Scheduling

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by TruBridge

Clear the way for care.

Scheduling

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Table of Contents

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 the **Patient Scheduling application** for release Version 22.01. A brief summary of each enhancement is given referencing its particular location if applicable. 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 **TruBridge Support**.

Event Screen - Update Option -- FA-13665

DESCRIPTION: The workflow of the Event screen has been reverted to its original behavior when selecting **Update**. Now, when accessing the Event screen while scheduling a patient, entering all necessary information and selecting **Update** will save the details and return to the scheduling grid.

DOCUMENTATION: See Event Screen 63

Patinet Connect Icon Added -- FA-7511

DESCRIPTION: A Patient Connect icon has been added to the navigation panel within Patient Scheduling for easy selection.

NOTE: *Patient Connect is a purchased application and may only be utilized with Web Client. If wanting to utilize Patient Scheduling with Web Client, users will need the Enterprise Wide Scheduling behavior control for Web Client Scheduling.*

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 4, Locations 18 and Personnel 25.

Chapter 2 Overview

The Patient Scheduling application will allow facilities to utilize an integrated scheduling system between a hospital and clinic. The functions within the application are completely interactive and in real time to help improve work flow. Once data is entered into the system and the schedule screen is exited, the appointment information may be accessed by everyone utilizing the system. Before using the scheduling functions, each user will need to set up information to view the schedule to his/her preferences.

When users are in the System Administrator or Scheduling roles, there are default settings that will allow them to access the schedule and schedule appointments as necessary. For users who are not in the System Administrator or Scheduling roles, they will have limited view only access to certain areas of the Patient Scheduling application. The following screens and options are what is available when users have view only access.

- Patient Appointments
  - Profile Search
- Wait List
- Day View
- Week View
- Month View

NOTE: *Users may not select an empty block from any grid view.*

- Schedule Options
  - Add Option
    - Insert Option
- Remove Option
- Change Order
- Print Schedule
- Daily Schedule
- Refresh Option
- Appointment Detail
  - Previous Version Appointments
  - PDF Option
  - History Option
  - Event Screen
- Group Detail
  - Appointment Detail

NOTE: *Facilities outside of the United States may choose a date format of MMDDYY, DDMMYY or YYMMDD to be used throughout the Scheduling application. A TruBridge Representative will need to be contacted in order for the date format to be changed.*

Chapter 3 Table Maintenance

3.1 Overview

Before Scheduling may be used, table maintenance must be performed. All of the resources, categories, and tasks/procedures will need to be set up first before a schedule may be created. Any user who needs access to maintain the scheduling tables will need access to Scheduling Table Maintenance screens in Rule Based Security. The tables must be set up in a specific order which is outlined in the following section.

3.2 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** > **<u>Tasks/Procedures</u>**

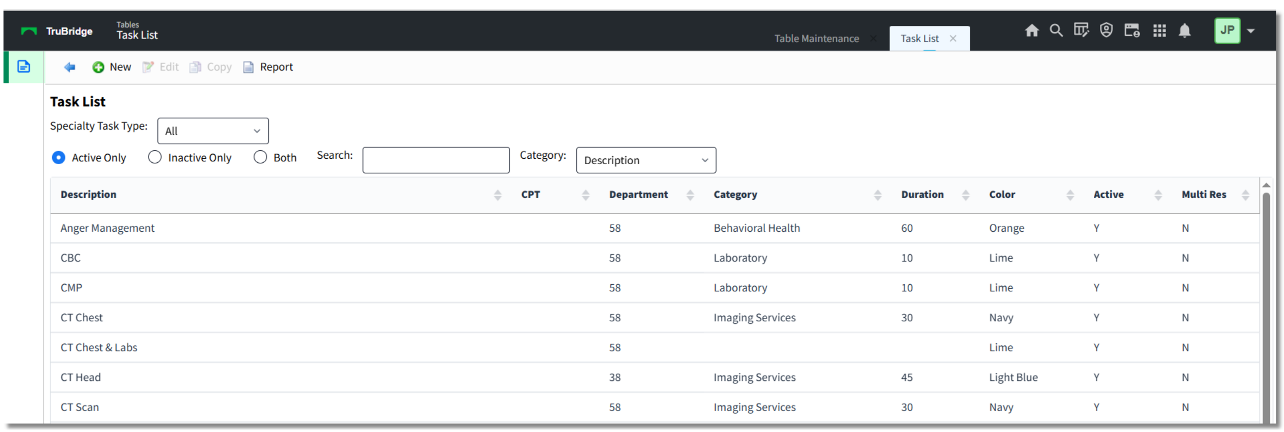


Table Maintenance - Tasks/Procedures

Below is an explanation of each column:

- **Description:** This column lists the task.
- **CPT:** This column display 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:** This column is for the department that owns the task.

- **Category:** This column displays the category assigned to the task.
- **Duration:** This column displays the length of time allotted for the task.
- **Color:** The column displays 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.

Action Bar options:

- **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**.**

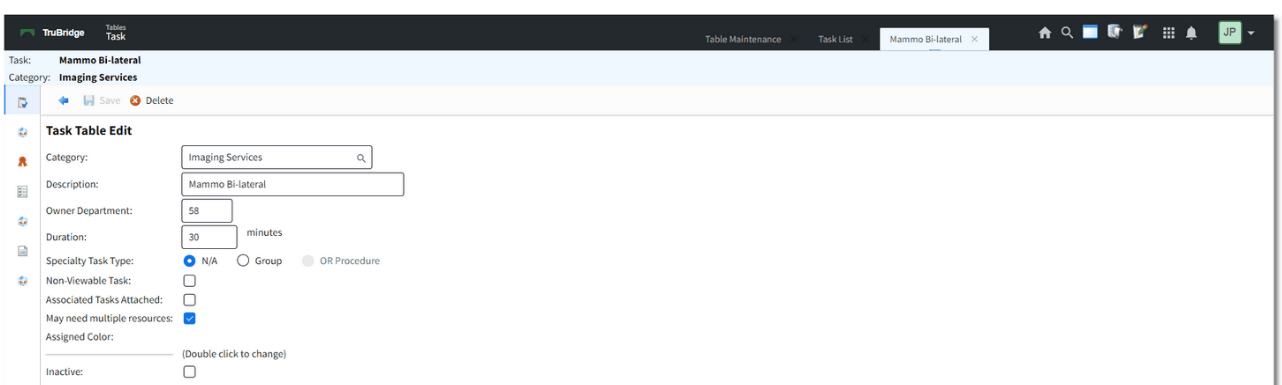
NOTE: *This report is also available within the Report Dashboard and it titled "Scheduling Task Table Setup".*

Task Table Edit

Selecting 

Edit will display the Task Table Edit screen.

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



Task Table Edit

Below is an explanation of each field:

- **Category:** Select the **magnifying glass** to display the category list look-up to choose the appropriate category for the task. These codes are set up in the Categories 14 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.

Action Bar options:

- **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 Resources

Select 

Task Resources on the navigation panel if needing to add resources to the task. 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.

Action Bar options:

- **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 **Add** to add resources to the task. 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.

Action Bar options:

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

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

Precert

Select **Precert** on the navigation panel to enter precertification information during the scheduling process for certain financial classes. 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

Action Bar options:

- **Add:** Selecting **Add** 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 Remove will remove a financial class from the task for precertification.

- **Add Wildcard:** Selecting **Add Wildcard** 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 Tasks

Selecting **Associated Tasks** from the navigation panel 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.

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.

Action Bar options

- **Add:** Select Add 9 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.

<u>Add</u>

When **Add** is selected from the Associated Tasks screen, the Task List will 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.*

The Association Schedule screen will then display to determine when the task will need to be scheduled. 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 enable the following features:
  - **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 dependent 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 Scenarios

The following are examples of how associated tasks may be used.

Scenario 1:

OR Procedure Series has been set up as the "lead" 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., the system 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."

Scenario 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 system 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.

Scenario 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 system 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

Selecting **Items** from the navigation panel 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.

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 display. This will allow an item number to be added to the task. Select the **magnifying glass** icon to the right of Item Number to search for an item.

A search option is available to search for an item by description or item number. Once the item number or description have been located, double-click on the item. TruBridge EHR will return to the Item Edit screen so that any additional information may be added.

Below is an explanation of each field:

- **Item Number:** This is the Item Master number for the selected item.

- **Item Description:** This is the Item Master description for the selected item.

- **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.

Action bar options

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

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

Instructions

Selecting **Instructions** from the navigation panel will allow instructions to be created in the Instructions 15 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.

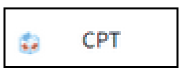
Below is an explanation of each column:

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

Selecting 

CPT from the navigation panel will allow multiple CPT codes to be associated with a task. This will then allow scheduler 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.

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.

3.3 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** > **<u>Categories</u>**

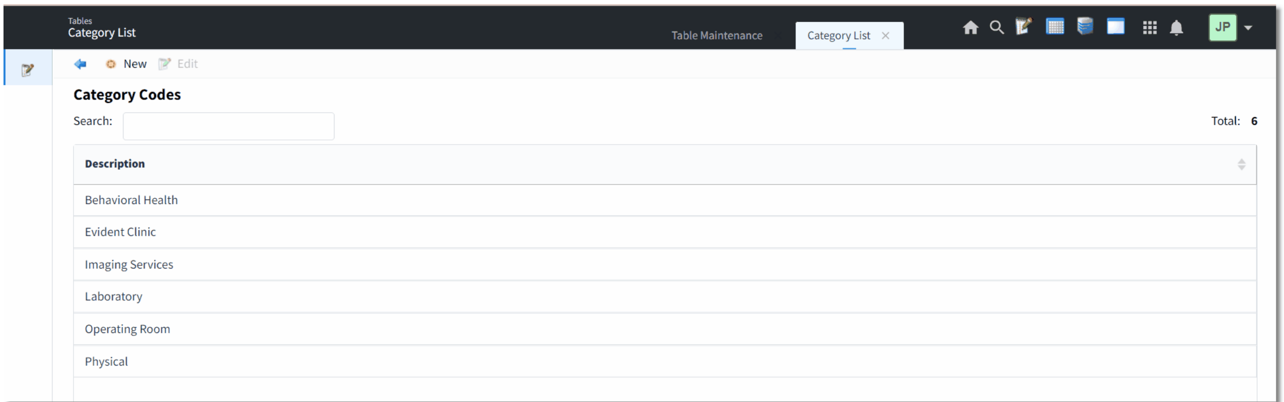


Table Maintenance - Categories

Below is an explanation of each column:

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

Action Bar options:

- **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.

<u>Category Code Edit</u>

Selecting New or Edit will display the Category Code Edit screen. 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.

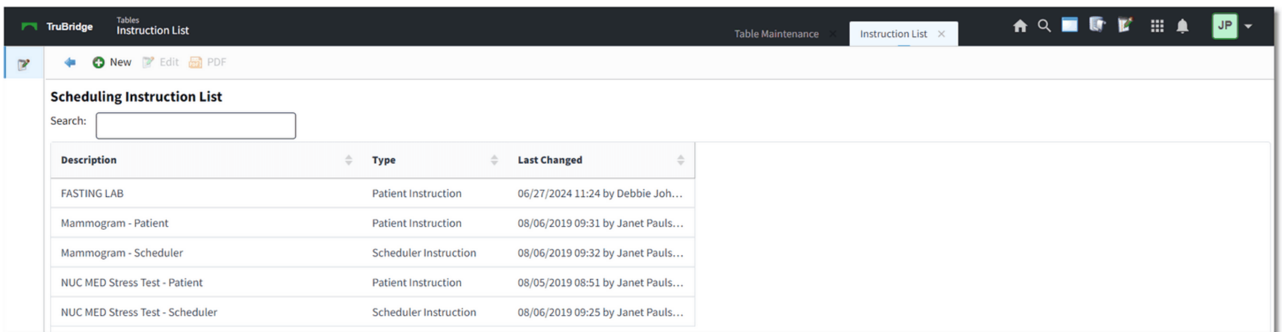
Action Bar options:

- **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.

3.4 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** > **<u>Instructions</u>**



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:

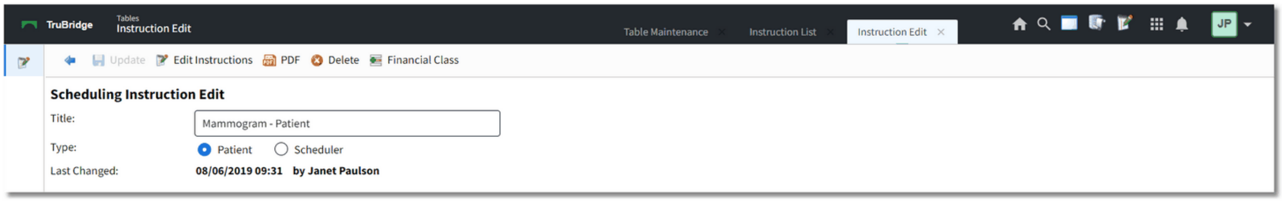
- **New:** Selecting this option will allow a new instruction to be created.
- **Edit:** This option will become enabled once an existing instruction is selected. Selecting this option will allow the information on the instruction to be changed.
- **PDF:** This option will become enabled once an existing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

<u>Scheduling Instruction Edit</u>

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.*

<u>Financial Class Edit</u>

Financial Classes may be assigned to an instruction so that it 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 choose from. To wildcard financial classes, select 

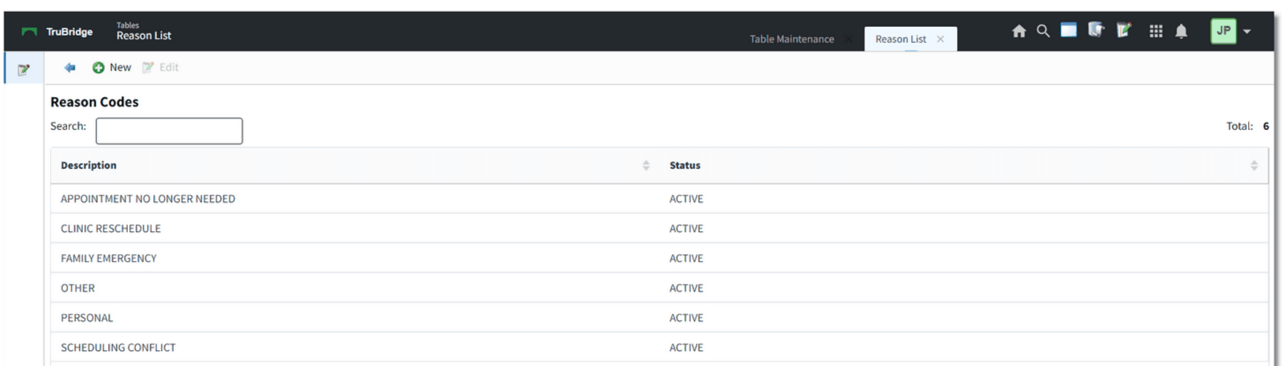
Add Wildcard to input the wildcard.

The primary financial class on the patient's appointment that matches the financial class listed on the instruction determines what will pull to the appointment.

3.5 Reasons

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

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



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

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.

3.6 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**

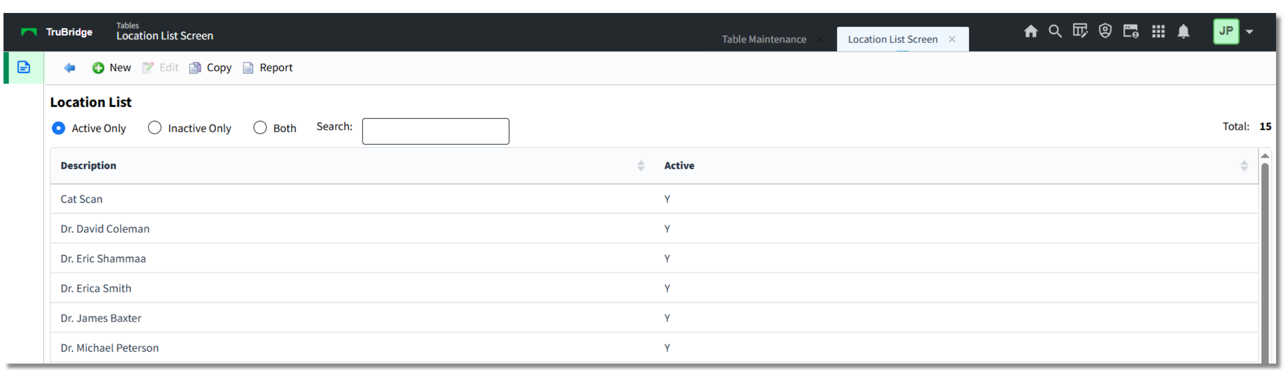


Table Maintenance - Locations

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.

Action Bar options:

- **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** > **<u>Edit</u>**

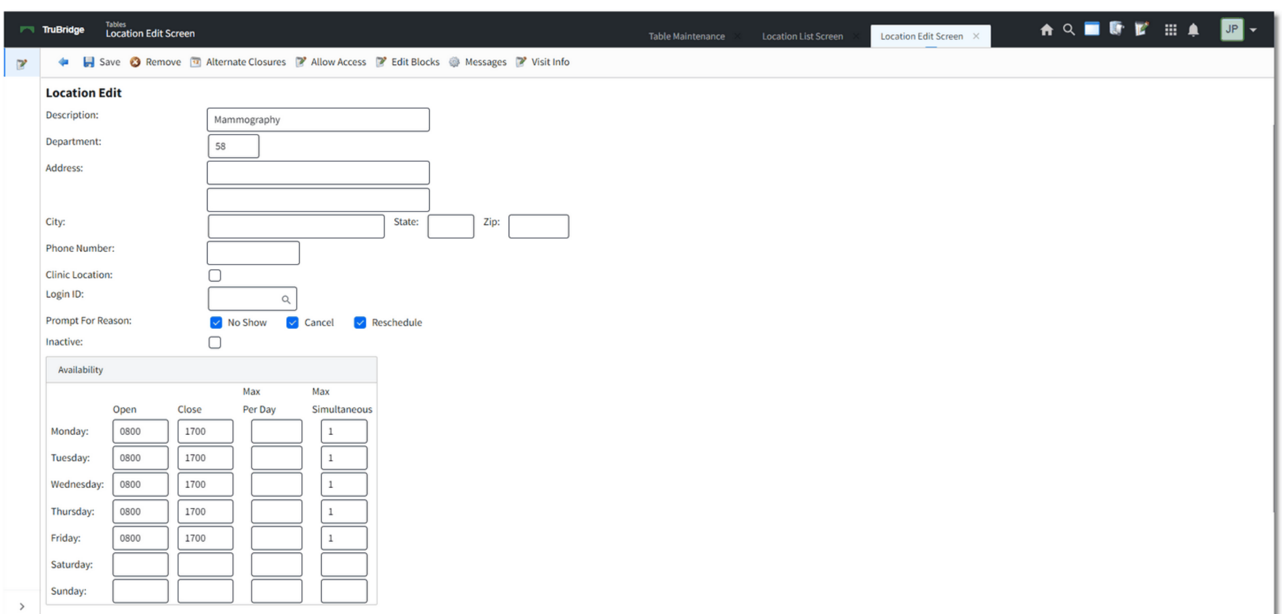


Table Maintenance - Locations

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 that utilizes the TruBridge Provider EHR module.

- **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 any 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.*

Action Bar options:

- **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* 34 *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 34 table.

Schedule Location Alternate Closures 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

Action Bar options:

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

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.*

Action Bar options:

- **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).

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 Identity Management. 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.

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 list may be delimited by reason or date range at the top of the screen.

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.*

Once on the Resource Selection screen, select the plus sign next to the resource that needs to be added in 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.

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. The system will then return to the Block screen.

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.

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.

3.7 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 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.

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

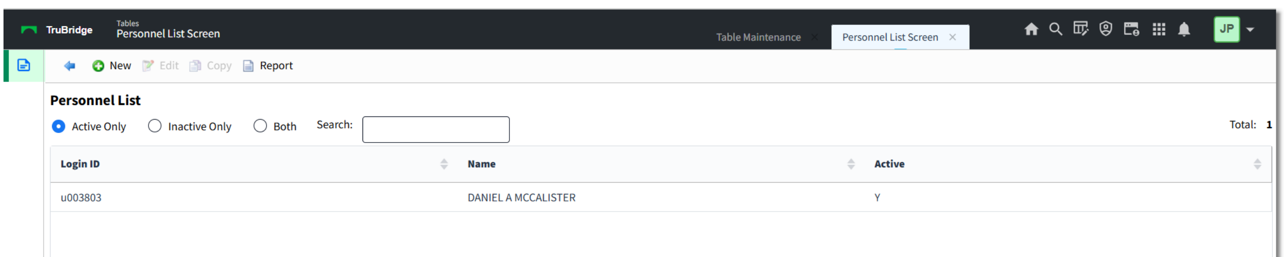


Table Maintenance - Personnel

Below is an explanation of each column:

- **Login ID:** The employee's logname that is used to log in 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.

Action Bar options:

- **New:** Selecting this option will allow a new personnel record to be created.
- **Edit:** Selecting this option will allow the information for the personnel record 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**

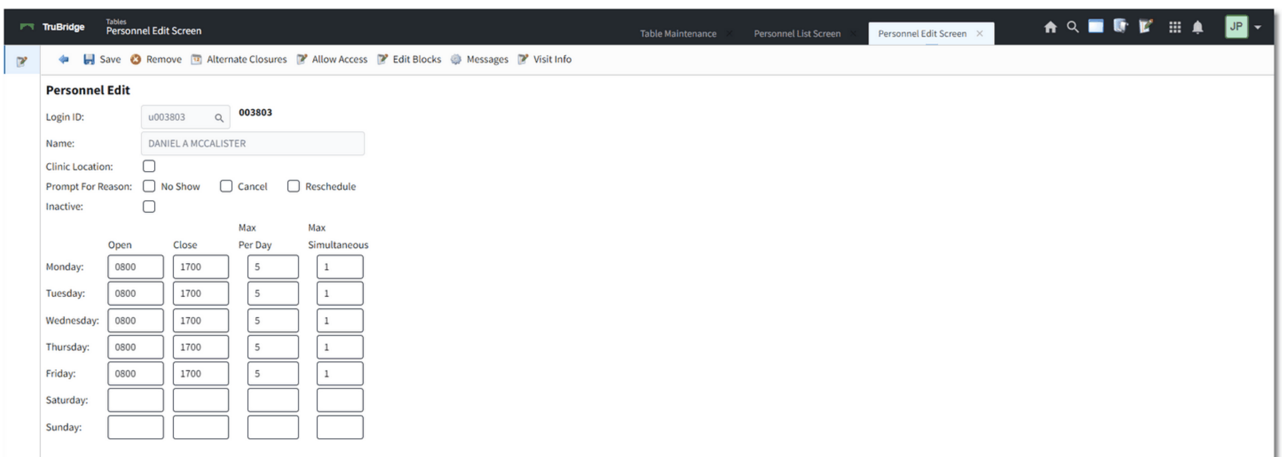


Table Maintenance - Personnel

Below is an explanation of each field:

- **Login ID:** This is the logname associated with the employee. A search option is available if the logname or "login ID" is not known.

- **Name:** This is the name of the person who is affiliated with that particular logname or "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 employee will be available to schedule patients. This will reflect on the scheduling grid.
  - **Open:** This is the time the employee will be available for the day. The time must be entered in military time.
  - **Close:** This is the time the employee will no longer be available for the day. The time must be entered in military time.
  - **Max Per Day:** The maximum number of patients that may be scheduled for the day.
  - **Max Simultaneous:** The maximum number 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.*

Action Bar options:

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

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

- **Alternate Closures:** This option is selected if the user needs to set up specific days/times that the employee 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* 34 *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 34 table.

Schedule Personnel Alternate Closures

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

Action Bar options:

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

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 employee will not be available 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 personnel is not available 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 personnel is not available 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 employee will not be available 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 should end at a certain time every day, select* ***No end date*** *and enter in the end time only in the End by field, leaving the date blank.*

Action Bar options:

- **Save:** Save any changes made to the alternate closure.

- **Remove Recurrence:** Remove the alternate closure from the personnel record.

Allow Access

The Allow Access option will allow users to be added who need access to view the personnel on the scheduling grid, Wait List, 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).

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 Identity Management. 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.

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 list may be delimited by reason or date range at the top of the screen.

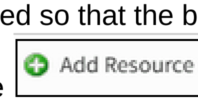
Below is an explanation of the columns:

- **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.*

Once on the Resource Selection screen, select the plus sign next to the resource that needs to be added 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.

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 **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.

Visit Info

The **Visit Info** option will determine if a visit needs to be created for the personnel 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.

3.8 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 Identity Management. 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 Identity Management.

Schedules may also be set up within the Appointment Scheduler through Schedule Options37.

NOTE*: If the signed-on user has access to Table Maintenance via behavior controls in Identity Management, 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** > **Schedules**

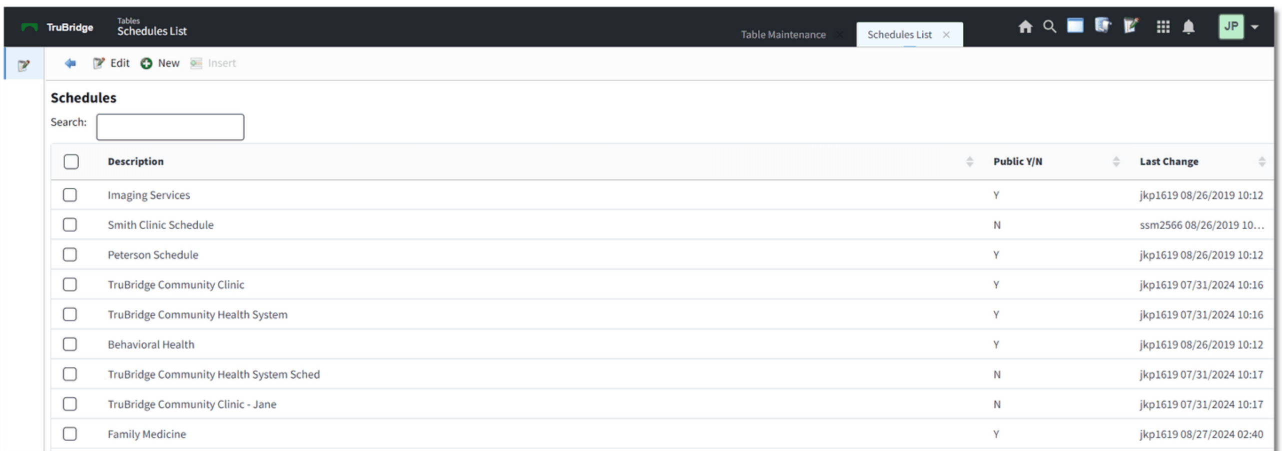


Table Maintenance - Schedules

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

Action Bar options:

- **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.

Schedule Edit - New

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

Action Bar options:

- **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

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.

Action Bar options:

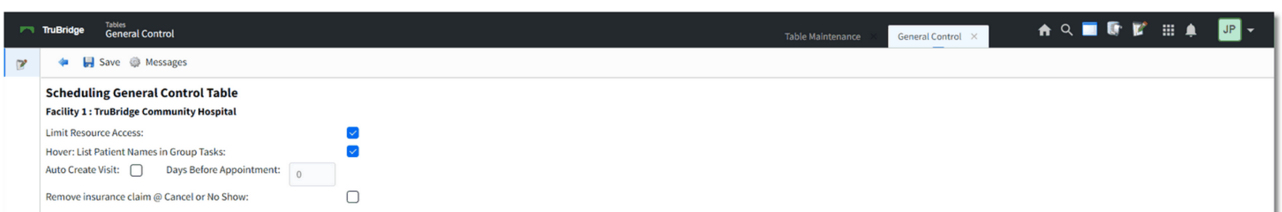
- **Save Pending:** This will save all resources in the Pending Resources column and bring the user back to the Schedule Edit Screen.

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

3.9 General Control

The Scheduling General Control table allows for certain settings to be made to the Updated 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 18 and Personnel 25 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 Locations18 and Personnel25 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.

Select 

Save to save any changes made to the table.

3.10 Titles

Setup in the Titles table is required if images will be uploaded through the Updated Scheduling application.

Select **Web Client** > **Tables** > **Business Office** > **Titles**

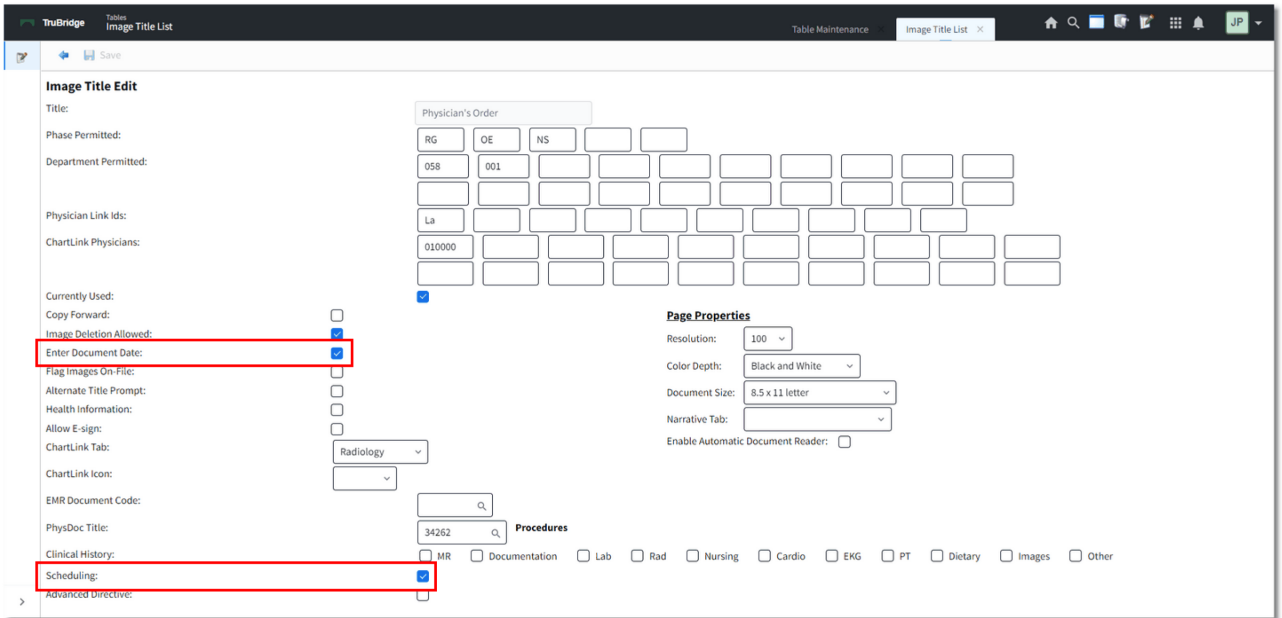


Image Title Edit

Below is an explanation of the fields related to Updated Scheduling:

- **Enter Document Date:** If this field is selected, during the scanning process the system will prompt for a document date. The default will be the current date and time. The date entered will display in the Date/Time column on the Scheduling Images screen and next to the Image Title in Electronic File Management on the patient's account.

- **Scheduling:** Select this option to allow the image title to be used when uploading images in Updated Scheduling. Please refer to the Attaching Images 72 section of this user guide for more information on how to upload images.

Select 

Save to save any changes made to the table.

Chapter 4 Schedule Options

4.1 Overview

Before scheduling patients, each user will need to set up Schedule Options within Appointment Scheduling. This will allow each scheduler to customize the view of the schedule to his/her preference. Each schedule that the user creates will be available for them to choose from the scheduling grid. Only the user that originally creates a schedule will be able to make changes to the schedule.

4.2 Schedule Options

To begin, select **Schedule Options** within Patient Scheduling.

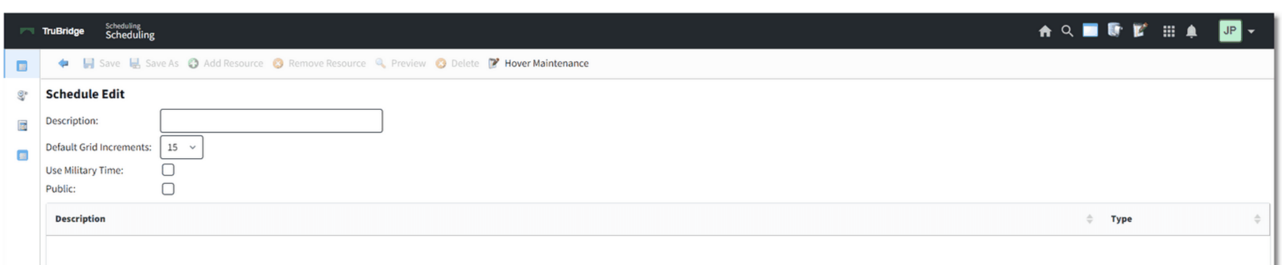
The My Schedules screen will then display. To add an existing schedule, or create a new schedule, select **Add**.

A list of public schedules, or schedules previously created by the signed on user, may appear on the screen. To begin creating a new schedule, select **New**.

NOTE: *To begin creating schedules, users will need the Behavior Control "Create/Edit My Schedules" set to allow in Identity Management, otherwise 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 Identity Management.*

NOTE: *If there are no public schedules, or previously created schedules created by the signed on user, no schedules will display and a new one will need to be set up.*

Select **Web Client** > **Scheduling** > **Schedule Options** > **Add** > **New**



Scheduling Options - Schedules

Complete the following fields:

- **Description:** Enter in the name of the schedule.

- **Default Grid Increments:** Select the number of minute increments to display on the scheduling grid.

- **Military Time:** Select this option to view the scheduling grid times in Military Time.

- **Public:** This option will not be available for selection when accessing through Schedule Options. It will only be accessible through the Schedules table in Table Maintenance. For more information please see the Schedules 31 section of this user guide.

Once all the appropriate fields have been filled out, select Save **Save.**

Add Resource

Then select Add Resource **Add Resource**.

The Resource Selection screen will allow locations and personnel to be added to the created schedule. Attached to each resource are tasks that may be performed by that resource.

To add a resource to the schedule, select the plus sign next to each resource under the Search Resources column to add it to the Pending Resources column.

To remove a pending resource, select the minus sign next to the resource under the Pending Resources column.

Once all the resources have been added for the schedule, select Save Pending **Save Pending**. The screen will then return back to the Schedule Edit screen.

NOTE: *If a schedule is created in error, or needs to be deleted completely, select the* ***Delete*** *option from the action bar.*

Preview

The Preview option will become available on the action bar once locations have been added to the schedule.

Select Preview **Preview** to view how the schedule will be displayed in the Daily View on the scheduling grid. This is a view-only screen that may be used to determine if the schedule is set up appropriately.

Select the back arrow to return back to the Schedule Edit screen.

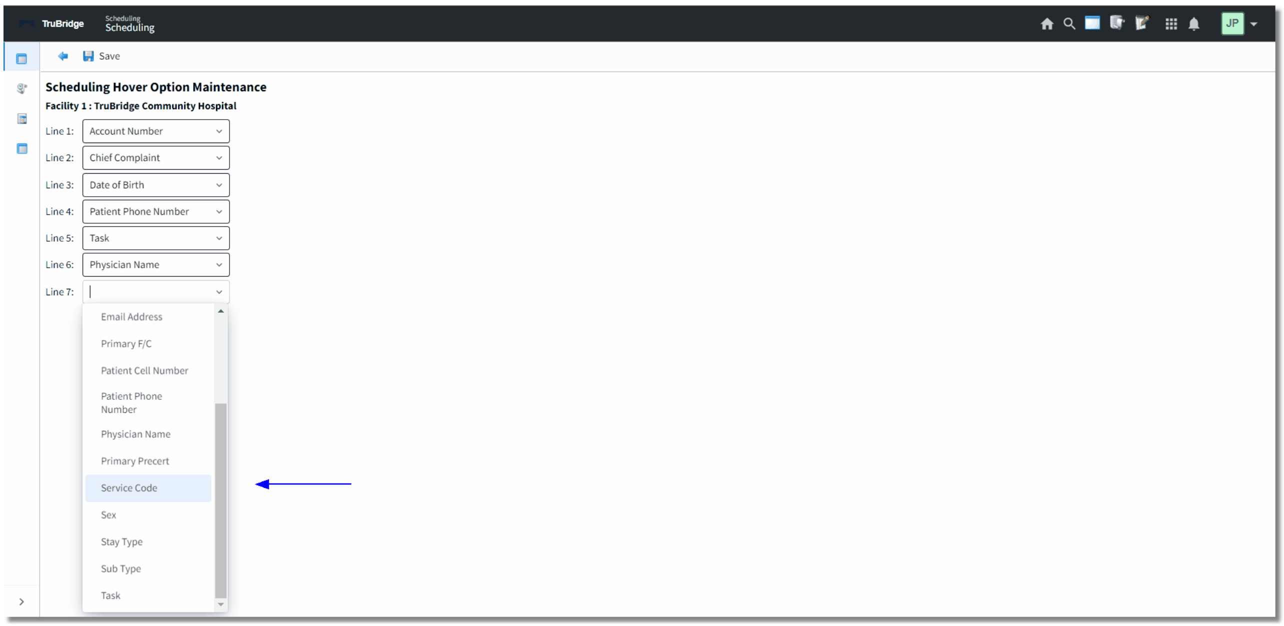
Hover Maintenance

The Hover Maintenance 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).

To customize the patient pop-up information on the scheduling grid, select the data elements from each drop down in the order it needs to appear in the pop-up. It is not required to select all seven lines. Once all selections have been made, select 

Save on the action bar.

Select **Web Client** > **Scheduling** > **Schedule Options** > **Edit** > **Hover Maintenance**



Scheduling Hover Option Maintenance

Change Order

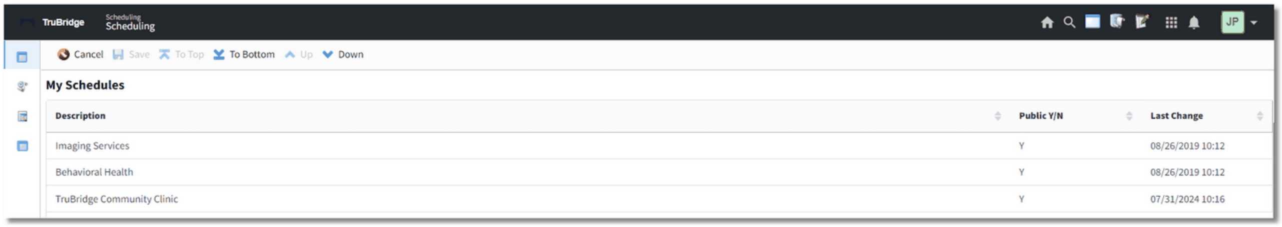
The Change Order option will be available on the action bar only if more than one location has been added to the schedule.

Select 

Change Order on the action bar to change the order of the locations on the schedule. The order in which the locations appear on the Schedule Edit screen is the order that will be displayed on the scheduling grid.

Once Change Order has been selected, more options become available on the action bar.

Select **Web Client** > **Scheduling** > **Schedule Options** > **Edit** > **Change Order**



Scheduling Options - Change Order

Below is an explanation of each Change Order option:

- **Preview:** Select this option to preview the schedule in the Daily View on the scheduling grid.
- **Hover Maintenance:** Select this option to customize the patient pop-up that displays when hovering over the patient name on the scheduling grid.
- **Cancel:** Select this option to exit the Change Order screen without saving any changes.
- **Save:** Select this option to save any changes made to the order of the locations.
- **To Top:** Select this option to move a location to the first line.
- **To Bottom:** Select this option to move a resource to the last line.
- **Up:** Select this option to move a resource up one line.
- **Down:** Select this option to move a resource down one line.

4.3 How to Just Like another Schedule

To be able to use an existing schedule set up by another user:

1. Select Schedule Options **Schedule Options**.
2. Select Add **Add**
3. Select the schedule to copy and then select Edit **Edit**.
4. Select Save As **Save As** to begin copying the schedule. Any of the fields may be changed to accommodate the new schedule and resources may be added as well.

NOTE: *The Description MUST be different than any of the other existing schedules.*

5. Select Save **Save** once all changes have been made. Then select the back arrow to return to the Schedules screen.

6. The new schedule will then be listed on the Schedules screen.

7. To add the copied schedule to the My Schedules screen, select the schedule from the list and then select 

Insert.

NOTE: *More than one schedule may be selected and inserted to the My Schedules screen at the same time.*

4.4 My Schedules

The My Schedules screen will display schedules that have been chosen by the signed on user.

There are three options available on the My Schedules screen.

- **Add:** Select this option to add more schedules to the My Schedules screen.
- **Remove:** Select this option to remove a schedule from the My Schedules screen.
- **Change Order:** Select this option to change the order of the schedules. The order of the schedules on this screen, is the order the schedules will appear in the Schedule drop-down on the scheduling grid. This option will only display if more than one schedule is on the My Schedules screen.

Chapter 5 Scheduling Grid

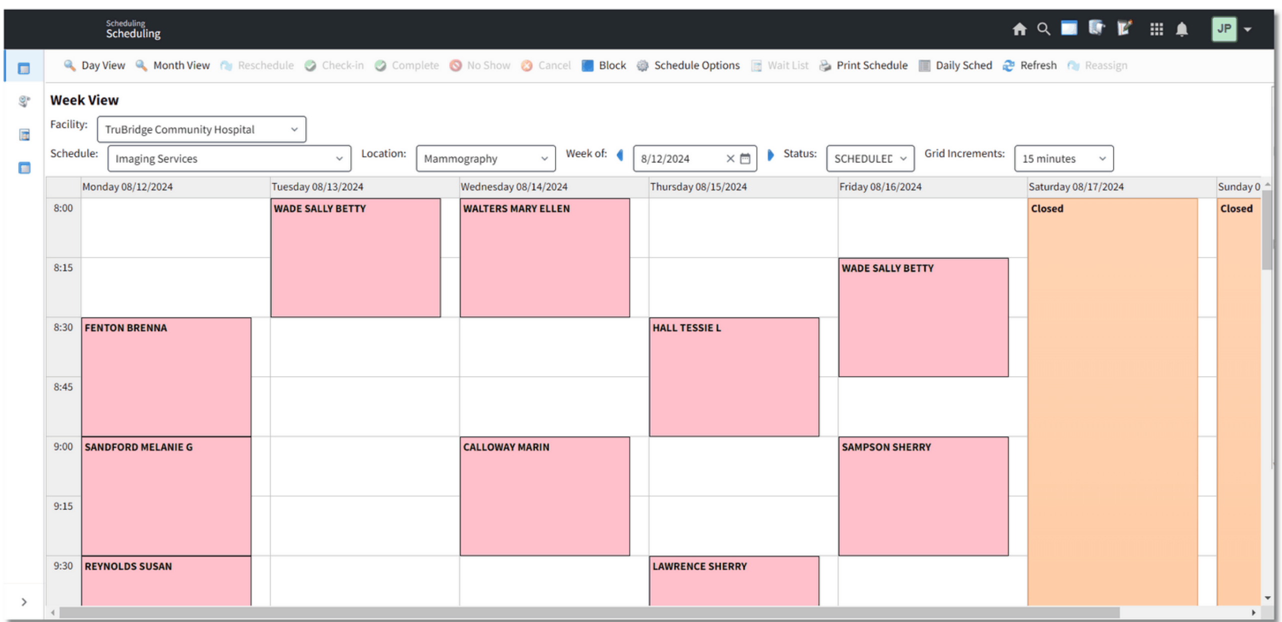
5.1 Overview

Once the Scheduling application is accessed, the screen will display the scheduling grid for the schedule set to default in Schedule Options. The locations will display in the order they were added to the schedule. The week will default to the current week, and the status will default to Scheduled but may be changed to All, Completed, Canceled or No Show.

The Grid Increments drop-down will allow the time increments to be changed on the scheduling grid. The scheduling grid will always default to the increment setting for the schedule, but may be changed as needed.

NOTE: *The Grid Increments option is only available on the Day and Week View schedules.*

Select **Web Client** > **Scheduling**



Appointment Scheduling

The Facility will default to the facility the user is currently logged on to. Select the drop-down to select a different facility for which to schedule.

Scheduled patients names will display on the scheduling grid and the grid cell will be shaded for the amount of time the task has been set up for.

Hovering over any of the shaded grid cells will display a pop-up with some of the patient's information. This information may be customized for each schedule. Please refer to the Hover Maintenance 38 section of this user guide for information on how to customize.

NOTE: *When a patient is scheduled for the same date and time as an existing appointment for the same location, a message will display which states "Warning: Patient currently scheduled for this date/time. Do you wish to schedule anyway?" When this prompt is answered "Yes," the appointment will be scheduled. When the prompt is answered "No," the appointment will remain Unscheduled and may be addressed at a later time. In order to use this feature, the "Overbook Appointments" Scheduling Behavior Control will need to be set to Allow.*

5.2 Day, Week, and Month Views

The day, week, and month views within the schedule will allow each user to set how the schedule will be viewed. When any of the views are selected, the schedule will retain that view until it is changed again. The day, week, and month view options are available on the action bar.

Day View

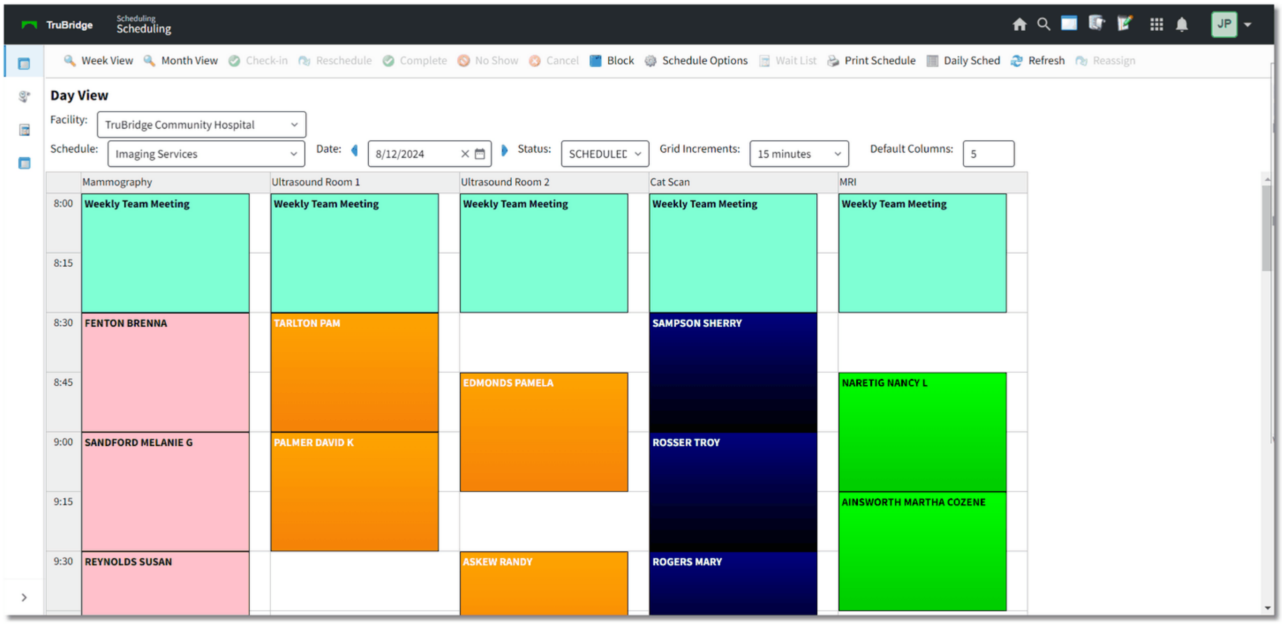
The Day View option will display all the resources (personnel and locations) as the column headers for the schedule selected. Selecting one of the resource column headers will toggle back to the week view for the selected schedule.

The number of columns that display are based on the Default Columns field at the top of the schedule. This field may be set to a minimum of five columns, up to a maximum of 12 columns and may be set per user.

Upon accessing the Day View, the screen will automatically scroll to an hour before the current time. When scrolling to a different time on the screen and then moving to another day, the screen will maintain the selected time.

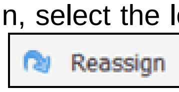
If needing to look at a different day, select a different date from the date picker at the top of the schedule.

Select **Web Client** > **Scheduling** > **Day View**



Schedule - Day View

Location Reassignment

The ability to reassign appointments to another location, or to another date, is available from the Day View screen. To begin, select the location header to enable the Reassign option on the action bar. Once enabled, select 

Reassign.

NOTE: *To have access to the Reassign option, the user must have the Behavior Control "Reassign Appointments" set to allow in Identity Management.*

The Reassign Appointments screen with then display. Select each appointment that needs to be reassigned from the list. Multiple appointments may be selected by holding the Ctrl key and selecting each one.

To reassign to a new location, select the location from the Location drop-down. Then to reassign the appointments to a new date, select the new date in the **To Date** field and select the location from the **Location** drop-down.

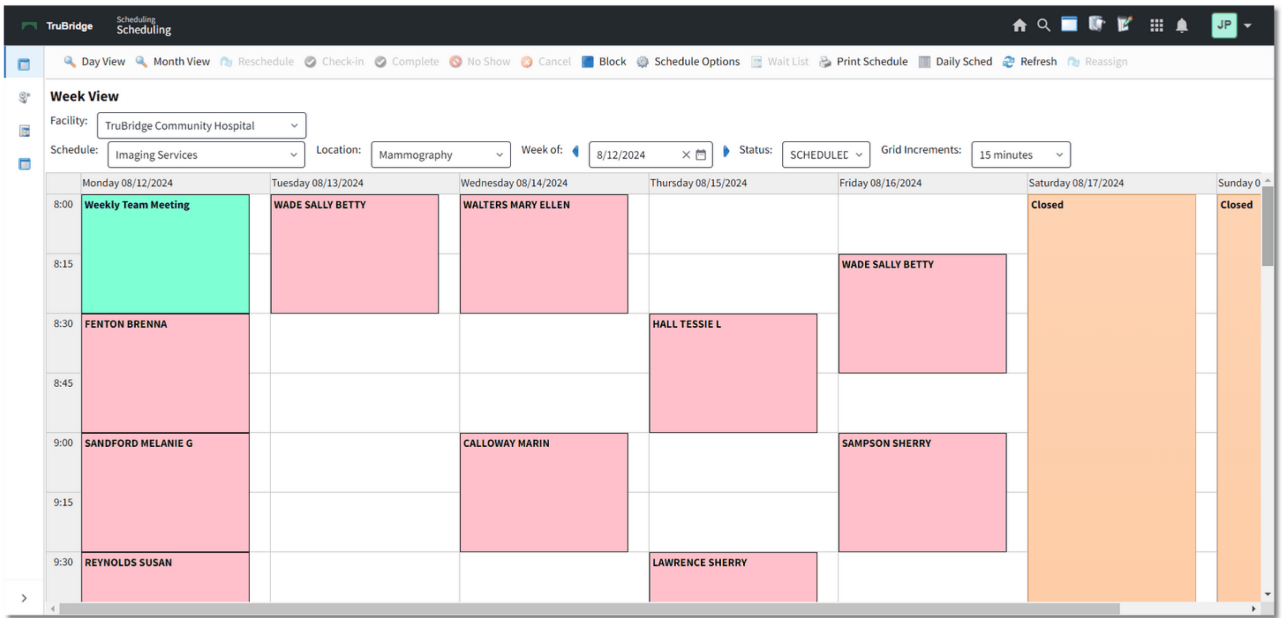
Once all the new information has been selected, the Update option will become enabled on the action bar. Select **Update** to reassign the appointment(s).

Week View

When in the Week View, the default will be today's week starting with Monday. Selecting one of the date column headers will toggle back to the day view for the selected schedule.

If needing to look at a different week, select a different date from the date picker at the top of the schedule.

Select **Web Client** > **Scheduling** > **<u>Week View</u>**



Schedule - Week View

Month View

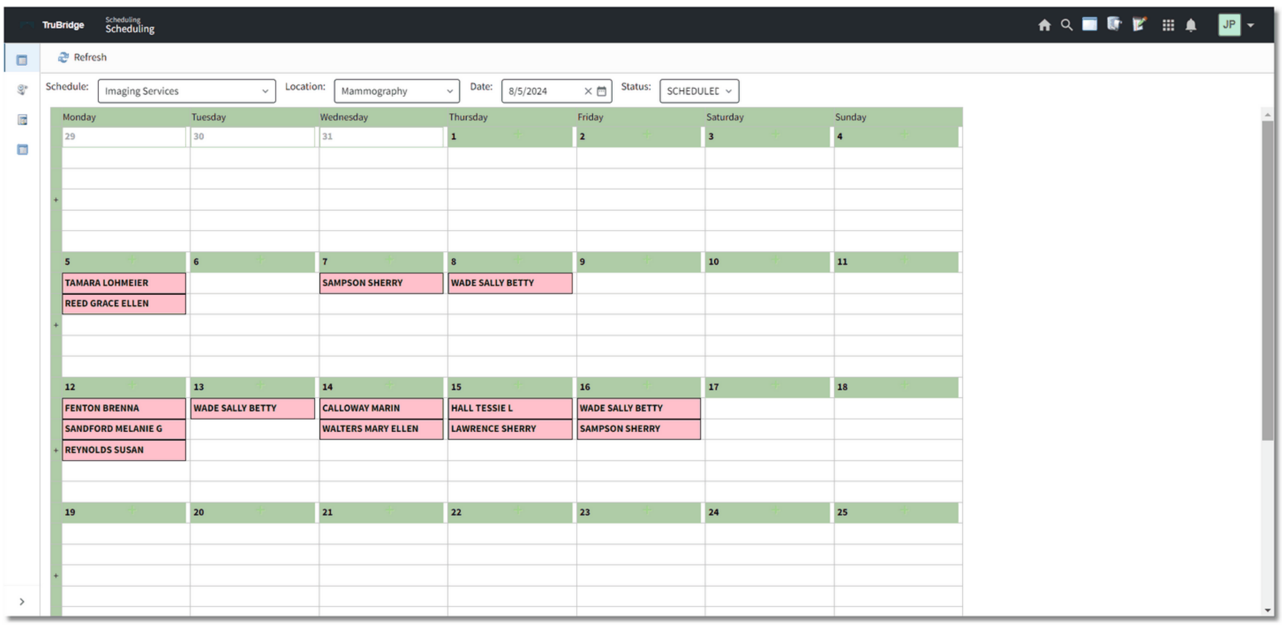
When in the Month View, the default will be the current month. Selecting one of the column headers for a particular day will toggle back to the day view for the selected schedule. Selecting the plus sign at the beginning of the week will toggle back to the week view for the selected schedule.

Only five patient names will display for each day. If there are more than five patients scheduled for a day, the schedule will display the names of the first four patients scheduled for the day and the last slot will display "2 more..., 3 more..." etc., depending on how many patients have been scheduled.

When double-clicking on a patient's name from the month view, it will open the patient's Appointment Detail screen.

If another month is needed, select a date from the date picker at the top of the schedule.

Select **Web Client** > **Scheduling** > **<u>Month View</u>**



Schedule - Month View

5.3 Action Bar Options

The options available on the Action Bar from the Scheduling Grid will activate once a patient name is selected. Some of these options are also available from the Appointment Detail 85 screen.

Below is an explanation of each option:

- **Day/Week/Month View:** Please refer to the Day, Week, and Month Views 43 section of this user guide on how these options work.

- **Reschedule:** Select this option to reschedule the patient's appointment. Please refer to the Rescheduling 101 section of this user guide on how this option works.

- **Check-In:** This option will only be available if the scheduled patient has an account linked to it. Select this option to change the patient's status to Checked-In. The appointment will display with a  **green mark** on the scheduling grid to notate the patient has arrived. Please refer to the Check-In for Clinics 87 section of this chapter for more information on the check-in process for clinics utilizing TruBridge Provider EHR. This option is also available on the patient's Appointment Detail screen.

NOTE: *Once the Check-In option is selected, it will change to Reverse Check-In. Select* ***Reverse Check-In*** *if the Check-In option was selected in error. If Reverse Check-In is selected, the green check mark will be removed on the scheduling grid and the patient's appointment will return to its previous status.*

- **Complete:** Select this option once the patient has completed the scheduled visit. As soon as this option is selected, the screen will auto-refresh to reflect the Complete status. This option is also available on the patient's Appointment Detail screen.

- **No Show:** Select this option if the patient is a no show for the scheduled appointment. As soon as this option is selected, the screen will auto-refresh to reflect the No Show status.This option is also available on the patient's Appointment Detail screen.

- **Cancel:** Select this option to cancel a patients appointment. As soon as this option is selected, the screen will auto-refresh to reflect the Cancel status.This option is also available on the patient's Appointment Detail screen.

NOTE: *When an appointment's status is changed to Reschedule, No Show or Cancel, TruBridge EHR may prompt for a Reason to be selected as to why the appointment was changed, if the Location/Personnel is set to prompt for a reason. See the figure below of the Select Reason Code screen that will display. The Reason Codes are created in the Reasons table in Table Maintenance. Please refer to the Reasons 17 section of this user guide for more information. Once a reason has been selected, select* ***Select*** *on the action bar. The selected reason will display in the Reason column of the patient's Appointment Detail screen.*

- **Block:** Please refer to the Scheduling Block 91 section of this user guide on how this option works.

- **Schedule Options:** Please refer to the Schedule Options 37 section of this user guide on how this option works.

- **Wait List:** Please refer to the Wait List 104 section of this user guide on how this option works.

- **Print Schedule:** Please refer to the Print Schedule 115 section of this user guide on how this option works.

- **Daily Sched:** Please refer to the Daily Schedule 48 section of this user guide on how this option works.

- **Refresh:** Select this option to update the information on the scheduling grid.

- **Reassign:** Select this option to reassign appointments to another location, or to another date. To begin, select the location or date header to enable the Reassign option on the action bar. Please refer to the Day View 43 section of this user guide for additional information on how this option works.

NOTE: *To have access to the Reassign option, the user must have the Behavior Control "Reassign Appointments" set to allow in Identity Management.*

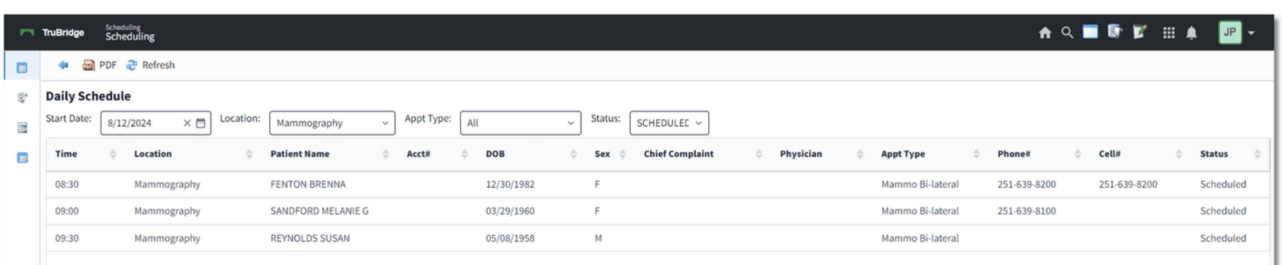
5.4 Daily Schedule

The Daily Schedule option provides the ability to view appointments scheduled for single or multiple resources for a particular day. Select 

Daily Schedule to display a current list of appointments.

NOTE: *This option is also available from the Tracking Board.*

Select **Web Client** > **Scheduling** > **Daily Sched**



Daily Schedule

Once selected, the Daily Schedule will default to the current date, but may be changed if needed. The Location will default to the location the scheduler was on when Daily Schedule was selected. If wanting to see a listing of appointments for all resources, select the Location drop down and select **All**. The Appointment Type will default to All, but a specific type may be selected. Only appointment types currently listed on the screen will be available from the drop-down. The Status will default to all Scheduled appointments, but may be changed to Canceled, No Show, Complete or All. Each column on the screen may be selected to sort in ascending or descending order.

If a patient's appointment has a visit linked, when double-clicking on a patient's name, it will open up the patient's chart. If the appointment has not been linked to a visit, when double-clicking on the patient's name, it will open the Appointment Detail screen so that Link may then be selected to link a visit to the appointment.

NOTE: *In order to open a patient's chart, the control behavior Open Charts must be set to allow in Identity Management.*

As patients are scheduled, select 

Refresh from the action bar to get an updated list of the Daily Schedule.

NOTE: *The Daily Schedule will look to the locations that the user's login has access to for the selected schedule.*

To print the Daily Schedule, select 

PDF from the action bar.

NOTE: *If the "All" Status is selected, the PDF option will not be available on the action bar.*

Chapter 6 Scheduling Patients

6.1 Overview

This section addresses the scheduling of appointments for new and existing patients and how to link an appointment to a particular patient visit. Users will need the "Create Appointments" Behavior Control set to allow in order to schedule a patient. This Behavior Control is a default if the user is in the Scheduling role. Users will also have the ability to schedule a patient during "closed" hours on the scheduling grid if the "Override Scheduling Blocks" Behavior Control is set to allow in Identity Management.

Once a patient has been scheduled in the system, the patient's profile cannot be deleted. If a color has been assigned to a task in the Task/Procedures table, the assigned color will display on the scheduling grid once a patient has been scheduled.

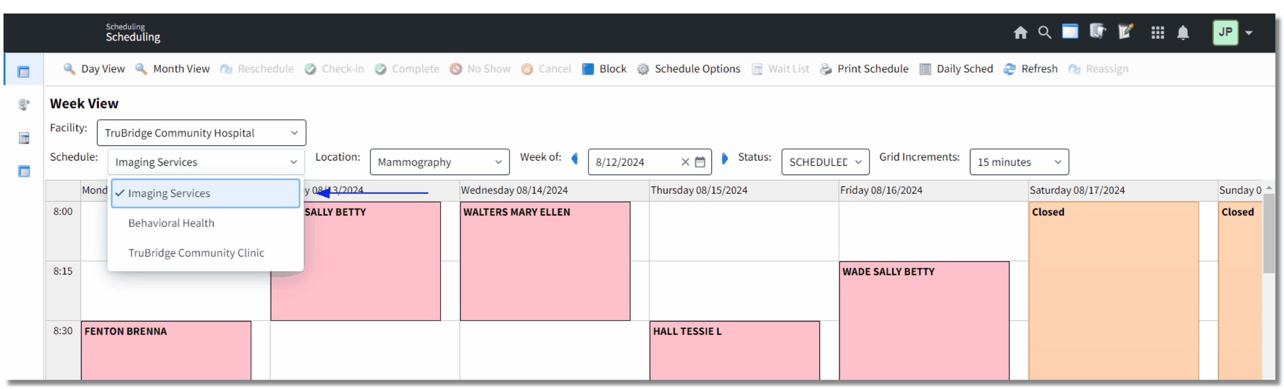
If Patient Connect has been purchased, patients scheduled from the scheduling grid will display in Patient Connect and vice versa. As patient's receive their confirmation message and selects Confirm, Request to Reschedule or Request to Cancel their appointment, one of the following icons will display in front of the patient's name on the scheduling grid in Patient Scheduling.

-  : Patient has confirmed their appointment.
-  : Patient is checked-in for their appointment.
-  : Patient has requested to cancel their appointment.
-  : Patient has requested to rescheduled their appointment.

6.2 Scheduling an Existing Patient

To begin scheduling a patient, select the schedule from the Schedule drop-down.

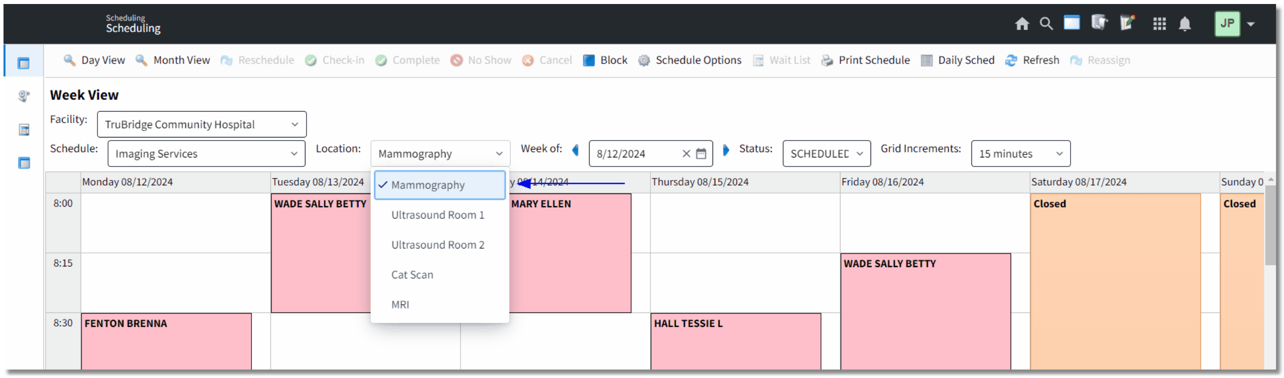
Select **Web Client** > **<u>Scheduling</u>**



Appointment Scheduling

Select the resource from the Location drop-down.

Select **Web Client UX** > **Scheduling**

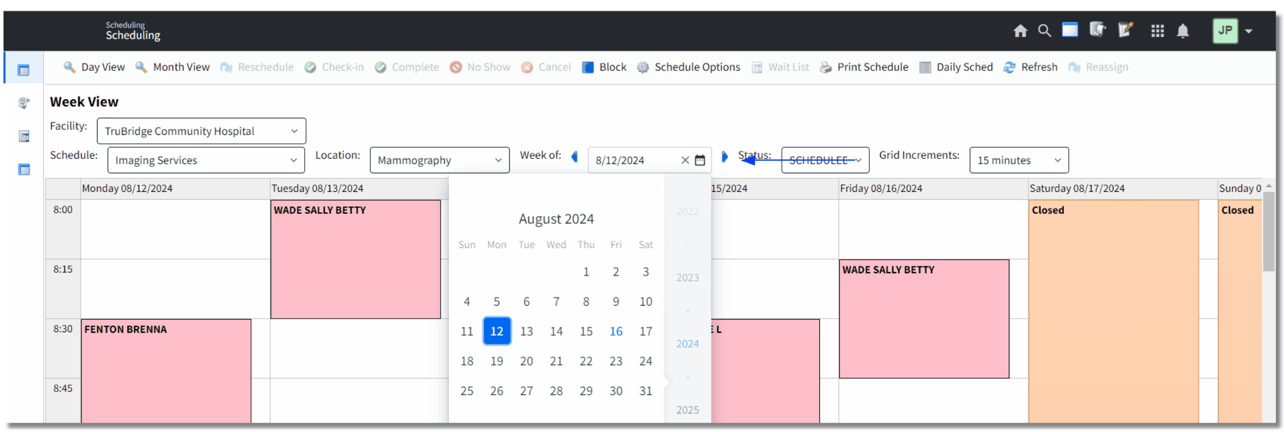


Schedule

Select the week for the schedule to display. The scheduling grid will automatically default to the current week.

NOTE: *Whichever date is selected, the scheduling grid will start with the Monday date of that week when in the Weekly View.*

Select **Web Client** > **Scheduling**

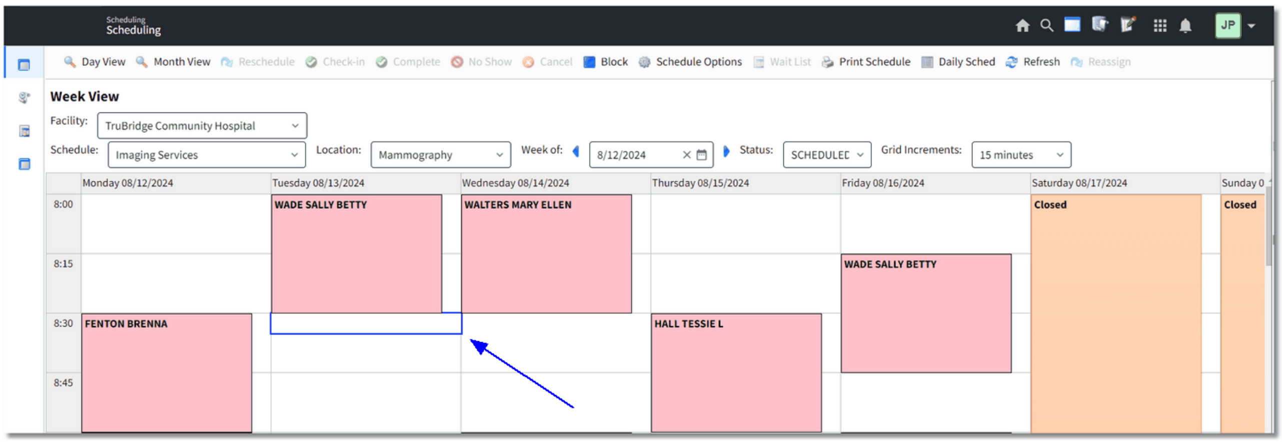


Schedule

Place the cursor in the date and time on the grid for when the schedule is and double-click. If the patient is already scheduled for the same day and time in the current location or another location, a warning will display, "Patient is currently scheduled for this date and time. Do you wish to schedule anyway?" Select **Yes** to continue or **No** to return to the scheduling grid.

NOTE: *Warnings will display when a time slot is selected and the maximum total number of patients scheduled for that day have been reached and/or the maximum total number of patients that may be scheduled simultaneously for that time slot have been reached. If the Overbook Appointments behavior control is set to allow in Identity Management, the scheduler will have the ability to override/overbook the appointment being created.*

Select **Web Client** > **<u>Scheduling</u>**

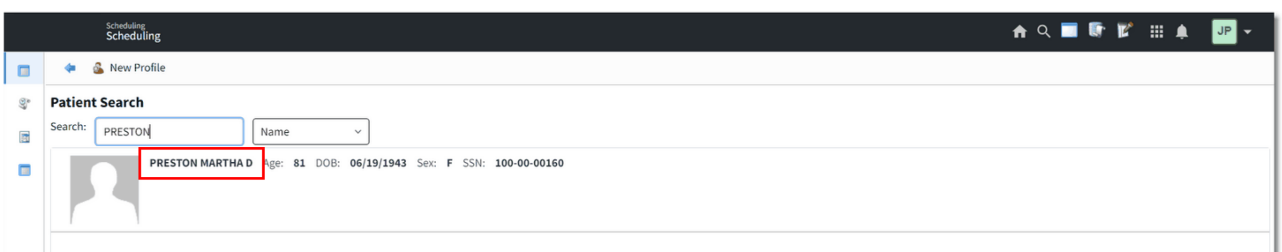


Schedule

Search for a patient by Date of Birth or Name. The screen will list existing profiles that match the search criteria provided. If the search provides the correct patient, double-click on the name of the correct patient.

NOTE: *The last element (Name or Date of Birth) that was selected will remain the search criteria element the next time a patient is scheduled. This functionality will be based per user login.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **<u>Schedule</u>**

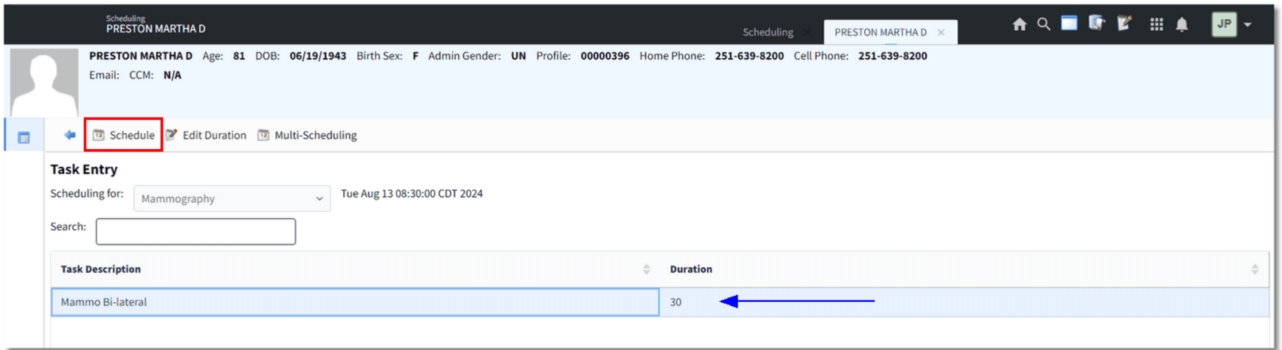


Schedule - Patient Search

Select a Task for the resource selected and then select **Schedule.** If wanting to change the duration of the task before scheduling, select the task and then select **Edit Duration** from the action bar.

NOTE: *If a Patient Note exists on the Patient's Profile, it will display at this time. The Patient Note is view only and may not be modified or deleted within the Scheduling application.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Schedule** > **Select Patient**



Schedule - Task Entry

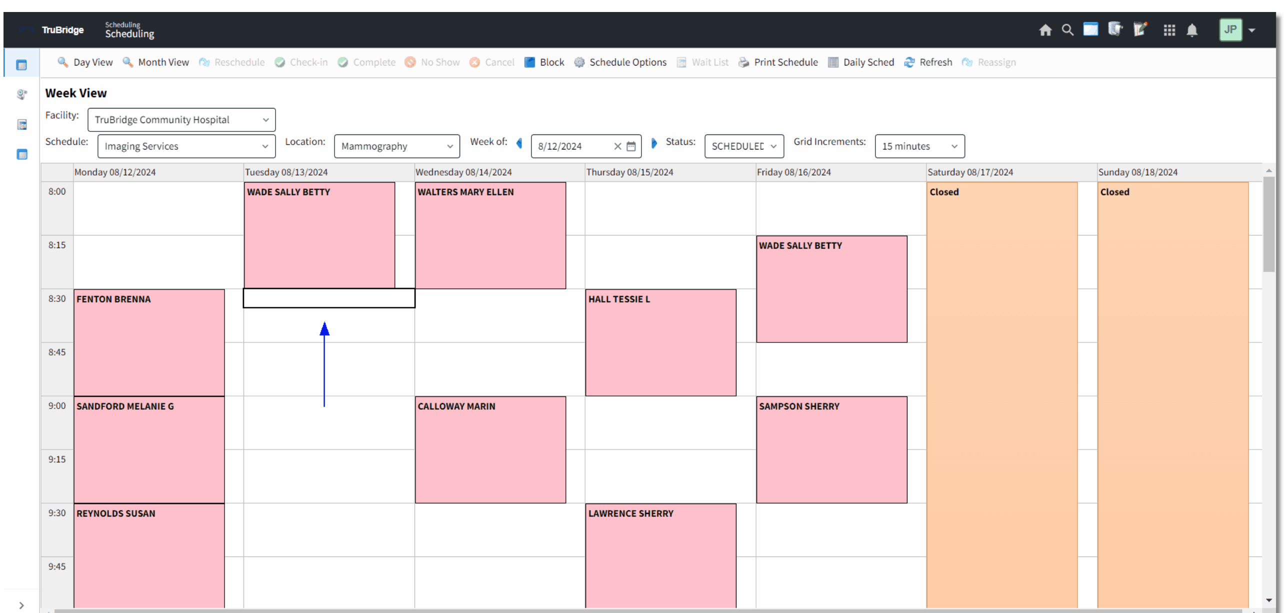
The system will then go to the Event screen. Fill out the Event screen and select Update **Update** to save the information. Select the back and the scheduled patient's name will display on the scheduling grid.

NOTE: *Please refer to the* [*Event Screen*] 63 *section of this user guide for information on how to complete this screen.*

6.3 Scheduling a New Patient

To schedule a patient that has never been to the facility, place the cursor in the date and time on the grid for when the schedule is and double-click.

Select **Web Client** > **Scheduling**

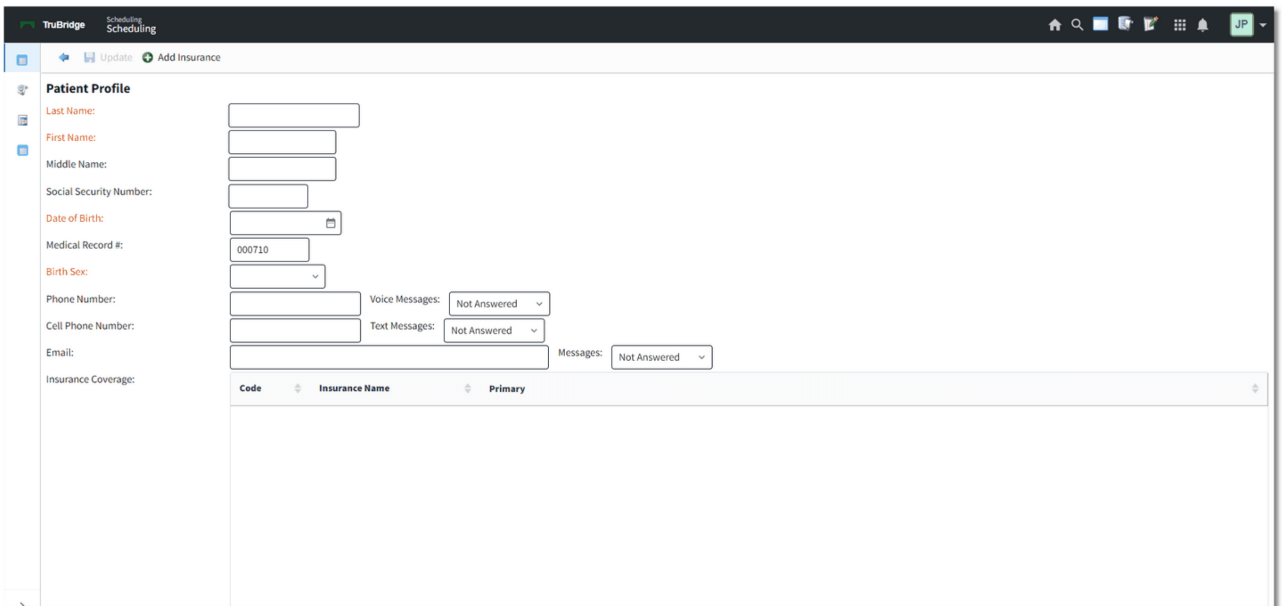


Schedule

Search for a Patient by Date of Birth or Name. If the patient is not listed, select **New Profile**.

The fields highlighted in red are required and must be completed. If the Social Security Number is not known, a generic profile number will be assigned.

Select **Web Client** > **Scheduling** > **Select Date and Time** > **New Profile**



Schedule - Patient Profile

As the information is entered in the required fields, they will turn black. Once all the information has been filled out select **Save.**

NOTE: *If the information provided is on an existing profile, a warning will appear saying so.*

Select a Task for the resource selected and select **Schedule**.

The system will then go to the Event screen. Fill out the Event screen and select **Update** to save the information. Select the back and the scheduled patient's name will display on the scheduling grid.

NOTE: *Please refer to the Event Screen* 63 *section of this user guide for information on how to complete this screen.*

6.4 Scheduling Multiple Tasks

To schedule multiple tasks for a patient, place the cursor in the appropriate (date and time) cell on the grid for when the first task should be scheduled and double-click.

Search for a patient by Date of Birth or Name. Once the correct patient is displayed, double-click on the patient's name.

NOTE: *If it is a patient who has never been seen at the facility, select* ***New Profile*** *to proceed.*

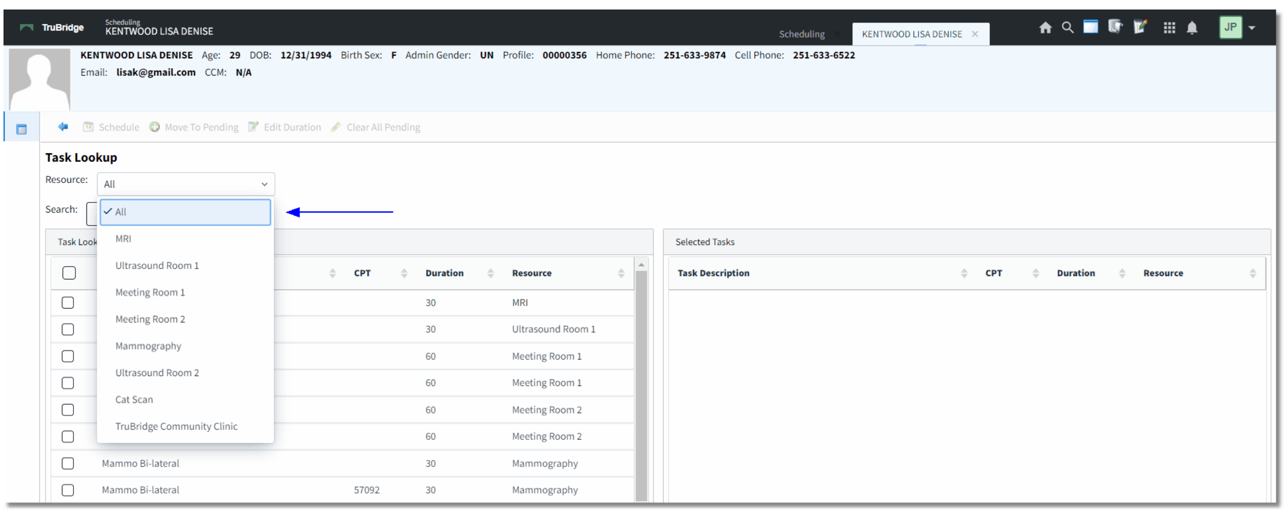
Select 

Multi-Scheduling from the task bar.

A listing of all tasks for the resource selected from the scheduling grid will then display. Select the **Resource** drop-down menu to select another resource.

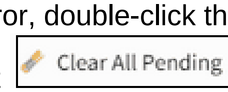
NOTE: *Select All from the resource drop-down menu to view a list of all resources and tasks associated with the schedule.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **<u>Multi-Scheduling</u>**



Task Lookup - Multi-Scheduling

Select each task that will need to be scheduled for the patient and then select 

Move to Pending on the action bar to move the tasks to the Selected Tasks column. If a task is moved to the Selected Tasks column in error, double-click the task to remove it. To remove all tasks listed in the Selected Tasks column, select 

Clear All Pending from the action bar.

NOTE: *Multiple tasks may be moved to the Selected Tasks column at one time by holding down the Ctrl key and selecting each task and then selecting* ***Move to Pending****.*

Once all tasks have been selected, select Schedule **Schedule** on the action bar.

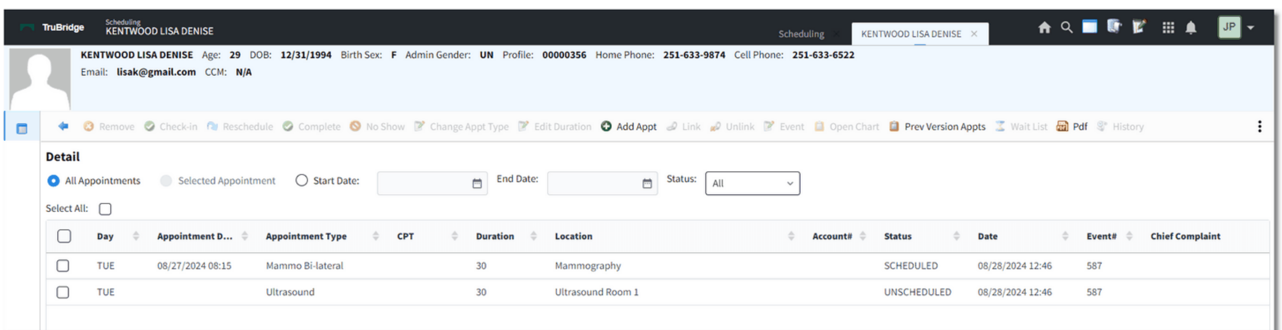
NOTE: *The first task listed in the Selected Tasks column will be scheduled for the original date and time selected on the scheduling grid.*

TruBridge EHR will then proceed to the Event screen. Fill out the Event screen and select Update **Update** once finished.

NOTE: *Please refer to the [Event Screen](#) 63 section of this user guide for information on how to complete this screen.*

TruBridge EHR will then go to the Appointment Detail screen and list all the tasks in order by selection. The first task will be at a status of "SCHEDULED" with the date and time originally selected on the scheduling grid. Any additional tasks will be at a status of "UNSCHEDULED".

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Multi-Scheduling** > **Move to Pending** > **Schedule** > **Update**

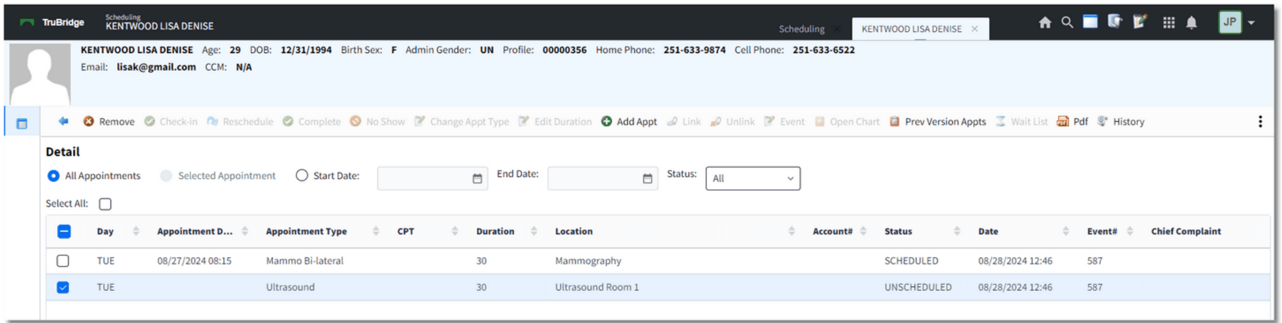


Appointment Detail - Multi-Scheduling

Unscheduled Tasks

Each task at the Unscheduled status will need to be scheduled. To do this, double-click on the Unscheduled task.

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Multi-Scheduling** > **Move to Pending** > **Schedule** > **Update**



Appointment Detail - Multi-Scheduling

TruBridge EHR will then go to the Weekly Schedule to allow the user to select the date and time to schedule the task. The date of the schedule will default to the date of the first scheduled task, but this may be changed if necessary. Double-click an available date and time to schedule the task.

TruBridge EHR will then return to the Appointment Detail screen and the task will then display at a "SCHEDULED" status. If there are any additional Unscheduled tasks, these may also be selected for scheduling at this time. Once all tasks have been scheduled, select the back arrow on the action bar to return to the scheduling grid.

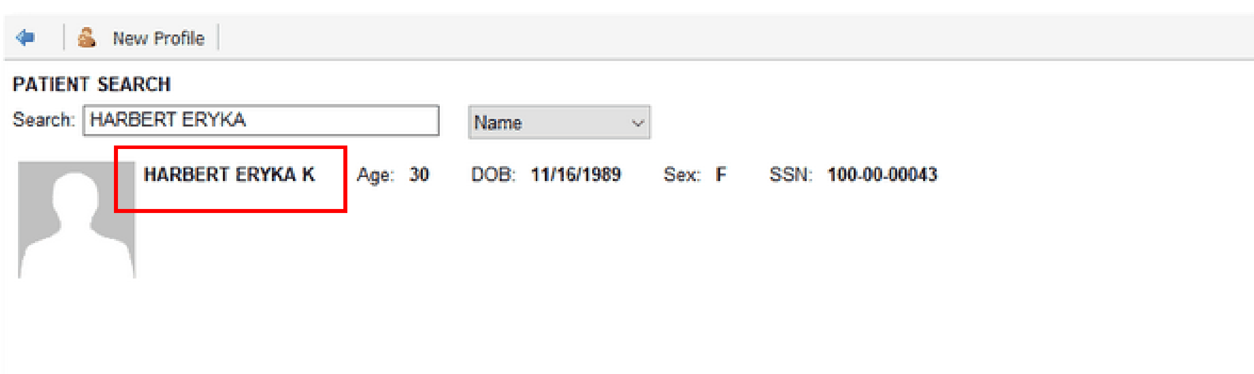
6.5 Scheduling Recurring Appointments

To schedule recurring appointments for a patient, place the cursor in the appropriate date and time cell on the grid for when the first appointment should be scheduled and double-click.

Search for a Patient by Date of Birth or Name. Once the name of the desired patient is displayed, double-click on the patient's name.

NOTE: *If it is a patient who has never been seen at the facility, select* ***New Profile*** *to proceed.*

Select **Web Client** > **Scheduling** > **Select Date and Time**



Patient Search

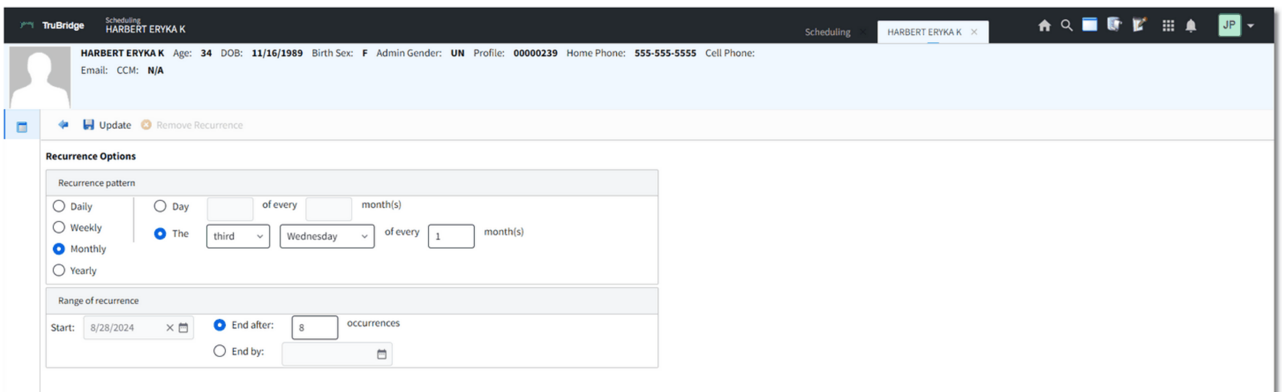
Select the task to be scheduled and then select **Schedule** from the action bar.

To set up the recurrence pattern, select **Recurring** on the action bar.

Recurrence Options screen will then display. The recurrence pattern and range of recurrence selections will need to be set up based on how often the patient will need to be seen. Once all recurrence options have been completed, select **Update** on the action bar.

NOTE: *The options for the recurrence pattern will change as Daily, Weekly, Monthly or Yearly is selected.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task** > **Schedule** > **Recurring**



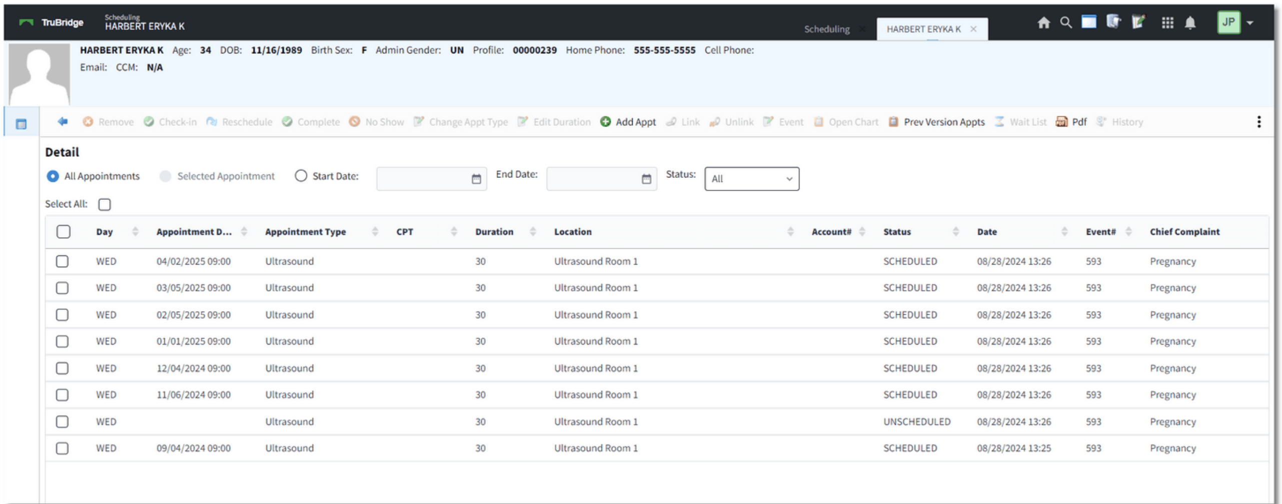
Recurrence Options

TruBridge EHR will return to the Event screen. Fill out the screen and select **Update** once finished.

NOTE: *Please refer to the [Event Screen](63) section of this user guide for information on how to complete this screen.*

TruBridge EHR will then proceed to the Appointment Detail screen and list each appointment that the patient will have, based on what was selected in the Recurrence Options screen.

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task** > **Schedule** > **Recurring** > **Update** > **Update**



Appointment Detail

If there is a conflict with the scheduling of any appointment, a warning will appear stating "Warning: There is a conflict with scheduling on XX/XX/XXXX XX:XX. Do you wish to schedule anyway?" If **Yes** is selected, and the user has the Behavior Control's "Override Scheduling Blocks" and "Overbook Appointments" set to allow, then TruBridge EHR will continue to schedule the appointment for the date and time of the conflict. If **No** is selected, or the user does not have the Behavior Control's "Override Scheduling Blocks" and "Overbook Appointments", the appointment will be listed at a status of "UNSCHEDULED."

Conflicts may occur for any of the following reasons:

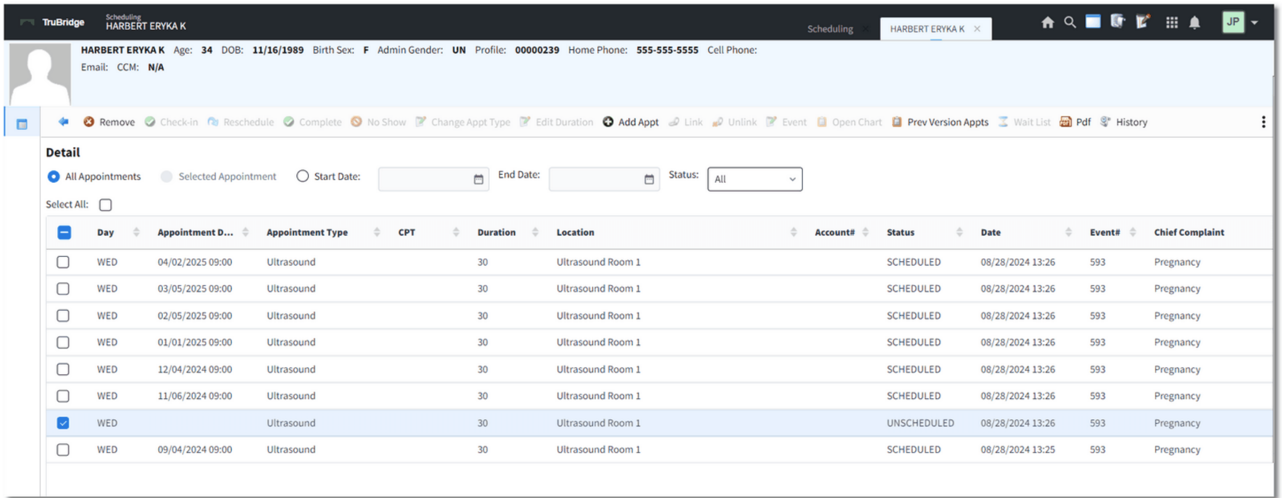
- The Patient Profile already has a scheduled appointment for the same date and time as the recurring appointment.
- The Max Per Day and/or Max Simultaneous settings in the Locations and Personnel tables have been exceeded for the selected resource, due to previously scheduled appointments.
- Schedule Blocks and Alternate Closures are on the scheduling grid for the date and time for which the appointment is intended to be scheduled.

Unscheduled Tasks

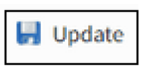
To schedule an appointment that is at the Unscheduled status, double-click it on the Appointment Detail screen.

NOTE: *If any Unscheduled appointments cannot be reconciled at this time, the user can do so at a later time by running the Unscheduled Tasks Report. For more information on how to run this report, please refer to the* *Unscheduled Tasks Report* 120 *section.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task** > **Schedule** > **Recurring** > **Update** > **Update**



Appointment Detail

TruBridge EHR will then proceed to the scheduling grid for the day or week the appointment should be scheduled. The date and time slot for which the system had attempted to schedule the patient will display in red on the scheduling grid. The resource and date may be changed to look at other availabilities. Once a date and time have been determined, double-click that slot on the scheduling grid and select 

Update on the action bar to return to the Appointment Detail screen to view all the recurring appointments. Select the back arrow on the action bar to return to the scheduling grid.

Changing Status

If the status of a recurring appointment needs to be Rescheduled, Checked-in, Completed, Canceled or marked as a No Show, an additional prompt may display.

When the Reschedule or Cancel option is selected, a prompt will display asking if the status change is for the entire series. If **Yes** is selected, the Reschedule or Cancel status will be applied to all recurring appointments for the patient. TruBridge EHR will update the scheduling grid. If **No** is selected, the Reschedule or Cancel status will only be applied to the selected appointment.

If the Check-in, Complete, or No Show option is selected for the appointment, the action will only be applied to the selected appointment.

6.6 Scheduling Associated Tasks

Before scheduling associated tasks for a patient, the appropriate table maintenance must be performed. Please refer to the Tasks/Procedures 4 and Associated Tasks 9 sections for more information on how to set up associated tasks.

Once table maintenance is complete, double-click the date and time to begin scheduling the associated tasks.

Search for a Patient by Date of Birth or Name. Once the correct patient is displayed, double-click on the patient's name.

NOTE: *If it is a patient that has never been to the facility, select **New Profile** to proceed.*

Select the task to be scheduled and then select 

Schedule from the action bar.

NOTE: *Any tasks that are set as Non-Viewable in the Tasks/Procedures table will not display on this screen.*

Fill out the Event screen with any applicable information and select 

Update once finished.

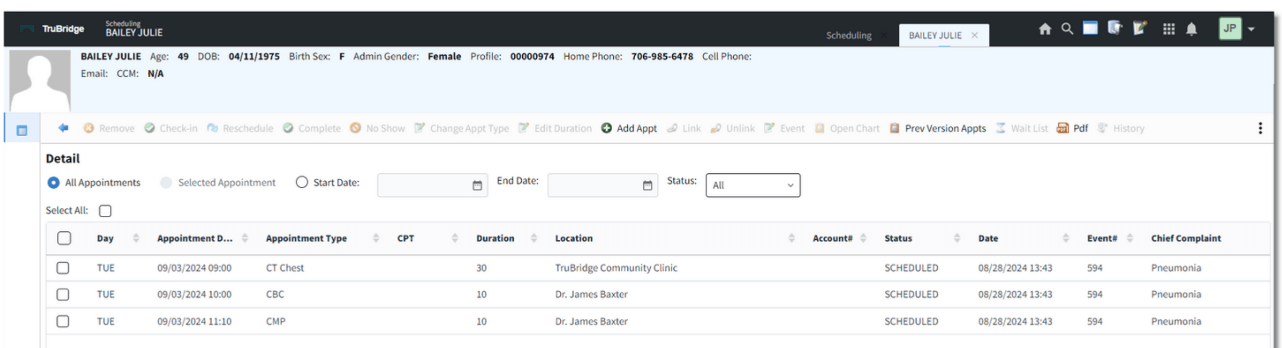
NOTE: *Please refer to the Event Screen* 63 *section of this user guide for information on how to complete this screen.*

TruBridge EHR will then go to the Appointment Detail screen and display all of the associated tasks for the patient. TruBridge EHR will schedule the tasks in the order they are arranged in the Associated Tasks section of the Tasks/Procedures table.

Select the back arrow to return to the scheduling grid.

NOTE: *If there were any conflicts with the scheduling of any of the tasks, the tasks in question will remain at the "UNSCHEDULED" status and may be selected from this screen to return the user to the scheduling grid to select an available resource and time slot.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task** > **Update**



Appointment Detail Screen - Associated Tasks

6.7 Scheduling for Multiple Resources

When scheduling a patient for a task, TruBridge EHR will allow the patient to display on more than one resource on a scheduling grid. This may be accomplished by selecting 'May need multiple resources' in the Tasks/Procedures 4 table.

During the scheduling process, once a task has been selected, additional resources will display to be selected. Filters are available to delimit the resources by location or personnel. Once a resource is selected, select **Continue** to continue with scheduling the patient.

After the patient has been scheduled, the Appointment Detail screen will reflect if there are multiple resources for the appointment.

NOTE: *Recurring appointments may be scheduled for multiple resources.*

The **Change Appt Type** and **Add Appt** options on the action bar will not be available if more than one resource is present for the selected appointment.

Rescheduling

When rescheduling an appointment with more than one resource, the entire event will move to the new date and time for all resources.

If there is a conflict with the date and time for one of the resources, and the user has the ability to overbook appointments, a warning will display. Select Continue to display the Edit Resource screen. The conflict will display in the Unavailable column and will allow another resource, for those available, to be selected. If not wanting to choose another resource, select Continue to overbook the appointment.

If there is a conflict with the date and time for one of the resources, and the user does not have the ability to overbook appointments, a warning will display. Select OK to display the Edit Resource screen. The conflict will display in the Unavailable column and a new resource will need to be selected in order to continue.

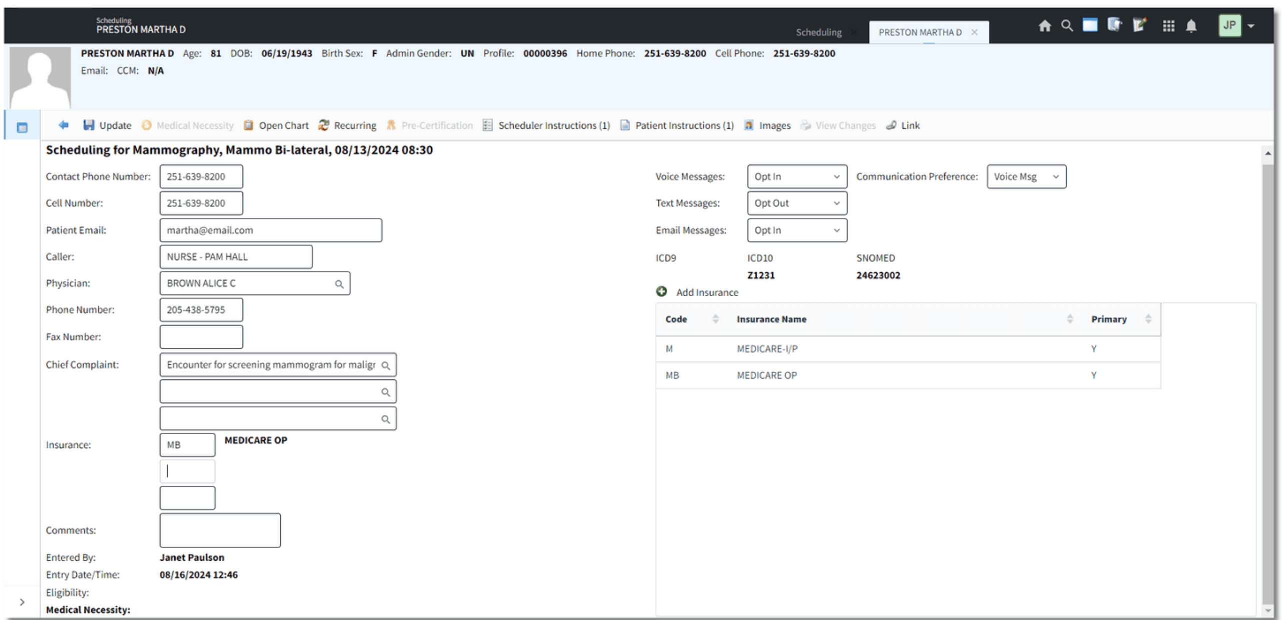
NOTE: *When rescheduling an appointment with multiple resources, the Next Available option will be disabled.*

Chapter 7 Event Screen

7.1 Overview

The Event screen is where all the information regarding the appointment is captured. None of the information on the screen is required to be completed, but it is best to capture as much as possible.

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Schedule** > **Select Patient** > **Select Task** > **Schedule**



Schedule - Event

The following fields may be completed while scheduling a patient:

- **Contact Phone Number:** The patient's phone number will automatically pull from the patient profile.
- **Voice Messages:** Select **Opt In** or **Opt Out** from the drop-down to determine if a patient would like to receive voice messages regarding their appointment, to the number in the Contact Phone Number field. This field is utilized by facilities using the Patient Connect application. Facilities that have not purchased Patient Connect may utilize this field for informational purposes.
- **Communication Preference:** The patient's communication preference will pull from the patient profile. To add or make changes to this field, select the patient's preferred form of communication from the drop-down menu. The options for this field are E-mail, Voice Message or Text Message.
- **Cell Number:** The patient's cell phone number will automatically pull from the patient profile. This number may be over-keyed if needed.

- **Text Messages:** Select **Opt In** or **Opt Out** from the drop-down to determine if a patient would like to receive text messages regarding their appointment, to the number in the Cell Number field. This field is utilized by facilities using the Patient Connect application. Facilities that have not purchased Patient Connect may utilize this field for informational purposes.

- **Patient Email:** The patient's email address will automatically pull from the patient profile, if present. This field will only be accessible if the Behavior Control 'Update Patient Email to Profile' is set to allow in Identity Management. If the email address is added or changed from this field, it will automatically update the patient profile as well.

- **Email Messages:** Select **Opt In** or **Opt Out** from the drop-down to determine if a patient would like to receive emails regarding their appointment, to the number in the Patient Email field. This field is utilized by facilities using the Patient Connect application. Facilities that have not purchased Patient Connect may utilize this field for informational purposes.

- **Caller:** Enter who is making the appointment (Patient, Nurse, Doctor etc.)

- **Physician:** Use the look-up to select a referring physician for the appointment.

- **Phone Number:** The physician phone number will automatically populate if loaded in the physician table. This number may be over-keyed if needed.

- **Fax Number:** The physician fax number will automatically populate if loaded in the physician table. This number may be over-keyed if needed.

- **Chief Complaint:** Use the look-up to enter up to three chief complaints.

NOTE: *For stand alone clinics utilizing TruBridge Provider EHR or a department set up as a clinic utilizing Thrive Provider EHR, free text the reason for the patient's visit in the Chief Complaint fields as opposed to using the look-up.*

- **Insurance:** The patient's insurance(s) may be populated in the three fields provided. The first field is for the primary insurance, the second field is for the secondary insurance and the third is for the tertiary insurance. A list of insurances on the patient's profile will display on the right side of the screen to help determine which financial classes to use as the primary, secondary or tertiary. Select **Add Insurance** to add a new insurance for the patient. If a new insurance is added, it will also be added to the patient's profile. Double-click on an insurance to view the Policy Information screen to make any changes as needed. If a new insurance is added or changes have been made to the insurance, select **Save** to retain all information.

  Only insurances listed on the right-side of the screen may be entered in the Insurance fields. The only exception will be is if the patient is Private Pay. For Private Pay patients, enter a **P** in the primary insurance field.

NOTE: *Insurances may only be added or edited from this screen. If an insurance needs to be removed, this must be done from the patient profile.*

NOTE: *If visits are being auto created, the insurances listed in these fields will be used to create the claims on the account when the visit is created.*

- **Comments:** A comment may be entered.

Select 

Update to save any information that was entered and to return to the scheduling grid. The Entered By field will then populate with the users name of whom created the event as well as the entry date and time.

7.2 Action Bar Options

The options available on the Action Bar from the Event screen may be utilized during the initial scheduling of the patient or at some point in the future. However, certain options will not be enabled until the appointment has been initially scheduled.

Below is an explanation of each option:

- **Update:** Select this option to save an new or changed information on the screen.
- **Medical Necessity:** Please refer to the Medical Necessity 65 section of this chapter on how this option works.
- **Open Chart:** This option may be selected to view the patient's virtual chart.
- **Recurring:** Please refer to the Scheduling Recurring Appointments 57 section of this user guide on how this option works.
- **Pre-Certification:** Please refer to the Pre-Certification 67 section of this chapter on how this option works.
- **Scheduler Instructions:** Please refer to the Instructions 71 section of this chapter on how this option works.
- **Patient Instructions:** Please refer to the Instructions 71 section of this chapter on how this option works.
- **Images:** Please refer to the Images 72 section of this chapter on how this option works.
- **View Changes:** Please refer to the View Changes 74 section of this chapter on how this option works.
- **Link:** Please refer to the Linking from Event Screen 79 section of this user guide on how this option works.

7.3 Medical Necessity

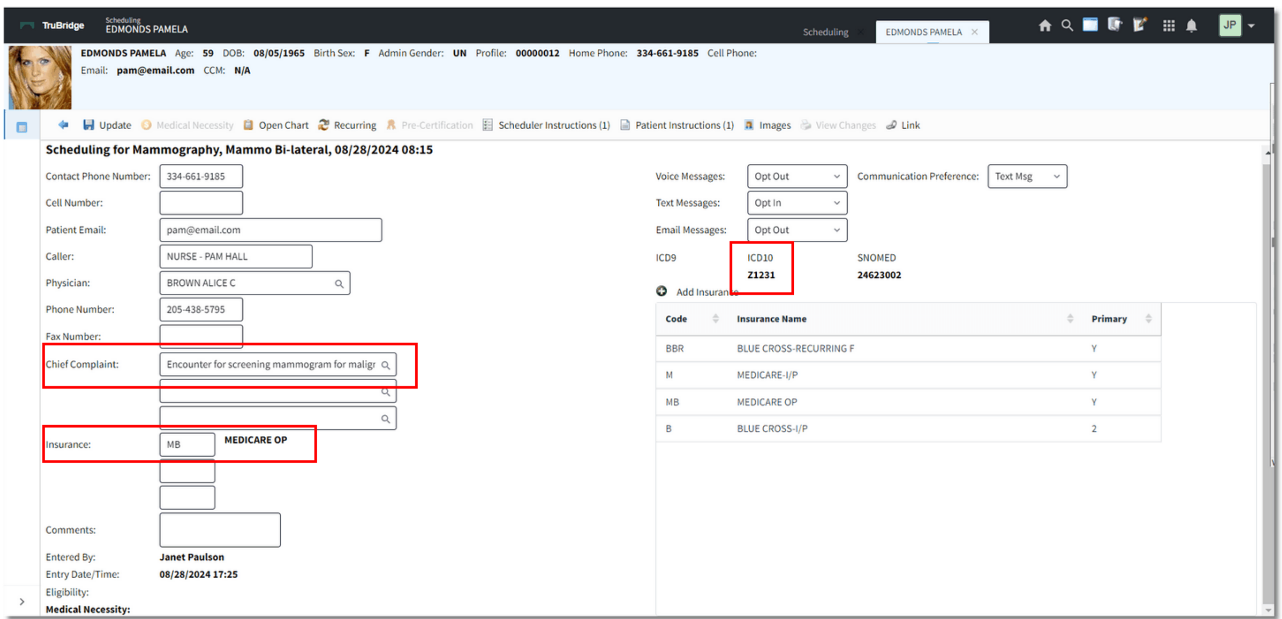
Medical Necessity may be checked at the time the appointment is scheduled if the appropriate table maintenance has been done. Any task that is needing Medical Necessity checked at the time it is scheduled will need to have an item number assigned to it in the Tasks/Procedures table. The item that is assigned to the task, will need to have a CPT code attached to it on page 1 of the Item Master. Please refer to the Items 12 section for more information about assigning an item to a task.

NOTE: *Medical Necessity is a purchased application. Please contact a TruBridge Client Executive for more information about purchasing.*

When scheduling a task that is set to check for Medical Necessity, enter one or more ICD10 codes in the Chief Complaint field(s) followed by the primary insurance code on the Event screen. Once Update **Update** is selected from the action bar, TruBridge EHR will automatically run Medical Necessity to see if there is a conflict.

NOTE: *The magnifying glass lookups must be used when entering an ICD10 code in the Chief Complaint fields.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task**

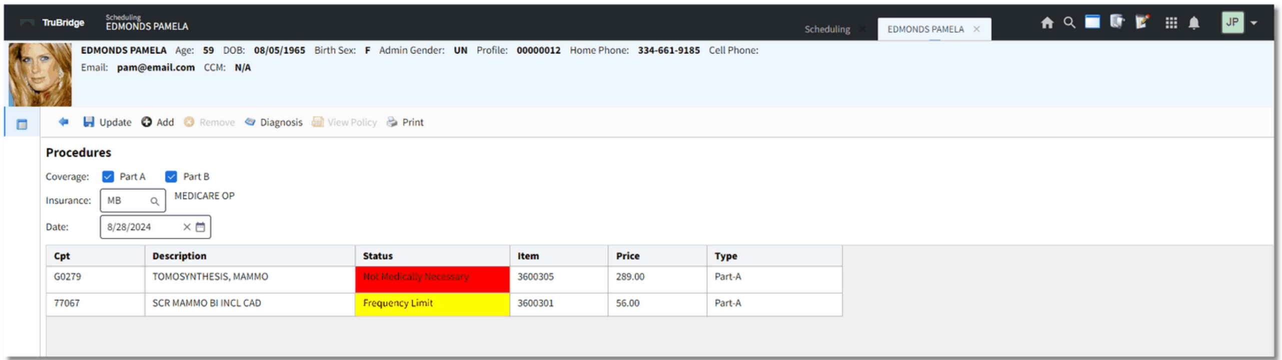


Event Screen

If the ICD10 codes meet the Medical Necessity criteria, the system will return to the grid as usual and the Event screen and the "Medical Necessity completed" field will be updated with the date, time and login of the user who checked Medical Necessity.

If the ICD10 codes entered DO NOT meet the Medical Necessity criteria, the system will then display the Medical Necessity screen. From there, ABN's may be printed, if needed. Select the **back arrow** or select Update **Update** to exit the Medical Necessity screen. A prompt will then display "Contains procedures that are not covered by insurance. Would you like to proceed with the appointment?" Select **Yes** to schedule the task, or select **No** to cancel scheduling the task.

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task** > **Update Event Screen** > **Update**



Medical Necessity

If needing to re-access Medical Necessity for a scheduled task, select the **Event** option from the Appointment Detail screen and then select **Medical Necessity** from the action bar.

NOTE: *The Medical Necessity option on the action bar of the Event screen will not be enabled until the Event screen has been updated and then reaccessed.*

Please refer to the Medical Necessity documentation for more information on how to use the application.

7.4 Pre-Certification

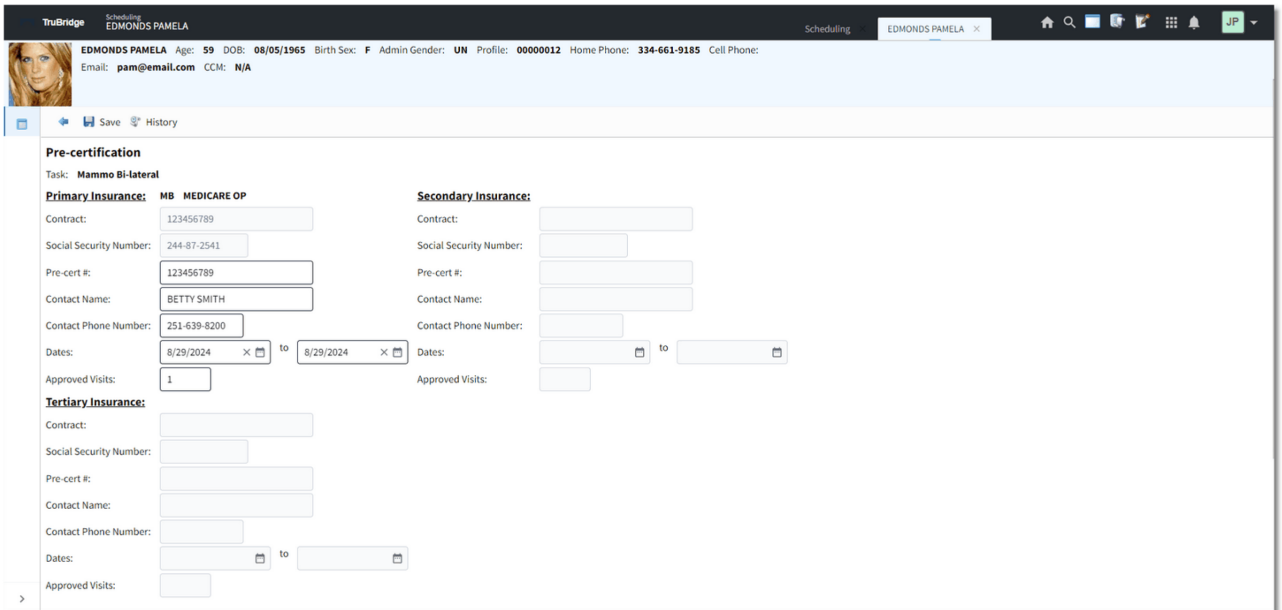
Pre-certification information may be entered for a patient's visit if table setup has been completed. Each task will need to define which financial classes will need to capture pre-certification information in the Tasks/Procedures table. When a patient is scheduled for the task, the patient must have a financial class that matches one for the task being scheduled. For more information on how to define financial classes for a task, please see the Precert 8 section.

To begin entering pre-certification information when scheduling a patient, complete the necessary information on the Event screen and then select Update.

NOTE: *the Pre-Certification option on the action bar of the Event screen will not be enabled until the Event screen has been exited and then reaccessed.*

The Pre-Certification screen will display information for the primary, secondary and tertiary insurances. The Contract Number and Social Security Number will auto-populate from the Insurance Policy Information screen. The remaining fields will need to be manually entered with any necessary information for the pre-certification. Once all information is entered, select **Save** on the action bar. Then, select **back arrow** to exit the screen.

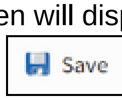
Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task** > **Update** > **Pre-Certification**



Pre-Certification Screen

When populating a pre-certification number for an appointment, this will update the Insurance System - Policy Information screen of the patient account to which the appointment is linked. For more information on how to link a visit to an appointment, please see the How to Link a Registered Account to the Schedule 79 section.

Pre-Certification for Multiple Tasks

When scheduling multiple tasks for a patient, pre-certification information for each task/appointment may be entered from the Pre-Certification screen. If table maintenance has been done to automatically display the Pre-Certification screen, once the Event screen has been updated, the Pre-Certification screen will display for the first task selected. Once the appropriate information has been populated, select 

Save and then select the  **right arrow** on the action bar to go to the Pre-Certification screen for the next task.

Pre-Certification information for the next task may then be populated. Once the appropriate information has been populated, select **Save** on the action bar. If needing to go back to the Pre-Certification screen for the previous task, select the **left arrow** on the action bar. If all pre-certification information has been entered, select the back arrow on the action bar to return to the Event screen to finish scheduling the appointment.

Pre-Certification for Recurring Appointments

When scheduling recurring appointments for a patient, the information entered on the Pre-Certification screen will apply to all appointments. Upon exiting the Pre-Certification screen, the system will then display the Appointment Detail screen with a listing of all the recurring appointments. The last column of the screen is called Pre-Certification and will display the number of Approved Visits entered on the Pre-Certification screen.

For example, if the patient was scheduled for 10 recurring appointments, the Pre-Certification column will initially display 0/10. Once a patient has completed an appointment, and **Complete** is selected on the action bar, the Pre-Certification column will then display 1/10 meaning one recurring appointment has been completed and there are nine visits left for the patient.

If the Approved Visits field is left blank in the Pre-Certification screen, the Pre-Certification column will not display anything.

Pre-Certification History

If changes need to be made to the pre-certification information, double-click the patient from the scheduling grid and then select **Event** on the action bar.

Then select **Pre-Certification** on the action bar to display the Pre-Certification screen and make any necessary changes to any of the available fields. If changes are made, select **Save** on the action bar to keep the new information.

Changes that are made on this screen will be saved in History. To view changes, select **History** on the action bar.

The Pre-Certification History screen will display the following:

- The task the change was made.
- The insurance the change was made.
- Which field the change was made.

- The previous value in the field the change was made.
- The login of the user who made the change.
- The date and time the change was made.

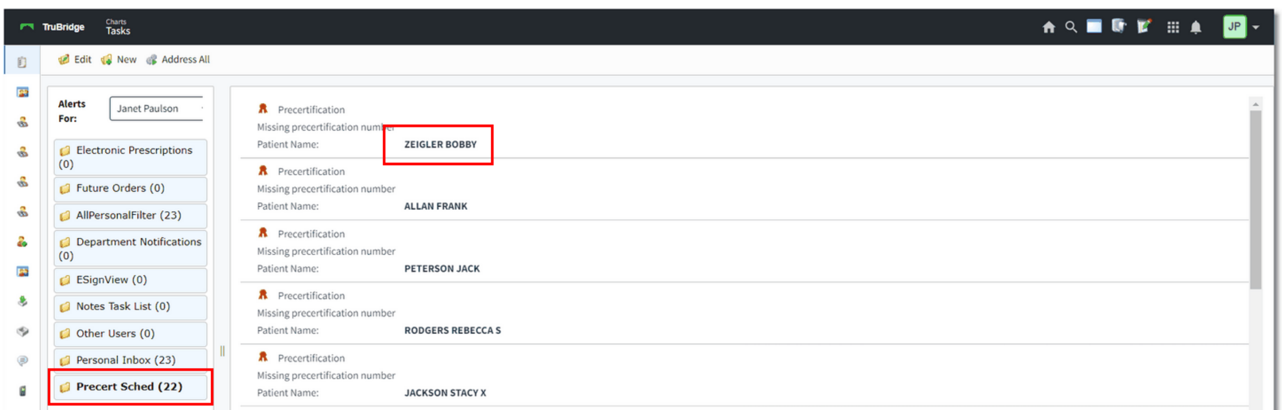
Pre-Certification Home Screen Alert

When a task is setup to have pre-certification information entered and the Pre-Certification screen is exited without entering a pre-certification number, a Home screen alert will be created and sent to the users subscription box.

To access the Home screen from the scheduling grid, select the **Home** option next to the application drawer. from the navigation pane.

In order to see the pre-certification alerts, a folder will need to be created with a filter task type of Scheduling Precertification. To correct the alerts, double-click on the patient's name.

Select **Web Client** > **<u>Home</u>**



Home Screen

The system will then display the Pre-Certification screen. Any applicable information may be populated. Select Save **Save** on the action bar to keep changes. Select the back arrow on the action bar to return to the Home screen.

NOTE: *If the Pre-certification number field is not populated, the alert will still display on the Home screen.*

Once all alerts have been addressed, it will no longer appear on the Home screen.

7.5 Instructions

Scheduler Instructions and/or Patient Instructions may be viewed from the Event screen when scheduling a patient. Only instructions attached to a task for designated financial classes may be viewed. This will be denoted if there is a number displayed on the instruction options. For example, if the option displays as "Scheduler Instructions (1)", this means there is one instruction the scheduler needs to view for this task.

NOTE: *The primary financial class on the patient's appointment that matches the financial class listed on the instruction determines what will pull to the appointment. If the primary financial class is changed on the Event Screen, the instructions will update according to the new financial class.*

Select either the 

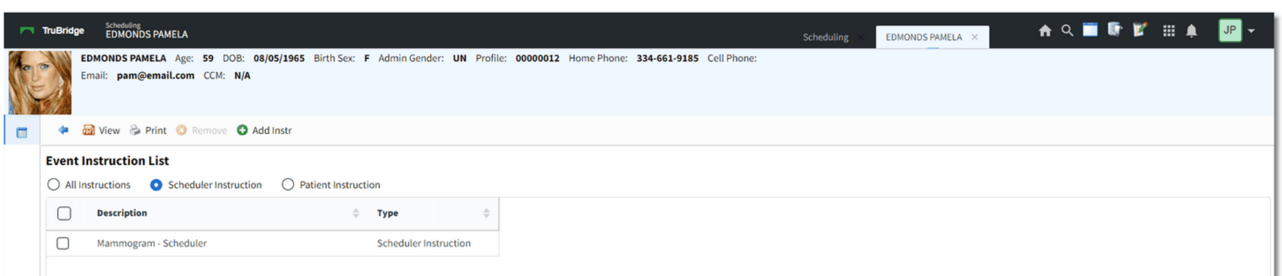
Scheduler Instructions or the 

Patient Instructions option to view the instruction(s). If there is only one instruction, it will automatically display on the screen in a PDF format. If there are more than one instructions for the scheduler or patient, the Event Instruction List will list all instructions to select from.

NOTE: *The Scheduler Instructions and Patient Instructions option is also available on the Appointment Detail screen.*

NOTE: *The instruction attached to a task and financial class will follow the appointment appropriately if the Change Appointment or Add Appointment options are selected from the Appointment Detail screen. The same applies when scheduling a patient for multiple appointments.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Select Patient** > **Select Task** > **<u>Scheduler Instructions/Patient Instructions</u>**



Event Instruction List

Once an instruction has been selected from the list, 

View or 

Print may be selected on the action bar. To add an instruction to the list, 

Add Instruction may be selected to display a listing of all instructions. If wanting to remove an instruction, select the instruction from the list and then select 

Remove.

NOTE: *To have access to the Add Instruction and Remove options, the Behavior Control 'Add and Remove Instructions' will need to be set to allow in System Administration.*

7.6 Images

Images may be attached to a patient's appointment from the Event screen or the Appointment Detail screen. Once an appointment with an image is linked to a visit, the image may then be viewed in Electronic File Management.

NOTE: *If an appointment is unlinked from a visit, the scheduling image on the original linked account will need to be deleted from Appointment Images AND through Electronic File Management.*

Before images may be attached to a patient's appointment, any image titles that will be used in the Patient Scheduling application must have the 'Scheduling' option selected in the Titles table. Please refer to the Titles 35 section of this user guide for more information.

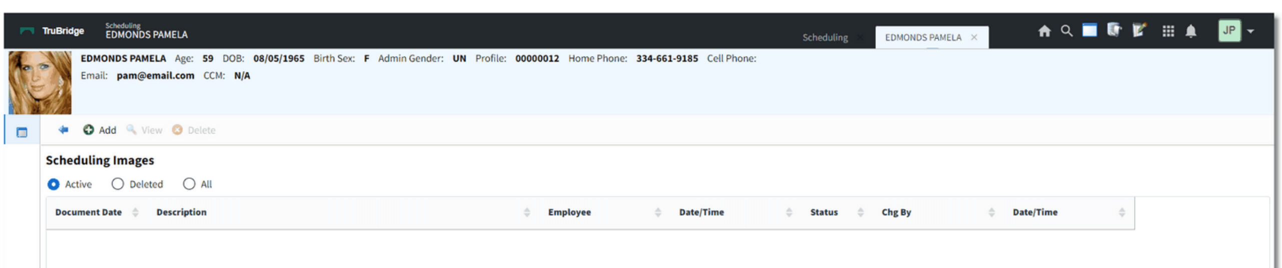
Event Screen

To attach an image from the Event screen, select Images **Images** on the action bar.

NOTE: *If the facility's optical drive has not been set up for your facility, the following message may display when the Images option is selected, "Warning: Scheduling Optical Drive is not set. Please contact TruBridge to have the drive set." Call TruBridge Support if this message displays.*

Any existing images for the patient's appointment may display on the screen. Select Add **Add** on the action bar to begin adding an image to the appointment.

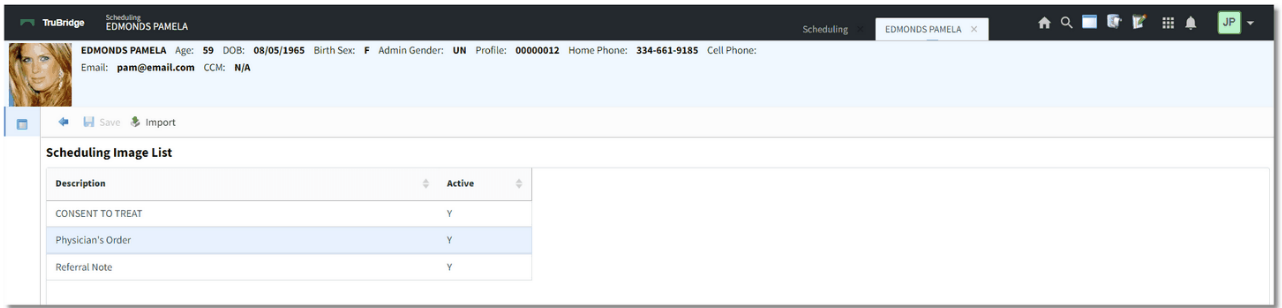
Select **Web Client** > **Scheduling** > **Select Date and Time** > **Schedule** > **Select Patient** > **Select Task** > **Schedule** > **Images**



Scheduling Images

Select an image title from the Scheduling Image List. Once an image title is selected, the Import option will become enabled. Select Import **Import** on the action bar to continue.

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Schedule** > **Select Patient** > **Select Task** > **Schedule** > **Images** > **Add**



Scheduling Image List

Once Import is selected, select the file from where it is located on the computer. TruBridge EHR will then return to the Scheduling Image List. Select 

Save to attach the image to the appointment. To exit the screen, select the **back arrow**.

NOTE: *If 'Enter Document Date' is selected in the Image Titles table, an additional prompt will appear to enter an alternate date and time the image is being attached to the appointment.*

The image title of the attached image will then display on the Scheduling Images screen.

To view the attached image, select the image title and then select 

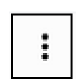
View on the action bar.

If the image was attached to the wrong appointment, select the 

Delete option to mark this image as deleted. In order to have access to this option, the image title will need to be set to allow deletion and users will need the Behavior Control, 'Delete Scheduling Image' set to Allow in System Administration.

Radio buttons are available to delimit the images by Active, Deleted or All. The default will be Active.

Appointment Detail Screen

Images may also be attached from the Appointment Detail screen. Select the  **kabob menu** on the action bar to display the Images option.

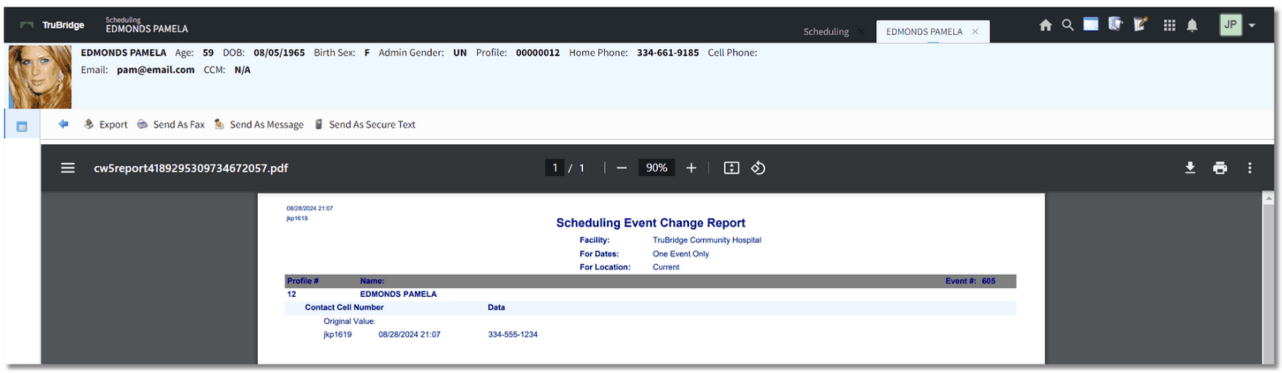
The process for adding images from Appointment Detail is the same as adding it from the Event screen.

7.7 View Changes

To view changes made to specific fields within the Event screen select 

View Changes to display the Scheduling Event Change Report. These changes will only be captured if information is changed after the appointment is originally scheduled. The fields within the Event screen that will be recorded are as follows: Contact Phone Number, Cell Number, Caller, Email Address, all Chief Complaint fields, all Insurance fields and Comments.

Select **Web Client** > **Scheduling** > **Select Patient** > **Event** > **View Changes**



View Changes

Each field that had a change made in the Event screen for the appointment will be listed below the patient name. The field that was changed will be listed in dark blue. Below the field name will be the change that was made. The 'Original Value' will be listed first followed by the information that was originally in the field. Below the Original Value will list the user login(s) that made the change to the field, the date and time the change was made and what the information was changed to.

To print the report, select 

Export on the action bar.

NOTE: *The Scheduling Event Change Report is also available on the Report Dashboard. When running the report from here, the report will allow users to filter for changes to be viewed within a time frame and for individual profiles. See the* *Scheduling Event Change Report* 119 *section of this user guide for more information.*

Chapter 8 TeleHealth Appointments

8.1 Overview

The TeleHealth feature enables facilities to schedule video conference appointments for patients with their healthcare providers. This functionality allows providers to seamlessly launch virtual visits directly from the Daily Schedule option, enhancing convenience and accessibility. By integrating telehealth capabilities, the application aims to improve patient care and streamline the appointment process.

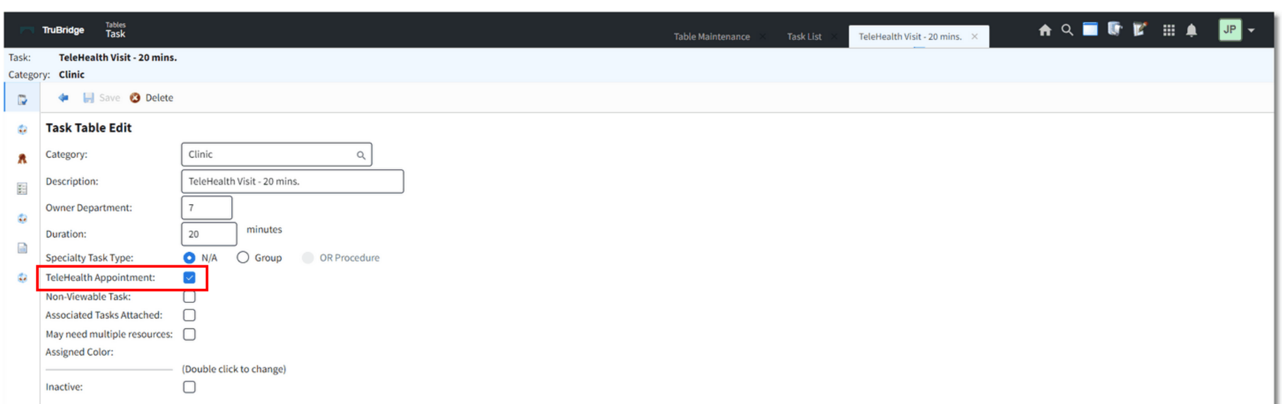
The TeleHealth feature is a purchased function of the Patient Scheduling application. Please contact TruBridge Support for additional information.

8.2 TeleHealth Table Maintenance

Before scheduling a TeleHealth appointment, tasks must be set up as a TeleHealth appointment in the Tasks/Procedures 4 table.

NOTE: *When creating TeleHealth tasks, it is recommended to put "TeleHealth" somewhere in the task description to easily identify when scheduling appointments.*

Select **Web Client** > **Tables** > **Patient Intake** > **Tasks/Procedures** > **Select TeleHealth Appointment** > **Edit**



Task/Procedures Table - TeleHealth Appointment

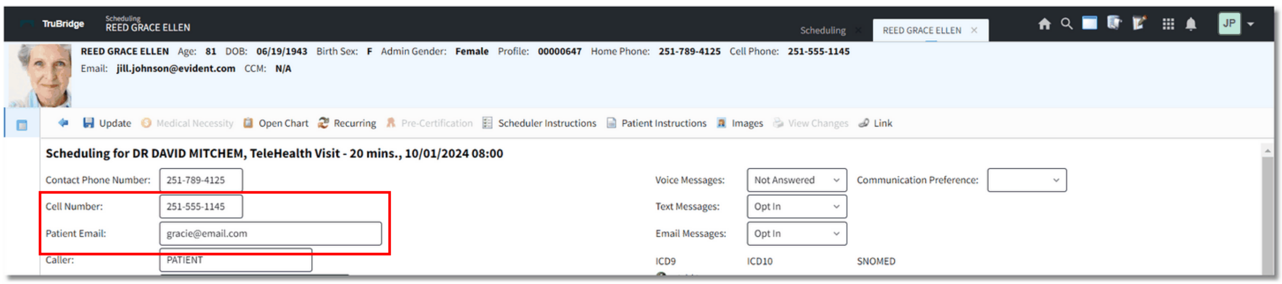
NOTE: *The TeleHealth Appointment field will only display for facilities that have purchased TeleHealth.*

8.3 Scheduling Telehealth Appointments

During the scheduling process a patient's cell phone or email address must be present on the Event screen for the patient to receive a notification with a link to join the appointment.

NOTE: *If both the cell phone and email fields are left blank, a warning will display saying "TeleHealth Appointments require a Cell number or Email".*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Schedule** > **Select Patient** > **Select TeleHealth Appointment Task** > **Schedule**



Event Screen - TeleHealth Appointments

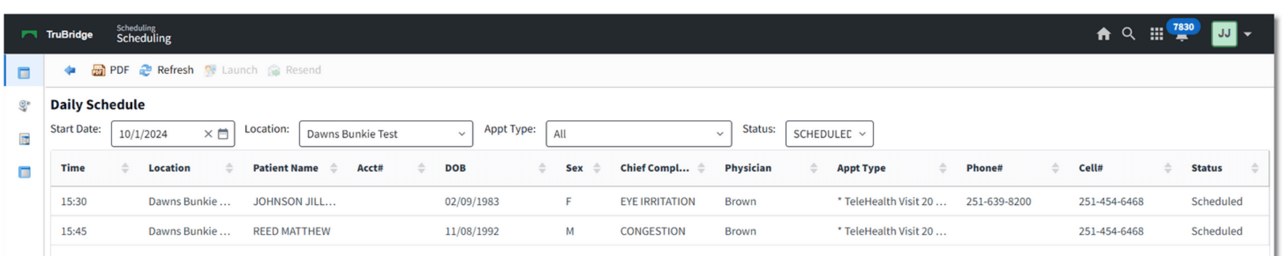
Appointment notifications will be sent 20 minutes prior to the scheduled appointment time and will remain active 20 minutes after the appointment duration ends.

If a patient needs a link resent to their cell phone and/or email, this may be done from the Daily Schedule 48 screen.

8.4 Launching Appointments

TeleHealth appointments will be launched from the Daily Schedule screen and will be notated with an asterisk in front of the Appointment Type.

Select **Web Client** > **Scheduling** > **Daily Sched**



Daily Schedule - TeleHealth Appointments

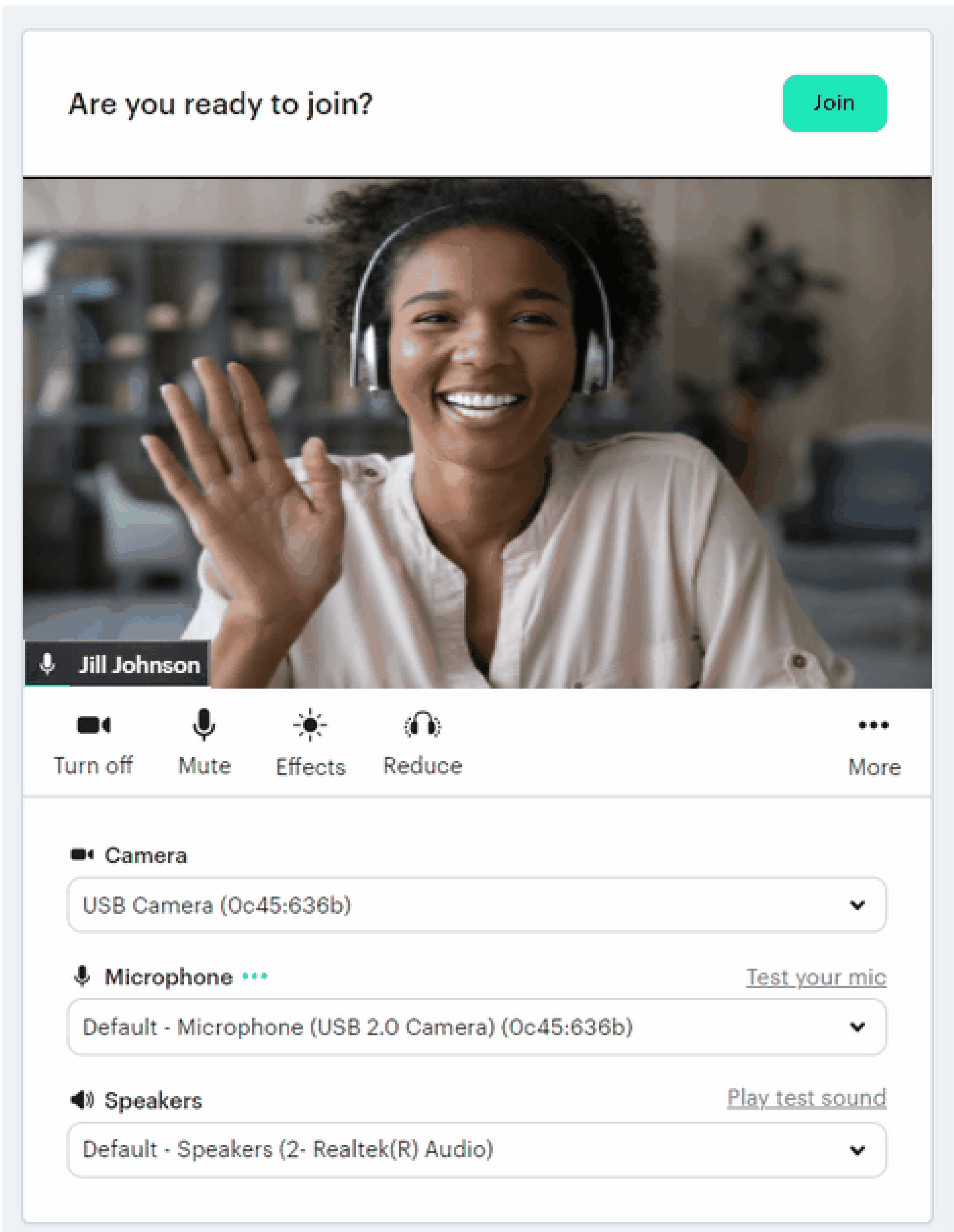
If needing to resend a link to the patient, select the TeleHealth appointment and then select 

Resend on the action bar.

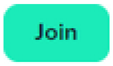
NOTE: *The Resend option will only be available when there is an appointment within the expected time and the patient has not received a message.*

When ready to start an appointment, select the TeleHealth appointment and then select 

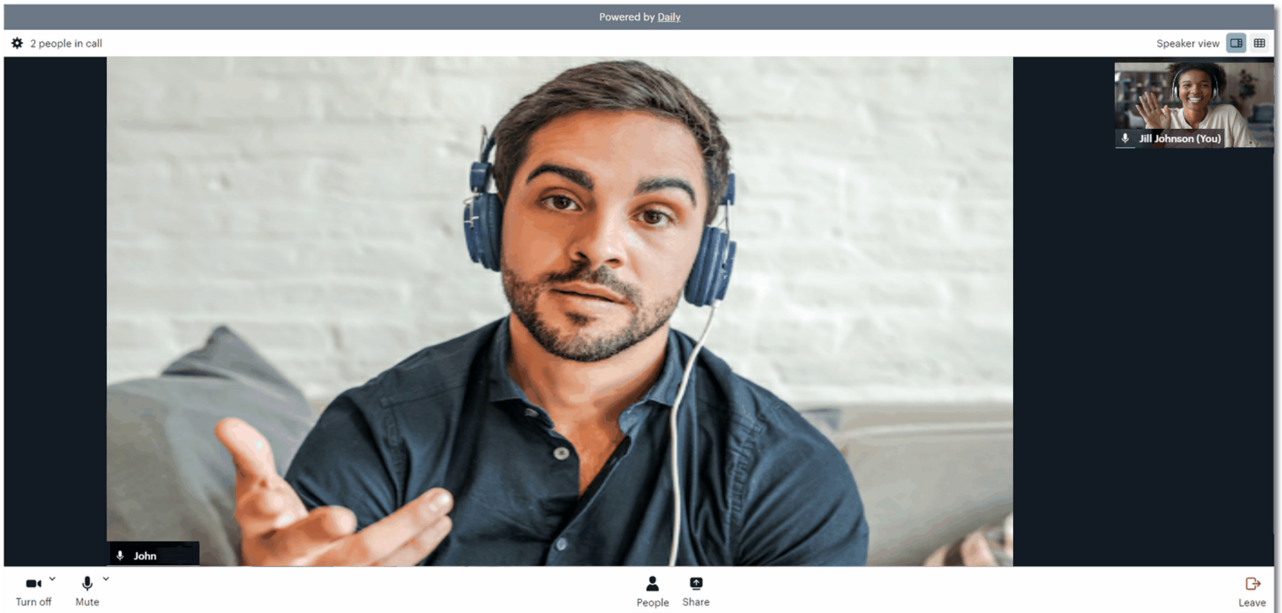
Launch on the action bar to be taken to a virtual room. Patient's will use the link sent to their cell phone and/or email to be taken to the virtual room.



Virtual Room - TeleHealth

Select 

Join to see and speak to the patient.



TeleHealth Appointment

Chapter 9 Registering and Linking Accounts

9.1 Overview

Scheduled patients will need to have a visit created prior to their appointment. Once the visit is created, the visit may be linked to the appointment. This may be done automatically based on table setup, from the Appointment Detail screen or from the Event screen while scheduling

9.2 Linking from Appointment Detail

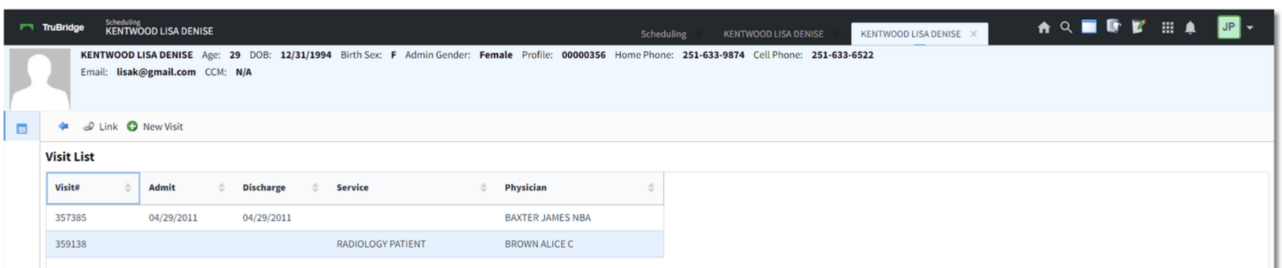
To link a registered account to the schedule from the Appointment Detail screen, begin by double-clicking the patient's name from the grid. Then select the Appointment Type from the list and then select 

Link.

A listing of visits will then display by admit date in reverse chronological order. Select the appropriate account number from the listing and select 

Link.

Select **Web Client** > **Scheduling** > **Select Appointment** > **Link**



Schedule - Visit List

Once the account is linked to the appointment, the account number will display in the Schedule Detail.

NOTE: *Multiple appointments may be linked to a single visit.*

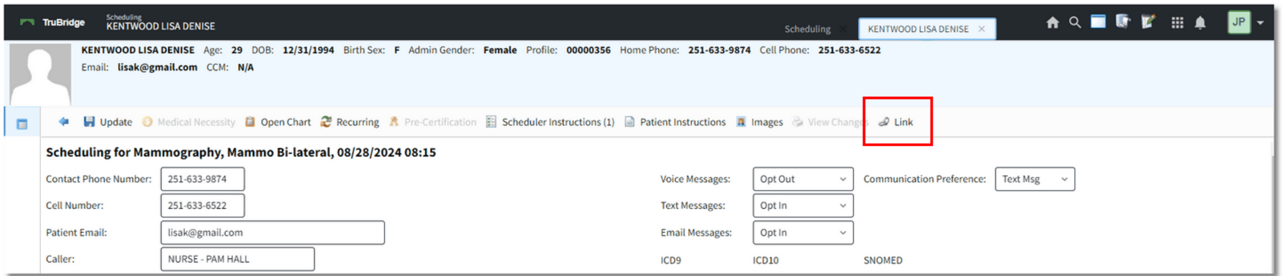
9.3 Linking from Event Screen

To link a registered account to the schedule from the Event screen during the scheduling process, select 

Link on the action bar. This option will not be available during the initial scheduling process if there are no visits on the patient's profile. In most cases, this will happen when creating a brand new profile.

The Link option will only be available during the initial scheduling of the patient. If the Event screen is accessed after the appointment has been scheduled, the Link option will not be available. The appointment will need to be linked from the Appointment Detail screen at that point. .

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Schedule** > **Select Patient** > **Select Task** > **Schedule**



Event Screen

A listing of visits will then display. Select the appropriate account number from the listing and select 

Link. Then proceed with scheduling the patient.

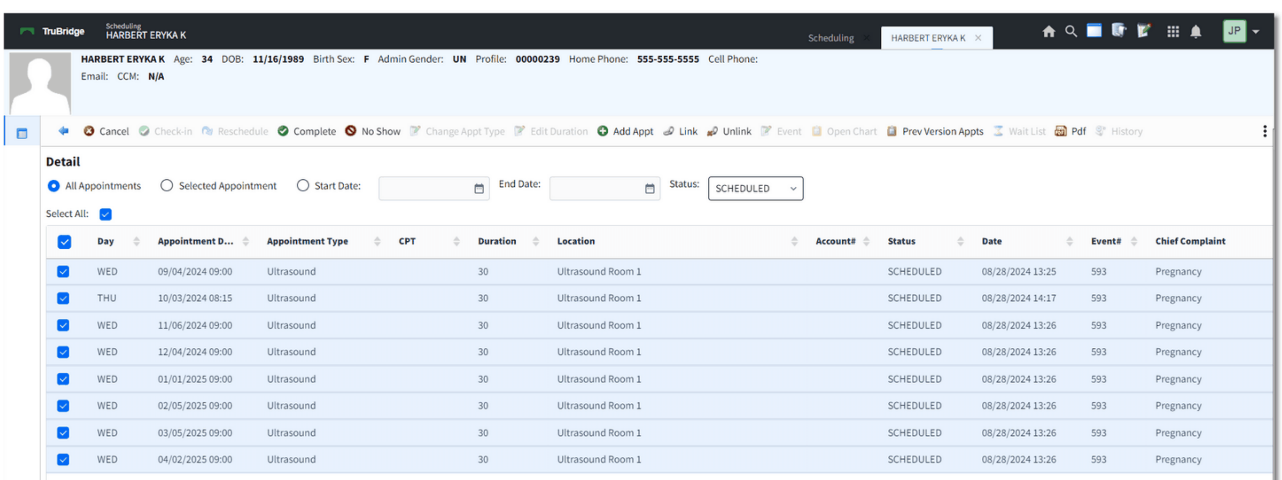
NOTE: *Multiple appointments may be linked to a single visit.*

9.4 Linking Multiple Appointments to a Visit

To link multiple appointments to a visit, from the Appointment Detail screen, select the **All Appointments** radio button and then select each appointment to be linked. Once all appointments are selected, select 

Link from the action bar.

Select **Web Client** > **Scheduling** > **Select Appointment** > **Select All Appointments Radio Button**



Appointment Detail - Multiple Appointment Link

Select the visit to link all the selected appointments, then select 

Link from the action bar.

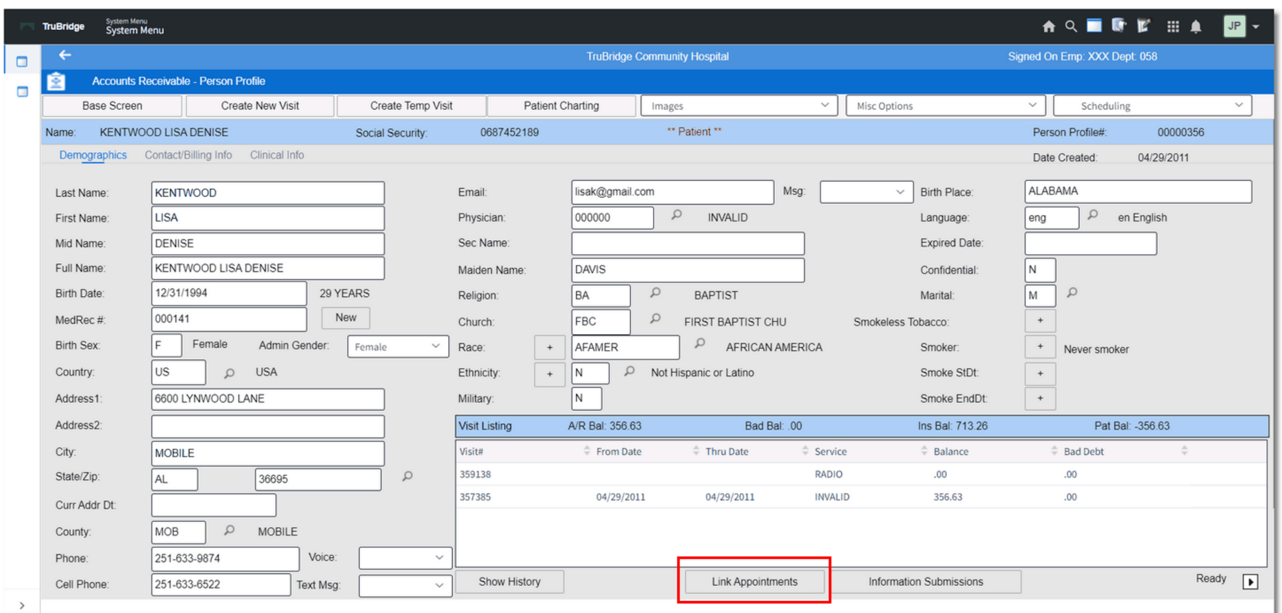
After Link has been selected, the screen will return to the Appointment Detail screen. The selected visit will now display for the selected appointments.

9.5 Linking from Patient Profile

To link a patient visit to a scheduled appointment from within the Patient Profile, select 

Link Appointments on the Demographics tab.

Select **Web Client** > **System Menu** > **Hospital Base Menu** > **Profile Listing** > **Select Patient** > **Demographics Tab**



Patient Profile - Link Appointments

A listing of available appointments will then display. Select the appointment and then select 

Link from the action bar to select the appropriate patient visit.

A listing of available patient visits will then display. Select the appropriate patient visit and then select 

Link from the action bar to finish linking the patient visit to the appointment.

Once the visit is linked to the appointment, the patient visit number will display in the Account Number column. If the incorrect patient visit was linked to the appointment, select 

Unlink from the action bar and the patient visit will be unlinked from the appointment.

9.6 POC Whiteboard

Facilities using the POC Whiteboard have the ability to display scheduled patients on their departments' Whiteboard once the appointment is linked to a patient's account. In order for this to work, the following table maintenance is required:

- Web Client > Tables > Control > Department
  - o Select Department > Page 2 > Whiteboard Type field = E

- Hospital Base Menu > Master Selection > Business Office Tables > Business Office Table Maintenance > Exam Rooms
  - o Create a user defined location for the department using the Whiteboard

NOTE: *The above table maintenance will need to be done for the patient's scheduled location's department. The location department is linked in the Location table.*

After the patient has been scheduled and linked to a visit, the patient will automatically display on the department's POC Whiteboard.

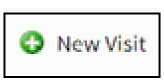
NOTE: *If the appointment is changed to a status of Cancel or No Show, the patient will automatically be removed from the POC Whiteboard.*

9.7 Registering a New Visit

To register a new visit for a scheduled appointment, begin by double-clicking the patient's name from the grid.

Then, select 

Link from the action bar.

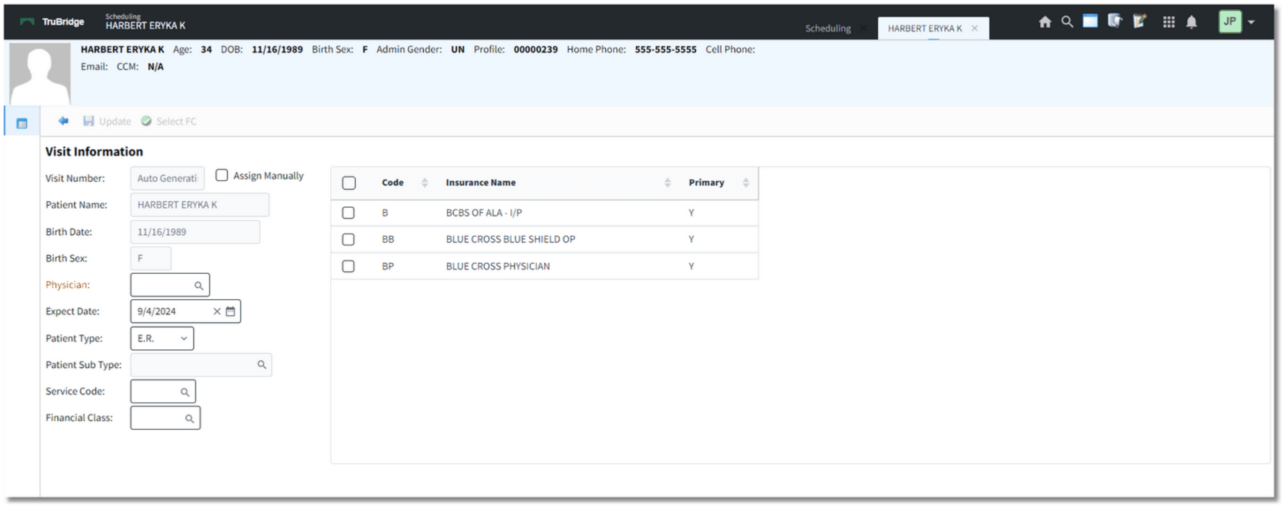
Select 

New Visit from the action bar.

NOTE: *In order to select the New Visit option, users will need the Census control behavior Allow Registration set to "Allow" within Identity Management.*

The Visit Information screen will then display. This screen will allow information that is related to the visit to be entered.

Select **Web Client** > **Scheduling** > **Select Appointment** > **Link** > **<u>New Visit</u>**



Visit Information

Below is an explanation of each field:

- **Visit Number**: The visit number will default to Auto Generating. Selecting the **Assign Manually** check-box to the right of the Visit Number field will make the Visit Number field accessible so that the visit number may be manually assigned.

- **Patient Name**: This is the patient's name as it appears on the Patient Profile screen.

- **Birth Date**: This is the patient's date of birth as it appears on the Patient Profile screen.

- **Sex**: This is the patient's gender as it appears on the Patient Profile screen.

- **Physician**: The user must select the attending physician from the physician look-up. If a physician is not selected, the prompt "Can't save. Please enter a valid Physician number" will display.

- **Expect Date:** The expect date will default to the patient's scheduled appointment date that was selected from the scheduling grid. This date may be changed if necessary.

- **Patient Type**: The user must select the stay type from the drop-down menu.

- **Patient Sub Type**: Select the sub type from the drop-down list, if applicable.

- **Service Code**: The service code field may be edited by entering the desired service code or selecting the **magnifying glass** icon to open a look-up menu for service codes. Double-click the desired service code to add it to the Visit Information screen.

- **Financial Class**: Select the appropriate insurance coverage(s) from the insurance list that displays on the right, then choose 

Select FC from the action bar. If the desired insurance coverage is not listed or there are not any insurance coverages listed, select the **magnifying**

glass icon in the Financial Class field to access the Insurance List screen. Highlight the desired insurance coverage(s) and select **OK**.

Select  **Update** once all of the information has been gathered. The system will then create a Temporary Visit and the Guarantor listed on the patient's profile will copy over as the Guarantor for the visit.

NOTE: *When the system creates the Temporary Visit, it will appear on the Exceptions Report if services were rendered. If the Temporary Visit has a zero dollar balance, it will appear on the Incomplete Register report.*

The visit that was just created will then be linked to the patient's appointment.

9.8 Auto Created Visits

Patient visits may be auto created when they are scheduled for an appointment. The visit will automatically be linked to the appointment and the Expect Date on the visit will be the date the appointment was scheduled for. The insurance selected when creating the appointment will copy over to the visit from the Event screen as well. The type of visit that is created is determined by the Location of where the patient is being scheduled. Table maintenance is needed in order to use this functionality. Please refer to the General Control 34, Personnel 25 and Locations 18 sections under the Table Maintenance chapter for further information.

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 the **Auto Create Visit** field in the General Control table to enable this functionality.*

If an appointment marked as Canceled or a No Show, the visit will be unlinked from the appointment.

NOTE: *These visits may then be deleted with the Pre-Admit Delete Report.*

If the appointment is rescheduled, the Expect Date on the visit will be updated to the new rescheduled date.

Clinic Locations

Auto created visits for locations that have been marked as a Clinic Location in the Personnel or Location tables will not have the admit date/time auto-populated. The admit date/time will populate once the patient has been Checked-In.

Chapter 10 Appointment Detail

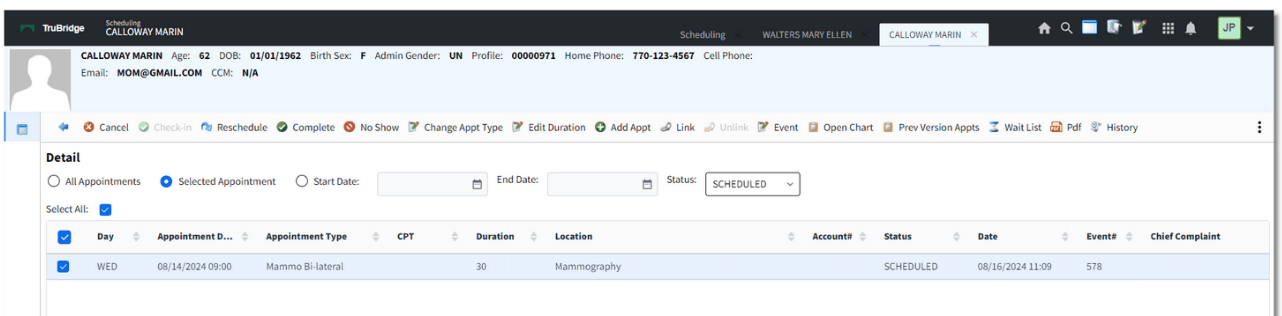
10.1 Overview

The Appointment Detail screen will show the appointment day, date and time, appointment type, CPT, duration, location, account number and status of each appointment that has been scheduled for a patient. If a registered account has been linked to a scheduled appointment, it will also display.

10.2 Action Bar Options

When a scheduled patient is selected from the grid, the display will default to Selected Appointment. This may be changed to All Appointments to see all appointments that have been scheduled for the patient. The status will default to the status of the appointment selected from the grid. A date range may be entered in the Start Date and End Date fields to display scheduled appointments within the date range. The Select All option will allow all appointments displayed on the screen to automatically be selected. Selecting an appointment from the list, or selecting **Select All**, will allow any of the options from the action bar to be selected as desired.

Select **Web Client** > **Scheduling** > **<u>Select Appointment</u>**



Appointment Detail

Below is an explanation of each option on the action bar:

- **Cancel:** This option may be selected if the patient cancels their appointment. This option is also available from the scheduling grid.

NOTE: *If "Remove insurance claim @ Cancel or No Show" is selected in the [General Control](34) Table and the appointment is marked as Canceled, all insurance claims will be removed from the patient's account.*

- **Check-In:** This option will only be available if the scheduled patient has an account linked to it. Select this option to change the patient's status to Checked-In. The appointment will display with a  **green mark** on the scheduling grid to notate the patient has arrived. Please refer to the [Check-In for Clinics](87) section of this chapter for more information on the check-in process for clinics utilizing TruBridge Provider EHR.

NOTE: *Once the Check-In option is selected, it will change to Reverse Check-In. Select* ***Reverse Check-In*** *if the Check-In option was selected in error. If Reverse Check-In is selected, the green check mark will be removed on the scheduling grid and the patient's appointment will return to its previous status.*

- **Reschedule:** Select this option to reschedule the patient's appointment. For more information on how to reschedule, see the Rescheduling 101 section of this user guide.

- **Complete:** Select this option once the patient has completed the scheduled visit. This option is also available from the scheduling grid.

- **No Show:** Select this option if the patient is a no show for the scheduled appointment. This option is also available from the scheduling grid.

NOTE: *If "Remove insurance claim @ Cancel or No Show" is selected in the General Control* 34 *Table and the appointment is marked as No Show, all insurance claims will be removed from the patient's account.*

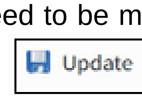
NOTE: *When multiple appointments have been selected for a status change that requires a reason code, once a reason code is selected, a prompt will display, "This reason code will apply to all applicable appointments. Continue?" If Yes is selected, the reason code will be applied to all selected appointments. If No is selected, TruBridge EHR will return to the Appointment Detail screen and the reason code will not be applied to the selected visits*.

- **Change Appt Type:** This option may be selected to change the type of appointment that has already been scheduled for the patient. Once selected, a listing of available tasks for the selected resource will display.

- **Edit Duration:** Select this option to change the duration of the task set in the Task/Procedure table.

- **Add Appointment:** This option may be selected to schedule another appointment for the patient. Once selected, the scheduling grid will display to begin scheduling a new appointment.

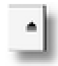
- **Link/Unlink:** This option may be selected to link an appointment to a registered patient's account or to unlink an appointment from a registered patient's account. For more information on how to link an account, please refer to the Registering and Linking Accounts 79 section of this user guide.

- **Event:** This option may be selected if changes need to be made to the scheduled appointment. If any changes are made on the event screen, select  **Update** once done.

- **Open Chart:** This option may be selected to view the patient's virtual chart.

- **Previous Version Appts:** This option may be selected to view any of the patient's previous appointments scheduled in the clinic's Appointment Scheduling or in Enterprise Wide Scheduling. Please refer to the Previous Version Appointments 88 section of this user guide for more information on this option.

- **Wait List:** This option may be selected to place the patient on the Waiting List. Please refer to the Wait List 104 section of this user guide for more information on this option.

NOTE: *Depending on the size of the computer screen, not all options on the action bar will display. If the do not display, they will be housed in the*  ***eject*** *option. Select this option to display the rest of the action bar options.*

- **PDF:** This option is for viewing and printing in report format the information that is displayed in the Appointment Detail screen. This will allow the appointment(s) to be printed and given to the patient, if requested. The report will display Patient Name, Date of Birth, Week Day of the Appointment, Appointment Date and Time, Appointment Type, Resource, Resource Address, Resource Phone Number and Status of the appointment.

NOTE: *The appointment time will display in standard time regardless of the display settings for the schedule.*

- **History:** This option will show the progression of an appointment from the date and time it was scheduled to the time it is completed. Please refer to the History 90 section of this user guide for more information.

- **Scheduler Instructions:** This option is also available on the patient's Event screen. Please refer to the Instructions 71 section of this user guide for more information.

- **Patient Instructions:** This option will allow any Patient Instructions to be displayed. This option is also available on the patient's Event screen. Please refer to the Instructions 71 section of this user guide for more information

- **Images:** Select this option to view or add images to the patient's appointment. Please refer to the Attaching Images 72 section of this user guide for more information.

- **Edit Resources:** Select this option if needing to add or remove resources from the appointment.

10.3 Check-In for Clinics

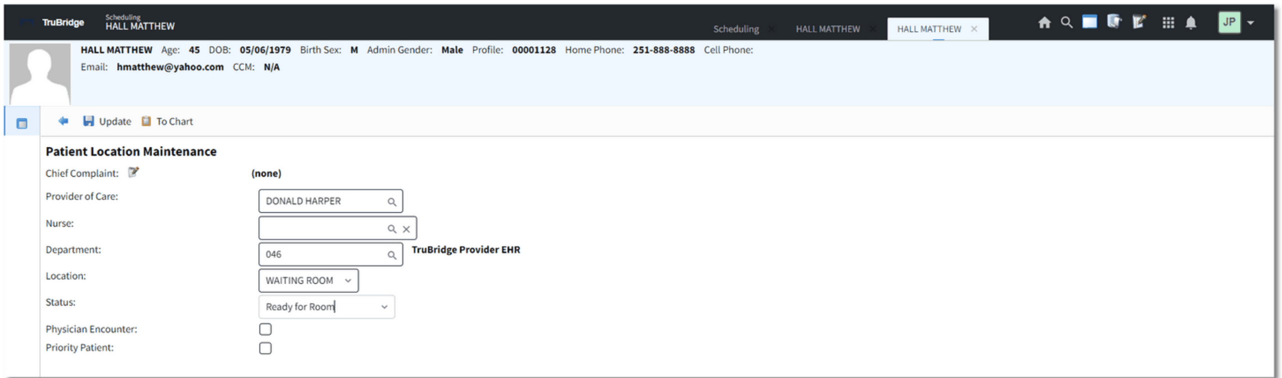
The Check-In option will function differently for clinic locations utilizing TruBridge Provider EHR. The Check-In option will be used to place the patient onto the Clinic Tracking Board to notify medical staff of when the patient has arrived for their appointment. This option is also available from the daily and weekly views on the scheduling grid.

This option will only be available if the scheduled patient has a registered clinic account linked to it and the location of the appointment is marked as a Clinic Location in the Locations 18 or Personnel 25 tables. For more information on how to link an account, please see the Registering and Linking Accounts 79 section of this user guide.

Once 

Check-In is selected, the Patient Location Maintenance screen will display.

Select **Web Client** > **Scheduling** > **Select Appointment** > **<u>Check-In</u>**



Patient Location Maintenance

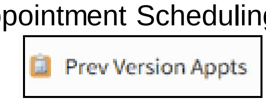
The Provider of Care will pull from the linked account and the Department will default to the department the user is logged in to (typically, this will already be the clinic department number).

Select the **Location** drop-down and select **Waiting Room**. Then select the **Status** drop-down and select **Ready for Room**. Select  **Update** to then place the patient on the Clinic Tracking Board and exit back to the Scheduling application.

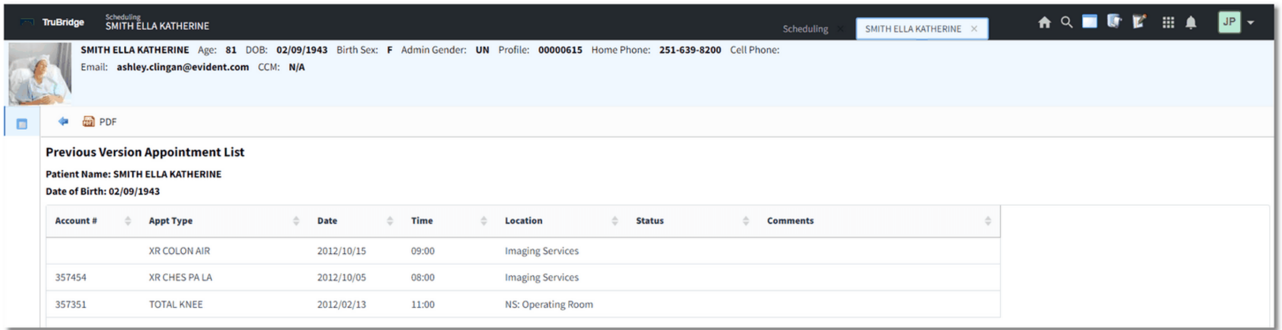
A  **green mark** will appear next to the patient's name on the scheduling grid once the Check-In process has been completed.

NOTE: *Once the Check-In option is selected, it will change to Reverse Check-In. Select **Reverse Check-In** if the Check-In option was selected in error. For clinic locations, Reverse Check-In will remove the patient's appointment from the Clinic Tracking Board. It will also remove the green mark on the scheduling grid and move the patient's appointment to its previous status.*

10.4 Previous Version Appointments

To view all previous appointments scheduled in either the clinic's Appointment Scheduling option or through Enterprise Wide Scheduling may be viewed by selecting  **Previous Version Appointments**. This view only screen will first list any appointments scheduled in Enterprise Wide Scheduling and will then list appointments scheduled through Appointment Scheduling with the most recent appointment listed first. If the scheduled appointment was linked to an account in Enterprise Wide Scheduling, the account number will display in the first column next to the appointment type; otherwise, the account number column will be blank. Selecting the  **PDF** option from the action bar will display the listed appointments in a PDF report format.

Select **Web Client** > **Scheduling** > **Select Appointment** > **Previous Version Appts**



Previous Version Appointment List

Below is an explanation of each column:

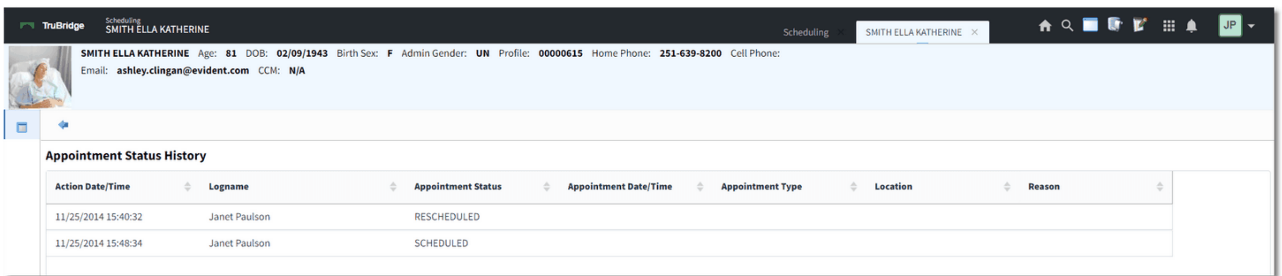
- **Account #:** The account number that is linked to the scheduled appointment for the patient. This will only display if the account was linked through Enterprise Wide Scheduling, otherwise this column will be blank.
- **Appt Type:** The type of appointment that was scheduled for the patient
- **Date:** The date of the scheduled appointment for the patient.
- **Time:** The time of the scheduled appointment for the patient.
- **Location:** The location of the scheduled appointment for the patient.
- **Status:** The status of the scheduled appointment for the patient. This may display either Complete, Canceled, No Show or Discontinued.
- **Comments:** Any comments that may have been entered for the scheduled appointment for the patient

10.5 History

To display the actions taken on the appointment select 

History to view the Appointment Status History screen. It will log the date and time a change is made to the status of the appointment along with the user who made the change. Other information that is gathered is the Appointment Type, Location and Reason Code. This screen is only viewable per scheduled appointment.

Select **Web Client** > **Scheduling** > **Select Appointment** > **History**



Appointment Status History

10.6 Auto Charging

Charges may automatically post to a patient's account that is scheduled for a group task or for a task with associated tasks. To begin this process, table maintenance must be done. For group tasks, the task being scheduled must be set as "Group" in the Tasks/Procedures 4 table. Then the items associated with the group task must be set to "Charge at Complete". See the Items 12 section for information on how to do this.

In order for the charges to post to the patient's account, the scheduled visit must be linked to an account. See the Registering and Linking Appointments 79 section for information on how to do this.

When the patient is present for their appointment, they must then be Checked-In. After the patient is done with their appointment, the scheduled visit must then be marked as Complete. See the Action Bar Options 47 section for information on the Check-In and Complete options.

Once the scheduled visit is marked as Complete, the items associated with the group task will then be created and posted to the patient's account. The issuing department for the charges will be the Owner Department for the group task in the Tasks/Procedures table. The service date for the charges will be the patient's appointment date.

NOTE: *If a charge is applied to a patient's account in error, the charge will need to be removed manually.*

Chapter 11 Scheduling Block

11.1 Overview

This section will cover how to "block off" or reserve times from the scheduling grid without having to go in to table maintenance. This feature is used when it is necessary to reserve time for group tasks, meetings, conferences, vacation, etc.

11.2 Scheduling Block

To begin the schedule block process, first select a time slot from the scheduling grid and then select 

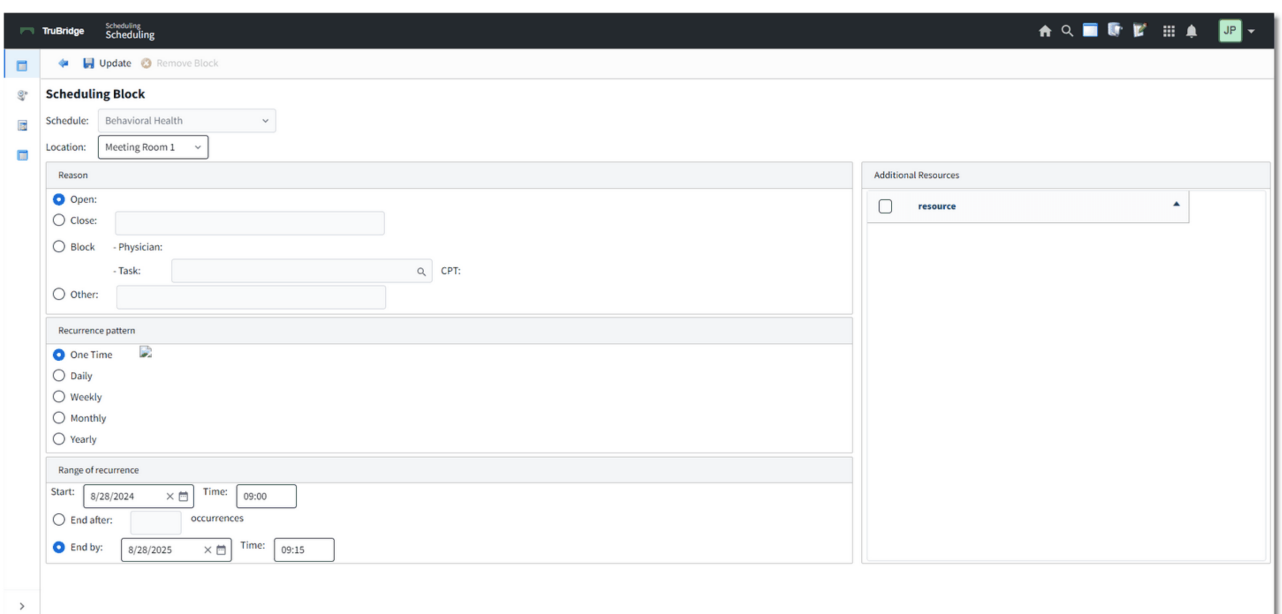
Block from the action bar.

NOTE: *In order to have access to the Block option, the user must have the Create/Edit Block behavior control set to allow in Identity Management.*

The Scheduling Block screen will then display. The Schedule and Location that was selected from the grid will display at the top of the screen. Select the drop-down menu(s) to change the Schedule and/or Location if needed. The Reason, Recurrence Pattern and Range of Recurrence sections will need to be completed depending on the type of block and how often/long the block will occur.

NOTE: *Additional resources may only be added to a block from the Locations* 18 *and Personnel* 25 *tables.*

Select **Web Client** > **Scheduling** > **Select Date and Time** > **Block**



Scheduling Block

Below is an explanation of each section:

- **Reason:** Select the reason why the schedule is being blocked.
  - **Open:** Select this option to allow a resource to be open for a day and time that is typically closed.
  - **Close:** Select this option if the resource will be closed. If selected, free-text the reason for the closure.
  - **Block:** Select this option to block the schedule for a physician or for a group task.
    - **Physician:** Reserved for future programming.
    - **Task:** Select this option to block the schedule for a group task. If selected, use the lookup to select the group task set up in the tables. If a task has a CPT associated with it, it will display at the end of the line.
  - **Other:** Select this option if the schedule block will be for any other reason. If selected, free-text the reason for the closure.
  - **Assigned Color:** Double-click on this option to assign a color to the closure, to appear on the scheduling grid. This option will only be available when Close or Other is selected.

NOTE: *The reason that is selected will appear on the scheduling grid.*

- **Recurrence Pattern:** Select how often the schedule block will occur.
  - **One Time:** Select this option if the scheduling block will be occurring one time.
  - **Daily:** Select this option if the scheduling block will be occurring on a daily basis. If this option is selected, more options will become available.
    - **Every __ day(s):** Select this option if the scheduling block will be occurring every set number of days. If selected, populate the number of day(s) the block will recur.
    - **Every weekday:** Select this option if the scheduling block will be occurring Monday thru Friday.
  - **Weekly:** Select this option if the scheduling block will be occurring on certain days of the week, every week. If selected, the days of the week will become available to be selected.
  - **Monthly:** Select this option if the scheduling block will be occurring on certain days of the month. If this option is selected, more options will become available.
    - **Day __ of every __ month(s):** Select this option if the scheduling block will be occurring on a certain date each month. If selected, populate the day of the month, followed by number of month(s) the block will recur.
    - **The __ ____ of every __ month(s):** Select this option if the scheduling block will be occurring on a certain week and/or day each month. If selected, use the drop downs to select how often (first Monday of the month, last weekday of the month etc.) followed by the number of month(s) the block will recur.
  - **Yearly:** Select this option if the scheduling block will be occurring on the same day of the year every year. If this option is selected, more options will become available.
    - **Every __ __:** Select this option if the scheduling block will occur on the same day of the month every year. If this option is selected, use the drop down to select the month, followed by the day of the month.
    - **The __ __ of __:** Select this option if the scheduling block will occur on week and/or day each year. If selected, use the drop downs to select how often (last Thursday of the month, first weekend of the month etc.) and then select the month the block will recur each year.

- **Range of Recurrence:** Select how long the schedule block will last.
  - **Start/Time:** Select the date and time the schedule block will start. This will default to what was selected from the scheduling grid.
  - **Block Duration (Hours/Minutes):** Populate the hours and minutes to be blocked on the scheduling grid.
  - **No End Date:** Select this option if the schedule block has no end date.
  - **End after __ occurrences:** Select this option if the schedule block will end after so many occurrences. If selected, populate how many times the schedule block will occur.
  - **End by/Time:** Select this option if the schedule block has a certain date and time it will end.

After all the information for the schedule block has been entered, select 

Update from the action bar. To remove a recurring schedule block, select 

Remove Block from the action bar.

NOTE: *If there are conflicts with another scheduling block or a scheduled patient, a warning will appear alerting the scheduler. If the user has the Override Scheduling Blocks behavior control set to "Allow" in Identity Management, the system will allow the user to continue to block the schedule.*

The block will display on the scheduling grid along with the reason selected from the Scheduling Block screen. If additional changes need to be made to the schedule block, double-click it on the scheduling grid to display the Scheduling Block screen.

NOTE: *If needing to remove a block from the scheduling grid that has additional resources attached to it, a message will display stating that this occurrence, or all future occurrences, will be deleted for all additional resources.*

11.3 Group Task

A group task allows multiple patient appointments to be assigned to the group task's corresponding grid cell and allows these appointments to be managed by the user from the Group Task screen and from the patient's Appointment Detail screen.

NOTE: *The Group Task's occurrence does follow the max simultaneous and max per day guidelines defined for each task resource.*

Once a task/procedure has been setup as a group task in the Tasks/Procedures 4 table, the group task may be created on the scheduling grid and then patients may be assigned.

To begin creating a group task, select a cell for the date and time for the group task to begin and then select 

Block from the action bar.

The Scheduling Block screen will then display. In the Reason section, select the **Block** option and then use the Task lookup to select the task/procedure that has been set as group task in the tables. The Recurrence pattern and Range of recurrence will also need to be set up. Once all the information has been populated, select 

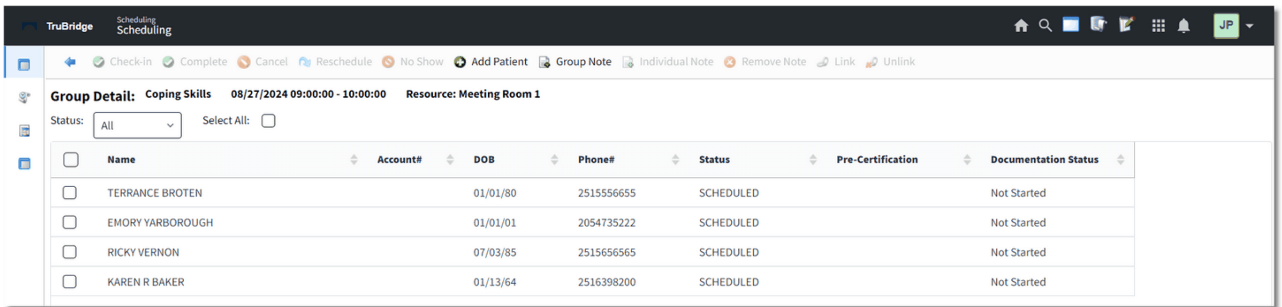
Update from the action bar.

The group task will then appear on the scheduling grid with the description of the task.

Group Task Patient Scheduling

To start scheduling patients in the group task, double-click on the group task from the scheduling grid.

Select **Web Client** > **Scheduling** > **Select Group Task**



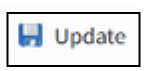
Group Detail Screen

The Group Detail screen will then display. Select 

Add Patient from the action bar.

NOTE: *If the maximum number of patients has been scheduled for the group task, the Add Patient option will not be available. However, if the user has the Behavior Control "Overbook Appointments" set to allow, this will allow the maximum number of patients set for the task to be ignored.*

The Patient Search screen will then display and will allow the patient to be searched, then scheduled.

The Event screen will display to fill out information regarding the patient's appointment. Once all information has been entered, select 

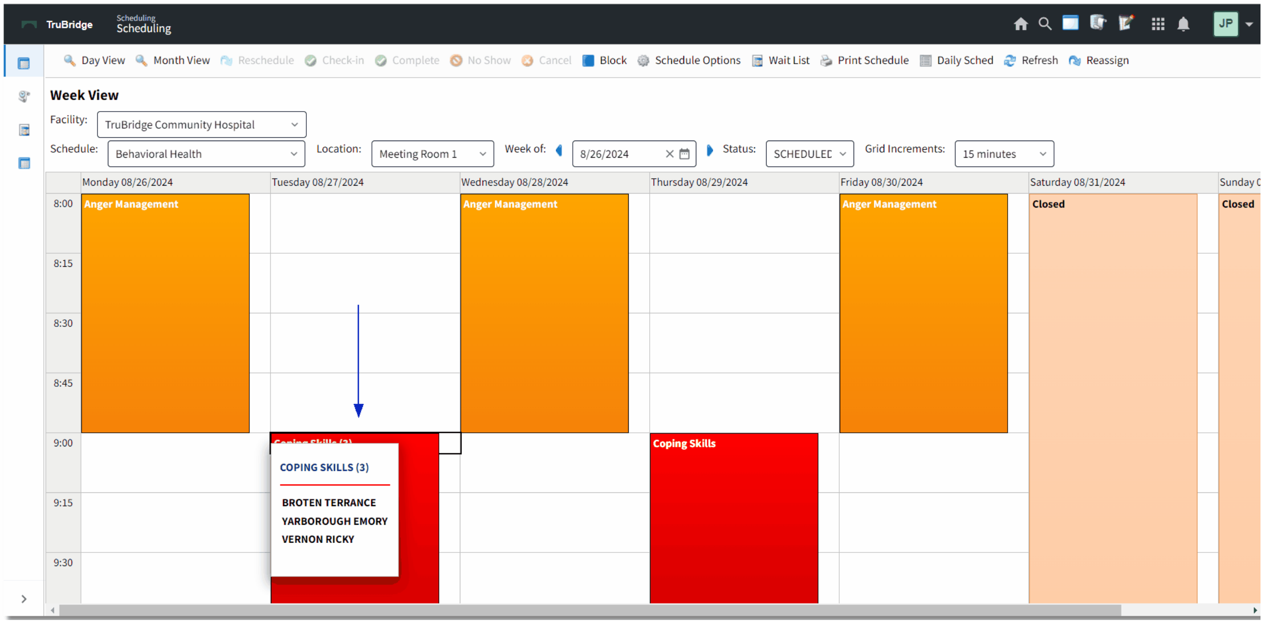
Update.

The patient will then be listed on the Group Detail screen. Every patient scheduled for the selected group task will be listed on this screen.

As patients are scheduled for a group task, the number of patients will display next to the description of the task and in any corresponding blocked off cells. Hovering over the group task will display a pop-up. Depending on table setup, it will either display the number of patients scheduled for the group task, or it will display the names of the patients scheduled for the group task.

NOTE: *To display the names of the patients scheduled for the group task, 'Hover: List Patient Names in Group Task' will need to be selected in the General Control table. Please see the* *General Control* 34 *section of this user guide for more information.*

Select **Web Client** > **Scheduling**



Group Task - Scheduling Grid

Group Task Recurring Scheduling

To schedule patients for recurring group tasks, begin by selecting the group task on the scheduling grid.

The Group Detail screen will then display. Select 

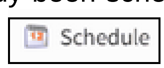
Add Patient from the action bar.

NOTE: *If the maximum number of patients has been scheduled for the group task, the Add Patient option will not be available. However, if the user has the Behavior Control "Overbook Appointments" set to allow, this will allow them to exceed the maximum number of patients set for the task.*

The Patient Search screen will then display and will allow the patient to be searched, then scheduled.

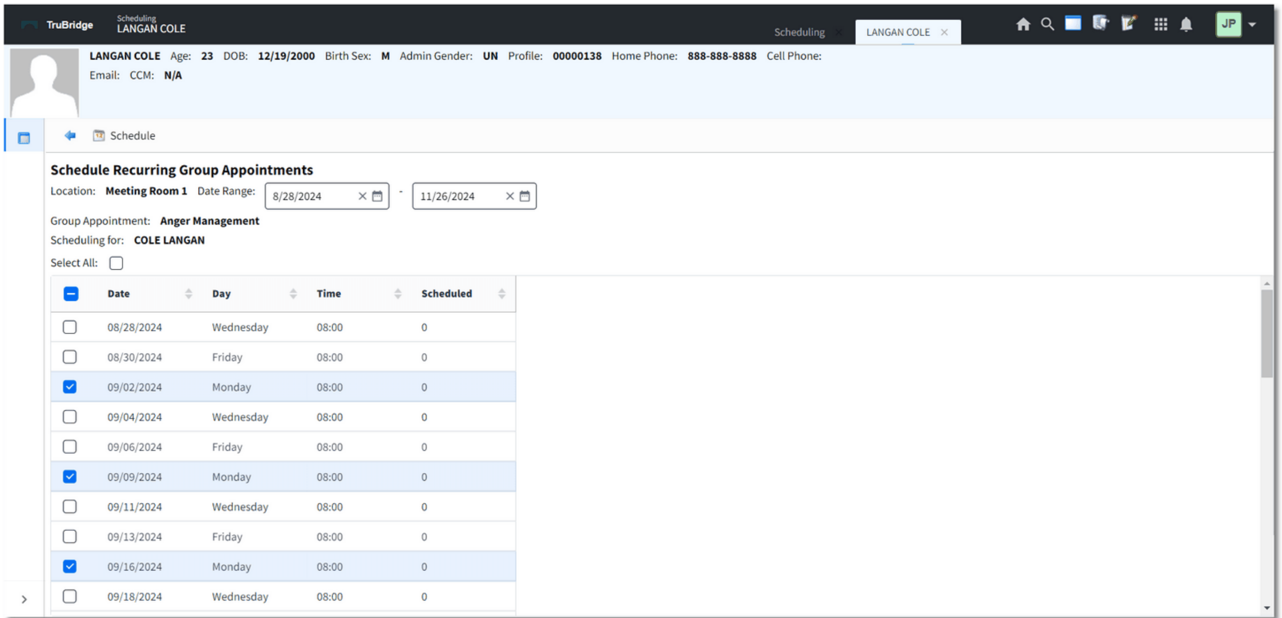
Select 

Recurring from the action bar.

The Schedule Recurring Group Appointments screen will then display with a list of scheduled occurrences for the group task. Select each date for which the patient needs to be scheduled. The Scheduled column will reflect the number of patients that have already been scheduled for the group task on that specific date. Once all dates have been selected, select 

Schedule from the action bar.

Select **Web Client** > **Scheduling** > **Select Group Task** > **Add Patient** > **Select Patient** > **Recurring**



Group Task - Schedule Recurring Groups Appointments

TruBridge EHR will then return to the Scheduling screen to continue with entering in the patient information.

If there is a conflict with the scheduling of any group appointment, a warning will appear stating "Warning: There is a conflict with scheduling on XX/XX/XXXX XX:XX. Do you wish to schedule anyway?" If **Yes** is selected, and the user has the Behavior Controls "Override Scheduling Blocks" and "Overbook Appointments" set to allow in Identity Management, then TruBridge EHR will continue to schedule the appointment for the date and time of the conflict. If **No** is selected, or the user does not have the Behavior Controls "Override Scheduling Blocks" and "Overbook Appointments" in Identity Management, the appointment will be listed at a status of "UNSCHEDULED."

NOTE: *For information on how to schedule appointments at the Unscheduled status, please refer to the* *Scheduling Recurring Appointments* 57 *section of this user guide.*

Conflicts may occur for any of the following reasons:

- The Patient Profile already has a scheduled appointment for the same date and time as the recurring appointment.
- The Max Per Day and/or Max Simultaneous settings in the Locations and Personnel tables have been exceeded for the selected resource, due to previously scheduled appointments.
- Schedule Blocks and Alternate Closures are on the scheduling grid for the date and time for which the appointment is intended to be scheduled.

Group Note

Within the Group Detail screen, select **Group Note** to add documentation to the patients listed on the screen. A Group Note may only be added if the patient's appointment has been linked to a visit.

If a PhysDoc template has been preloaded in the Tasks/Procedures 4 table for the group task, once **Group Note** is selected, the preloaded template will automatically be selected and display a preview on the screen. If not wanting to use the preloaded PhysDoc template, the template may be unchecked and then another may be selected. If a template has not been preloaded, the PhysDoc template list will display and another template may be selected to use.

Once the desired template has been selected, select **Insert** on the action bar. TruBridge EHR will then display the template on the screen to be completed.

After the template has been documented, select **Insert** on the action bar. TruBridge EHR will then display the information that was documented on the PhysDoc template. On this screen, any additional information that needs to be added may be free texted anywhere on the screen.

Once all information has been documented, select **Save** on the action bar. Selecting **Save** will allow the information to be saved and further editing of the Group Note may be done at any time, if needed. If the Group Note is no longer needed, select **Delete** on the action bar. To exit the Group Note, select the **back arrow** to return to the Group Detail screen.

NOTE: *The Delete option will not be available until Save has been selected.*

Once a Group Note has been added to a patient, the Remove Note option on the action bar will be available to remove a Group Note. If information needs to be added or removed from the Group Note, select Group Note on the action bar.

For more information about PhysDoc templates, please refer to the Physician Documentation user guide.

Individual Note

Within the Group Detail screen, select Individual Note **Individual Note** to add documentation to a selected patient account on the screen. An Individual Note may only be added if the patient's appointment has been linked to a visit.

If a Documentation document has been preloaded in the Individual Note field in the Tasks/Procedures 4 table for the group task, once Individual Note is selected, the preloaded template will automatically display in the Pending Documents section of the Document List screen. If not wanting to use the preloaded Documentation document, select the document and then select Remove **Remove** from the action bar. Another document may be selected from the Search Documents section of the screen to use for the Individual Note. If a document has not been preloaded, the Document List will display and another document may be selected to use.

Once the desired document has been selected and displays in the Pending Documents column, select Process **Process** on the action bar. TruBridge EHR will then display the document on the screen to be completed. To pull in the Group Note, one of two options may be followed:

- Select the Group Note section preference, the Group Note Selection screen will display to select the Group Note. Once selected, select Insert **Insert** on the action bar and continue documentation. For section preference setup, please see the Documentation Setup user guide.
- If a section preference is not set up, Group Note may be inserted via Charting Options. For more information regarding Charting Options, please see the Documentation Functionality user guide.

Once documentation is complete, select Update **Update** on the action bar. TruBridge EHR will then display the information that was documented on the ClinDoc template.

Once all information has been documented, select the **back arrow** on the action bar. The information will then be saved and further editing of the Individual Note may be done at any time, if needed. If the Individual Note is no longer needed, select Retract **Retract** on the action bar. To exit the Individual Note, select the **back arrow** to return to the Group Detail screen.

The status of the Individual Note will display on the Group Detail screen in the Documentation Status column. The status' are as follows:

- **Not Started:** The user has not started the Individual Note.
- **Unsigned:** The user has started the Individual Note, but has not signed.
- **Signed:** The user has signed and is finished with documentation.

For more information about Documentation documents, please refer to the Documentation Functionality and Documentation Setup user guide.

Group Detail

The Group Detail screen will display all appointments scheduled for the group task. To view the Group Detail screen, double-click the group task from the grid.

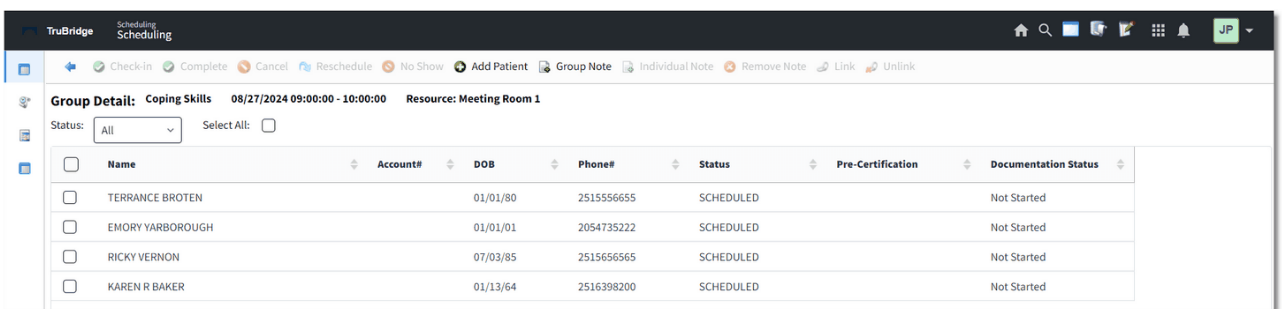
The Group Detail screen will initially display appointments at any status (i.e. Scheduled, No Show, Canceled etc.). To delimit which status displays on the screen, select the **Status** drop-down and choose the appointment status to be viewed.

The status for a patient's appointment may also be changed from this screen by selecting Check-In, Complete, Cancel, Reschedule or No Show on the action bar.

The Select All option will allow all appointments displayed on the screen to be selected. Selecting an appointment from the list, or selecting **Select All**, will allow any of the options from the action bar to be selected as desired.

NOTE: *If all patient's are rescheduled for a group task, or reassigned to another resource, a prompt will display, "There are no appointments in the group task block. Do you wish tot remove the block?" Selecting **Yes** will remove the group task block from the scheduling grid. Selecting **No** will leave the group task block on the scheduling grid.*

Select **Web Client** > **Scheduling** > **<u>Select Group Task</u>**



Group Task - Group Detail

11.4 Editing Blocks

Changes may be made to a block's single occurrence, or to a block's series, when set as a recurring block. The block may be edited or removed entirely, depending on what needs to be done. To begin editing a block, select an existing one from the scheduling grid and then select **Block** from the action bar.

TruBridge EHR will then prompt, "This is a recurring block. Do you want to open only this occurrence or the series?" Select **Open this occurrence** to make changes to the block for the selected day and time, or select **Open the series** to make changes to the entire block from the date selected forward.

Once a selection has been made, select **OK** from the action bar to continue, or select **Cancel** to return to the scheduling grid.

On the Scheduling Block screen, changes may only be made to the Recurrence Pattern section if the block is being edited for the series. The Range of Recurrence section may be edited if the block is for an occurrence or series, but only the begin and end times may be edited.

If needing to remove a block for an occurrence or series, it may be done by selecting **Remove Block** from the action bar. However, it may only be removed if there are no patients at the Scheduled or Check-In status for the block.

Once all changes have been made, select **Update** on the action bar.

NOTE: *If appointments have been scheduled for the block being edited and it is moved to another day and/or time, the appointment day and/or time will remain unchanged.*

Chapter 12 Rescheduling an Appointment

12.1 Overview

This section will cover how to reschedule an appointment for a patient from the scheduling grid. The process for rescheduling will allow the user to select the appointment from the grid and then "copy and paste" the appointment to the new time and resource.

12.2 Rescheduling

To reschedule a patient, select the patient's name from the scheduling grid and then select 

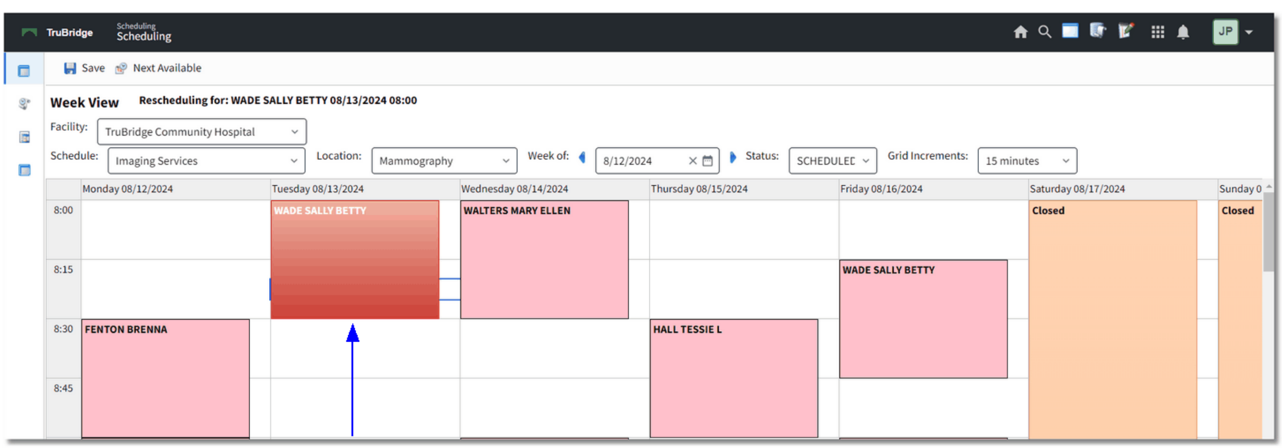
Reschedule from the action bar.

NOTE: *The Reschedule option will not be available to be selected until a patient is selected from the grid. If Reschedule is selected from the Day View schedule, the screen will then change to the Week View to select the new date and time.*

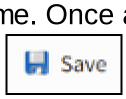
NOTE: *If the Location has any of the 'Prompt For Reason' options selected in the Locations table, the Select Reason Code screen may display. If this screen displays, select a reason as to why the appointment is being rescheduled.*

The patient's slot on the grid will turn red indicating it has been selected for rescheduling. The top of the screen will also indicate the patient that has been selected for rescheduling.

Select **Web Client** > **Scheduling** > **Select Appointment** > **<u>Reschedule</u>**



Rescheduling

The Schedule, resource and date may be changed as necessary to reschedule for the right place and time. Once a new date and time have been decided, select the appropriate slot on the grid, and select 

Save from the action bar.

NOTE: *If the resource needs to be changed, the Locations drop-down will only include resources that are associated with the task being rescheduled.*

NOTE: *If a new cell is not selected and **Save** is selected, the patient will remain in the original appointment slot. If a destination cell is chosen, and the rescheduling process needs to be canceled, the original slot must be selected. Select **Save** from the action bar.*

The original scheduled slot on the grid will be emptied, and the patient will now display on the grid in the new scheduled date and time.

Next Available

Anytime the Reschedule option is selected, the Next Available option will be enabled. This will display a listing of all available resources, dates and times for the task that is currently scheduled.

To begin using the Next Available option, select the patient from the grid and then select 

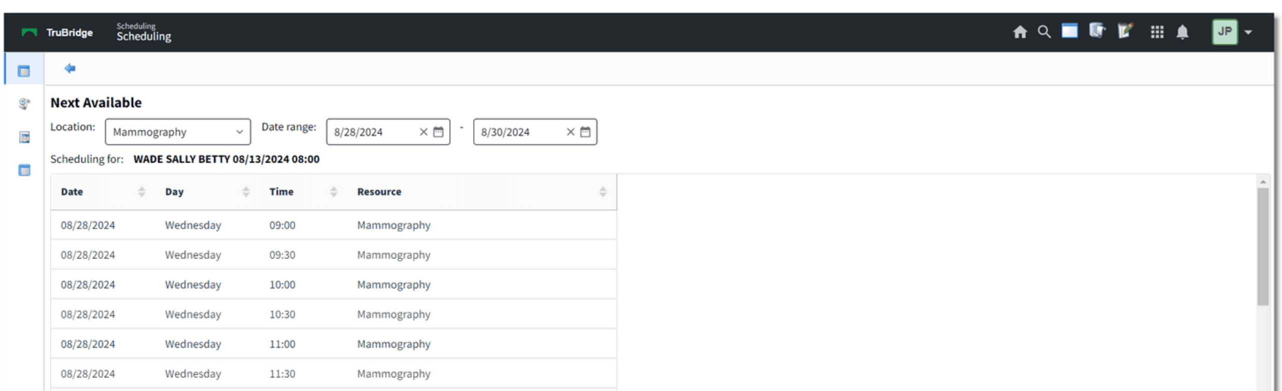
Reschedule.

The patient's slot on the grid will turn red to indicate it has been selected for rescheduling. The top of the screen will also indicate the patient that has been selected for rescheduling.

Select 

Next Available to display a listing of available resources, dates and times for the selected task. If no availability is found, a message will display saying "No match for the criteria."

Select **Web Client** > **Scheduling** > **Select Appointment** > **Reschedule** > **<u>Next Available</u>**



Reschedule - Next Available

Double-click the new resource, date and time once it has been determined.

NOTE: *To stop the reschedule process, select the **back arrow** from the action bar without making a selection. Then select the **Save** option from the action bar.*

Once selected, the appointment will be scheduled and the previous time slot will be released from the grid. The scheduler will then be taken back to the scheduling grid.

Chapter 13 Wait List

13.1 Overview

This section will cover how to place patients on the waiting list. The waiting list will be used for patients who are wanting an appointment on a day other than the one the patient has been scheduled. The wait list will allow the patient to be prioritized and given a preference of which day(s) and time(s) work best. Patients may also be placed on the waiting list for task or physician blocks. Once a patient is scheduled from the waiting list, that patient will automatically be removed from the waiting list. Only locations for which the user has been given access will be viewable from the wait list.

13.2 Wait List Procedures

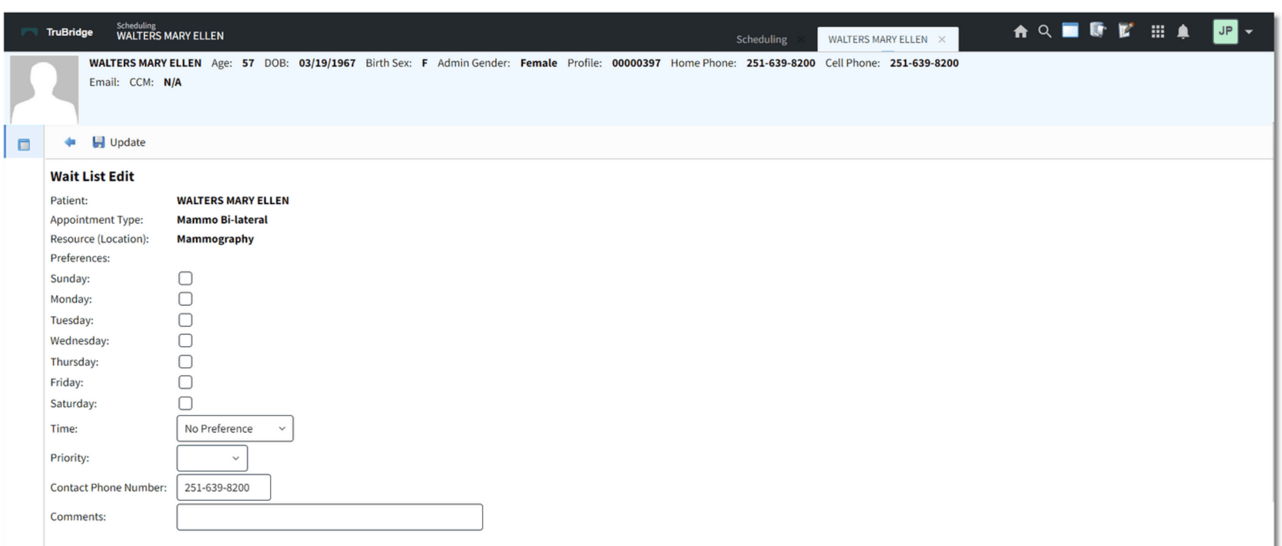
A patient cannot be placed on the wait until they have been placed on the schedule. To place a patient on the wait list, select the patient from the scheduling grid.

From the Appointment Detail screen, select 

Wait List from the action bar.

The Wait List Edit screen will then display. The patient name, appointment type and resource will display first. Preferences may then be selected per the patient's request.

Select **Web Client** > **Scheduling** > **Select Appointment** > **<u>Wait List</u>**



Wait List Edit

Below is an explanation of each Preference:

- **Days of the Week:** Select the days of the week the patient would like to try and get an appointment.

- **Time:** Select if the patient would prefer an appointment in the AM, PM or No Preference.

- **Priority:** Select if the patient's priority is Low, Medium or High. Selecting a priority will determine where the patient will be placed on the Wait List.

- **Contact Phone Number:** The patient's contact phone number will pull from what was entered for the appointment. This may be over-keyed.

- **Comments:** This is a free text field that will allow comments to be populated and will appear on the Wait List.

***NOTE:** It is not required that every field in the Preferences section be selected. If it is left blank, the patient will still display on the wait list.*

Once all Preferences have been selected, select 

Update from the action bar.

13.3 Rescheduling from the Wait List

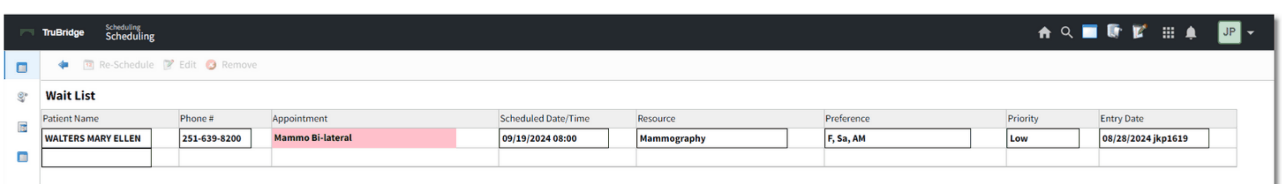
To view a listing of patients on the wait list for a certain location, date and time, first select the appropriate resource from the Location drop down. Then select a date and time on the scheduling grid, and select 

Wait List from the action bar.

The Wait List screen will then display a listing of scheduled patients with tasks associated with the selected resource based on preferences previously selected. If a color has been assigned to a task in the Task/Procedures table, the assigned color will display in the Appointment column next to each patient.

***NOTE:** If no preferences were selected for a patient, the patient will display on this screen.*

Select **Web Client** > **Scheduling** > **Select Resource, Date and Time** > **<u>Wait List</u>**



Wait List

To reschedule a patient, select the patient's name from the Wait List and select 

Re-Schedule from the action bar.

The screen will then return to the scheduling grid to choose a date and time. For more information on how to Reschedule, see the Rescheduling 101 section of this user guide.

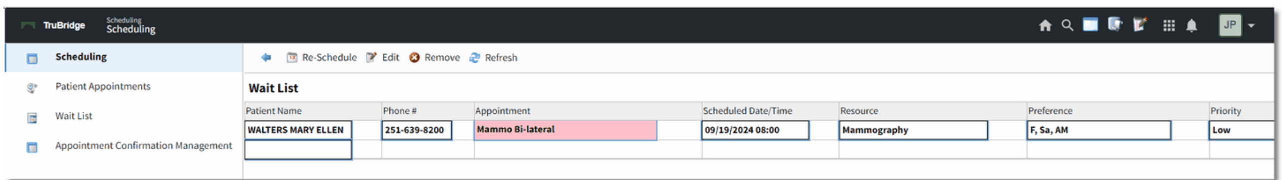
13.4 Viewing All Patients on the Wait List

To view a listing of patients on the wait list, select 

Wait List from the navigation panel.

Viewing the Wait List through this option will show all patients, all resources, and all dates that have been wait listed. Patients with a high priority will be listed first, followed by medium then low.

Select **Web Client** > **Scheduling** > **<u>Wait List</u>**



Wait List

If changes are needed to the patient's preferences for the wait list, select the patient from the Wait List and then select 

Edit from the action bar.

NOTE: *Patient's may be rescheduled from this screen by selecting **Re-Schedule** from the action bar.*

Chapter 14 Lookup of Scheduled Appointments

14.1 Overview

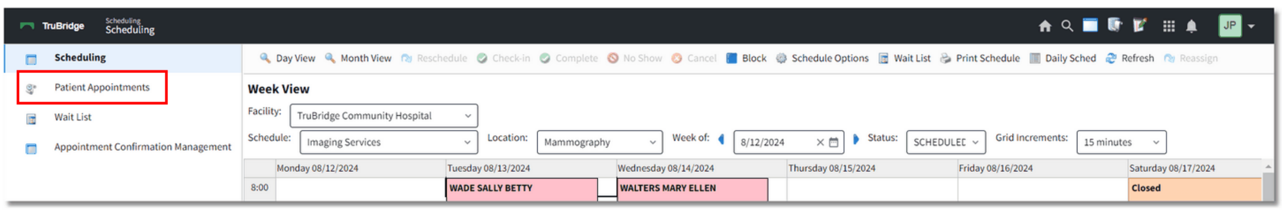
This section will cover how to look up a patient's scheduled appointment as well as any past appointments that have been scheduled.

14.2 Appointment Lookup

To begin searching for scheduled appointments, select 

Patient Appointments from the navigation panel.

Select **Web Client** > **<u>Scheduling</u>**



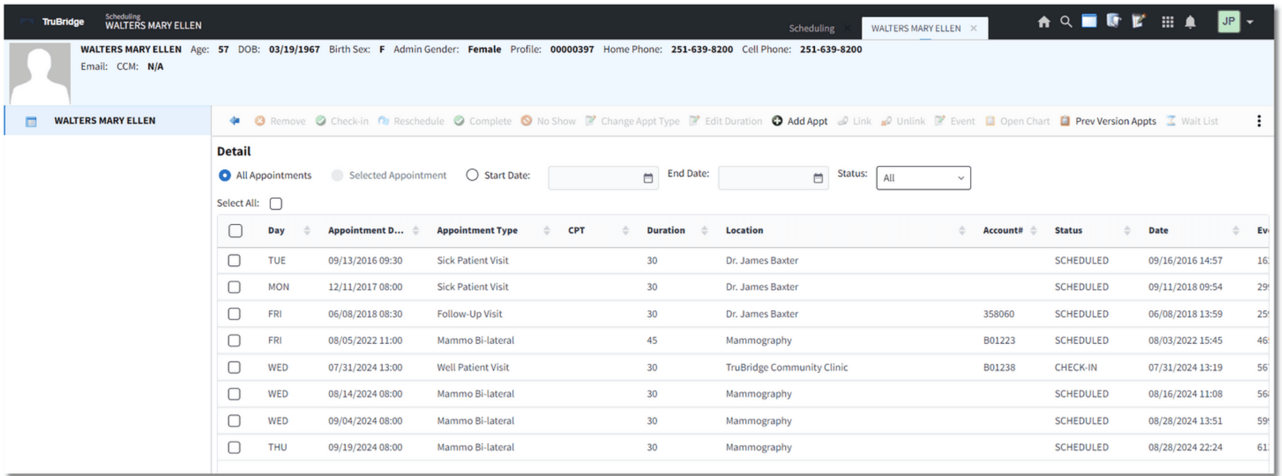
Appointment Lookup

Search for the patient by date of birth or by name. Double-click on the patient's name to view a listing of scheduled appointments.

A listing of all previous appointments the patient has had will be displayed. A date may be entered in the Starting Date option to display scheduled appointments from that date forward. The status drop-down will default to All but may be changed to further delimit the listing of appointments. Selecting one of the appointments from the list will allow any of the options from the action bar to be selected as desired.

NOTE: *The Selected Appointment option will only be available when selecting the patient from the scheduling grid.*

Select **Web Client** > **Scheduling** > **Patient Appointments** > **Select Patient**



Appointment Lookup - Appointment Detail

Chapter 15 Print Reports

15.1 Overview

This section will cover the reports for Patient Scheduling. These reports will display all information associated with a scheduled task.

15.2 Appointment Reason Report

The Appointment Reason Report will display appointments that have been changed along with a Reason Code within a specified date range.

How to Print

1. Select **Report Dashboard**

2. Select **Appointment Reason Report**

3. Select **Run**

4. On the Appointment Reason Report screen, select the following options:

- **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Login will be available for selection.)
- **Appointment Date Range:** Select the appointment date range to display appointments with a Reason Code.
- **Appointment Status:** Select one of the following status' to display appointments within the date range of the selected status:
  - **All**
  - **Cancel**
  - **No Show**
  - **Rescheduled**
- **Resource:** This is a free text field that will allow a Resource to be populated so that only appointments with a Reason Code for that Resource will display.
- **Sections To Exclude:** One of the following may be selected to exclude specific sections from displaying on the report.
  - **Exclude Summary By Reason**
  - **Exclude Grand Totals By Reason**
  - **Exclude Summary By Resource**
  - **Exclude Grand Totals By Resource**
- **Level of Detail:** Select the level of detail.
  - **Detail**
  - **Summary**
- **Include Cover Sheet**: Select this option to include a Cover Sheet with the report.
- **Safe Mode**: Select this option if the report would not build due to bad data being in a field. If the report has bad data, a message will appear stating that it should be run using Safe Mode.

- If selected, Safe Mode will replace all of the bad characters with a **?**. This will allow the intended report to generate. The bad data may then be seen and can be corrected at the account level.
- **Output Format**: Use the drop-down box to select one of the following Report Format options:
  - **PDF**
  - **XML**
  - **CSV**
  - **HTML**
  - **MAPLIST**
  - **TXT**

4. Select **Run Report** on the action bar to display the report in the selected output format.

Description and Usage

The Appointment Reason Report will display appointments that have changed along with a Reason Code within a specified date range. The report will detail the Appointment Date/Time, Reason, Status, Resource, Physician and Patient Name plus summary sections by Reason and Resource.

Appointment Reason Report

08/29/2024 TruBridge Community Hospital 1
09:51 Appointment Reason Report appointment_reason.template
Document was generated by the Thrive EHR Software
08/01/2024 - 08/29/2024

Appointment Date/Time	Reason	Status	Resource	Physician	Patient Name	
08/14/2024 08:00:00	OTHER	RESCHEDULED	Mammography		WALTERS MARY ELLEN	
WEDNESDAY - 08/14/2024	Reason		Canceled	No Show	Rescheduled	Total
	OTHER				1	1
Appointment Date/Time	Reason	Status	Resource	Physician	Patient Name	
08/27/2024 09:00:00	OTHER	CANCELED	Meeting Room 1		BAKER KAREN R	
TUESDAY - 08/27/2024	Reason		Canceled	No Show	Rescheduled	Total
	OTHER		1			1
Summary By Reason						
	Reason		Canceled	No Show	Rescheduled	Total
	OTHER		1		1	2
Total:			1	0	1	2
Summary By Resource						
	Resource		Canceled	No Show	Rescheduled	Total
	Mammography				1	1
	Meeting Room 1		1			1
Total:			1	0	1	2

Listed below is an explanation of each column.

- **Appointment Date/Time:** The appointment date and time that has a Reason Code.

- **Reason:** The selected Reason Code for the appointment change.

- **Status:** The status of the appointment. This will display either Canceled, No Show or Rescheduled.

- **Resource:** The location from where the appointment was scheduled.

- **Physician:** The physician entered for the patient's appointment.

- **Patient Name:** The patient's name that is on the Patient Profile.

Summary By Reason

This section will give summary totals of all the appointments by Reason Code and Status within the selected date range.

Summary By Resource

This section will give summary totals of all the appointments by Resource and Status within the selected date range.

15.3 Limited Access by Resource

The Limited Access by Resource report will list, by resource (i.e. Location and Personnel), the login ID and name assigned on the Allow Access screen in the Locations and Personnel tables on the Patient Intake tab of Table Maintenance.

How to Print

1. Select **Report Dashboard**

2. Select **Limited Access by Resource**

3. Select **Run**

4. On the Limited Access by Resource screen, select the following options:
   - **Facility:** Select the desired Facility. (Only Facilities designated for access by that User Login will be available for selection.)
   - **Resource:** A resource (i.e. Location or Personnel) may be entered to display users assigned to a particular resource. Leave this field blank to display all resources.
   - **Login ID:** A users login ID may be entered to display all of the resources the login ID has been assigned to. Leave this field blank to display all user logins.
   - **Name:** A users first and last name may be entered to display all of the resources the name has been assigned to. Leave this field blank to display all user names.
     - **Include Cover Sheet**: Select this option to include a Cover Sheet with the report.
     - **Safe Mode**: Select this option if the report would not build due to bad data being in a field. If the report has bad data, a message will appear stating that it should be run using Safe Mode.
       - If selected, Safe Mode will replace all of the bad characters with a **?**. This will allow the intended report to generate. The bad data may then be viewed for correcting at the account level.

- **Output Format**: Use the drop-down box to select one of the following Report Format options:
  - **PDF**
  - **XML**
  - **CSV**
  - **HTML**
  - **MAPLIST**
  - **TXT**
- **Page Orientation:** Use the drop-down box to select one of the following page orientations:
  - **Portrait**
  - **Landscape**

4. Select **Run Report** on the action bar to display the report in the selected output format.

Description and Usage

The Limited Access by Resource report will list, by resource (i.e. Location and Personnel), the login ID and name assigned on the Allow Access screen in the Locations and Personnel tables on the Patient Intake tab of Table Maintenance. This will help supervisors determine which users have or have not been assigned to a resource, as well as, which users have been disabled in TruBridge EHR.

Limited Access by Resource

08/29/2024 TruBridge Community Hospital 1
09:59 Limited Access by Resource scheduling_access_by_resource.template
Document was generated by the Thrive EHR Software

Resource	Login ID	Name	Disabled Date
Cat Scan			
DANIEL A MCCALISTER			
DR BROOKE BISCHOFF	dcj53155	COLE DAVID D	
DR DAVID MITCHEM			
Dr. David Coleman			
Dr. James Baxter			
Dr. James Baxter (clinic)			
Dr. Michael Peterson			
Exam Room 1			
IMAGING SERVICES			

Listed below is an explanation of each column:

- **Resource:** The resource set up in either the Locations or Personnel table.
- **Login ID:** The user login ID added to the resource in the Allow Access screen of the Locations or Personnel table.
- **Name:** The user name added to the resource in the Allow Access screen of the Locations or Personnel table.
- **Disabled Date:** The date the user login ID was disabled in Identity Management. If the information for this column is blank, the user is still active in TruBridge EHR. If a date displays in this column, the user is no longer active in TruBridge EHR and should then be removed from the Allow Access screen for the resource.

15.4 Precertification Report

The Precertification Report will display information from the Precertification screen of the patient's appointment.

How to Print

1. Select **Report Dashboard**

2. Select **Precertification Report**

3. Select **Run**

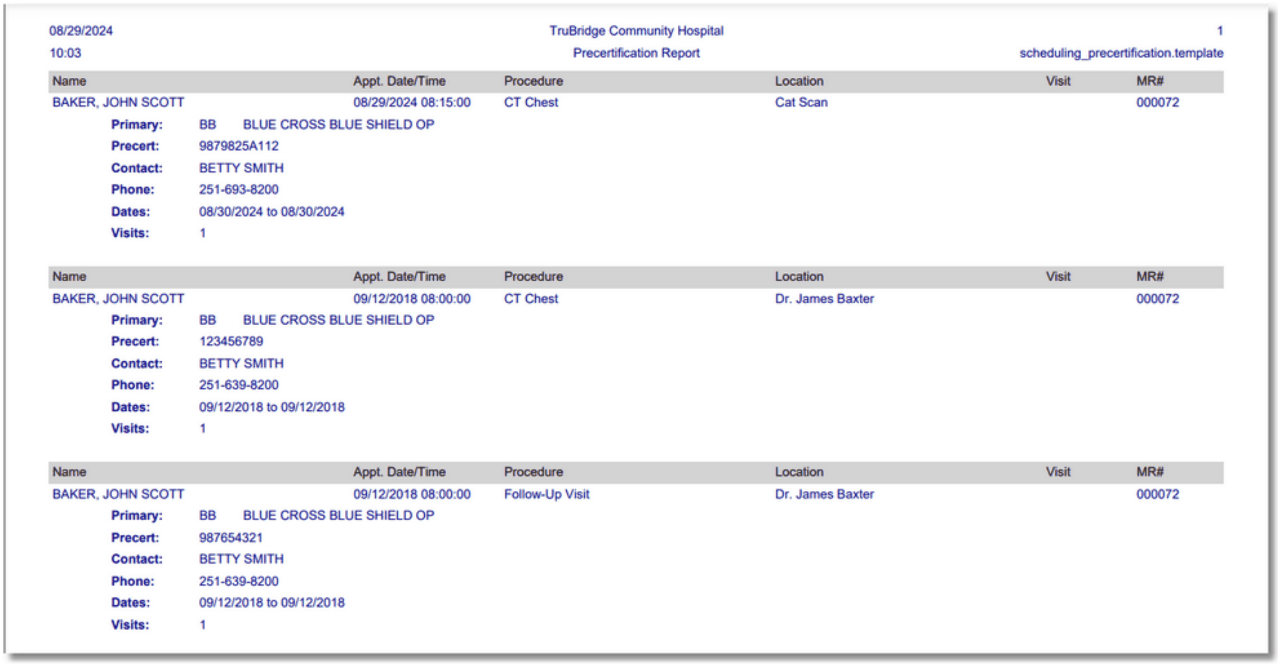
4. On the Precertification Report screen, select the following options:

- **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Login will be available for selection.)
- **Appointment Date Range**: Enter a date range for a listing of patients with appointments within the range requiring precertification information.
- **Include**: Select one of the following options:
  - **All**: Select this option to view all appointments with and without precertification information.
  - **Precertified:** Select this option to only view financial classes that are set to require precertification in the task table and that have the precertification number field filled out.
  - **Not Precertified:** Select this option to only view financial classes that are set to require precertification in the task table, but the precertification number field is not filled out.
- **Include Cover Sheet**: Select this option to include a Cover Sheet with the report.
- **Safe Mode**: Select this option if the report would not build due to bad data being in a field. If the report has bad data, a message will appear stating that it should be run using Safe Mode.
  - If selected, Safe Mode will replace all of the bad characters with a **?**. This will allow the intended report to generate. The bad data may then be seen and can be corrected at the account level.
- **Output Format**: Use the drop-down box to select one of the following Report Format options:
  - **PDF**
  - **XML**
  - **CSV**
  - **HTML**
  - **MAPLIST**
  - **TXT**

Description and Usage

The Precertification Report will display all appointments within a date range with tasks that require pre-certification information. This report will help determine if the necessary pre-certification information has been gathered and loaded on the Pre-Certification screen within Scheduling.

Precertification Report



08/29/2024		TruBridge Community Hospital			1
10:03		Precertification Report			scheduling_precertification.template

Name	Appt. Date/Time	Procedure	Location	Visit	MR#
BAKER, JOHN SCOTT	08/29/2024 08:15:00	CT Chest	Cat Scan		000072

Primary: BB BLUE CROSS BLUE SHIELD OP
Precert: 9879825A112
Contact: BETTY SMITH
Phone: 251-693-8200
Dates: 08/30/2024 to 08/30/2024
Visits: 1

Name	Appt. Date/Time	Procedure	Location	Visit	MR#
BAKER, JOHN SCOTT	09/12/2018 08:00:00	CT Chest	Dr. James Baxter		000072

Primary: BB BLUE CROSS BLUE SHIELD OP
Precert: 123456789
Contact: BETTY SMITH
Phone: 251-639-8200
Dates: 09/12/2018 to 09/12/2018
Visits: 1

Name	Appt. Date/Time	Procedure	Location	Visit	MR#
BAKER, JOHN SCOTT	09/12/2018 08:00:00	Follow-Up Visit	Dr. James Baxter		000072

Primary: BB BLUE CROSS BLUE SHIELD OP
Precert: 987654321
Contact: BETTY SMITH
Phone: 251-639-8200
Dates: 09/12/2018 to 09/12/2018
Visits: 1

Precertification Report

Listed below is an explanation of each column.

- **Name:** The patient's name associated with the appointment.
- **Appt. Date/Time:** The appointment date and time.
- **Procedure:** The task/procedure for which the appointment was scheduled.
- **Location:** The location of the appointment.
- **Visit:** The visit number linked to the appointment. If this is blank, a visit has not been linked.
- **MR#:** The patient's medical record number associated with the appointment.
- **Primary/Secondary/Tertiary:** The financial class requiring precertification information.
- **Precert:** The financial class' precertification number for the appointment.
- **Contact:** The person to contact regarding the precertification.
- **Phone:** The phone number of the contact person.
- **Dates:** The dates of the precertification.
- **Visits:** The number of allowed visits for the precertification.

15.5 Print Schedule

The Scheduling report may be printed for an individual resource or for a complete schedule with multiple resources. Any options selected for the report will stick based on the previous selections of the user.

How to Print

1. Select **Scheduling**

2. Select **Print Schedule** from the action bar.

3. Select **Run**

4. On the Print Report Screen, select the following options:
- **Schedule:** Select the schedule to be printed from the drop-down menu.
- **Status**: Select the status of the scheduled event(s) to print. The options for this are:
  - **All**
  - **Complete**
  - **Cancel**
  - **No Show**
  - **Scheduled**
- **Date:** Enter the beginning and end dates to print the schedule.
- **Sort:** Select **Chronological** to print the report in chronological order, or select **Alphabetical** to print the report is alphabetical order by the patients name.
- **Include Demographics:** Select this option to display the patients' age, primary insurance, visit number, stay type, medical record number and film number.
- **Include Chief Complaints:** Select this option to display the chief complaint entered on the event screen.
- **Include Comments:** Select this option to display any comments entered on the event screen.
- **Include Blocks**: Select this option to display any scheduled blocks on the report (i.e. Group Tasks). The blocks will display on the report with the description of the task in the Task column followed by the duration.
- **Include Closures:** Select this option to display any closures on the report (i.e. Lunch, Office Meetings etc.). The closures will display on the report with the description of the closure in the Task column followed by the duration.
- **Unlinked Only:** Select this option to only display appointments that are not linked to an account number.
- **Mask Patient Name:** Select this option to print the patient's first name and the initial of their last name. Example: John Smith would print as John S.
- **Suppress Patient Identifiers:** Select this option to suppress the patient's name, date of birth, sex and phone number from displaying on the report. The areas where this information would typically print, will be blank.
- **Page Break by Resource/Date:** Select this option to page break the report by resource and date. If this field is unchecked, the scheduled appointments will print, per resource, consecutively on one page.
- **Resources:** Select the resources to print for the selected schedule. To select multiple resources, press and hold the control key and then select each desired resource. The following options are also available from the action bar:

- **Select All:** Select this option to select all of the listed resources to print.
- **Clear Resource Filter**: Select this option to clear out all selected resources.

5. Select **PDF** or **CSV** on the action bar once all of the parameters have been selected and the report is ready to be printed.

Description and Usage

The Scheduling report may be printed for an individual resource or for a complete schedule with multiple resources. The report may include demographics if the scheduled event has been linked to an account and may also include any chief complaints or comments from each event. This report may be run for a single day or for a date range and will page break by resource.

Print Schedule - PDF

08/29/2024 10:10
Janet Paulson

Imaging Services

Facility: TruBridge Community Hospital
Schedule For: Mammography
Schedule Date: 08/12/2024 Monday

Time:	Patient Name:	DOB:	CPT:	Task:	Duration:	Physician:	Phone/Cell:	IMG
08:30	**BRENNA F**	12/30/1982		Mammo Bi-lateral	30 mins	**DONALD HARPER**	251-639-8200 / 251-639-8200	
	Age 41 Sex: F Prim Ins: BLUE CROSS BLUE SHIELD OP			Visit #: 359141	Stay Type: E.R.	MR#:	Film#:	
	Chief Complaint: 24623002 Z1231 Encounter for screening mammogram for malignant neoplasm of breast							
09:00	**MELANIE S**	03/29/1960		Mammo Bi-lateral	30 mins	**HARBISON JOSHUA**	251-639-8100	
	Age 64 Sex: F Prim Ins: PRIVATE PAY			Visit #: 003345	Stay Type: O/P	MR#: 000373	Film#:	
	Chief Complaint: 24623002 Z1231 Encounter for screening mammogram for malignant neoplasm of breast							
09:30	**SUSAN R**	05/08/1958		Mammo Bi-lateral	30 mins	**DONALD HARPER**	251-555-1684 / 251-654-1254	
	Age 66 Sex: M Prim Ins: BLUE CROSS BLUE SHIELD OP			Visit #: 356934	Stay Type: I/P	MR#:	Film#:	
	Chief Complaint: 24623002 Z1231 Encounter for screening mammogram for malignant neoplasm of breast							

Listed below is an explanation of each column.

- **Time:** This is the scheduled time of the event.
- **Patient Name:** This is the name of the patient who has the scheduled event.
- **DOB:** This is the date of birth that is on the patient's profile.
- **CPT:** This is the CPT code associated with the appointment.
- **Task:** This is the scheduled task for the event.
- **Duration:** This is the amount of time scheduled for the event.
- **Physician:** This is the physician whose name was entered on the Event screen.
- **Phone/Cell:** The first number that displays is the patient's phone number that was entered on the Event screen. The second number that may display is the patient's cell phone number that may be captured on the Event screen.

- **IMG:** An asterisk '*' will display in this column if there is an image attached to the patient's appointment. If an image has been deleted from a patient's appointment, an asterisk will not display.

The following will be included if Include Demographics is selected:

- **Age:** This is the patient's age that is loaded on the patient's profile.
- **Sex:** This is the gender that is on the patient's profile.
- **Primary Insurance:** This is the patient's primary insurance that is loaded on the Event screen.
- **Visit #:** This is the patient's visit number that is linked to the event. A visit number will not display if a visit has not been linked to the event.
- **Stay Type:** This is the patient's stay type that is linked to the event. The stay type will only show if the event has been linked to a visit.
- **MR#:** This is the patient's Medical Record number that is loaded on the patient's profile
- **Film #:** This is the patient's film number that is loaded on the patient's profile

The following will be included if Include Chief Complaint is selected:

- **Chief Complaint:** The chief complaint will pull from the Event screen. If a specific diagnosis code was selected for the Chief Complaint, the code(s) will display along with the description. If multiple chief complaints were loaded on the Event screen, the report will only print the first one.

The following will be included if Include Comments is selected:

- **Comments:** The comments will pull from the Event screen if any were populated.

The following columns will be included when the report is displayed in a CSV format:

- **Scheduled Date:** The date of when the appointment was scheduled.

15.6 Scheduling Appointment Statistics Report

The Scheduling Appointment Statistics Report will generate statistical information of an appointment's status for a specified date range in a summary or detailed format.

How to Print

1. Select **Report Dashboard**

2. Select **Scheduling Appointment Statistics Report**

3. Select **Run**

4. On the Scheduling Appointment Statistics Report screen, select the following options:

- **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Login will be available for selection.)
- **Appointment Date :** Select the appointment date range to display all appointments withing the range.
- **By Status:** A status may be selected to only display statistics for a particular status (Cancelled, Scheduled, No Show, Completed, Other) . Select **All** to display all appointments.
- **Print Sections:** Select the drop-down to print sections for the Resource, Task/Procedure or Both.
- **Exclude:** The following options may be selected to exclude from the report:
    - Locations
    - Personnel
    - Group Tasks
    - OR Procedures
    - N/A
- **Summary:** Select **Yes** to print the report in a summarized version. Select **No** to print the report in a detailed version.

5. Select **PDF** on the action bar once all of the parameters have been selected and the report is ready to be printed.

Description and Usage

The Scheduling Appointment Statistics Report will generate statistical information of an appointment's status for a specified date range in a summary or detailed format. The Task/Procedure will display by each Resource setup in TruBridge EHR.

Scheduling Appointment Statistics Report

08/29/2024 10:12
jkp1619

Scheduling Appointment Statistics Report

Facility: TruBridge Community Hospital
For Dates: 08/12/2024 - 08/29/2024
Status: All

Task/Procedures by Resource	Total Appts	Percentage:
Cat Scan		
CT Chest	1	16%
CT Head	2	33%
CT Scan	3	50%
TOTAL:	6	
DR DAVID MITCHEM		
ESTABLISHED PATIENT	1	100%
TOTAL:	1	
MRI		
MRI	2	100%
TOTAL:	2	
Mammography		
Mammo Bi-lateral	12	100%
TOTAL:	12	

Listed below is an explanation of each column.

- **Tasks/Procedures by Resource:** The Task Type used when scheduling the patient. The Resource will pull from the location/personnel used when scheduling the patient.

- **Total Appts:** The total number of appointments for each Task Type.

- **Percentage:** The percentage of the task(s) performed at the Resource.

15.7 Scheduling Event Change Report

The Scheduling Event Change Report will display changes made to specific fields in the appointment Event screen. These changes will only be captured if information is changed after the appointment is originally scheduled.

How to Print

1. Select **Report Dashboard**

2. Select **Scheduling Event Change Report**

3. Select **Run**

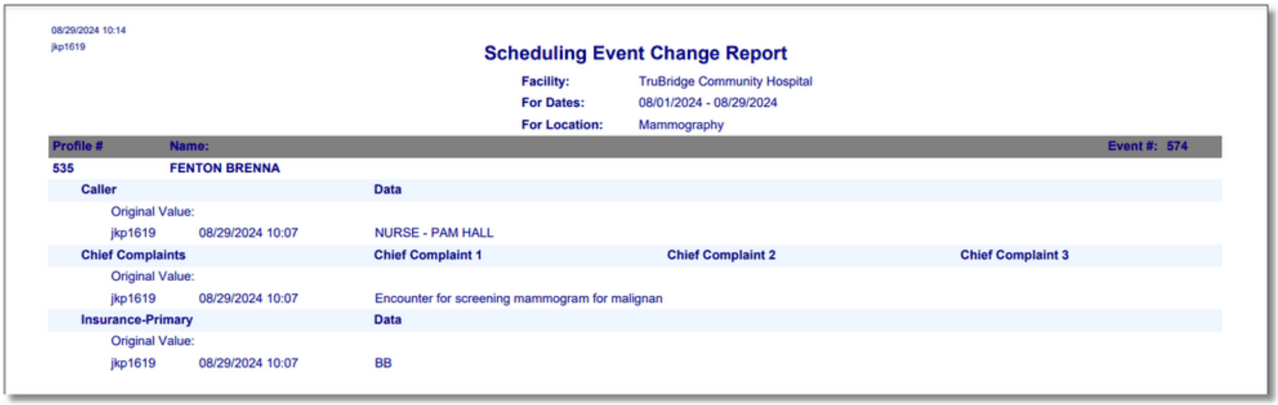
4. On the Scheduling Event Change Report screen, select the following options:
   - **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Login will be available for selection.)
   - **Appointment Date :** Select the appointment date range to display all appointments with event screen changes.
   - **Profile Number:** A profile number may be entered to view changes for a particular patient. If this field is left blank, any appointments with changes will pull to the report.
   - **Locations:** Select the location(s) to print the changes for. To select multiple locations, press and hold the control key and then select each desired location. At least one location must be selected to print the report.

5. Select **PDF** on the action bar once all of the parameters have been selected and the report is ready to be printed.

Description and Usage

The Scheduling Event Change Report will display changes made to specific fields in the appointment Event screen. These changes will only be captured if information is changed after the appointment is originally scheduled. The fields within the Event screen that will be recorded on this report are as follows: Contact Phone Number, Cell Number, Caller, Email Address, all Chief Complaint fields, all Insurance fields and Comments.

Scheduling Event Change Report


08/29/2024 10:14
jkp1619

Scheduling Event Change Report

Facility: TruBridge Community Hospital
For Dates: 08/01/2024 - 08/29/2024
For Location: Mammography

Profile #	Name:				Event #: 574
535	FENTON BRENNA				
Caller		Data			
Original Value:					
jkp1619	08/29/2024 10:07	NURSE - PAM HALL			
Chief Complaints		Chief Complaint 1	Chief Complaint 2	Chief Complaint 3	
Original Value:					
jkp1619	08/29/2024 10:07	Encounter for screening mammogram for malignan			
Insurance-Primary		Data			
Original Value:					
jkp1619	08/29/2024 10:07	BB			

Listed below is an explanation of each column.

- **Profile #:** The profile number of the patient that is attached to the appointment.

- **Name:** The patient's name on the appointment where changes were made.

- **Event #:** The number used by the system to capture the change(s) that was made.

Each field that had a change made in the Event screen for the appointment will be listed below each patient name. The field that was changed will be listed in dark blue. Below the field name will be the change that was made. The 'Original Value' will be listed first followed by the information that was originally in the field. Below the Original Value will list the user login(s) that made the change, the date and time the change was made and what the information was changed to.

15.8 Unscheduled Tasks Report

The Unscheduled Tasks Report will identify any appointments that are at the Unscheduled status.

How to Print

1. Select **Report Dashboard**

2. Select **Unscheduled Tasks Report**

3. Select **Run**

3. On the Unscheduled Tasks Report screen, select the following options:
- **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Login will be available for selection.)
- **Sort**: Select how the report will be sorted. The options are as follows:
  - **Patient Name**
  - **Location Description**
  - **Task Description**

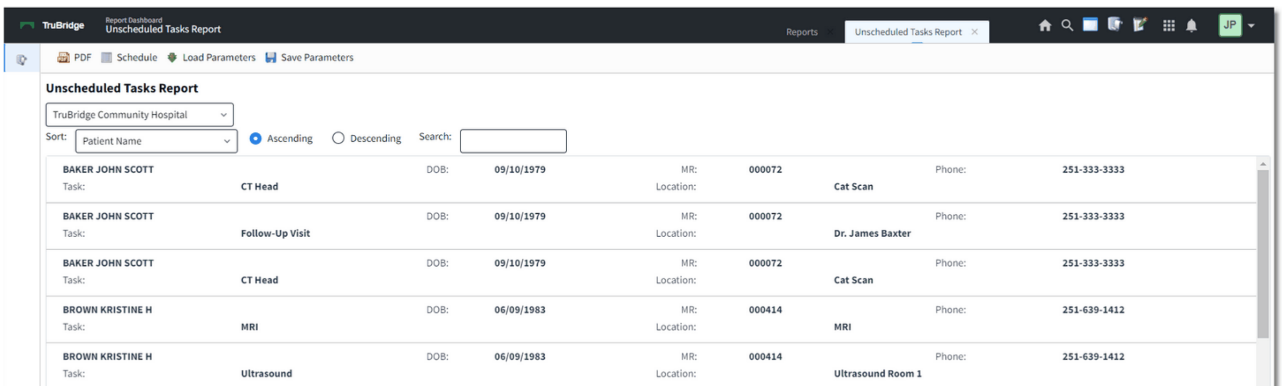
- **Ascending**: Select this option to display the report in ascending order, A-Z.
- **Descending**: Select this option to display the report in descending order, Z-A
- **Search**: Use this option to search for a specific patient.

4. Select **PDF** on the action bar to display the report in Adobe.

Description and Usage

The Unscheduled Tasks Report will identify any appointments that are currently at the Unscheduled status. As soon as the report is selected, the report will display on the screen. A PDF option is available on the action bar which allows the user to display the report in Adobe. From there, the report may then be printed.

Unscheduled Tasks Report



Unscheduled Tasks Report

Listed below is an explanation of each column.

- **Patient Name:** The name of the patient for whom the unscheduled appointment was created.
- **DOB:** The Date of Birth of the patient affiliated with the unscheduled appointment.
- **MR:** The Medical Record number of the patient affiliated with the unscheduled appointment.
- **Phone:** The phone number of the patient affiliated with the unscheduled appointment.
- **Task:** The task associated with the unscheduled appointment for the patient.
- **Location:** The resource at which the unscheduled appointment will need to be scheduled.