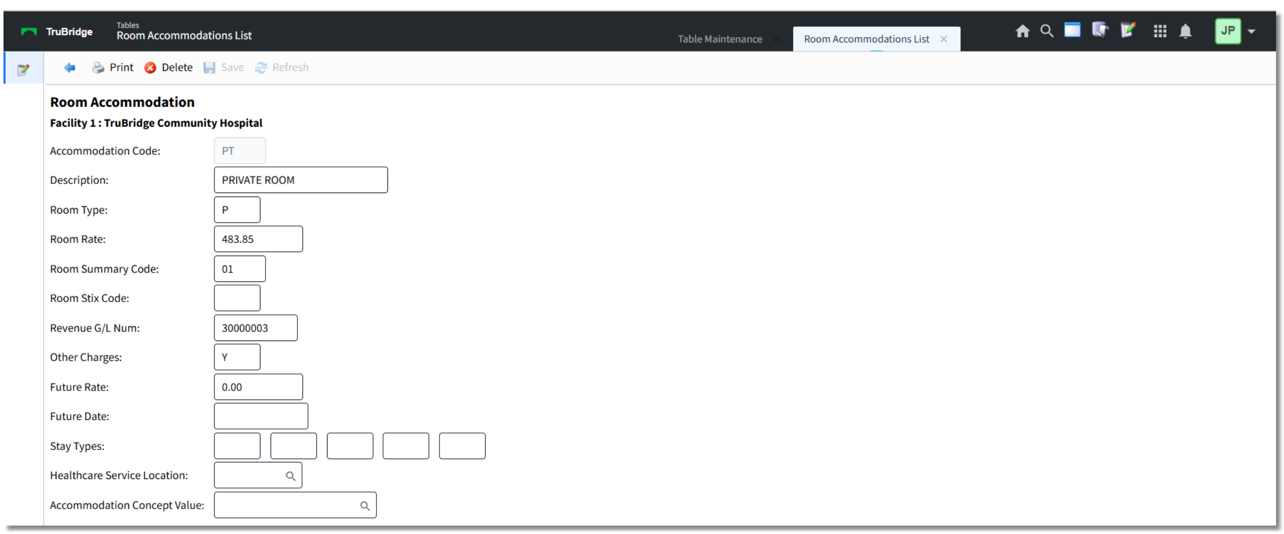
Select **Web Client** > **Tables** > **Patient Intake** > **Room Accommodation**



Room Accommodations List

Select **New** to enter a new room accommodation code or select an existing code from the list and select **Edit**.

Select **Web Client** > **Tables** > **Patient Intake** > **Room Accommodation** > **Select a Code**



Room Accommodations Maintenance

- **Accommodation Code:** Enter a 2-character alpha and/or numeric code.
- **Description:** Enter a Description using up to 25 characters that will display when using the Registration and ADT lookup option in the Admit Code field in the ADT screen.
- **Room Type:** Enter a one-character code that indicates the type of room (e.g., S-Semi-Private, I-ICU). Room Types are set up by selecting **Room Types** in the Business Office Tables.

- **Room Rate:** Enter the charge for this Accommodation Code. This amount will override the rate loaded in the Room Table and charge the patient's account when the Final Census is run as an update.

- **Room Summary Code:** Enter the TruBridge Summary Charge code that represents a group of chargeable items associated with a UB04 Revenue Code.

- **Room Stix Code:** This field is no longer used.

- **Revenue G/L Number:** Enter the General Ledger account number that will receive this revenue. If this field is left blank, the General Ledger number loaded in the Summary Code Table for this accommodation code will be used. If the Summary Code table does not have a General Ledger number loaded, the summary code loaded in the Room Table will be used to pull the correct General Ledger number.

- **Other Charges Y/N:** Entering **Y** in this field will include any other charges set in the Room Table (i.e., phone, special equipment). The charges will post to the patient's account when the Final Census is run as an update. **N** will exclude these charges on the Final Census.

- **Future Rate/Date:** Enter the future rate for this room and the date the rate increase should become effective.

- **Stay Types:** Enter the Stay Types that will use this Accommodation Code. If this field is left blank, any Stay Type will be able to use this Accommodation Code.

- **Healthcare Service Location**: Enter the National Healthcare Safety Network (NHSN) Location Code for this department. This code will be used for Healthcare Survey, Antimicrobial and Cancer Registry reporting. The NHSN Location Codes displayed in the look-up are maintained by TruBridge.

- **Accommodation Concept Value:** Enter the appropriate Observation or ICU Concept Value. Select the magnifying glass to display a listing of available codes. This field is used for Quality Measures only.

The following options are available on the action bar:

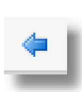
- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.

- **Print**: Displays the table settings in Adobe

- **Delete**:Deletes the table settings

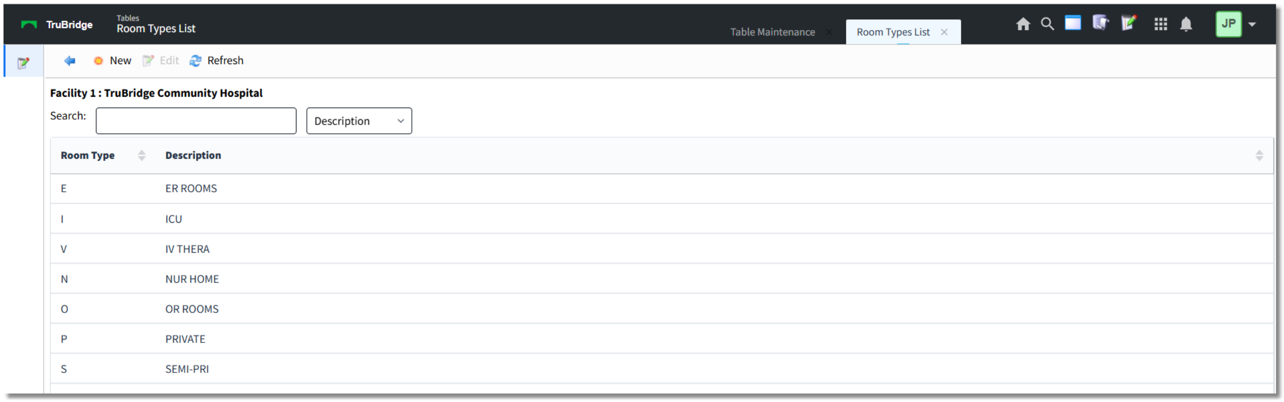
- **Save**: Saves changes made to the table settings

- **Refresh**: Allows changes to show immediately in the Room Accommodations list

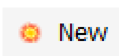
Select  **Back Arrow** to return to the previous screen.

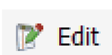
Chapter 20 Room Types

Select **Web Client** > **Tables** > **Patient Intake** > **Room Types**



Room Types List

Select 

New to enter a new room type code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Room Types** > **Select a Code**

Room Types

This table defines a one-digit code that is used in maintenance of the Room Table and Accommodation Code Table. Enter the Room Type and Description of the Room Type Code in the corresponding fields.

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings

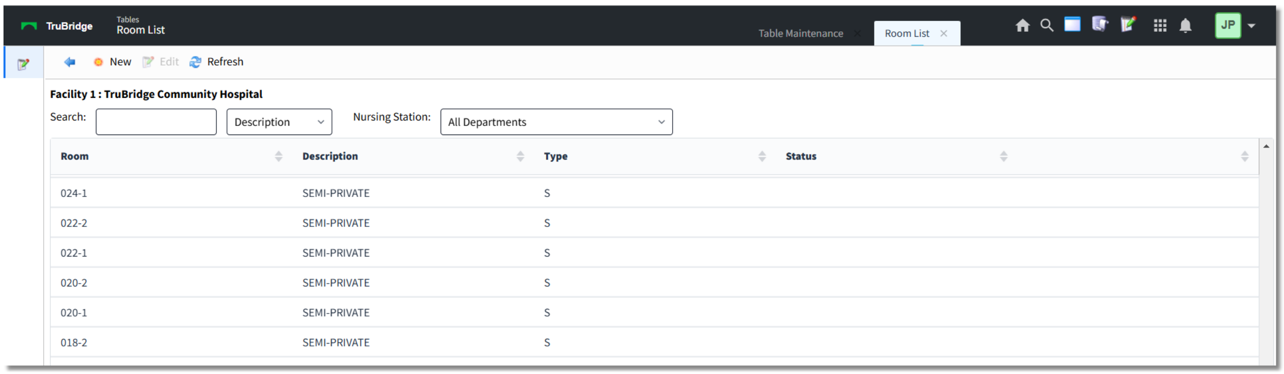
- **Refresh**: Allows changes to show immediately in the Room Types list

Select  **Back Arrow** to return to the previous screen.

Chapter 21 Rooms

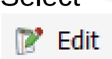
When additions or changes are made to the Room Table, the Regenerate Room File (Single User), in Special Functions, may need to be run.

Select **Web Client** > **Tables** > **Patient Intake** > **<u>Rooms</u>**



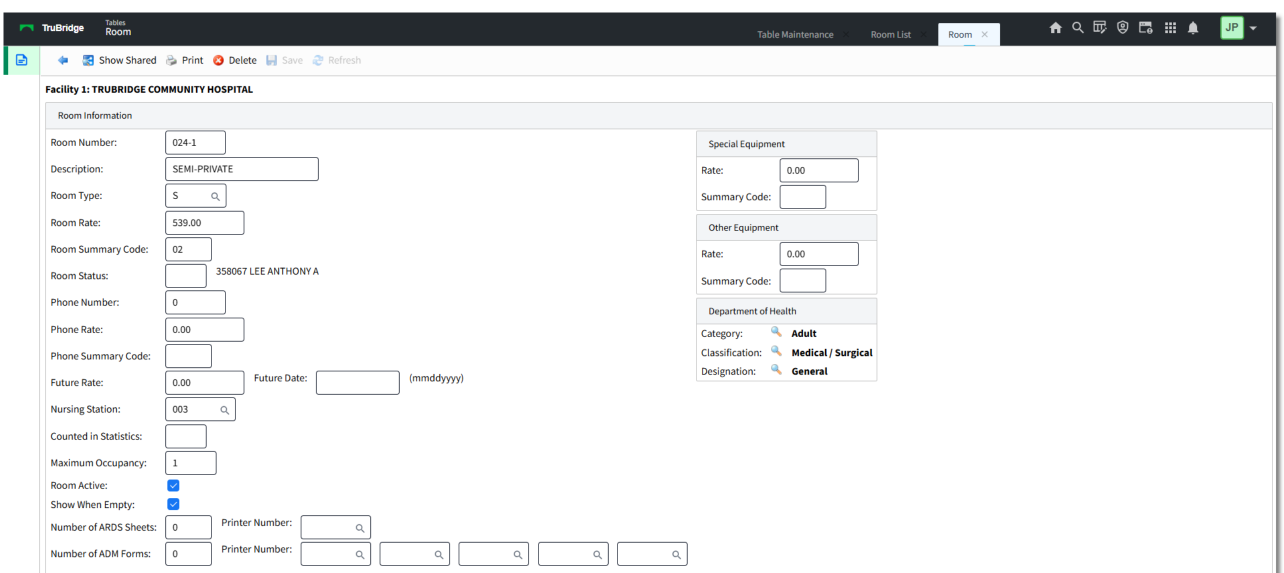
Room List

Select 

New to enter a new room or select an existing room from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Rooms** > **<u>Select a Room</u>**



Rooms Maintenance

- **Room Number:** Enter a code using up to five alpha and/or numeric characters. The room numbers may include dashes.

- **Description:** Enter a brief description of room type using up to 25 characters. If this room has a room status of **t**, indicating that it is being used by the MPEMR and ED Tracking Boards, the description of the room should be what shows as the location on the tracking board.

- **Room Type:** Enter the one-character room type that is displayed when using the lookup when registering a patient (**P**-Private, **S**-Semi-Private, **I**-ICU, **N**-Nursery). Room Types are set up through **Room Types** in the Table Maintenance Menu.

- **Room Rate:** Enter the room rate to be charged on the Final Census. No Index Regen is necessary when changes are made to this field.

- **Room Summary Code:** Enter the Summary Charge Code that represents the associated UB04 Revenue Code.

- **Room Status:** If the room is occupied, the patient's name and account number will display here or indicate "EMPTY" if unoccupied. Any character in this field will make the room unavailable for admitting. An **X** will exclude this room from Administrative Statistics. A room status of **t** will designate the room for use by the MPEMR and ED Tracking Boards. If a room has a status of **t**, it will not be displayed during registration and a patient will not be able to be admitted to the room. In addition, a room with a status of **t** will be excluded from Executive Information Statistics.

- **Phone Number:** Enter up to five digits for the room extension.

- **Phone Rate:** Enter the daily charge for phone use that will appear on the Final Census if applicable.

- **Phone Summary Code:** Enter the Summary Charge Code that represents the associated UB04 Revenue Code.

- **Future Rate/Date:** Enter the future rate for this room and the date the rate increase should become effective.

- **Nursing Station:** Enter the department of the Nursing Station assigned to this room. Final Census prints in order of Nursing Station. This is the only field that cannot be manipulated while the room is occupied. If this room has a room status of **t**, indicating that it is being used by the MPEMR and ED Tracking Boards, the nursing station will be the department onto whose tracking board the patient should fall.

- **Counted In Statistics:** Entering a **Y** in this field will include this room in Administrative Statistics Report. A **N** will exclude this room from the report in Executive Information. A **C** will allow any patients transferred from this room to a room counted in statistics to be included in the Administrative Statistics Report. Example: If an observation patient is admitted to a holding room (a non statistic room) and later moved to an inpatient room (one marked to count in statistics), this account will be included in census statistics.

- **Maximum Occupancy**: Allows a room to be used more than once, such as a Waiting Room. This field is a maximum of three digits.

- **Room Active**: If not selected, the room is not available for transfer.

- **Show When Empty**: When Maximum Occupancy is set for more than two, only one room will display. Once a patient is assigned, the location will become available. If deselected, the room will not display on the Tracking Board when empty.

- **No. of ARDS Sheets/Printer #:** Enter the number of ARDS Label Sheets to print automatically when a patient is admitted to this room. Enter the desired ARDS laser printer number where the labels should print.

***NOTE**: If a number of sheets is entered and no printer number, those sheets will print to the default label printer loaded in the Device Control Table for that terminal number. This feature only works with TruBridge's generic label print program. If the facility needs this to work for a custom program, it will need to be written into the custom program.*

- **No. of ADM Forms/Printer #:** Enter the number of Admission Forms to print automatically when a patient is admitted to this room. Enter the desired printer number where the forms should print.

<u>Special Equipment</u>

- **Rate:** Enter any additional daily charge for special equipment that will appear on the Final Census if applicable.

- **Summary Code:** Enter the Summary Charge Code that represents the associated UB04 Revenue Code.

<u>Other Equipment</u>

- **Rate:** Enter any additional daily charge for any other Equipment that will appear on the Final Census if applicable.

- **Summary Code:** Enter the Summary Charge Code that represents the associated UB04 Revenue Code.

<u>Department of Health</u>

The following fields are for facilities that report room availability to the Department of Health. This is for instances where there is a mass emergency, the bed types and availability will be readily known.

- **Category:** Select one of the following categories that defines the age/size appropriateness of the room: **Adult, Geriatric, Neonatal, Pediatric.**

- **Classification:** Select one of the following classifications that defines the primary level of care and services the room is intended to support: **Critical Care/Intensive Care, Intermediate/Stepdown, Medical/Surgical, Perinatal Care, Psychiatry Services, Physical Medicine & Rehab, Emergency Department.**

- **Designation:** Select one of the following designations that defines the grouping of specialty care/services that the room is designated for, or the unit of where the room is located: **General, Burn, Cardiac, Medical, Neuro, Surgical, Transplant, Trauma/Ortho.**

NOTE: *Rooms that are not grouped by specialty care/services or are used for multiple/mixed specialties should select General.*

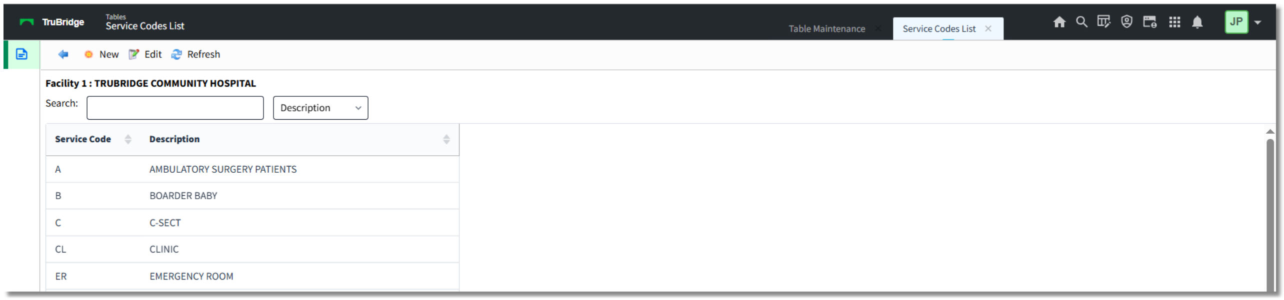
The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.
- **Print**: Displays the table settings in Adobe
- **Delete**:Deletes the table settings
- **Save**: Saves changes made to the table settings
- **Refresh**: Allows changes to show immediately in the Rooms list

Select  **Back Arrow** to return to the previous screen.

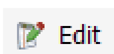
Chapter 22 Service Codes

Select **Web Client** > **Tables** > **Patient Intake** > **<u>Service Codes</u>**



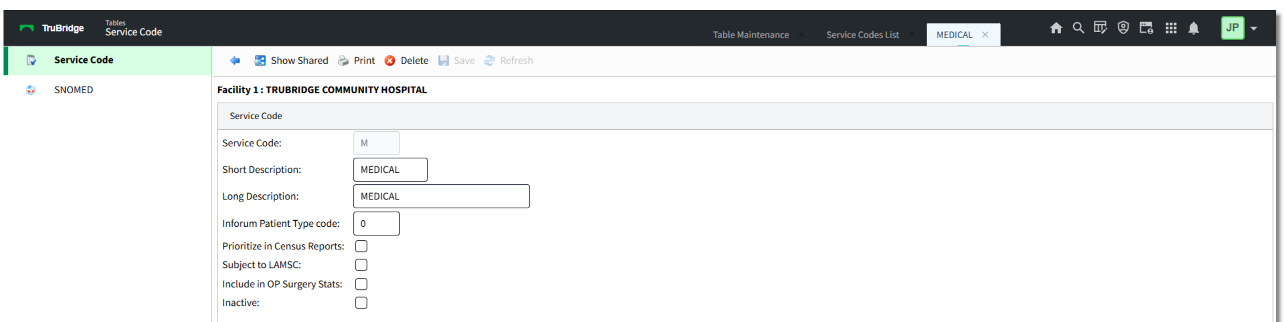
Service Codes List

Select 

New to enter a new service code or select an existing code from the list and select 

Edit.

Select **Web Client** > **Tables** > **Patient Intake** > **Service Codes** > **<u>Select a Code</u>**



Service Codes Maintenance

- **Service Code:** Enter a one or 2-character alpha or numeric code.
- **Short Description**: Enter a description using up to eight characters. This description will display when using lookup option in the Service Code field on the Patient tab in the Registration and ADT screen.
- **Long Description**: Enter a description using up to 30 characters.
- **Inforum Patient Type Code**: This field is used with the Quorum Inforum Interface and should be used with the Patient Type codes.
- **Include in 1-Day Surgery Stats (Y/N)**: When Y is entered, and this service code appears on an account, the account will be included in 1-day surgery statistics in Executive Information.

- **Prioritize in Census Reports Y/N**: Select Y to include this Service Code in the totals section of the Pre and Final Census reports. These reports print a maximum of 20 Service Codes. Prioritized codes pull first, and the remaining codes pull in alphabetical order.

- **Subject to LAMSC Y/N**: This field is for the state of Louisiana. It should be answered with a Y if the service code is subject to the Louisiana Mandated Service Charge.

- **Inactive**: If this field is selected the Service Code will not display in the Service Code lookup window.

The following options are available on the action bar:

- **Show Shared**: If the site is sharing tables, when this option is selected the fields that are shared between facilities will be highlighted in yellow.

- **Print**: Displays the table settings in Adobe

- **Delete**:Deletes the table settings

- **Save**: Saves changes made to the table settings

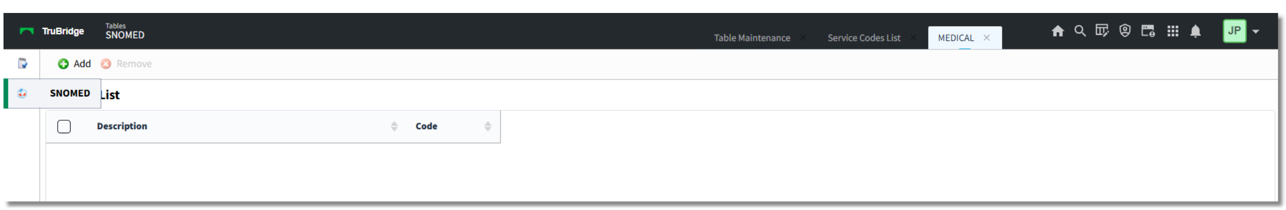
- **Refresh**: Allows changes to show immediately in the Service Codes list

Select  **Back Arrow** to return to the previous screen.

22.1 SNOMED

The SNOMED option on the navigation pane will need to be selected to add SNOMED's to the Service Code.

Select **Web Client** > **Tables** > **Patient Intake** > **Service Code** > **Select Service Code** > **SNOMED**



Service Codes Maintenance - SNOMED

Select **Add** to search for and select all applicable SNOMED codes. Once all SNOMEDs have been selected, choose **Add** again.

Chapter 23 Scheduling Tables

23.1 Tasks/Procedures

The third table that will need to be set up is the Tasks/Procedures table. This table is used to set up any and all tasks or procedures that will be performed in the facility. Each task/procedure will be set up with the amount of time it will take to complete and then resources (locations and personnel) are then attached to each task/procedure to designate where they may be performed.

There are options at the top of the screen that will allow the list to be delimited. The Specialty Task Type drop-down will allow the list to display All, Standard, Group or OR Procedure tasks. Below the drop down, tasks may be further delimited by Active Only, Inactive Only or Both. A search option is also available to search by the selected Category.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures**

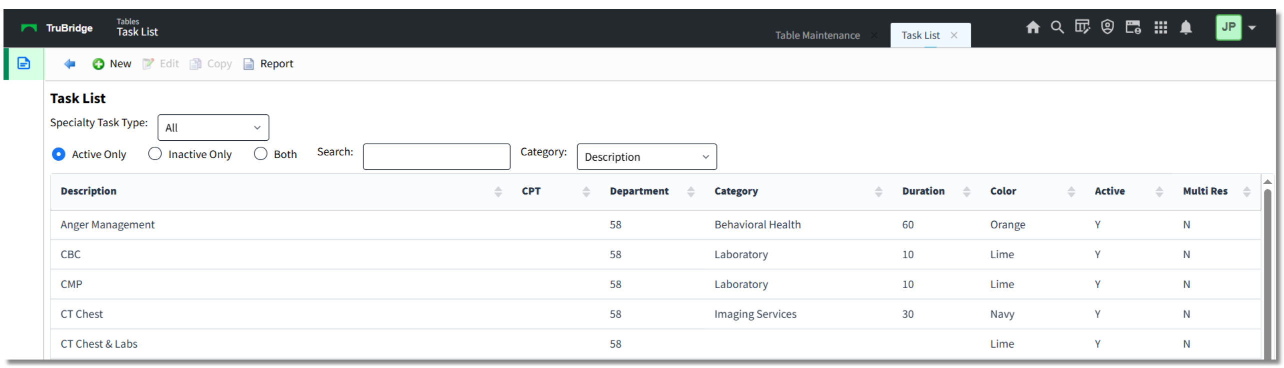


Table Maintenance - Tasks/Procedures

Below is an explanation of each column:

- **Description:** The description of the task
- **CPT:** This column displays the CPT associated with the task. If multiple CPT's are associated with a task, the first will be listed with no CPT followed by each CPT code associated with the task.
- **Department:** The department that owns the task
- **Category:** The category assigned to the task
- **Duration:** The duration of the task
- **Color:** The color assigned to the task

- **Active:** The column displays a Y if the task is actively being used, or an N if the task is marked as inactive.

The following options are available on the action bar:

- **New:** Selecting this option will allow a new task to be created.

- **Edit:** Selecting this option will allow the information on the task to be changed.

- **Copy:** Selecting this option will allow the task information to be copied to a new task. This will include any instructions and CPT codes to copy over.

- **Report:** Selecting this option enables information from the Tasks/Procedures table to be exported into a report. After selecting **Report,** the Report Writer Parameters screen will appear, allowing filters to be applied as needed. Once all are set, select **Run Report** to generate the file**.**

NOTE: *This report is also available within the Report Dashboard and it titled "Scheduling Task Table Setup".*

Task Table Edit

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit**

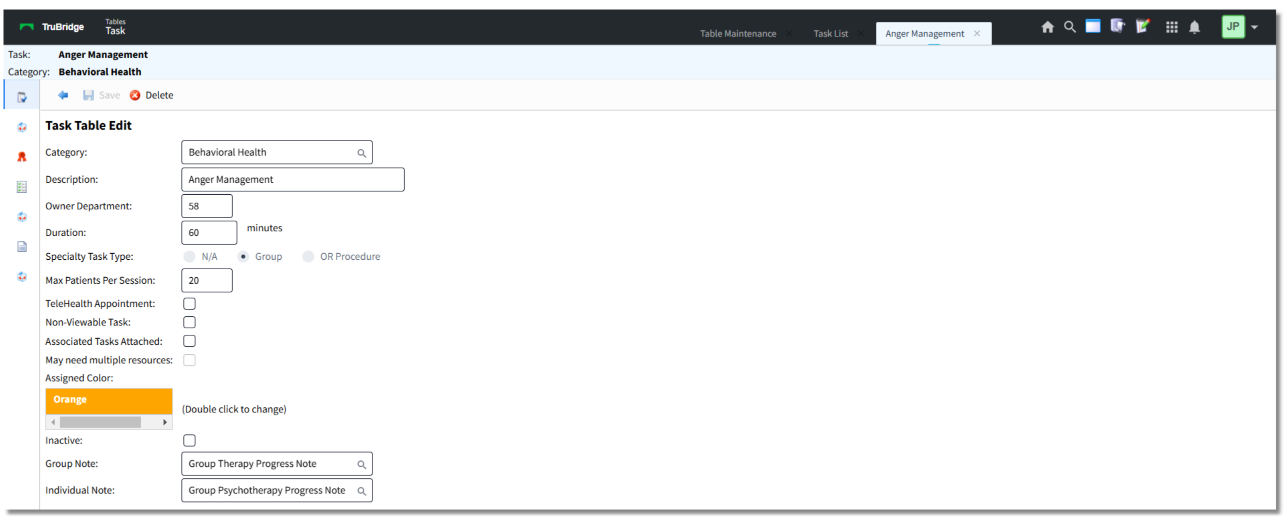


Table Maintenance - Tasks/Procedures

Below is an explanation of each field:

- **Category:** A category list look-up is available to choose the appropriate category for the task. These codes are set up in the Categories 67 table.

- **Description:** Description of the task.

- **Owner Department:** The department number of who will own the task. This option controls the ability to use the Check-In option from the scheduling grid.

NOTE: *If a department number is not loaded, the Check-In option will not display.*

- **Duration:** The number of minutes it will take to complete the task. This will be used to block off the appropriate amount of time on the schedule.

NOTE: *When creating a new task, and a duration is not populated, once Save is selected, this field will default to 5 minutes.*

- **Specialty Task Type:**
  - **Group:** Select this option if this task will allow multiple patients to be scheduled for the same task from the scheduling grid.
  - **OR Procedure:** This option is no longer used.

- **TeleHealth Appointment:** Select this option to designate the task as a TeleHealth appointment.

NOTE: *This field will only display when the TeleHealth Appointment application is set to active for a facility.*

- **Max Patients Per Session:** The number of patients allowed to be scheduled in a group session for the task. This field will only be visible if the Specialty Task Type field is set to Group. Only appointments at the Scheduled and Check-In status will be included in this count.

NOTE: *If this number is increased, patients may be added to future group tasks until the max is met. If this number is decreased, the existing group appointments will not be affected, but future group appointments will read the max and not allow additions.*

- **Non-Viewable Task:** Select this option to suppress the task from the Task Entry screen when scheduling a patient. This option should be used when the task should not be scheduled by itself but instead should be used as an Associated Task.

- **Associated Tasks Attached:** Select this option if the task will be used as a "shell" task. For example, if OR Procedure Series is setup as an Associated Task, then multiple other tasks may be attached and be scheduled simultaneously. If selected, only the Description and Owner Department fields will be accessible. The task will then look to the settings on the Associated Tasks screen. Associated Tasks must be added if this field is selected.

NOTE: *When Associated Task is selected and then Save is selected, the Duration field will default to '0' minutes, but may be changed if needed.*

- **May need multiple resources:** Select this option if multiple resources will need to be selected when scheduling the task. This will allow all resources associated to this task to be added or removed when scheduling.

NOTE: *This option will be disabled if a Specialty Task Type of Group is selected.*

- **Assigned Color:** Double-click this field to assign a color to the task on the scheduling grid. If a color is not assigned, the default color for the task will be white.

- **Inactive:** Select this option if the task will no longer be used. This will omit the task from any look-ups during scheduling.

- **Group Note:** Select the magnifying glass to select a PhysDoc Template to use as a Group Note for group tasks. This field will only been enabled if the Specialty Task Type is Group.

NOTE: *In order for the PhysDoc Templates to display in this lookup, "Scheduled" will need to be selected in the Physician Documentation Templates table for each template that will be used as a Group Note.*

- **Individual Note:** Select the magnifying glass to select a ClinDoc Document to use as an individual note for individual appointments. This field will only been enabled if the Specialty Task Type is Group.

The following options are available on the action bar:

- **Save:** Select this option to save any changes made to the task.

- **Delete:** Select this option to delete a task. If the task has been scheduled, the task cannot be deleted.

Task Resource

The Resources option on the navigation pane will need to be selected to add resources to the task.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Task Resources**

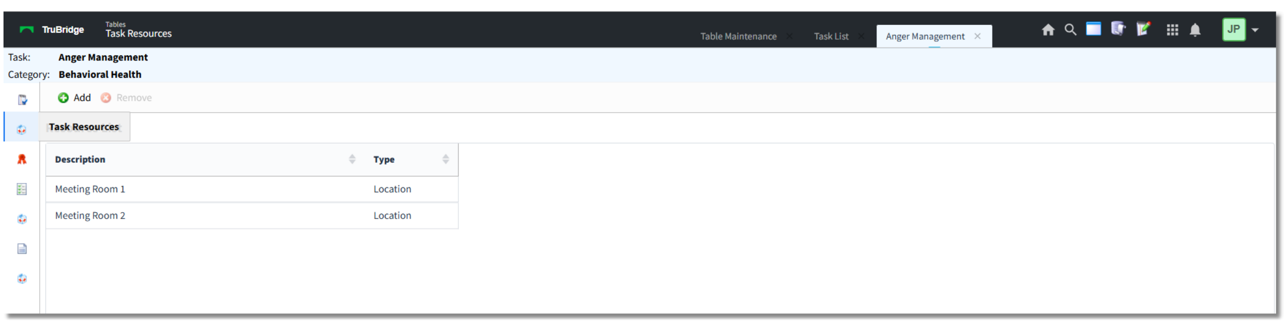


Table Maintenance - Tasks/Procedures

Below is an explanation of each column:

- **Description:** Displays the description of the resource associated with the task.

- **Type:** Displays the type of resource (Location or Personnel) associated with the task.

The following options are available on the action bar:

- **Add:** Selecting this option will allow resources to be added to the task.
- **Remove:** Selecting this option will remove a resource from the task.

Resource Selection

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Resources** > **Add**

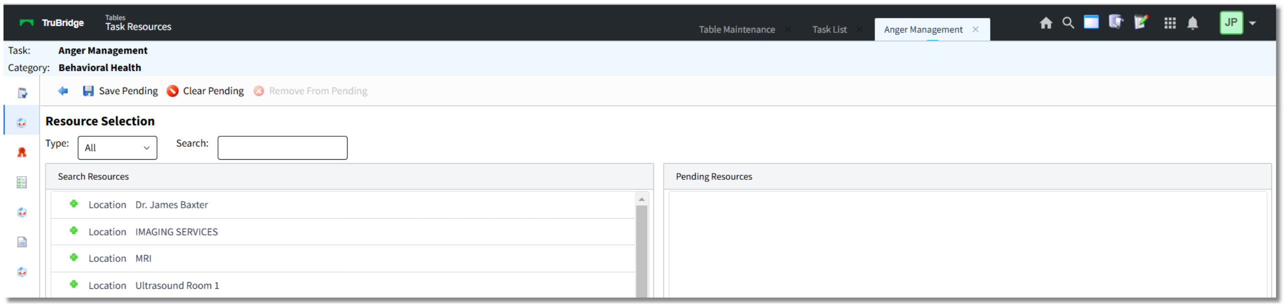


Table Maintenance - Tasks/Procedures

Below is an explanation of each column:

- **Search Resources:** Displays a listing of all available resources that may be selected for the task. A search option is available at the top of the screen. To add a resource to the task, select the green plus sign to add it to the Pending Resources column.

- **Pending Resources:** A listing of selected resources from the Search Resources column will display here. To remove a task from this column, select the red minus sign.

The following options are available on the action bar:

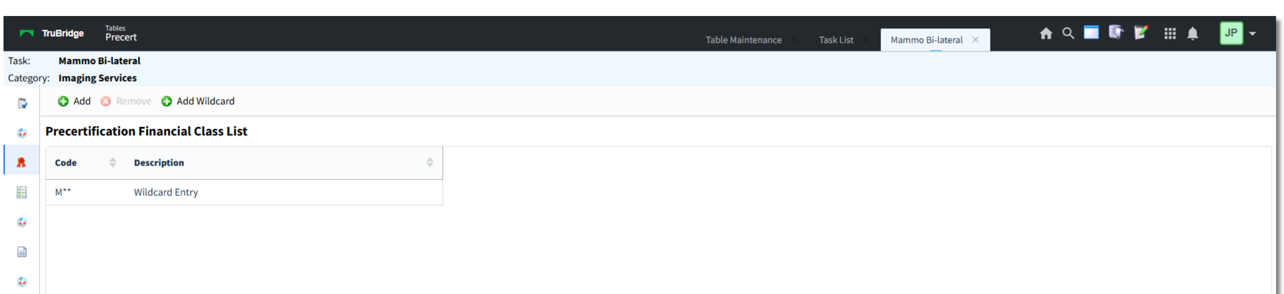
- **Save Pending:** This will save all resources in the Pending Resources column.

- **Clear Pending:** This will remove anything in the Pending Resources column.

Precert

The Precert option on the navigation pane will need to be selected if wanting to enter precertification information during the scheduling process for certain financial classes.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Precert**



Precertification Financial Class List

Below is an explanation of each column:

- **Code:** Displays the financial class associated with the task
- **Description:** Displays the description of the financial class associated with the task

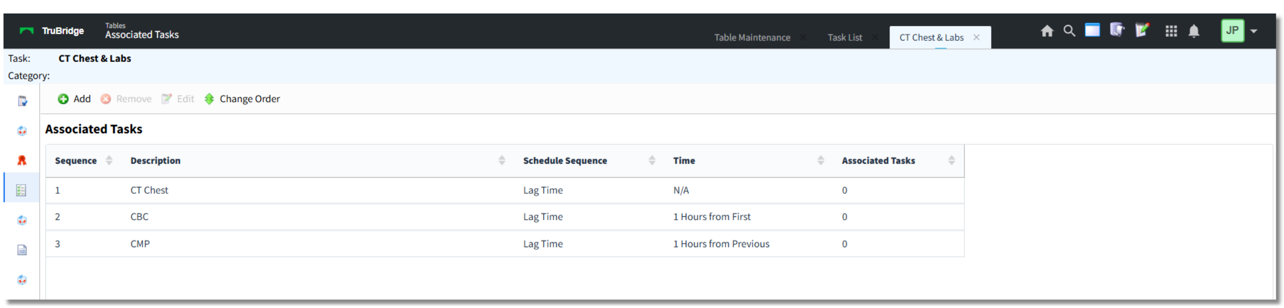
The following options are available on the action bar:

- **Add:** Selecting this option will allow financial classes to be added to the task for precertification. When selected, a list of financial classes will display. Select each financial class to add to the task and select **Save** from the action bar. This will allow precertification information to be added for the patient during scheduling.
- **Remove:** Selecting this option will remove a financial class from the task for precertification
- **Add Wildcard:** Selecting this option will allow financial classes to be added by wildcarding to the task for precertification. When selected, a wildcard may be populated in the Code field. A wildcard is distinguished by using an "*" in any of the three digits of the financial class code. Once populated, this will allow precertification for all financial classes that fall within the wildcard. Select **Save** from the action bar to save the wildcard.

Associated Task

The Associated Tasks option will allow associated tasks to be added when needing tasks to be scheduled simultaneously. When scheduling a patient, the system will read the tasks in the order in which they are arranged on this screen to apply the
associated settings. The tasks will then be scheduled for the resources attached to each associated task.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **<u>Associated Tasks</u>**



Associated Tasks

Below is an explanation of each column:

- **Sequence:** The numeric order of the tasks to be scheduled.

- **Description:** The description of the associated task.
- **Schedule Sequence:** The sequence type of the associated task. This will display Lag Time, Same Time or Follows.
- **Time:** The schedule time of the associated task.
- **Associated Tasks:** The number of sub-tasks already set up with the task.

The following options are available on the action bar:

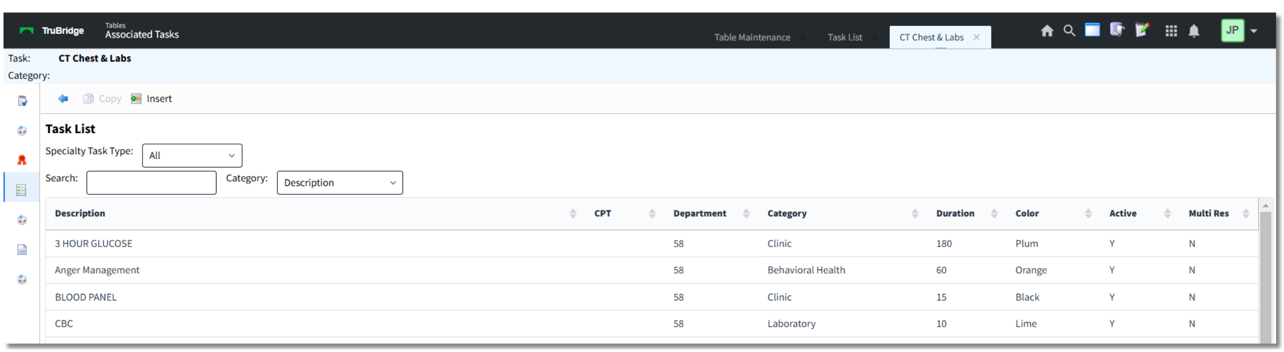
- **Add:** Select this option to go to the Task List screen in order to select a task to be associated. Once a task has been selected, the Association Schedule screen will then display.
- **Remove:** Select this option to delete a task from the Associated Tasks screen.
- **Edit:** Select this option to make changes to the Association Schedule for a task.
- **Change Order:** Select this option to move a task up or down in sequence.

Add

When **Add** is selected from the Associated Tasks screen, the Task List will then display. Select a task and then select **Insert** from the action bar to add it as an associated task.

NOTE: *The same task may be added multiple times as an Associated Task to the lead/parent task.*

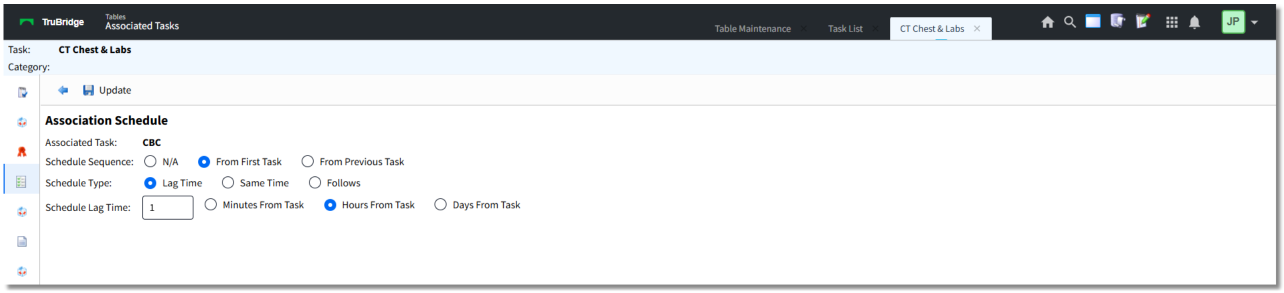
Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Associated Tasks** > **Add**



Associated Tasks - Task List

The Association Schedule screen will then display to determine when the task will need to be scheduled.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Associated Tasks** > **Add** > **Select Task** > **Insert**



Associated Tasks - Association Schedule

Below is an explanation of each field:

- **Schedule Sequence:** The following fields will determine at which point each associated task will be scheduled.
  - **N/A:** Select this option if the parent/lead task will be scheduled for the original time slot selected from the scheduling grid. If this option is selected for any subsequent associated tasks, the tasks will be moved to the Unscheduled status.
  - **From First Task:** Select this option if the task will need to be scheduled a certain amount of time after the first associated task listed in the Associated Task list. If this option is selected, the Schedule Lag Time fields will be available for selection.
  - **From Previous Task:** Select this option if the task will need to be scheduled a certain amount of time after the previous associated task listed in the Associated Task list. If this option is selected, the Schedule Lag Time fields will be available for selection.

- **Schedule Type:** The following fields will .
  - **Lag Time:** Select this option to enable the Schedule Lag Time options.
  - **Same Time:** Select this option to schedule the task at the exact same time as the lead task, first task or previous task. If this option is selected, the Schedule Lag Time fields will be disabled.
  - **Follows:** Select this option to schedule the task immediately following the lead task, first task or previous task, based on the order on the Associated Task screen. If this option is selected, the Schedule Lag Time fields will be disabled.

NOTE: *The Same Time and Follows options will work depending on which Schedule Sequence is selected.*

- **Schedule Lag Time:** The following fields will only be accessible if Lag Time has been selected as the Schedule Type.
  - **Minutes/Hours/Days:** Enter the number of minutes/hours/days in between each task's scheduled date/time.
  - **Minutes From Task:** Select this option and enter the number of minutes after the first or previous associated task before this particular associated task should be scheduled.
  - **Hours From Task:** Select this option and enter the number of hours after the first or previous associated task this particular associated task should be scheduled .
  - **Days From Task:** Select this option and enter in the number of days after the first or previous associated task this selected associated task should be scheduled .

NOTE: *When a new associated task is created, Minutes From Task will default to being selected for 5 minutes. If the Schedule Lag time is changed to Hours From Task, it will default to 1 hour. And if Days From Task is selected it will default to 1 day.*

Use Case Scenario

The following is an example of how associated tasks may be used:

1. OR Procedure Series has been set up as the "shell" task and has **Associated Task** selected on the Task Table Edit screen. It then has the following three associated tasks set accordingly:
   - OR Procedure 1: Association Schedule has N/A selected.
   - OR Procedure 2: Association Schedule has From First Task selected, Lag Time selected and Days From Task is set to "1."
   - OR Procedure 3: Association Schedule has From Previous Task selected, Lag Time selected and Days From Task is set to "1."

When scheduling an OR Procedure Series for Monday at 9:00 a.m., TruBridge EHR will automatically schedule OR Procedure 1 for Monday at 9:00 a.m., then OR Procedure 2 for Tuesday at 9:00 a.m. (one day from the first task), and then OR Procedure 3 for Wednesday at 9:00 a.m. (one day from the previous task).

The above scheduling scenario would also apply to the following settings:
- OR Procedure 1: Association Schedule has N/A selected.
- OR Procedure 2: Association Schedule has From First Task selected, Lag Time selected and Hours From Task is set to "24."
- OR Procedure 3: Association Schedule has From First Task selected, Lag Time selected and Hours From Task is set to "48."

2. OR Procedure 1 has been set up as the "lead/parent" task. It then has the following associated tasks set accordingly:
   - OR Procedure 2: Association Schedule has N/A selected.
   - OR Procedure 3: Association Schedule has N/A selected.

When scheduling OR Procedure 1 for Monday at 9:00 a.m., the software will automatically schedule OR Procedure 1 for Monday at 9:00 a.m. OR Procedure 2 and OR Procedure 3 will be placed at the Unscheduled status. OR Procedure 2 and 3 will then need to be scheduled for the appropriate resource.

3. OR Procedure 1 has been set up as the lead/parent" task. It is being scheduling for the resource "OR 1." It then has the following associated tasks set accordingly:
   - OR Procedure 2: Association Schedule has From First Task selected, Lag Time selected and Days from Task set to "1." Resource "OR 1" has been assigned to this task.
   - OR Procedure 3: Associated Schedule has From Previous Task selected, Lag Time selected and Days From Task is set to "1." Resource "OR 2" has been assigned to this task.

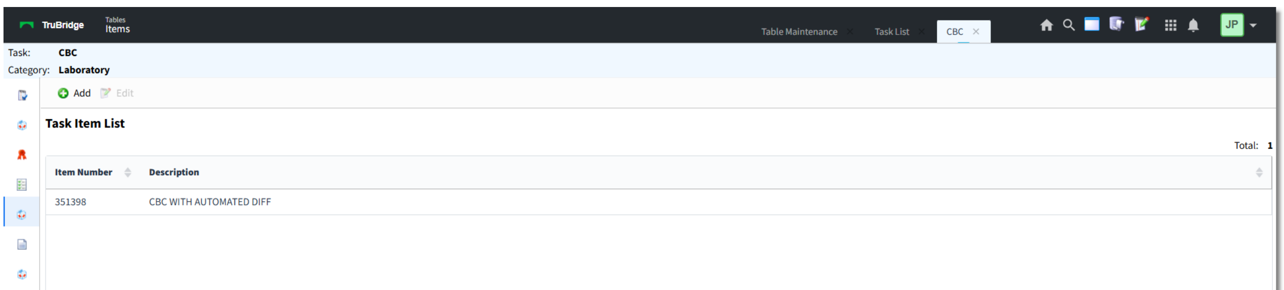
When scheduling OR Procedure 1 for Monday at 9:00 a.m. in the "OR 1" resource, the software will automatically schedule OR Procedure 1 for that time at that resource. OR Procedure 2 will then be scheduled for Tuesday at 9:00 a.m in the "OR 1" resource. OR Procedure 3 will be placed at the Unscheduled status because resource "OR 1" has not been assigned to the task.

NOTE: *If the scheduler does not have access to the resource assigned to a task on the schedule, the task will be placed at the Unscheduled status and will then need to be scheduled for the appropriate resource.*

Items

The Items option will allow items needing to be associated with a task to be added. This option is used along with Medical Necessity. Once an item is associated with a task, the item may then be ordered or charged once the task is set to complete.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Items**



Task Item List

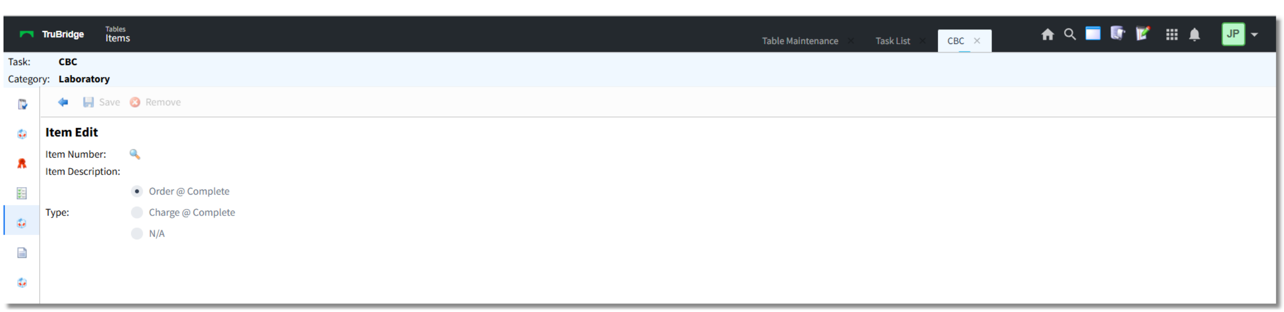
Below is an explanation of each column.

- **Item Number:** This is the Item Master number.
- **Description:** This is the description of the Item Master number

Add

When Add is selected, the Item Edit screen will then display. This will allow an item number to be added to the task. Select the Item Number magnifying glass to search for an item.

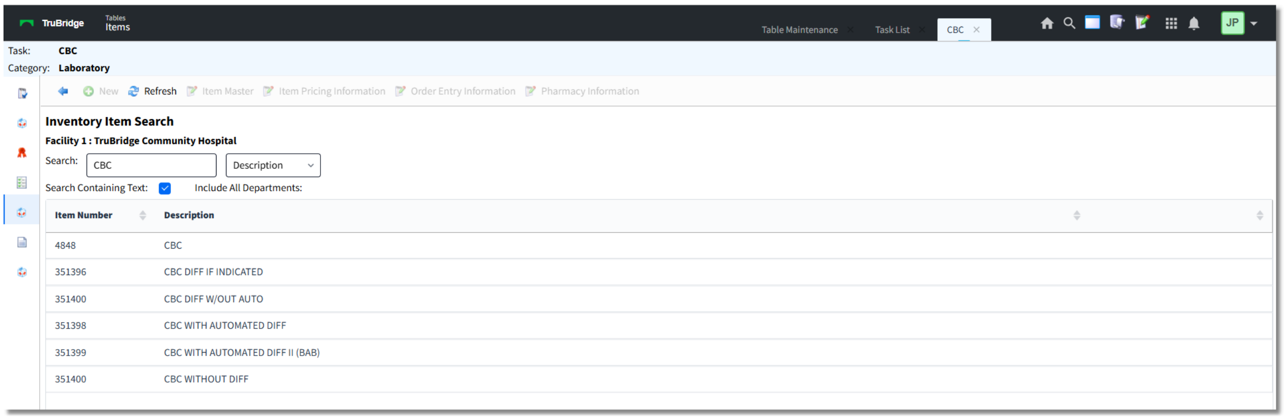
Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Items** > **Add**



Item Edit

A search option is available to search for an item by description or by item number. Once the item number and description have been located, double-click on the item.

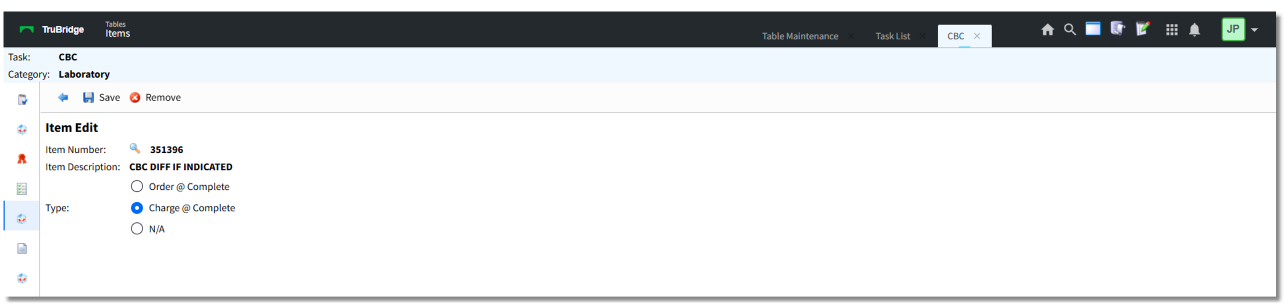
Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Items** > **Add** > **Item Number Look Up**



Item Lookup

After the item has been selected, the software will return to the Item Edit screen so any additional information may be added.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Items** > **Add** > **Item Number Look Up** > **Select Item**



Item Edit

Below is an explanation of each field:

- **Item Number:** The selected Item Master number
- **Item Description:** The selected Item Master number description

- **Type:** Select an option to determine when an item will be charged.
  - **Order @ Complete:** Select this option to charge the item once the order is complete.
  - **Charge @ Complete:** Select this option to charge the item once the charge is complete.
  - **N/A:** Select this option to charge the item as normal.

The following options are available on the action bar:

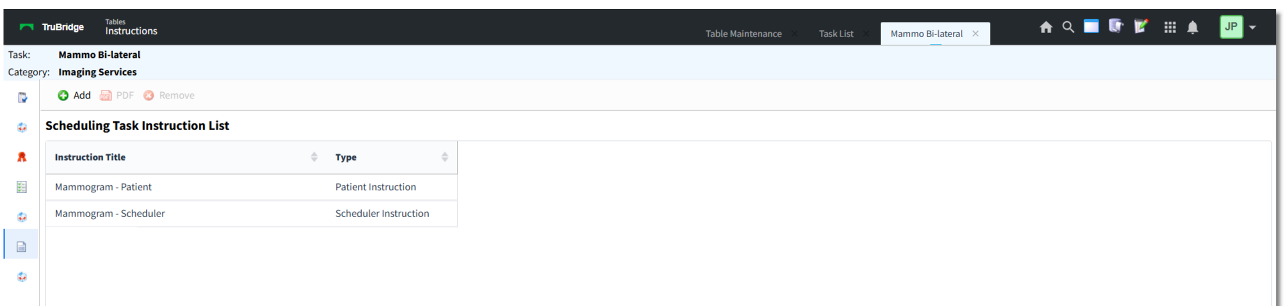
- **Save:** Select this option to save the information.

- **Remove:** Select this option to remove the item from the task/procedure.

Instructions

The Instructions option may be selected to allow instructions created in the Instructions 68 table to display for the scheduler and/or patient when scheduling the patient for a particular task. The instructions may be viewed on the Event screen or the Appointment Detail screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **Instructions**



Task - Instructions List

Below is an explanation of each column:

- **Instruction Title:** This will display the name of the instruction.

- **Type:** This will display if the instruction is a patient or scheduler instruction.

Action Bar Options

- **Add:** Select this option to add instructions to the task. Once selected, a list of all instructions created in the Instructions table will display.

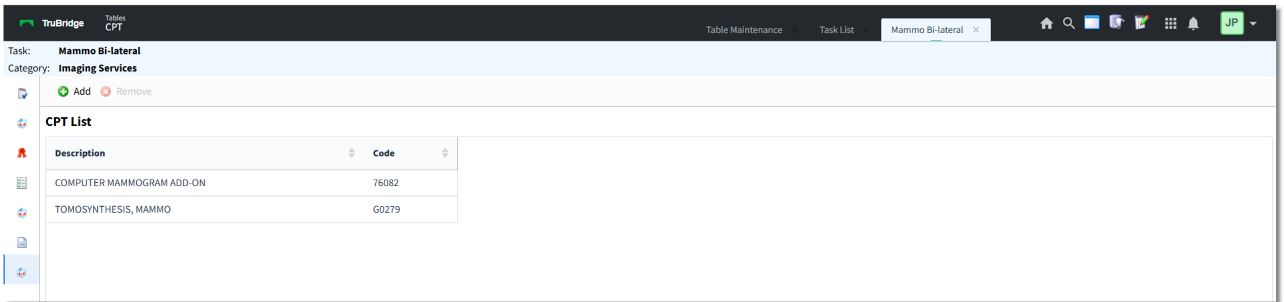
- **PDF:** Select this option if wanting to display the instructions in a PDF format. Selecting this option will also give the ability to print the instruction.

- **Remove:** Select this option to remove the instruction from the task.

CPT

The CPT option will allow multiple CPT codes to be associated with a task. This will then allow schedulers to select the CPT code to be used when scheduling a patient for this task. Once a patient is scheduled, the CPT code will display on the Appointment Detail screen as well as the Printed Schedule report. It will also be an option in the Hover Maintenance.

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select Task/Procedure** > **Edit** > **CPT**



Tasks - CPT List

Below is an explanation of each column:

- **Description:** This will display the description of the CPT code.
- **Code:** This will display the CPT Code associated with the description.

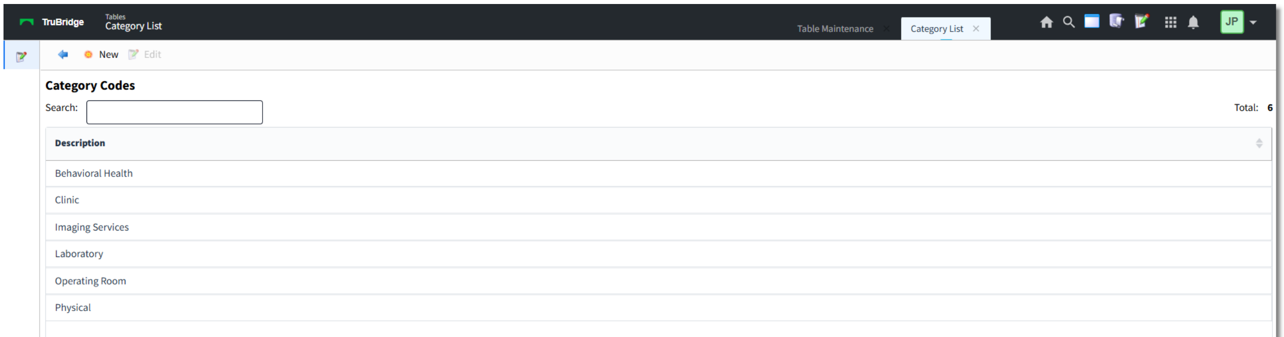
Action Bar Options

- **Add:** Select this option to add CPT codes to the task. Once selected, a list of all CPT codes will display.
- **Remove:** Select this option to remove a CPT from the task.

23.2 Categories

The second table that will need to be set up is the categories table. This table will first set up the category and then will be linked to a task/procedure.

Select **Web Client** > **Tables** > **Patient Intake** > **Categories**



Categories

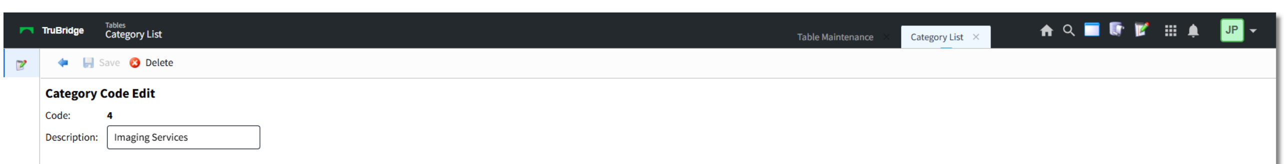
Below is an explanation of each column:

- **Description:** The description of the category. A search option is available at the top of the screen.

The following options are available on the action bar:

- **New:** Selecting this option will allow a new category to be created.
- **Edit:** Selecting this option will allow the information on the category to be changed.

Category Code Edit



Category Edit

Below is an explanation of each field:

- **Code:** This code is assigned by the system when a new category is created. This code cannot be changed.
- **Description:** The description of the category.

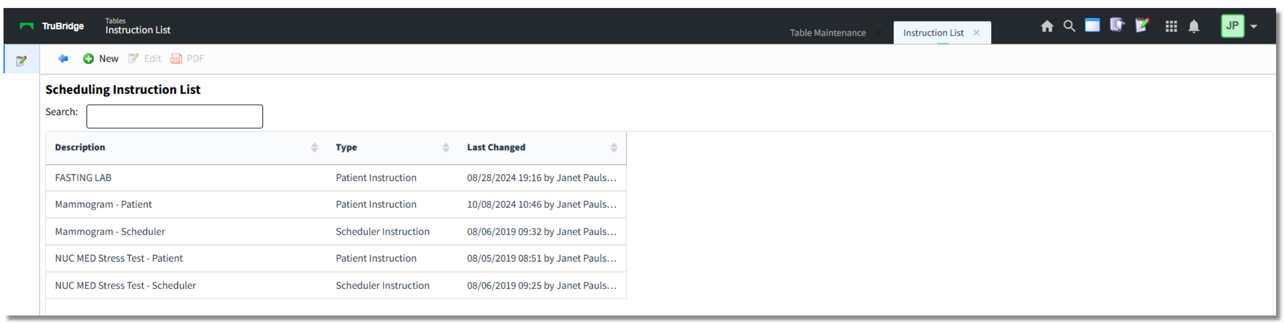
The following options are available on the action bar:

- **Save:** Select this option to save any changes if a new category code is created or if an existing category is changed.
- **Delete:** Select this option to delete a category from the table.

23.3 Instructions

The Instructions table may be setup if there are instructions for the scheduler or patient when a certain task is being scheduled. Scheduler instructions will be for information the scheduler needs to ask the patient, such as is the patient pregnant, before the task is scheduled. Patient instructions will be for information the scheduler needs to tell the patient in regards to the procedure being scheduled.

Select **Web Client** > **Tables** > **Patient Intake** > **Instructions**



Scheduling Instruction List

Below is an explanation of each column:

- **Description:** The description of the instruction. A search option is available at the top of the screen.
- **Type:** The type of instruction. This will display either Patient Instruction or Scheduler Instruction to denote who the instruction is for.
- **Last Changed:** The last date and time the instruction was updated. It will also display the name of the person who last made the changes.

Action Bar options:

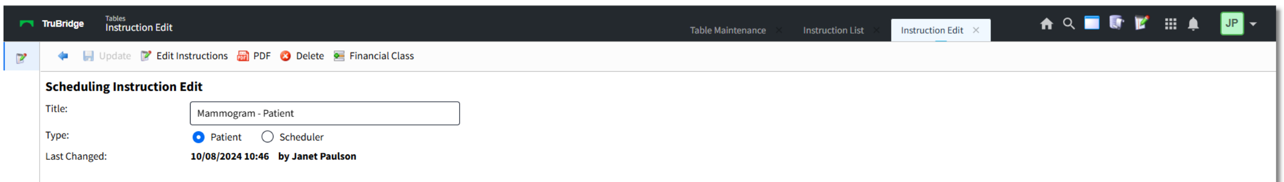
- **New:** Selecting this option will allow a new instruction to be created.
- **Edit:** This option will become enabled once an existing instruction is selected. Selecting this option will allow the information on the instruction to be changed.

- **PDF:** This option will become enabled once an existing instruction is selected. Selecting this option will display the instruction in a PDF format.

Scheduling Instruction Edit

Once an instruction has been selected, select the **Edit** option on the action bar to add or change the instruction.

Select **Web Client** > **Tables** > **Patient Intake** > **Instructions** > **Select Instruction** > **Edit**



Scheduling Instruction Edit

Below is an explanation of each field:

- **Title:** Enter the title of the instruction.

- **Type:** Select Patient or Scheduler to designate the type of instruction.
  - **Patient:** Select this option if the instruction will be for information the scheduler needs to tell the patient in regards to the procedure being scheduled.
  - **Scheduler:** Select this option if the instruction will be for information the scheduler needs to ask the patient, such as is the patient pregnant, before the procedure is scheduled.

- **Last Changed:** The last date and time the instruction was updated. It will also display the name of the person who last made the changes.

Action Bar options:

- **Update:** Select this option to save any changes made to the instruction.

- **Edit Instructions:** Select this option to add or edit information for the instruction. See the Instruction Edit section below for more information on this option.

- **PDF:** Select this option to display the instruction in a PDF format.

- **Delete:** Select this option to delete the instruction.

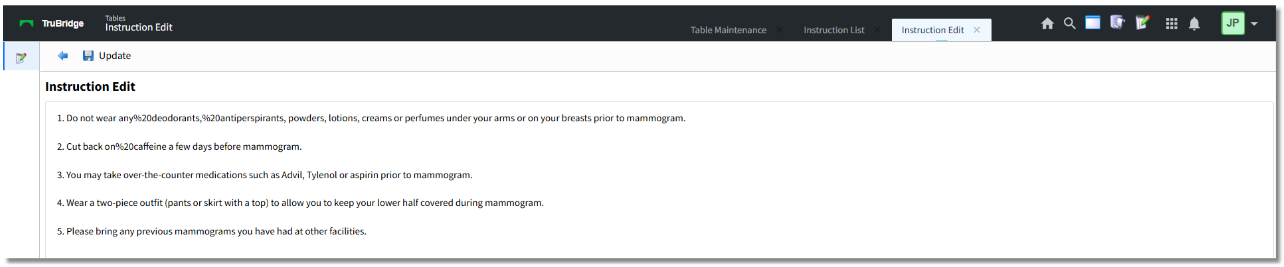
- **Financial Class:** Select this option to add financial classes that this instruction will apply to, if needed. See the Financial Class Edit section below for more information on this option.

Instruction Edit

Once Edit Instructions has been selected, the Instruction Edit screen will display. The instructions may then be typed in the box provided.

NOTE: *Formatting of the instructions (bold, underline, italic, etc.) will be enabled once the instructions have been typed and highlighted.*

Select **Web Client** > **Tables** > **Patient Intake** > **Instructions** > **Select Instruction** > **Edit** > **<u>Edit Instructions</u>**

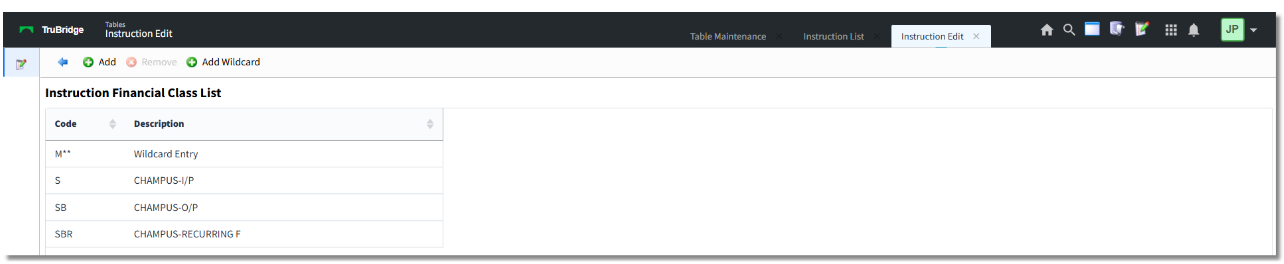


Instruction Edit

Financial Class Edit

Financial Classes may be assigned to an instruction so that is only applies to patients with that financial class. To add specific financial classes, select **Add** and a list of all available financial classes will display to select from. To wildcard financial classes, select **Add Wildcard** to input the wildcard.

Select **Web Client** > **Tables** > **Patient Intake** > **Instructions** > **Select Instruction** > **Edit** > **<u>Financial Class</u>**

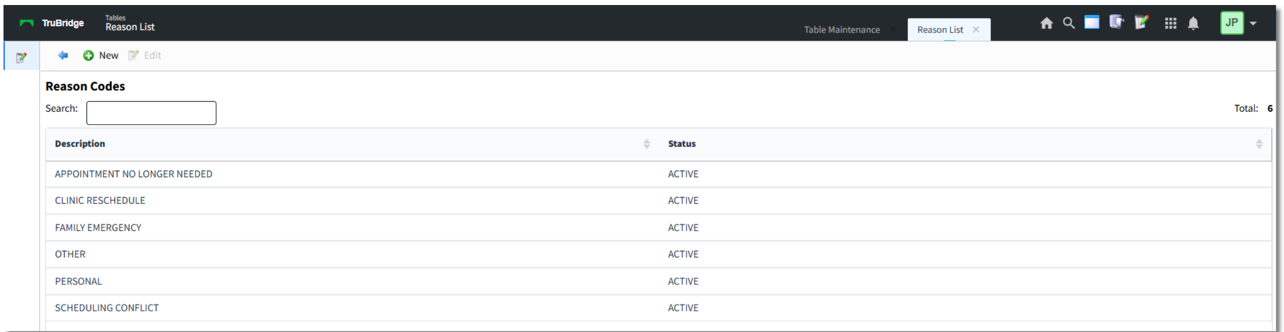


Instruction Financial Class List

23.4 Reasons

The Reasons table is used to store various reasons why an appointment's status has been changed to No Show, Cancel or Reschedule in Updated Scheduling.

Select **Web Client** > **Tables** > **Patient Intake**



Reason Codes Table

Below is an explanation of each column:

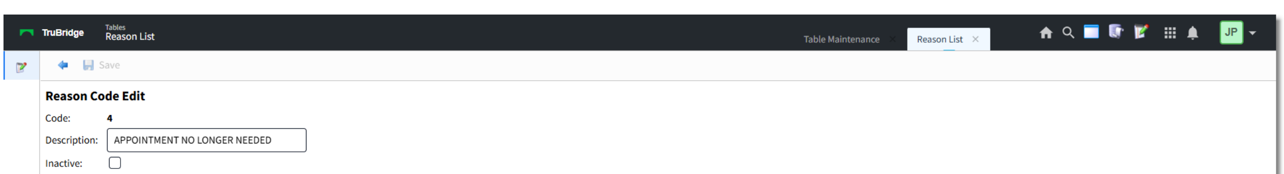
- **Description:** The description of the reason. A search option is available at the top of the screen.
- **Status:** Displays if the reason is Active or Inactive.

Action Bar options:

- **New:** Selecting this option will allow a new reason to be created.
- **Edit:** Selecting this option will allow the information on an existing reason to be changed.

Reason Code Edit

Select **Web Client** > **Tables** > **Patient Intake** > **Select Reason** > **Edit**



Reason Code Edit

Below is an explanation of each field:

- **Code:** This code is assigned by the system when a new reason is created. This code cannot be changed.

- **Description:** The description of the reason.

- **Inactive:** Select this option to make the reason inactive if it is no longer needed.

NOTE: *Deletion of a reason is not permissible.*

Action Bar options:

- **Save:** Select this option to save any changes if a new reason is created or if an existing reason is changed.

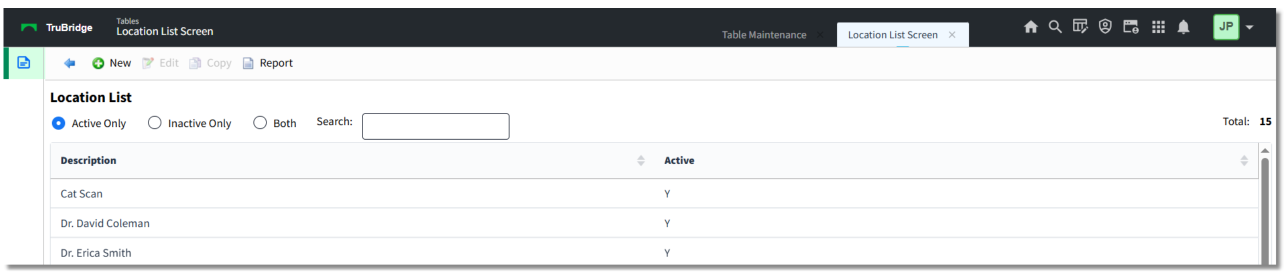
Chapter 24 Resources

24.1 Locations

The first table that should be set up is the locations table. All of the locations where tasks/procedures may be performed will need to be set up here. In this table, the hours of operation are set as well as when the location will need to be closed.

There are options at the top of the screen that will allow the list to be delimited by Active Only, Inactive Only or Both. A search option is also available.

Select **Web Client** > **Tables** > **Patient Intake** > **Locations**



Locations

Below is an explanation of each column:

- **Description:** The description of the location. A search option is available at the top of the screen.
- **Active:** The column displays a Y if the location is actively being used, or an N if the location is marked as inactive.

The following options are available on the action bar:

- **New:** Selecting this option will allow a new location to be created.
- **Edit:** Selecting this option will allow the information for the location to be changed.
- **Copy:** Selecting this option will allow the location information to be copied to a new location.

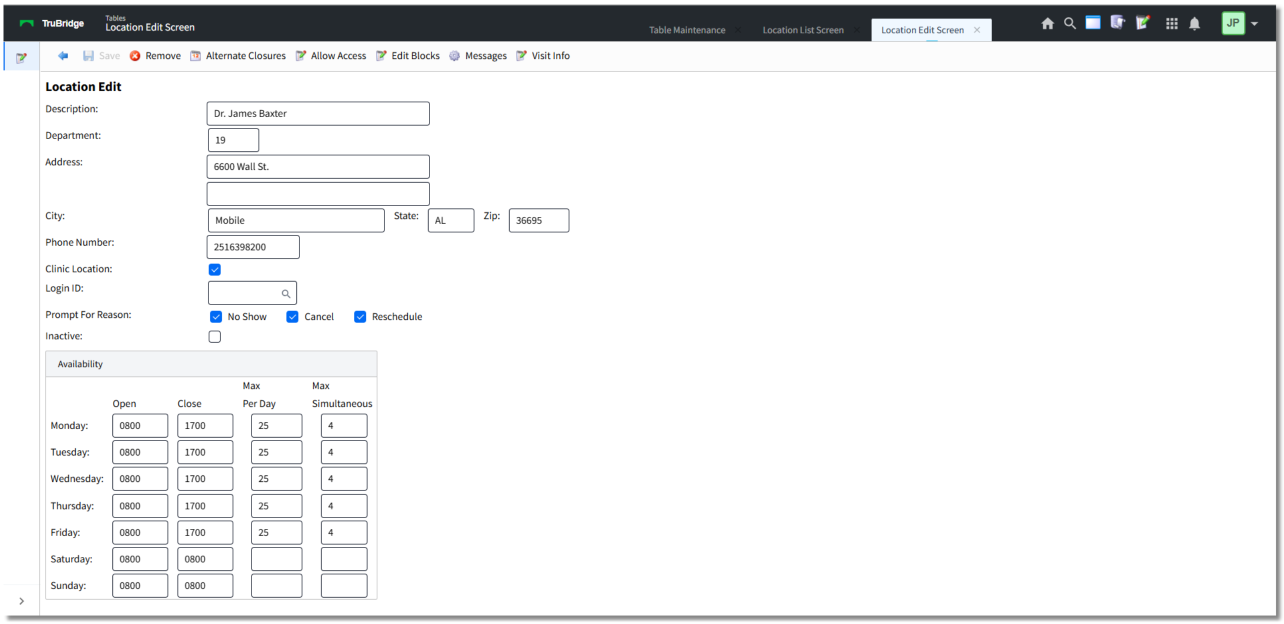
NOTE: *When creating a new location through the Copy option, give the location a name first and then save the new location. If further table maintenance is required, the new location should be accessed from the Location List.*

- **Report:** Selecting this option enables information from the Locations table to be exported into a report. After selecting **Report,** the Report Writer Parameters screen will appear, allowing filters to be applied as needed. Once all are set, select **Run Report** to generate the file**.**

NOTE: *This report is also available within the Report Dashboard and it titled "Scheduling Location Table Setup".*

Location Edit

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Edit**



Location Edit

Below is an explanation of each field:

- **Description:** The description of the location.
- **Department:** The department number associated with the location. This option controls the ability to use the Check-In option from the scheduling grid.

NOTE: *If a department number is not loaded, the Check-In option will not display.*

- **Address/City/State/Zip:** The address of the location.
- **Phone Number:** The phone number of the location.
- **Clinic Location:** Select this option if the location is a clinic location.
- **Login ID:** A provider's Login ID may be entered in this field to tie them to the location. This field is utilized with Patient Connect.
- **Prompt for Reason:** Select the following options to prompt for a Reason when an appointment status is changed to **No Show**, **Cancel** or **Reschedule** for this Location.

- **Inactive:** Select this option if the location will no longer be used. This will omit the location from look-ups during scheduling.

- **Availability:** This section will determine when the location will be available to schedule patients. This will reflect on the scheduling grid.
  - **Open:** The time of when the location will open for the day. The time must be entered in military time.
  - **Close:** The time of when the location will close for the day. The time must be entered in military time.
  - **Max Per Day:** The maximum amount of patients that may be scheduled for the day
  - **Max Simultaneous:** The maximum amount of patients that may be scheduled at the same time. If the number of patients are exceeded, a warning will appear as soon as the time slot is selected during scheduling.

    If two schedulers are scheduling at the same time and scheduler A selects a time slot to schedule the last patient before Max Simultaneous has been reached then scheduler B selects the same time slot, a warning will appear. The warning will let scheduler B know that the selected time slot has been locked by scheduler A and that the Max Simultaneous has been reached.

NOTE: *The Behavior Control "Override Appointments" may be set to allow for a user to override/overbook time slots that have been maxed out.*

The following options are available on the action bar:

- **Save:** Select this option to save any changes if a new location is created or if changes are made to an existing location.

- **Remove:** Select this option to delete a location.

- **Alternate Closures:** This option is selected if needing to set up specific days/times the location will be closed. This will be reflected on the schedule.

- **Allow Access:** This option is selected if needing to allow specific users access to view a location on the scheduling grid, Print Schedule and Daily Schedule. See below for more information on how to add users on the Allow Access screen.

NOTE: *In order for the Allow Access option to function as described, "Limit Resource Access" must be selected in the General Control table. See General Control 100 for more information.*

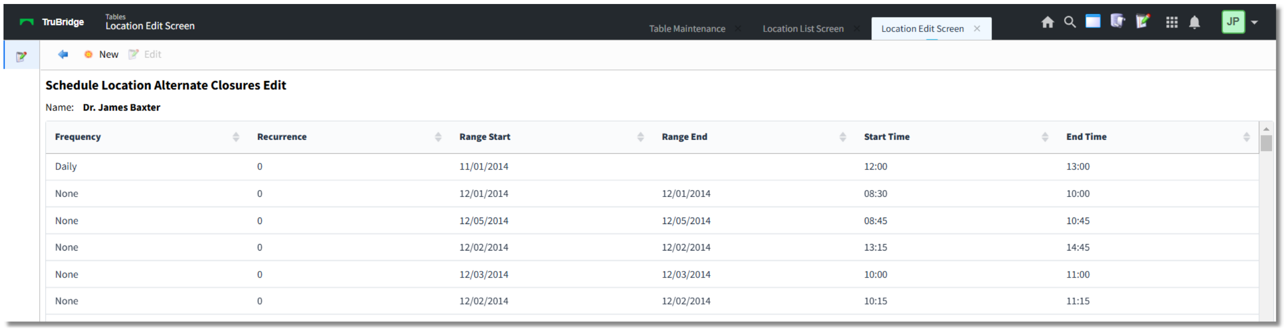
- **Edit Blocks:** Select this option to create a task block for this location. Creating a task block from this table will allow multiple resources to be added. See below for more information on how to create a task block.

- **Messages:** This option is used with the Patient Connect application.

- **Visit Info:** This option is selected if wanting to auto create visits during the scheduling process. In order to use the functionality, **Auto Create Visits** will also need to be selected in the General Control 100 table.

Schedule Location Alternate Closures Edit

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Alternate Closures**



Location - Schedule Location Alternate Closure Edit

Below is an explanation of the columns:

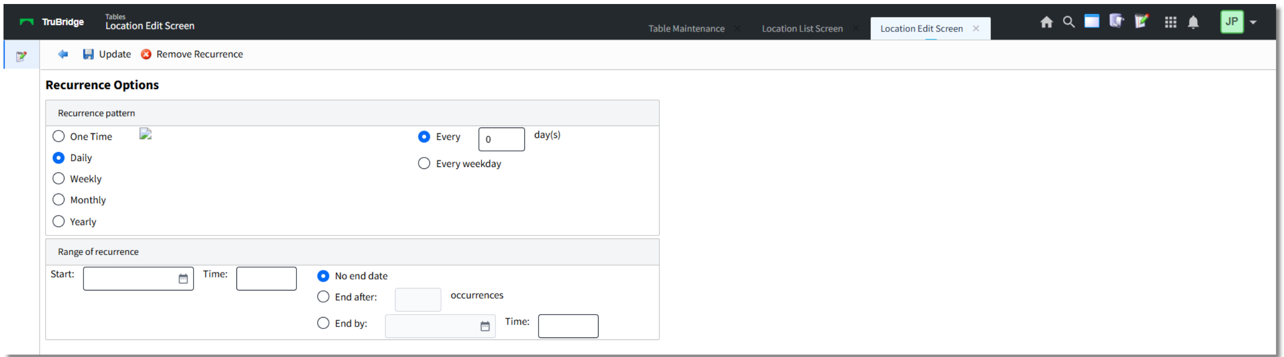
- **Frequency:** This will show how frequently the closure will occur.
- **Recurrence:** This is the number of recurrences set up for the closure.
- **Range Start:** The date the closure will start
- **Range End:** The date the closure will end
- **Start Time:** The time the closure will start
- **End Time:** The time the closure will end

The following options are available on the action bar:

- **New:** Select this option to set up a new alternate closure.
- **Edit:** Select this option to make changes to an existing closure.

Recurrence Options

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Alternate Closures** > **<u>New or Edit</u>**



Locations - Recurrence Options

Below is an explanation of each field:

- **Recurrence Pattern:** This section will determine how often the alternate closure will recur as well as what days it will recur.
  - **One Time:** Select this option if the closure will only happen one time. An example of when this would be used is if a doctor has vacation planned.
  - **Daily:** Select this option if the closure will occur on a daily basis. Once selected, choose how often the closure will recur. An example of when this would be used is if the location will close for lunch everyday.
    - **Every __ days (s):** Select this option to populate the number of days the closure will recur.
    - **Every weekday:** Select this option if the closure will recur Monday thru Friday.
  - **Weekly:** Select this option if the closure will occur on certain days of the week. Once selected, choose how of the closure will recur and on which days of the week. An example of when this would be used is if the location is closed on Mondays, Wednesdays and Fridays.
    - **Recur every __ week(s) on:** Populate the number of weeks the closure will recur and then select the days of the week the closure will recur on.
  - **Monthly:** Select this option if the closure will occur on a certain day of the month. Once selected, choose how often the closure will recur. An example of when this would be used is if the location is closed the last Friday of every month.
    - **Day __ of every __ month(s):** Select this option and populate the date of the month and how many months the closure will recur.
    - **The __ __ of every __ month(s):** Select this option to designate if the closure will happen on the first, second, third or fourth day of a month, followed by how many months the closure will recur.
  - **Yearly:** Select this option if the closure will occur on a certain day every year. Once selected, choose what day of the year the closure will recur on. An example of when this would be used is if the location will be closed on holidays such as Thanksgiving or Christmas.
    - **Every __ __:** Select this option to select the month and day of the closure.
    - **The __ __ of __:** Select this option if the closure will happen the first, second, third, fourth or last day of a month.

- **Range of Recurrence:** After the Recurrence Pattern is set up, the Range of Recurrence will need to be set up to determine when to start the closure. If the recurrence is only for a certain amount of time, information may be entered to state when it will end.
  - **Start:** The date the closure will start
  - **Time:** The time the closure will start
  - **No end date:** Select this option if the closure will never end.
  - **End After __ Occurrences:** Select this option if the closure will stop after a certain number of occurrences. If selected enter in the number of occurrences.
  - **End by: Time:** Select this time if the closure will stop on a certain date and time.

NOTE: *If a closure is being set up and has no end date, but will need to end at a certain time everyday, select* ***No end date*** *and then in the End by field, leave the date blank and enter in the end time only. An example of when this would be used is if the office closes everyday for lunch from 12:00-13:00.*

The following options are available on the action bar:

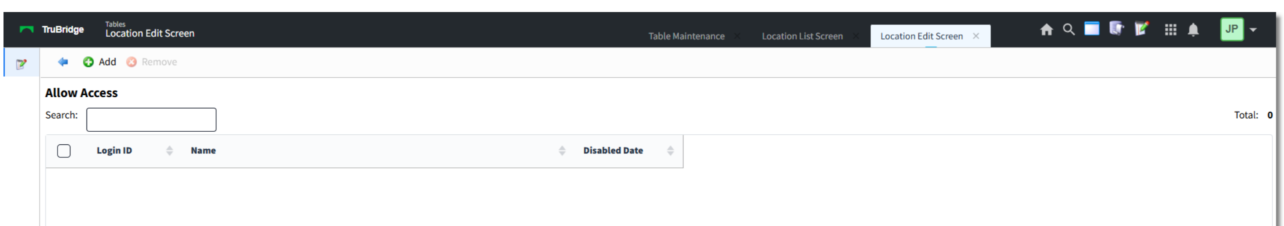
- **Save:** Select this option to save any changes made to the alternate closure.

- **Remove Recurrence:** Select this option to remove the alternate closure from the location.

Allow Access

The Allow Access option will allow users to be added who need access to view the location on the scheduling grid, Wait List, Print Schedule and Daily Schedule. If no users have been added to the Allow Access screen, the location will be viewable for all users. Once a user is added to the Allow Access screen, the location will only be visible to the listed user(s).

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Allow Access**



Allow Access

Below is an explanation of the columns:

- **Login ID:** The login ID of the user with allow access for the location.

- **Name:** The name associated with the login ID.

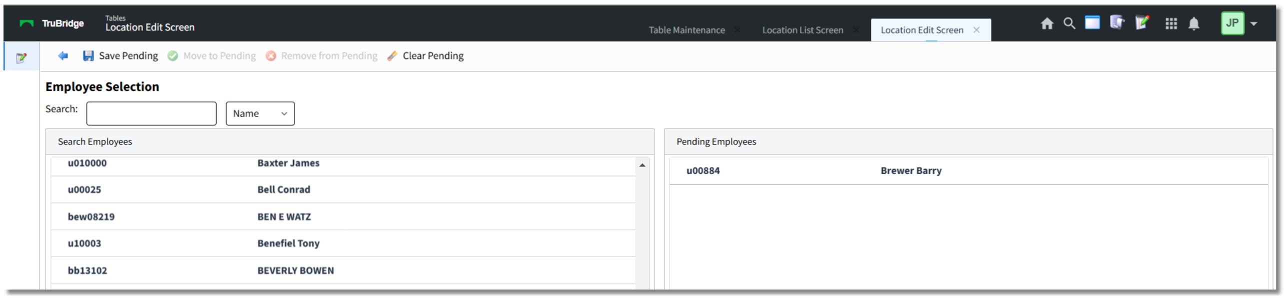
- **Disabled Date:** The date the login ID was disabled in System Administration. If this column is blank, the user is still active in TruBridge EHR.

Action Bar Options:

- **Add:** Select this option to add logins to the Allow Access screen.

- **Remove:** Select this option to remove logins from the Allow Access screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Allow Access** > **Add**



Employee Selection

The Add option for the Allow Access screen will allow employee's to be searched and added. Employees may be searched by Name or by Logname. Select the drop-down next to the Search field to select a search option for the employee(s). The following options on the action bar will become available as employees are selected.

- **Save Pending:** This option will become enabled once an employee has been added to the Pending Employees column. Select this option to save all employees in the Pending Employees column.

- **Move to Pending:** This option will become enabled once an employee is selected from the Search Employees column. Select this option to move the employee to the Pending Employees column.

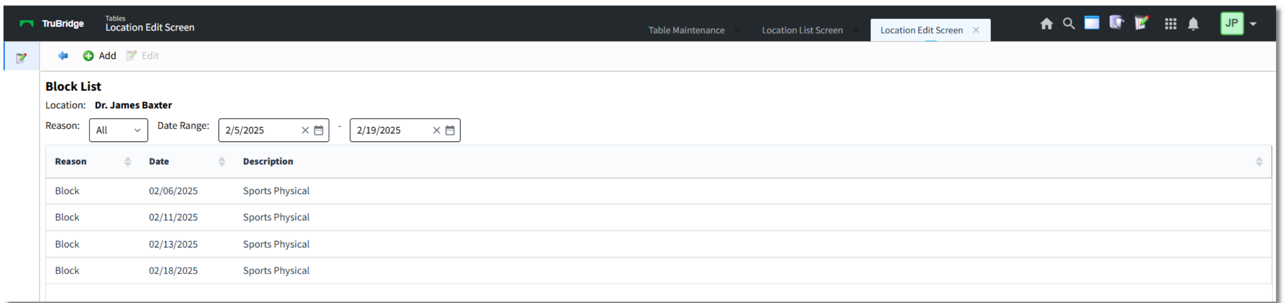
- **Remove from Pending:** This option will become enabled once an employee is selected from the Pending Employees column. Select this option to remove the employee from the Pending Employees column.

- **Clear Pending:** This option will become enabled once an employee is in the Pending Employees column. Select this option to remove all employees displaying in the Pending Employees column.

Edit Blocks

The Edit Blocks option will first display any existing blocks that have been setup for the selected location within the selected date range. The blocks may be delimited by reason or date range at the top of the screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Edit Blocks**



Block List

Below is an explanation of the columns:

- **Reason:** The reason for the block. This will display either Block, Other or Close.
- **Date:** The date of the block.
- **Description:** The description used for the block.

Action Bar Options:

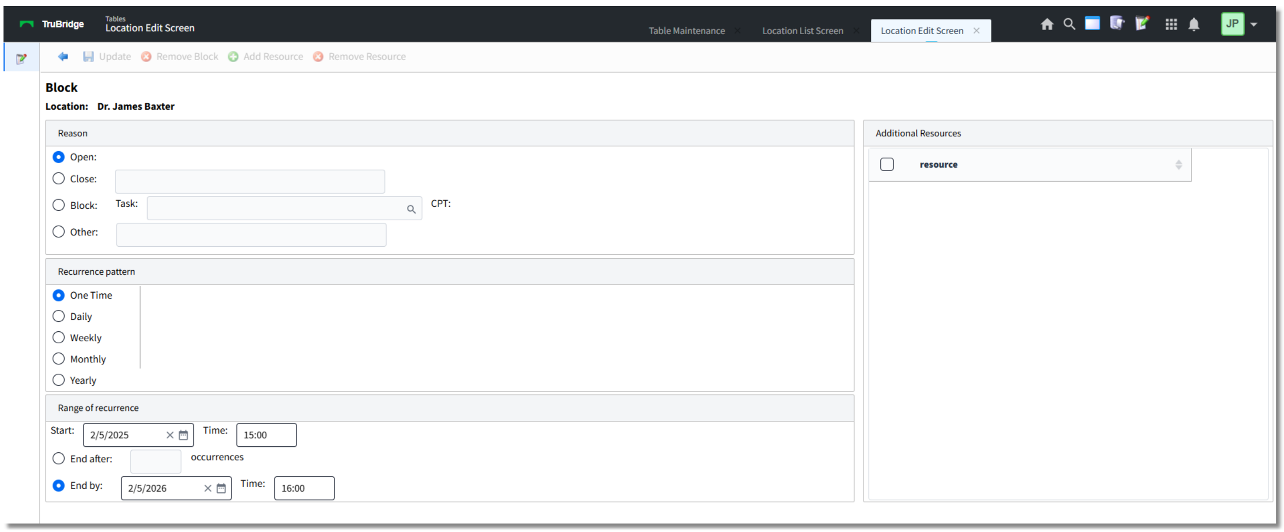
- **Add:** Select this option to add a block to the Block List. See below for more information on how to add a task block.
- **Edit:** Select this option to edit an existing block.

Add Block

Adding a block from the locations table will allow additional resources to be added so that the block will display on all schedules for those resources. When creating a new block, the Add Resource option will become enabled once Update is selected from the action bar.

NOTE: *Additional resources may only be added to a block from the Locations and Personnel tables.*

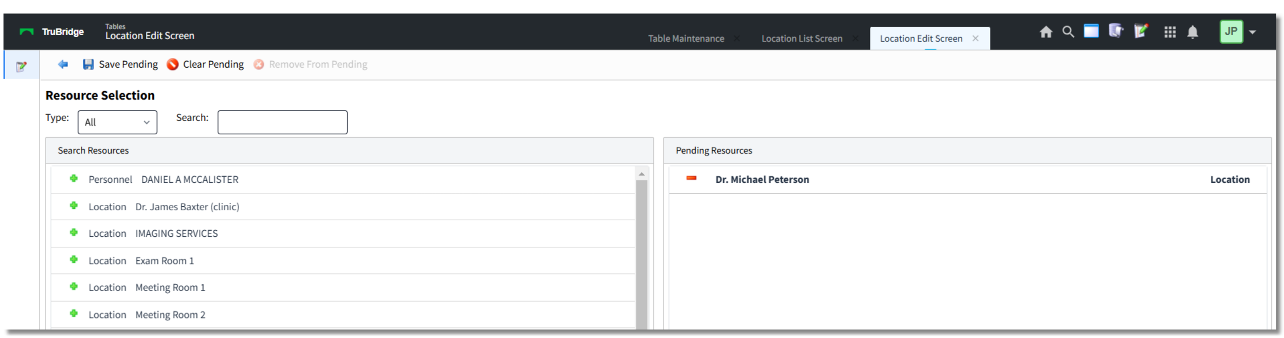
Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Edit Blocks** > **<u>Add</u>**



Block

Once on the Resource Selection screen, select the plus sign next to the resource that needs to be added from the Search Resources column to move it to the Pending Resources column. The Search Resources column may be delimited by using the Type and Search options at the top of the screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Edit Blocks** > **Add** > **<u>Add Resource</u>**



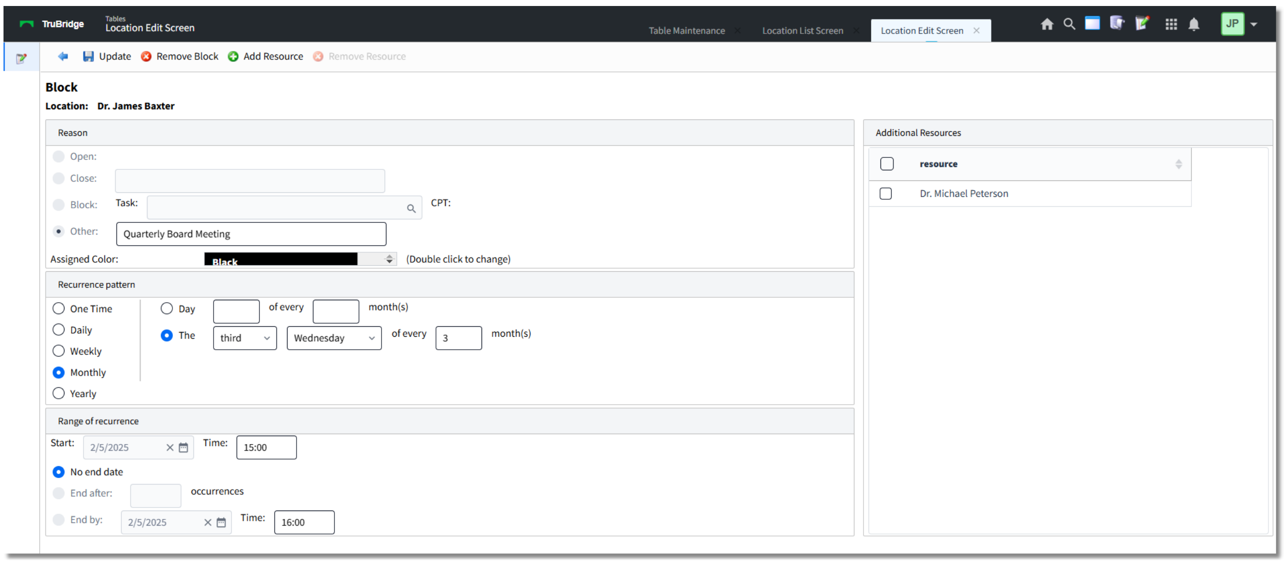
Resource Selection

The following options are available on the action bar.

- **Save Pending:** Select this option to save all resources in the Pending Resources column.
- **Clear Pending:** Select this option to remove all resources displaying in the Pending Resources column.
- **Remove from Pending:** Select this option to remove resources from the Pending Resources column.

Once all resources have been selected, select **Save Pending** on the action bar. TruBridge EHR will then return to the Block screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Edit Blocks** > **Add** > **Add Resource** > **Save Pending**



Block

Select **Update** to save all selections.

If a resource needs to be removed, select the resource from the Additional Resources section and then select **Remove Resource** from the action bar.

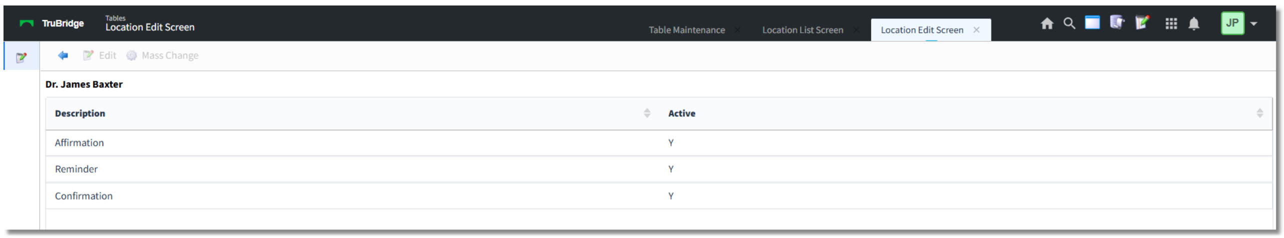
If **Remove Block** is selected on the action bar, a message will display stating that the block will be removed from all current and future occurrences for all resources listed.

Messages

The Messages option is used along with the Patient Connect application. This is where messages may be customized for a specific location where patient's are scheduled.

NOTE: *Access will need to be given to the Message Configuration Behavior Control to have access to this screen.*

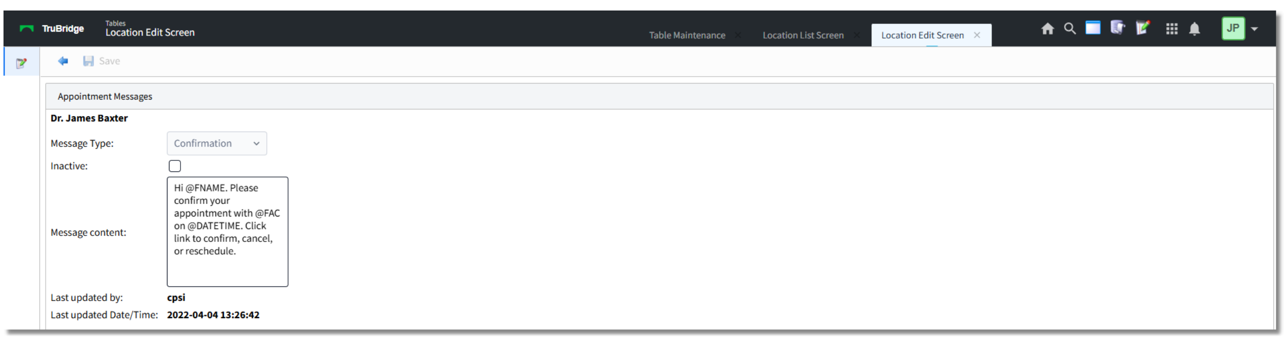
Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **<u>Messages</u>**



Messages

Select which message to customize and then select **Edit**.

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Messages** > **<u>Edit</u>**



Messages - Edit

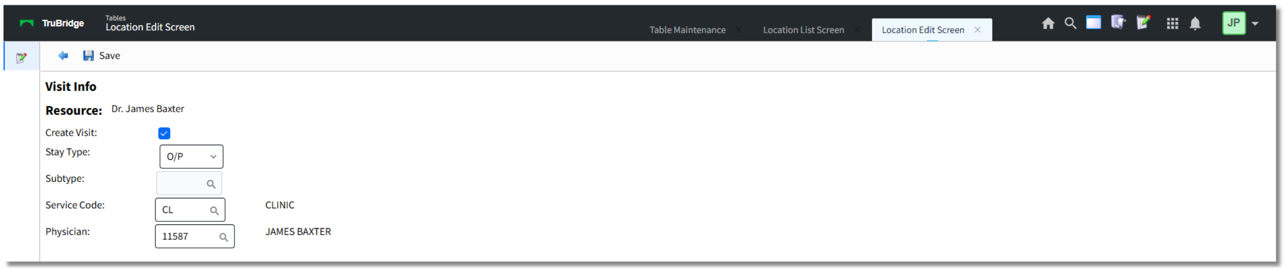
The Appointment Message for the selected location will display. The message may only be activated/deactivated and the message content customized.

Visit Info

The Visit Info option will determine if a visit needs to be created for the location during the scheduling process. To allow a visit to be created, select the **Create Visit** field.

Additional fields will display once **Create Visit** is selected. Define the Stay Type to be used when creating the visit. The Subtype, Service Code and Physician are optional fields that may be defined as well. Select **Save** once all fields have been addressed.

Select **Web Client** > **Tables** > **Patient Intake** > **Locations** > **Select Location** > **Visit Info**



Visit Info

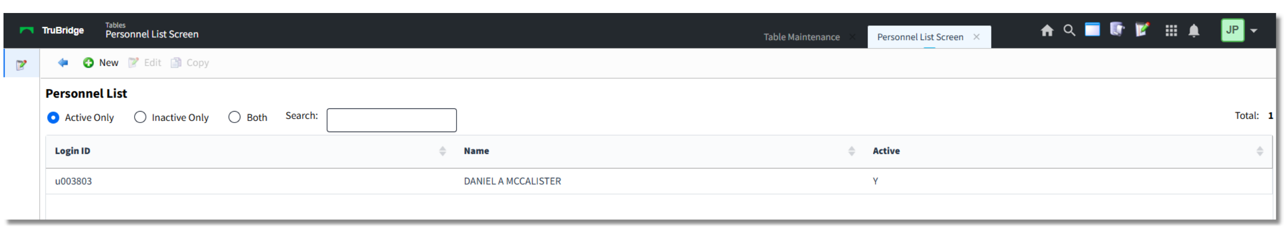
24.2 Personnel

All staff members who may perform tasks/procedures will need to be set up in the personnel table. This table is where the available hours are set as well as when the personnel will not be available.

There are options at the top of the screen that will allow the list to be delimited by Active Only, Inactive Only or Both. A search option is also available.

Personnel List

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel**



Personnel

Below is an explanation of each column:

- **Login ID:** The personnel's login id used to login to TruBridge EHR
- **Name:** This column displays the name of the employee who is affiliated with the logname to the left.

- **Active:** The column displays a Y if the person is actively being used, or an N if the person is marked as inactive.

The following options are available on the action bar:

- **New:** Selecting this option will allow a new personnel to be created.

- **Edit:** Selecting this option will allow the information for the personnel to be changed.

- **Copy:** Selecting this option will allow personnel information to be copied to a new personnel record.

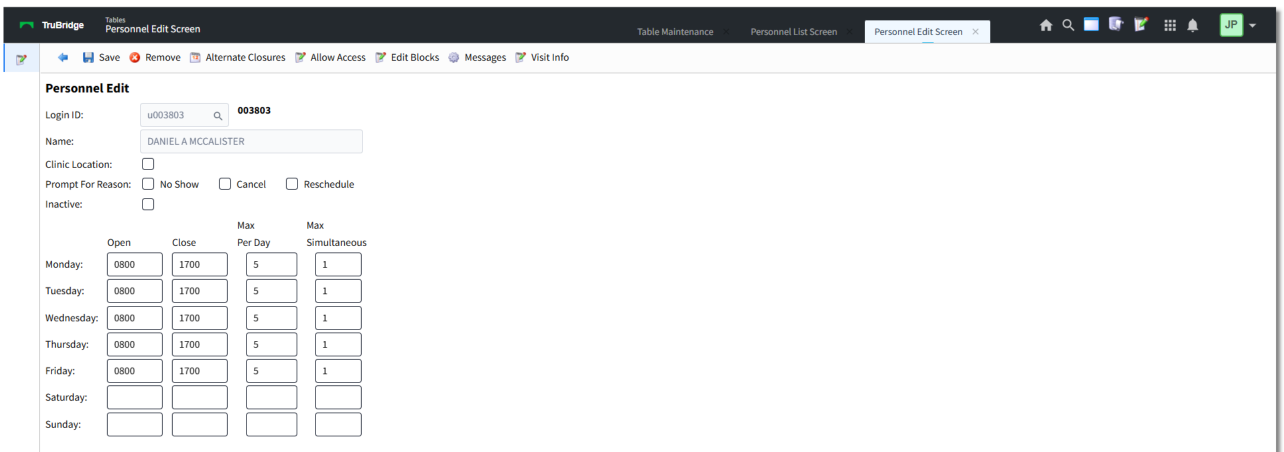
NOTE: *When creating a new personnel record through the Copy option, give the new entry a name first and then save the new entry. If further table maintenance is required, the new personnel record should be accessed from the Personnel List.*

- **Report:** Selecting this option enables information from the Personnel table to be exported into a report. After selecting **Report,** the Report Writer Parameters screen will appear, allowing filters to be applied as needed. Once all are set, select **Run Report** to generate the file**.**

NOTE: *This report is also available within the Report Dashboard and it titled "Scheduling Personnel Table Setup".*

Personnel Edit

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Edit**



Personnel Edit

Below is an explanation of each field:

- **Login ID:** The login id associated with the personnel. A search option is available if the login id is not known.

- **Name:** The personnel name that is attached to the login id. Once a login id is entered, the name will automatically be populated.

- **Clinic Location:** Select this option if personnel will be in a clinic location.

- **Prompt for Reason:** Select the following options to prompt for a Reason when an appointment status is changed to **No Show**, **Cancel** or **Reschedule** for this Personnel.

- **Inactive:** Select this option if the person will no longer be used. This will omit the person from any look-ups during scheduling.

- **Availability:** This section will determine when the personnel will be available to schedule patients. This will reflect on the scheduling grid.
  - **Open:** The time of when the personnel will be available for the day. The time must be entered in military time.
  - **Close:** The time of when the personnel will no longer be available for the day. The time must be entered in military time.
  - **Max Per Day:** The maximum amount of patients that may be scheduled for the day.
  - **Max Simultaneous:** The maximum amount of patients that may be scheduled at the same time. If the number of patients are exceeded, a warning will appear as soon as the time slot is selected during scheduling.

    If two schedulers are scheduling at the same time and scheduler A selects a time slot to schedule the last patient before Max Simultaneous has been reached, then scheduler B selects the same time slot, a warning will appear. The warning will let scheduler B know that the selected time slot has been locked by scheduler A and that the Max Simultaneous has been reached.

NOTE: *The Behavior Control "Override Appointments" may be set to allow for a user to override/overbook time slots that have been maxed out.*

The following options are available on the action bar:

- **Save:** Select this option to save any changes if a new personnel is created or if changes are made to an existing personnel.

- **Remove:** Select this option to delete a personnel.

- **Alternate Closures:** This option is selected if needing to set up specific days/times the personnel will be unavailable. This will be reflected on the schedule.

- **Allow Access:** This option is selected if needing to allow specific users access to view personnel on the scheduling grid, Print Schedule and Daily Schedule. See below for more information on how to add users on the Allow Access screen.

NOTE: *In order for the Allow Access option to function as described, "Limit Resource Access" must be selected in the General Control table. See General Control* 100 *for more information.*

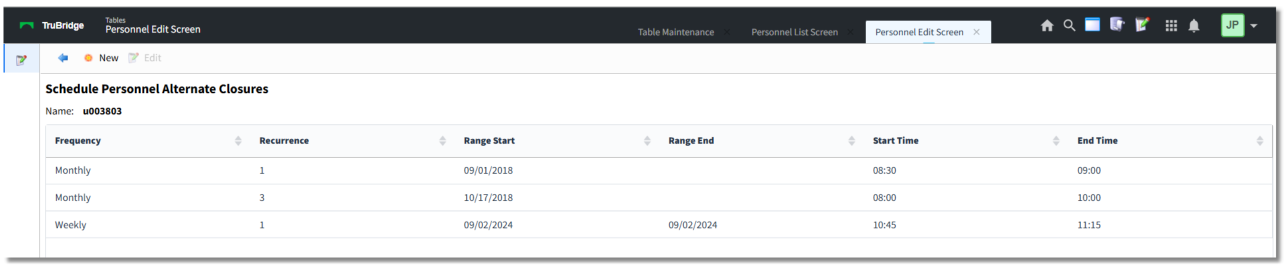
- **Edit Blocks:** Select this option to create a task block for this person. Creating a task block from this table will allow multiple resources to be added. See below for more information on how to create a task block.

- **Messages:** This option is used with the Patient Connect application.

- **Visit Info:** This option is selected if wanting to auto create visits during the scheduling process. In order to use the functionality, Auto Create Visits will also need to be selected in the General Control 100 table.

Schedule Personnel Alternate Closures

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Edit** > **Alternate Closures**



Personnel - Schedule Personnel Alternate Closure

Below is an explanation of the columns:

- **Frequency:** This will show how frequently the closure will occur.

- **Recurrence:** Number of recurrences set up for the closure

- **Range Start:** The date the closure will start

- **Range End:** The date the closure will end

- **Start Time:** The time the closure will start

- **End Time:** The time the closure will end

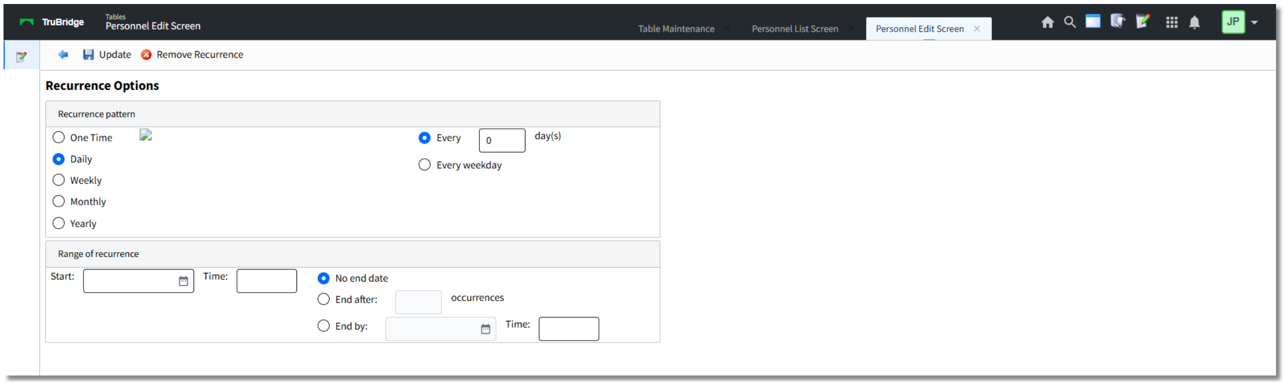
The following options are available on the action bar:

- **New:** Select this option to set up a new alternate closure.

- **Edit:** Select this option to make changes to an existing closure.

Recurrence Options

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Edit** > **Alternate Closures** > **New or Edit**



Personnel - Recurrence Options

Below is an explanation of each field:

- **Recurrence Pattern:** This section will determine how often the alternate closure will recur as well as what days it will recur.
  - **One Time:** Select this option if the closure will only happen one time. An example of when this would be used is if a doctor has vacation planned.
  - **Daily:** Select this option if the closure will occur on a daily basis. Once selected, choose how often the closure will recur. An example of when this would be used is if the location will close for lunch everyday.
    - **Every __ days (s):** Select this option to populate the number of days the closure will recur.
    - **Every weekday:** Select this option if the closure will recur Monday thru Friday.
  - **Weekly:** Select this option if the closure will occur on certain days of the week. Once selected, choose when the closure will recur and on which days of the week. An example of when this would be used is if the location is closed on Mondays, Wednesdays and Fridays.
    - **Recur every __ week(s) on:** Populate the number of weeks the closure will recur and then select the days of the week the closure will recur on.
  - **Monthly:** Select this option if the closure will occur on a certain day of the month. Once selected, choose how often the closure will recur. An example of when this would be used is if the location is closed the last Friday of every month.
    - **Day __ of every __ month(s):** Select this option and populate the date of the month and how many months the closure will recur.
    - **The __ __ of every __ month(s):** Select this option to designate if the closure will happen on the first, second, third or fourth day of a month, followed by how many months the closure will recur.
  - **Yearly:** Select this option if the closure will occur on a certain day every year. Once selected, choose what day of the year the closure will recur on. An example of when this would be used is if the location will be closed on holidays such as Thanksgiving or Christmas.
    - **Every __ __:** Select this option to select the month and day of the closure.
    - **The __ __ of __:** Select this option if the closure will happen the first, second, third, fourth or last day of a month.

- **Range of Recurrence:** After the Recurrence Pattern is set up, the Range of Recurrence will need to be set up to determine when to start the closure. If the recurrence is only for a certain amount of time, information may be entered to state when it will end.
  - **Start:** The date the closure will start
  - **Time:** The time the closure will start
  - **No end date:** Select this option if the closure will never end.
  - **End After __ Occurrences:** Select this option if the closure will stop after a certain number of occurrences. If selected enter in the number of occurrences.
  - **End by: Time:** Select this time if the closure will stop on a certain date and time.

NOTE: *If a closure is being set up and has no end date, but will need to end at a certain time everyday, select* ***No end date*** *and then in the End by field, leave the date blank and enter in the end time only.*

The following options are available on the action bar:

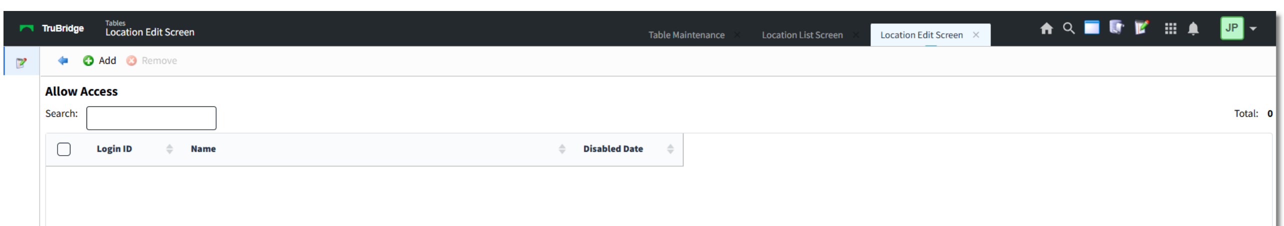
- **Save:** Select this option to save any changes made to the alternate closure.

- **Remove Recurrence:** Select this option to remove the alternate closure from the location.

Allow Access

The Allow Access option will allow users to be added who need access to view the personnel on the scheduling grid, Print Schedule and Daily Schedule. If no users have been added to the Allow Access screen, the personnel will be viewable for all users. Once a user is added to the Allow Access screen, the personnel will only be visible to the listed user(s).

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Allow Access**



Allow Access

Below is an explanation of the columns:

- **Login ID:** The login ID of the user with allow access for the location.

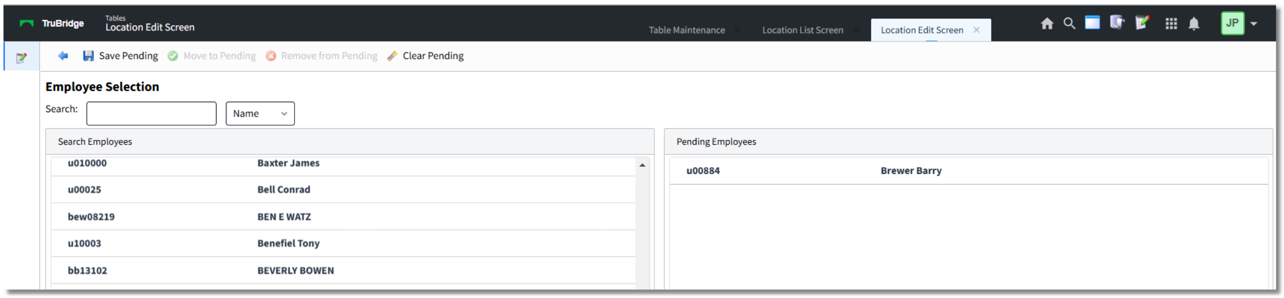
- **Name:** The name associated with the login ID.

- **Disabled Date:** The date the login ID was disabled in System Administration. If this column is blank, the user is still active in TruBridge EHR.

Action Bar Options:

- **Add:** Select this option to add logins to the Allow Access screen.
- **Remove:** Select this option to remove logins from the Allow Access screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Allow Access** > **Add**



Employee Selection

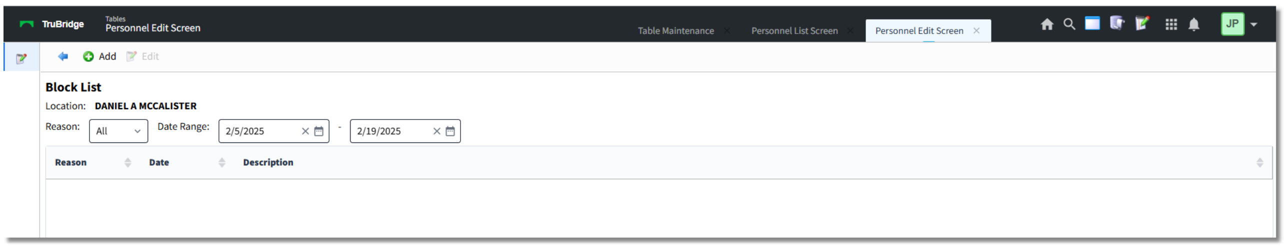
The Add option for the Allow Access screen will allow employees to be searched and added. Employees may be searched by Name or by Logname. Select the drop-down next to the Search field to select a search option for the employee(s). The following options on the action bar will become available as employees are selected.

- **Save Pending:** This option will become enabled once an employee has been added to the Pending Employees column. Select this option to save all employees in the Pending Employees column.
- **Move to Pending:** This option will become enabled once an employee is selected from the Search Employees column. Select this option to move the employee to the Pending Employees column.
- **Remove from Pending:** This option will become enabled once an employee is selected from the Pending Employees column. Select this option to remove the employee from the Pending Employees column.
- **Clear Pending:** This option will become enabled once an employee is in the Pending Employees column. Select this option to remove all employees displaying in the Pending Employees column.

Edit Blocks

The Edit Blocks option will first display any existing blocks that have been setup for the selected location within the selected date range. The blocks may be delimited by reason or date range at the top of the screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Edit Blocks**



Block List

Below is an explanation of the columns:

- **Reason:** The reason for the block. This will display either Block, Other or Close.
- **Date:** The date of the block.
- **Description:** The description used for the block.

Action Bar Options:

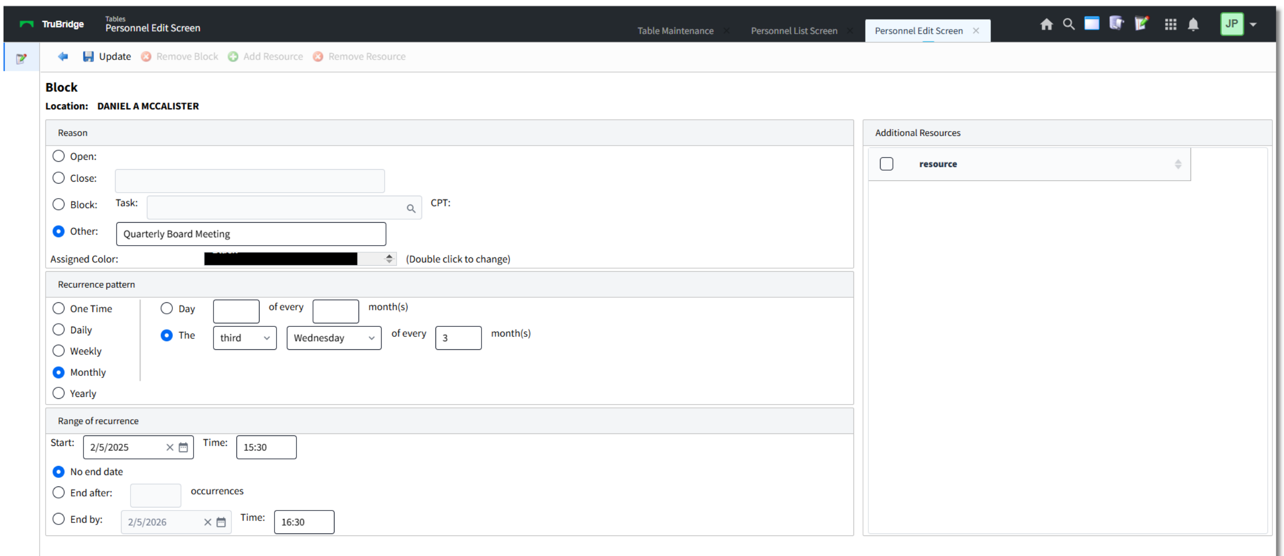
- **Add:** Select this option to add a block to the Block List. See below for more information on how to add a task block.
- **Edit:** Select this option to edit an existing block.

Add Block

Adding a block from the personnel table will allow additional resources to be added so that the block will display on all schedules for those resources. When creating a new block, the Add Resource option will become enabled once Update is selected from the action bar.

NOTE: *Additional resources may only be added to a block from the Locations and Personnel tables.*

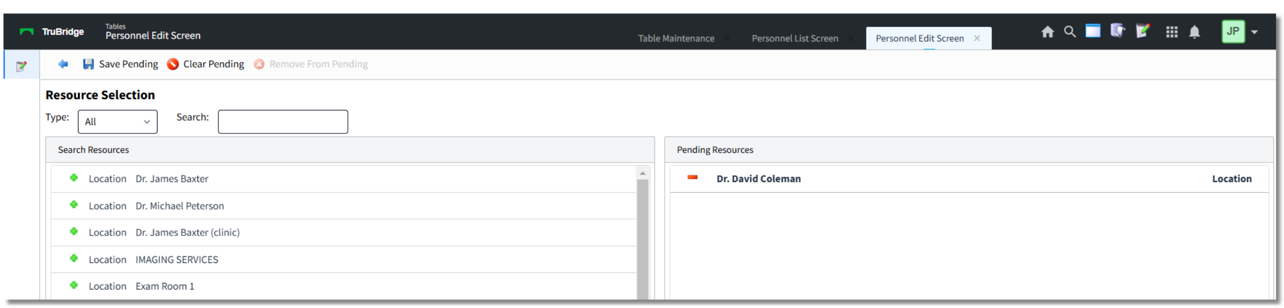
Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Edit Blocks** > **Add**



Block

Once on the Resource Selection screen, select the plus sign next to the resource that needs to be added from the Search Resources column to move it to the Pending Resources column. The Search Resources column may be delimited by using the Type and Search options at the top of the screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Edit Blocks** > **Add** > **Add Resource**



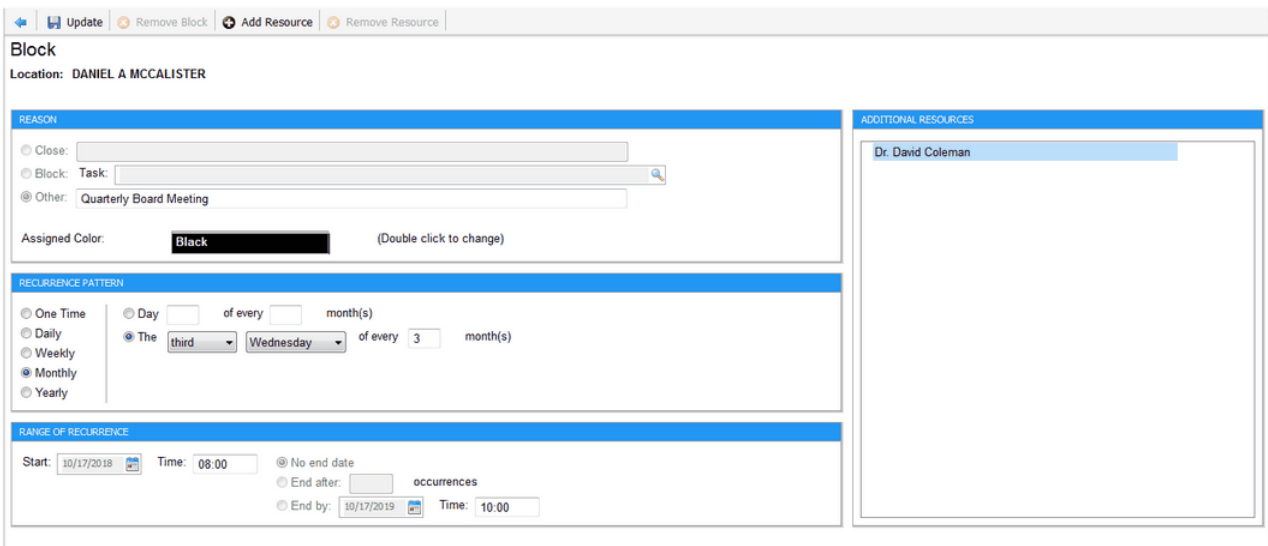
Resource Selection

The following options are available on the action bar.

- **Save Pending:** Select this option to save all resources in the Pending Resources column.
- **Clear Pending:** Select this option to remove all resources displaying in the Pending Resources column.
- **Remove from Pending:** Select this option to remove resources from the Pending Resources column.

Once all resources have been selected, select **Save Pending** on the action bar. TruBridge EHR will then return to the Block screen.

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Edit Blocks** > **Add** > **Add Resource** > **Save Pending**



Block

Select **Update** to save all selections.

If a resource needs to be removed, select the resource from the Additional Resources section and then select **Remove Resource** from the action bar.

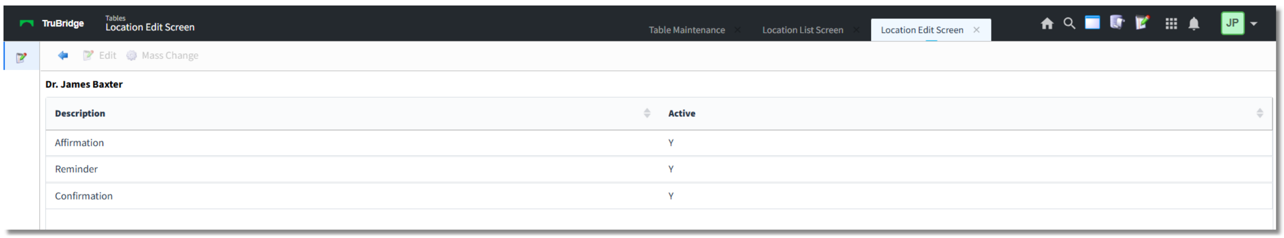
If **Remove Block** is selected on the action bar, a message will display stating that the block will be removed from all current and future occurrences for all resources listed.

Messages

The Messages option is used along with the Patient Connect application. This is where messages may be customized for a specific location where patient's are scheduled.

NOTE: *Access will need to be given to the Message Configuration Behavior Control to have access to this screen.*

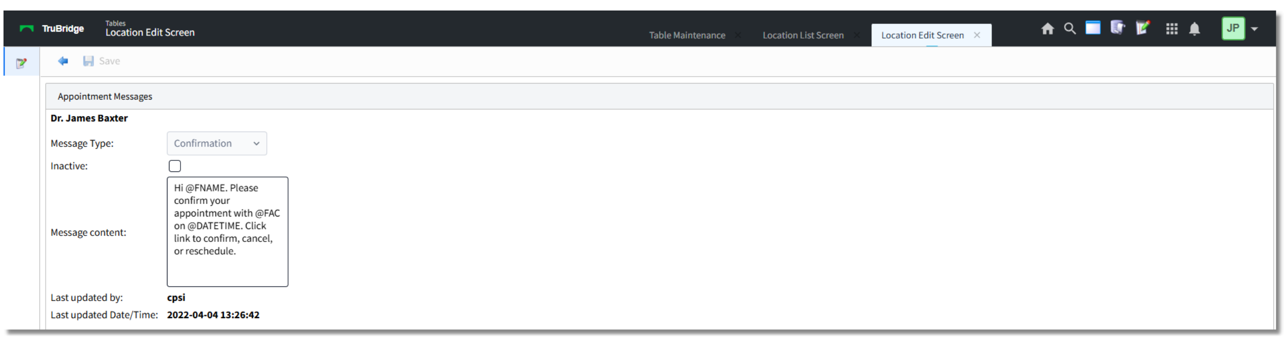
Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **<u>Messages</u>**



Messages

Select which message to customize and then select **Edit**.

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Messages** > **<u>Edit</u>**



Messages - Edit

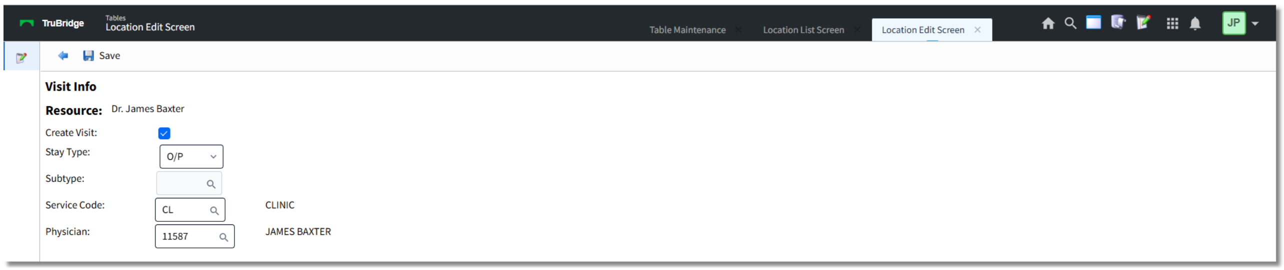
The Appointment Message for the selected location will display. The message may only be activated/deactivated and the message content customized.

Visit Info

The Visit Info option will determine if a visit needs to be created for the location during the scheduling process. To allow a visit to be created, select the **Create Visit** field.

Additional fields will display once **Create Visit** is selected. Define the Stay Type to be used when creating the visit. The Subtype, Service Code and Physician are optional fields that may be defined as well. Select **Save** once all fields have been addressed.

Select **Web Client** > **Tables** > **Patient Intake** > **Personnel** > **Select Personnel** > **Visit Info**



Visit Info

Chapter 25 Schedules

The Schedules table is where schedules will be housed. The schedule will have resources attached to it which will then allow patients to be scheduled under those resources. To begin creating schedules, users will need the Behavior Control "Create/Edit My Schedules" set to allow in System Administration. Only the user that originally creates a schedule will be able to make changes to the schedule. If a user is needing to make changes to a schedule created by another user, they will need the Behavior Control "Edit Other User's Schedules" set to allow in System Administration. Schedules may also be set up within the Appointment Scheduler through Schedule Options .

NOTE: *If the signed-on user has access to Table Maintenance via behavior controls in System Administration, they will be able to view all schedules regardless if the schedules are public or have been created by another user.*

Select **Web Client** > **Tables** > **Patient Intake** > **<u>Schedules</u>**

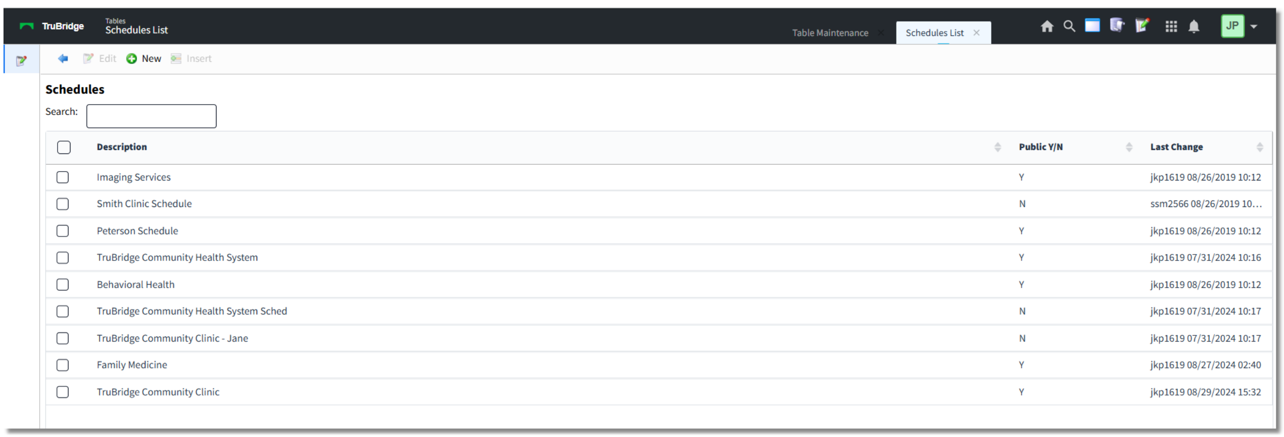


Table Maintenance - Schedules

Below is an explanation of each column:

- **Description:** The description of the schedule
- **Public Y/N:** This shows is the schedule is public for others to use. Will show Yes or No.
- **Last Change:** Displays the date and time as well as the login of the user who last edited the schedule

The following options are available on the action bar:

- **Edit:** Selecting this option will allow the information on the schedule to be changed.
- **New:** Selecting this option will allow a new schedule to be created.
- **Remove:** Selecting this option will remove a schedule from the table.

Schedule Edit - New

Select **Web Client** > **Tables** > **Patient Intake** > **Schedules** > **Select Schedule** > **New**

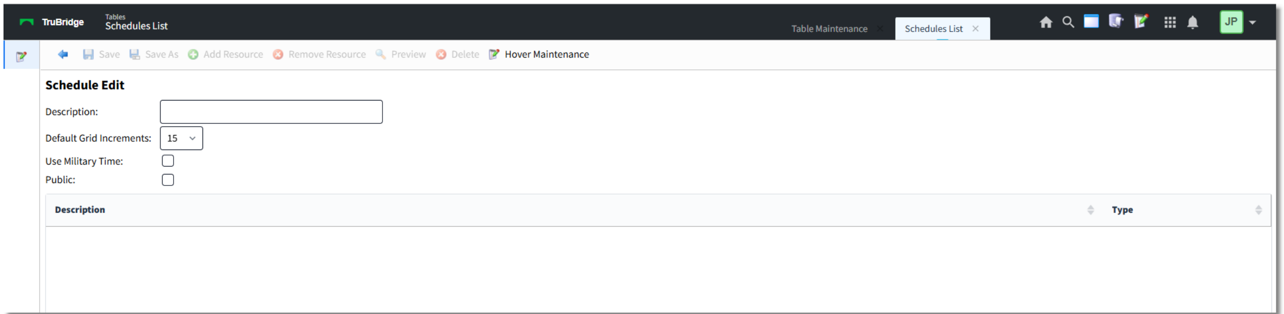


Table Maintenance - Schedules

Below is an explanation of each field:

- **Description:** The name of the schedule
- **Default Grid Increments:** The number of minute increments to display on the scheduling grid
- **Military Time:** Selecting this option will display the scheduling grid times in Military Time.
- **Public:** Selecting this option will make the schedule available to all users. The schedule may then be copied to another schedule.

Below is an explanation of each column:

- **Description:** The description of the resource attached to the selected schedule.
- **Type:** The type of resource (Location or Personnel) attached to the selected schedule.

Schedule Edit - Edit

Select **Web Client** > **Tables** > **Patient Intake** > **Schedules** > **Select Schedule** > **Edit**

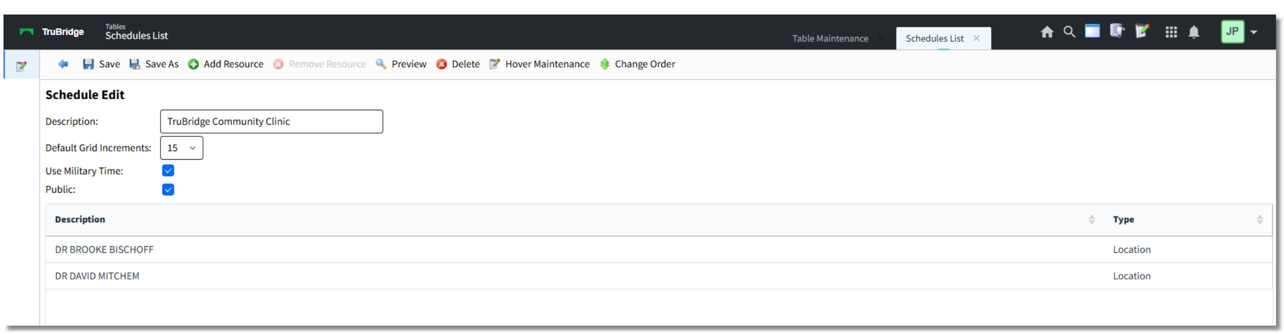


Table Maintenance - Schedules

The following options are available on the action bar:

- **Save:** This option will save the setup entered on the screen.

- **Save As:** This option allows the schedule to be saved under a new schedule description. Once selected, make the necessary changes and select Save.

- **Add Resource:** Selecting this option will go to the Resource Selection screen to add resources to the schedule.

- **Remove Resource:** Selecting this option will remove a selected resource from the schedule.

- **Preview:** Selecting this option will show how the schedule will be displayed in the Day View on the scheduling grid. This is a view-only screen that may be used to determine if the schedule is set up appropriately.

- **Delete:** Selecting this option will delete the schedule from the system. If selected, a prompt will display stating, "This schedule may be used by other employees. Do you wish to proceed?". Selecting Yes, will delete the schedule. Selecting No, will return back the Schedules screen.

NOTE: *If a schedule needs to be deleted, and is being utilized by one or more user logins, users will need the Behavior Control "Edit Other User's Schedules" set to Allow in Identity Management. This will allow the schedule to be deleted regardless if others are using the schedule. If users do not have the "Edit Other User's Schedules" Behavior Control, they will only be able to delete schedules they created.*

NOTE: *The Delete option will be inaccessible if the schedule has been marked as Public by another user.*

- **Hover Maintenance:** Selecting this option will allow each schedule's information that displays in the patient pop-up box on the scheduling grid to be customized. Up to seven lines of information may be selected. If nothing is selected in this option, the pop-up will display the default five lines (Date of Birth, Account Number, Patient Phone Number, Precertification, Task).

- **Change Order:** Selecting this option will allow the order of the locations on the schedule to be rearranged. The order in which the locations appear on the Schedule Edit screen is the order that will be displayed on the scheduling grid.

Resource Selection

Select **Web Client** > **Tables** > **Patient Intake** > **Schedules** > **Select Schedule** > **Edit** > **Add Resource**

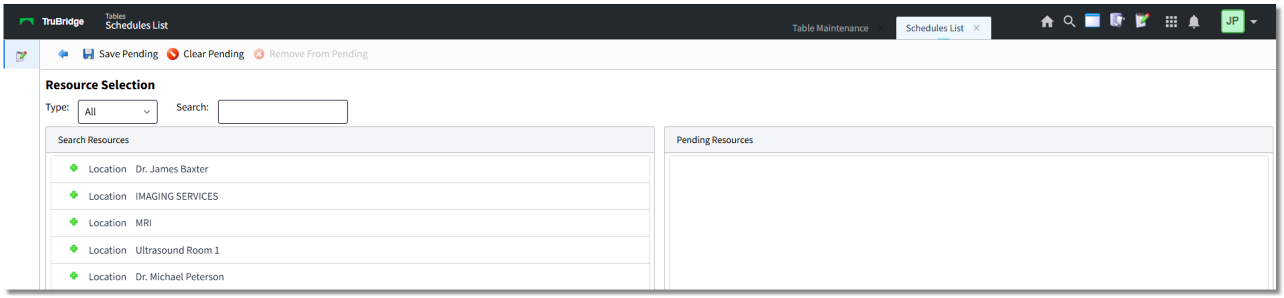


Table Maintenance - Schedules

Below is an explanation of each column:

- **Search Resources:** A listing of all available resources that may be selected for the schedule. A search option is available at the top of the screen. To add a resource to the schedule, select the green plus sign to add it to the Pending Resources column.

- **Pending Resources:** A listing of selected resources from the Search Resources column will display here. To remove a resource from this column, select the red minus sign.

The following options are available on the action bar:

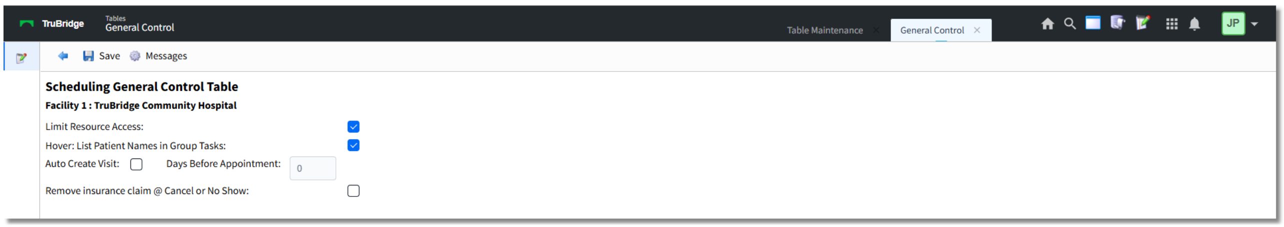
- **Save Pending:** This will save all resources in the Pending Resources column and bring the user back to the Schedule Edit Screen.

- **Clear Pending:** This will remove anything in the Pending Resources column.

Chapter 26 General Control

The Scheduling General Control table allows for certain settings to be made to the Patient Scheduling application.

Select **Web Client** > **Tables** > **Patient Intake** > **General Control**



Scheduling General Control Table

Below is an explanation of each field:

- **Limit Resource Access:** Select this option to limit which users have access to view certain resources (i.e. Locations and Personnel) in Updated Scheduling. Defining which users have access to view certain resources will be done through the Allow Access option in the Locations 73 and Personnel 84 tables.

- **Hover:** List Patient Names in Group Tasks: Select this option to display the names of all patients scheduled for a group task when hovering over the group block on the scheduling grid. If this option is not selected, only the number of patients scheduled for the group task will display when hovering over the group block.

- **Auto Create Visit:** Select this option to auto create visits once a patient has been scheduled for an appointment. This field will look to the Locations 73 and Personnel 84 tables when a patient is being scheduled to determine the visit information to be used.

NOTE: *For facilities wanting to use this functionality, it is recommended to first complete all the setup on each resource with the visit information. Once that is completed, select **Auto Create Visit** to enable this functionality.*

- **Days Before Appointment:** This field will be enabled once **Auto Create Visit** has been selected. Enter the number of days before an appointment the system will auto create a visit. If this field is left as zero, the visit will auto create as soon as the appointment has been scheduled.

- **Remove Insurance Claim @ Cancel or No Show:** Select this option to automatically remove insurance claims from patient accounts when the scheduled appointment is marked as Canceled or No Show. If not selected, insurance claims will remain on the patient account.

Below is an explanation of the options on the action bar:

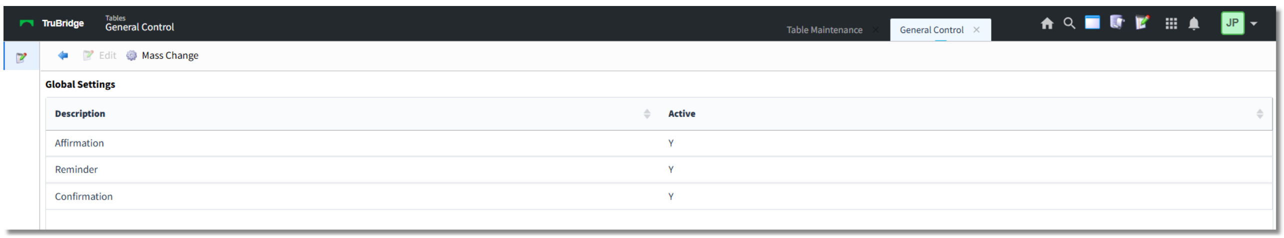
- **Messages:** This option is used with the Patient Connect application.

Messages

The Messages option is where the messages for the Patient Connect application may be set for all places being scheduled.

NOTE: *Access will need to be given to the Message Configuration Behavior Control to have access to this screen.*

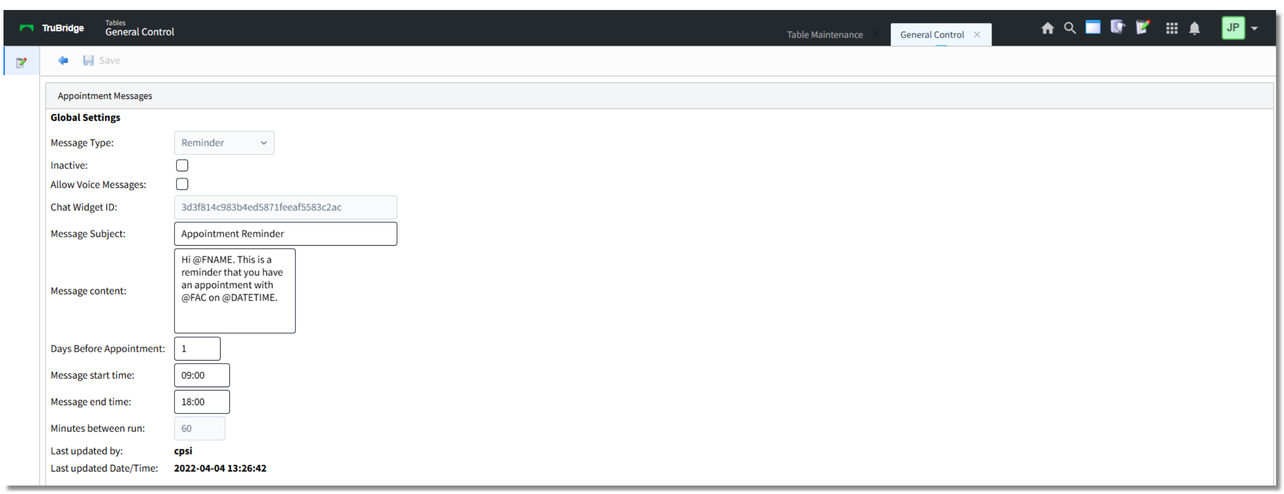
Select **Web Client** > **Tables** > **Patient Intake** > **General Control** > **Messages**



General Control - Messages

To customize a message, select the message and then select Edit to display the Global Settings for the selected message will appear.

Select **Web Client** > **Tables** > **Patient Intake** > **General Control** > **Messages** > **Edit**



General Control - Messages - Global Settings

Below is an explanation of each field.

- **Message Type:** Displays Confirmation, Reminder or Affirmation, depending on which message was selected.
- **Inactive:** Determines if the facility is sending the selected message. The default for this field will be unchecked.

- **Allow Voice Messages:** Select this option to enable voice messages and allow an auto call to be made to patients for appointment reminders if the patient has opted in for voice messages. This field will only display for Reminder messages.

- **Chat Widget ID:** For TruBridge use only.

- **Message Subject:** The subject to display in the email when it is sent to patients. There are mnemonics that may be used to automatically pull information in to the message:
  - **@FNAME:** This will pull the patient's name to the message.
  - **@FAC:** This will pull the name of the facility to the message.
  - **@MODAYR:** This will pull the US date format (Month, Day, Year) of the appointment to the message.
  - **@DAMOYR:** This will pull the international date format (Day, Month, Year) of the appointment to the message.
  - **@HHMM:** This will pull the time of the appointment to the message. The format will be HH:MM followed by AM or PM.
  - **@EVENTPHY:** This will pull the provider from the physician field on the Event screen of the appointment to the message.

- **Message Content:** The message the patient will get for the selected message.

- **Days Before Appointment:** The number of days before the appointment to send the message. This field will not display for Affirmation messages.

- **Message Start Time:** The time of day to begin sending the message.

- **Message End Time:** The time of day to stop sending the message.

- **Minutes Between Run:** The number of minutes between sending out messages.

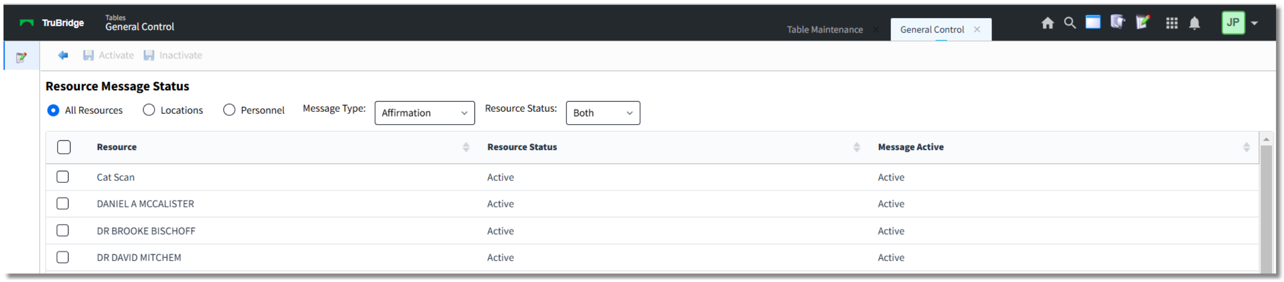
NOTE: *Appointment Reminder message will contain the text "<<No Reply>>" at the end to notify recipients that the mailbox messages are not monitored.*

Select **Save** to save any changes made to the table.

Messages - Mass Changes

The Mass Change option allows facilities to set Affirmation, Reminder, and Confirmation messages to active or inactive by resource (i.e., by Location/Personnel).

Select **Web Client** > **Tables** > **Patient Intake** > **General Control** > **Messages** > **Mass Change**



General Control - Messages - Mass Change

The list of the screen will display all Resources that have been set up in the Location and Personnel tables. The list may be delimited by Resource, Message Type and Resource Status (i.e., Active/Inactive).

Make sure to select the Message Type needing to be activated/inactivated from the drop-down and then select the Resources from the list.

Once all Resources has been selected, select **Activate** or **Inactivate** on the action bar.