RESOURCE AND PATIENT MANAGEMENT SYSTEM

Practice Management Application Suite

(BPRM)

Scheduling Module User Manual

Version 4 Patch 5
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Office of Information Technology
Division of Information Technology

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Preface

The Practice Management Application Suite (BPRM) is a browser-accessible graphical user interface (GUI) for the Indian Health Service (IHS) Resource and Patient Management System (RPMS) applications.

BPRM provides for the entry of new patients and editing the records of those already registered at a medical facility. The patient data managed with BPRM is crucial to the third-party billing and follow up treatment of patient care. Appropriate caution and checking should be employed to ensure that accurate data is entered into the patient registration system and, subsequently, transmitted to the National Patient Information Resource System.

1.0 Introduction

BPRM represents a forward step in the streamlining of IHS record and patient management. Through the use of a consistent GUI and module-based architecture, it simplifies record and patient management and allows for future expansion of the scope and capabilities of the system.

This user manual describes the use of the BPRM Scheduling module, scheduling-related reports provided by the Reports module, and options in the Settings module that affect appointment scheduling. A separate user manual gives an overview of the BPRM application suite, and individual user manuals are available for other modules in the suite.

2.0 Scheduling Module Operation

This section describes the features and functions of the BPRM Scheduling module.

2.1 Scheduling Toolbar

Click **Scheduling** from the taskbar (lower-left corner) and the scheduling toolbar (Figure 2-1) displays the top of the **Scheduling** module. Using the scheduling toolbar controls how (and what) patient scheduling information displays.

Figure 2-1: Scheduling toolbar

The scheduling toolbar contains the following options:

- Full Screen
- Calendar Selector
- Workspace View
- Waiting List
- Search Slot Availability
- Letters
- Zoom
- Assigned Clinics
- Refresh

2.1.1 Full Screen

Click the **Full Screen** control to view the clinic schedules without the scheduling toolbar, **Selection** pane, and **Filtering** pane. Click the control again (now displayed on the top-right corner of the screen) to return to normal view.

2.1.2 Calendar Selector

Use the **Calendar Selector** (Figure 2-2) of the scheduling toolbar to quickly navigate to the current date, as well as dates in the future.

Figure 2-2: Calendar selector

Click the controls in the **Calendar Selector** to navigate as follows:

- **Today**– Click **Today** to jump back to the current date.
- **From Today**– Click the drop-down arrow next to **Today** to jump from the current date to another date in the future. This opens a list of the following points in the future:
  - 1 Day
  - 2 Day
  - 1 Week
  - 2 Weeks
  - 3 Weeks
  - 1 Month
  - 2 Months
  - 3 Months
  - 4 Months
  - 6 Months
  - 1 Year

  Select any of these options to jump to that point from the current date.

2.1.3 Workspace View

Schedules are available in five different views:

- Day (one day with option to view additional days)
- Work Week (five days)
- Week (seven days)
- Month
- List

Access each of the views in the scheduling toolbar (Figure 2-3) to switch between the modes.

Figure 2-3: Workplace view

The different views are described in Sections 2.1.3.1 through 2.1.3.4.

2.1.3.1 Day

Click the **Day** control to see one day view of the Scheduling Workspace for the selected clinics. The **Day** view provides maximum detail for a single-day schedule.

Click the drop-down arrow next to the **Day** control (Figure 2-4) to view today, plus a number of days. For example, select **2 days** to view the schedule for today and tomorrow, and so on.

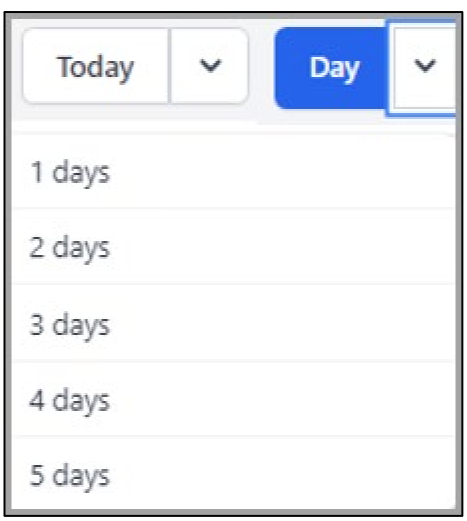


Figure 2-4: Day control dialog

2.1.3.2 Work Week

Click the **Work Week** control to see a one-week view of the Scheduling Workspace for the selected clinics to display Monday through Friday only.

2.1.3.3 Week

Click the **Week** control to see a one-week view of the Scheduling Workspace for the selected clinics to display Sunday through Saturday.

2.1.3.4 Month

Click the **Month** control to see a one-month view of the Scheduling Workspace for the selected clinics.

> **Note:** The **Month** view only displays one clinic at a time.

2.1.4 List View

Click the **List** option on the scheduling toolbar (Figure 2-5) to see a visual listing of patient appointments for the selected clinic(s).

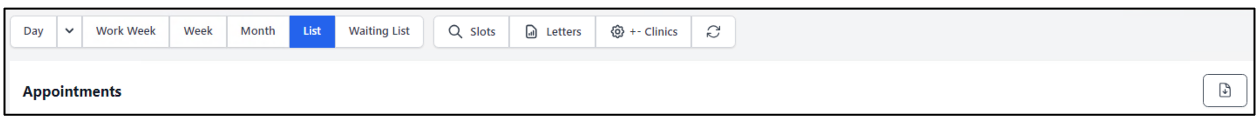


Figure 2-5: List View

The List View (Figure 2-5) displays patient appointments with following columns:

- Patient
- Appointment Date/Length
- Status/Clinic
- Created On/By
- Check In Time/By
- Check Out Time/By
- No Show-Cancel Time/By
- Comments
- Cancellation Reason/Remarks

> **Note:** It may be necessary to use the horizontal scroll bar at the bottom of the page to view the full width of the **List** view.

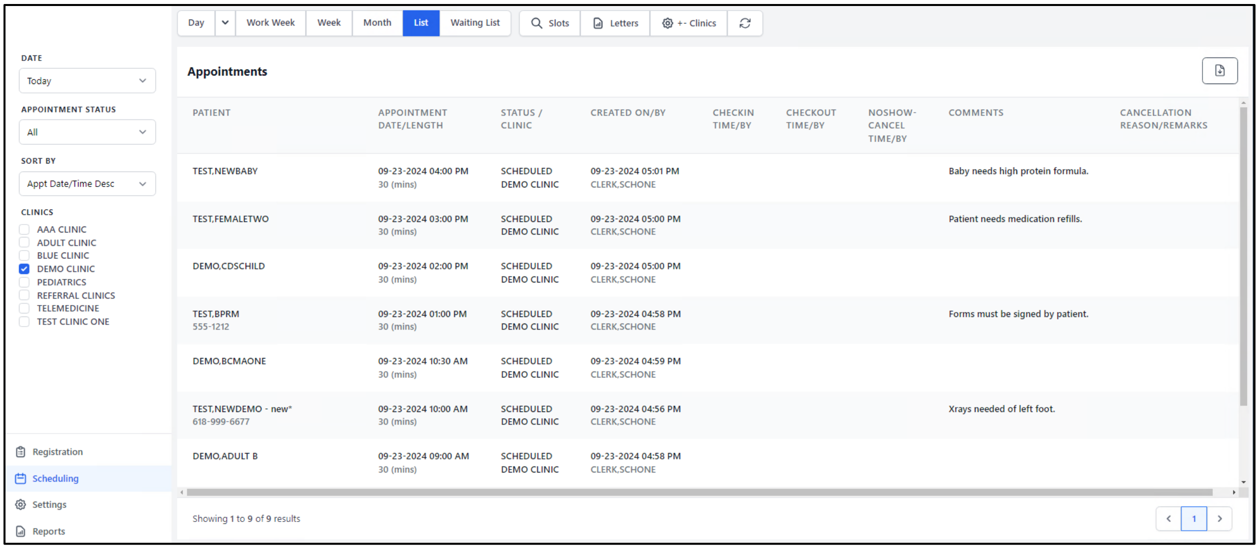


Figure 2-6: List View left navigation menu

In addition to the column display, there are multiple filter options available. The first filter is by **Date**, which provides the following options:

- Today
- Past
- Future
- All

The user can continue filtering the data by selecting an **Appointment Status**. The **Appointment Status** options display, as noted below:

- All
- Scheduled
- Checked In
- Checked Out
- No Show
- Cancelled by Patient
- Cancelled by Clinic

The user can select to sort the data in various ways by using the **Sort By** filter that provides the following options:

- Appt Date/Time Desc
- Appt Date/Time
- Check-In Time

- Check-Out Time
- No-Show/Cancel Time
- Patient Name

Finally, the **Clinic** filter provides selections based on the user's preferred resource list. Users can select one or more clinics by selecting the check boxes.

The **List View** also offers a variety of options for working with patient appointments.

> **Note:** These options are only available if the patient is in a clinic that the user has access to.

Right-click anywhere on an existing appointment line to open a context menu. Availability and options of context menus are dependent on the appointment status. Refer to Table 2-3 for additional information.

2.1.4.1 Create and Export List View Appointments to Excel

Click the Export icon (on the far right) to create and export the appointment entries to an Excel file.

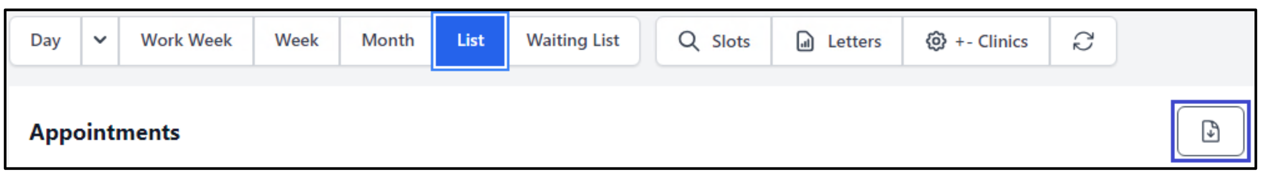


Figure 2-7: Export icon to create and export the appointment entries

The user will be asked to enter a Password. The password is case-sensitive and can be anything the user desires. The password will be required to open the Excel file once the file is created.

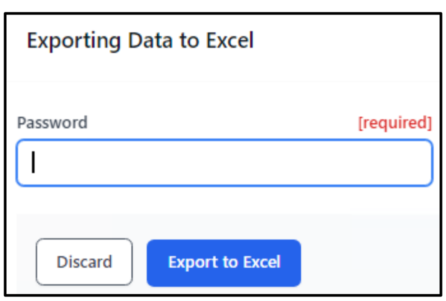


Figure 2-8: Data Export Password entry screen

After the password is entered, the user can select **Export to Excel** to initiate the export or **Discard** to exit.

The file will be named and saved to the Download folder as the default location, unless you have configured your browser to save to a specific location. If so, the user will be allowed to provide a file name and save location.

> **Note**: The export max allowed is less than 2000 entries. A message will display, to the user, if it exceeds this amount.

2.1.5 Waiting List

Use the **Waiting List** option on the scheduling toolbar (Figure 2-9) to add a patient to a clinic's waiting list or to manage the waiting list entries as needed.

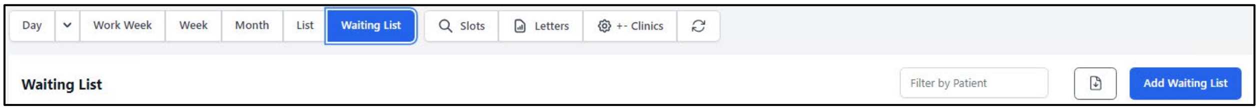


Figure 2-9: Waiting List

Important points about using the waiting list include using the options along the navigation menu (Figure 2-10) on the left-side of the page to view the waiting list using various filter options, as well as **Sort By** options (see Section 2.7 for information about using the waiting list from the Scheduling Workspace).

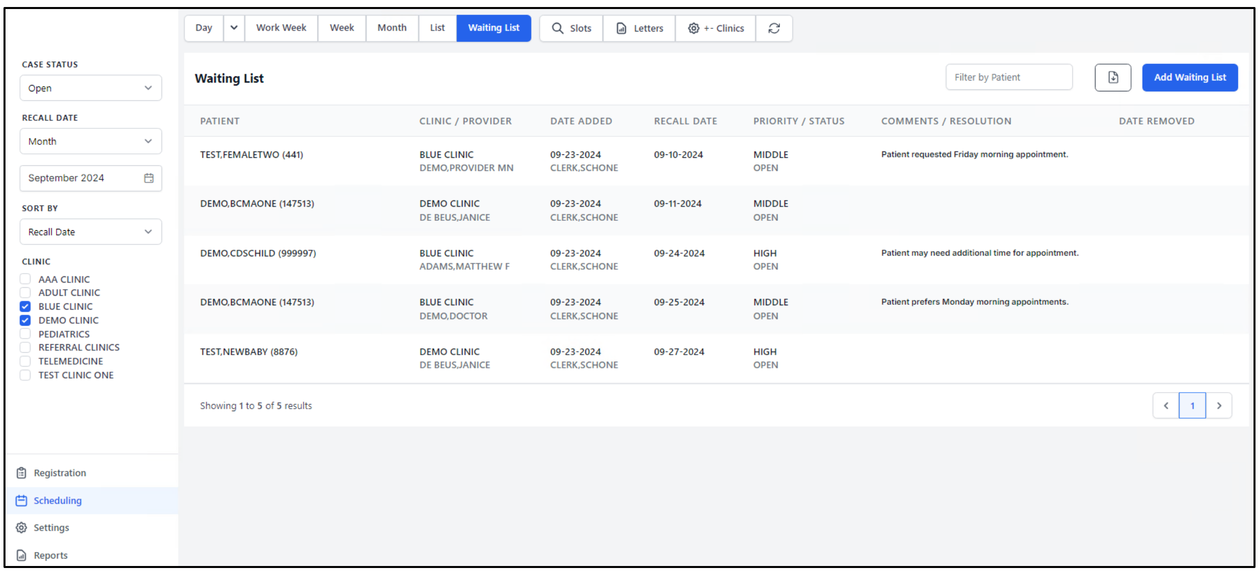


Figure 2-10: Waiting List left navigation menu

- The **Case Status** filter provides the ability to view open, closed, or all waiting list entries.
- The **Recall Date** filter provides the ability to view waiting list entries for **All Recall Dates** or **Recall Date = Today** or for a single month.
- The **Sort By** options provide a way to sort the listing by these criteria:

- Recall Date
- Patient Name
- Date Added to List
- Priority
- Date Removed

- The **Clinic** filter provides the ability to view a single or multiple **Clinic Waiting List** entries.

2.1.5.1 Filter by Patient

To filter the waiting list by patient, enter the patient’s name in the **Filter by Patient** field. As the user types within the field, the results will immediately start to filter in the list. User can also filter by health record number (HRN) or patient’s residence phone number using the XXX-XXX-XXXX format.

2.1.5.2 Create and Export Waiting List to Excel

Click the Export icon (between Filter by Patient and Add Waiting List button) to export the waiting list entries to an Excel file.

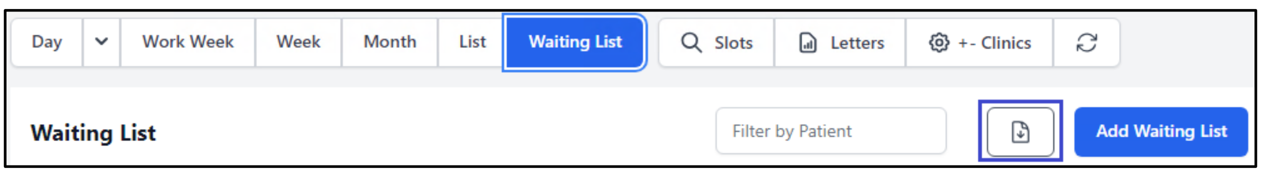


Figure 2-11: Export Icon

The user will be asked to enter a Password. The password is case-sensitive and can be anything the user desires. The password will be required to open the Excel file once the file is created.

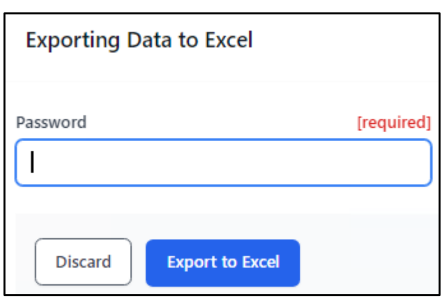


Figure 2-12: Data Export Password entry screen

After the password is entered, the user can select **Export to Excel** to initiate the export or **Discard** to exit.

The file will be named and saved to the Download folder as the default location, unless you have configured your browser to save to a specific location. If so, the user will be allowed to provide a file name and save location.

> **Note**: The export max allowed is less than 2000 entries. A message will display, to the user, if it exceeds this amount.

2.1.5.3 Add a Patient to a Waiting List

Select the **Add Waiting List** button to add a patient to a clinic's waiting list. This displays the **Add to Waiting List** dialog (Figure 2-13). A **Recent Patients** list is available for selection when the user selects the **Select Patient** search box. Refer to Section 2.6 for additional information.

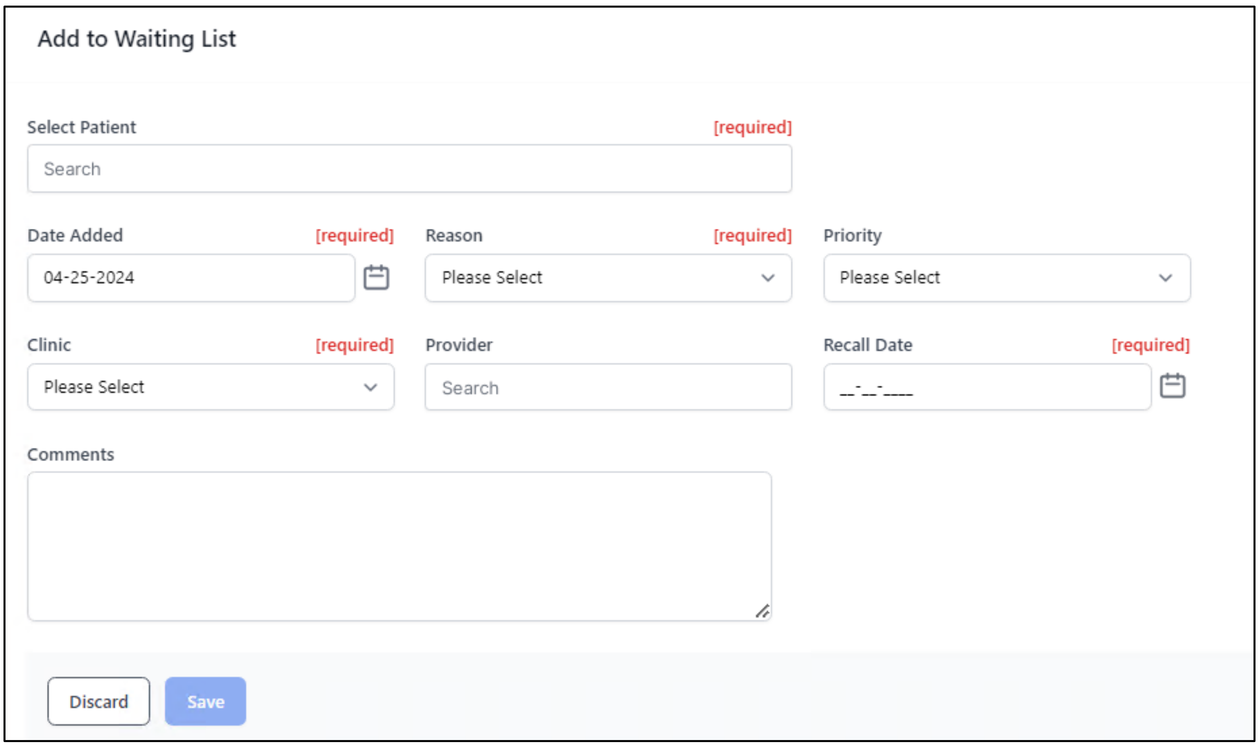


Figure 2-13: Add to Waiting List dialog

The **Add to Waiting List** dialog provides these fields:

- Patient (Required)
- Date Added (Required)
- Reason (Required)
- Priority
- Clinic (Required): These selections include only clinics with an active waiting list.

- Provider (if available)
- Recall Date (Required): This is the date by or on which the patient should be scheduled.
- Comments

Click **Save** to transfer the information to the waiting list (Figure 2-14).


Waiting List

Filter by Patient

Add Waiting List

PATIENT	CLINIC / PROVIDER	DATE ADDED	RECALL DATE	PRIORITY / STATUS	COMMENTS / RESOLUTION	DATE REMOVED
TEST,FEMALETWO (441)	BLUE CLINIC DEMO,PROVIDER MN	09-23-2024 CLERK,SCHONE	09-10-2024	MIDDLE OPEN	Patient requested Friday morning appointment.	
DEMO,BCMAONE (147513)	DEMO CLINIC TESTER,APPLE	09-23-2024 CLERK,SCHONE	09-11-2024	MIDDLE OPEN		
TEST,BPRM (469001) 555-1212	DEMO CLINIC DEMO,DOCTOR	09-23-2024 CLERK,SCHONE	09-17-2024	LOW OPEN	Patient needs transportation assistance.	
DEMO,CDSCHILD (999997)	BLUE CLINIC ADAMS,MATTHEW F	09-23-2024 CLERK,SCHONE	09-24-2024	HIGH OPEN	Patient may need additional time for appointment.	
DEMO,PATIENT - PREFERRED NAME* (500001) 515-658-9091	DEMO CLINIC DEMO,DOCTOR D DO	09-23-2024 CLERK,SCHONE	09-25-2024	HIGH OPEN		
DEMO,BCMAONE (147513)	BLUE CLINIC DEMO,DOCTOR	09-23-2024 CLERK,SCHONE	09-25-2024	MIDDLE OPEN	Patient prefers Monday morning appointments.	
TEST,NEWBABY (8876)	DEMO CLINIC DEMO,PROVIDER MN	09-23-2024 CLERK,SCHONE	09-27-2024	HIGH OPEN		

Showing 1 to 9 of 9 results

Figure 2-14: Waiting List example

Each entry in the waiting list shows the following information (if available):

- Patient (Name, HRN, Residence Phone Number)
- Clinic/Provider
- Date Added (Date Added, Added By)
- Recall Date
- Priority/Status
- Comments/Resolution
- Date Removed (Date Removed, Removed By)

2.1.5.4 Managing the Waiting List

Right-click an entry in the waiting List to display a context menu offering several options to manage the waiting list entries. Figure 2-15 shows an example of the Waiting List context menu. If the status is Open, then the context menu options **Edit**, **Remove**, and **Schedule** will display. If the status is Closed, the user will only be able to edit the entry.

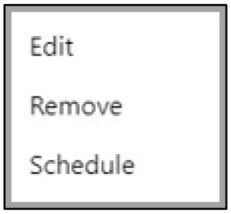


Figure 2-15: Waiting List context menu

The Waiting List context menu contains the options listed in Table 2-1.

Table 2-1: Waiting List context menu

Option	Description
Edit	Use this option to edit the details for an existing Waiting List entry.
Remove	Use this option to remove a patient from the Waiting List.
Schedule	Use this option to add an appointment for the selected patient in the Waiting List.

Edit a Waiting List Entry

1. Select a patient from the **Waiting List** pane (Figure 2-16).
2. Right-click the entry and select **Edit**.
3. Edit the **Reason**, **Priority**, **Recall Date**, **Provider**, and **Comments** fields as needed.
4. Click **Save** to save the edits or **Discard** to exit without saving the edits.

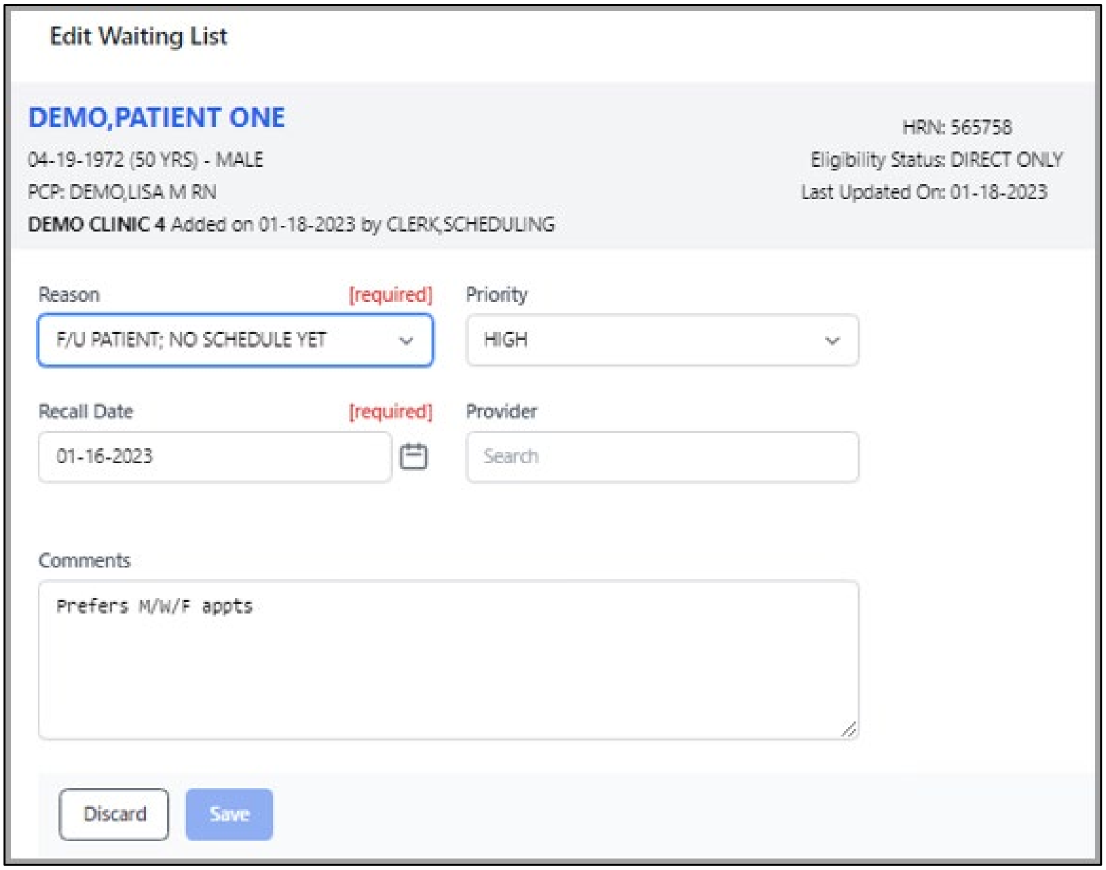


Figure 2-16: Edit Waiting List example

Remove a Waiting List Entry

1. To remove a patient from the waiting list without creating a scheduled appointment (Figure 2-17), right-click the entry and select **Remove**.
2. Type the **Date Removed**, **Resolution**, and **Comments**, as needed.
3. Click **Save** to remove the patient from the waiting list or click **Discard** to keep the patient on the list.

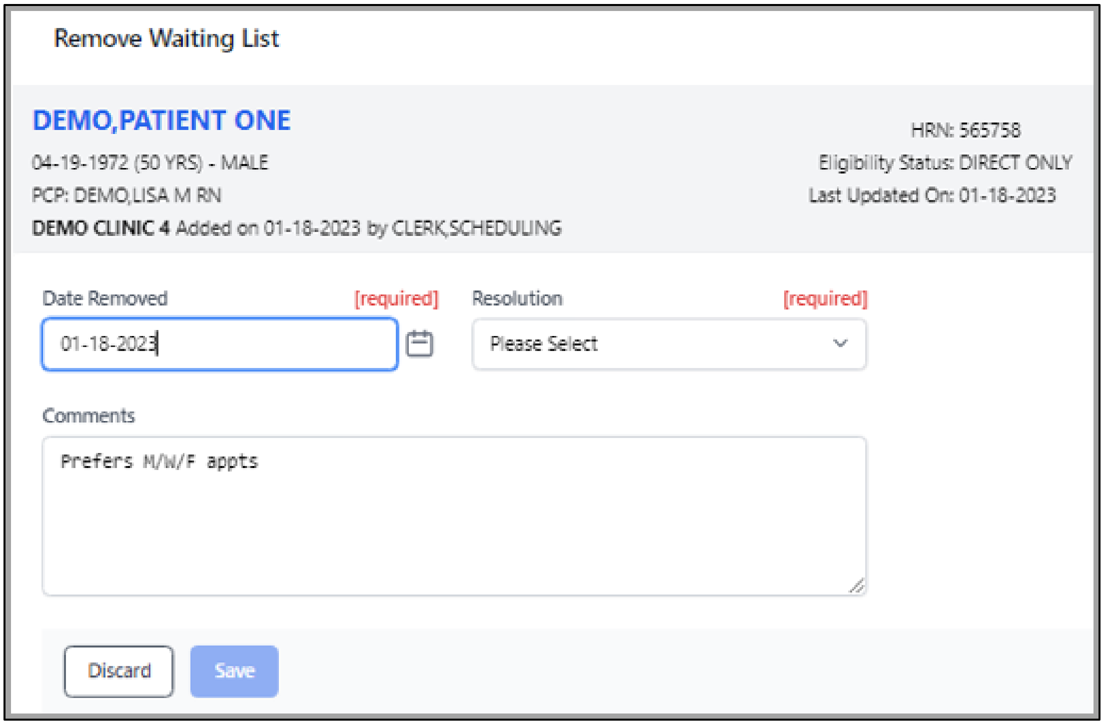


Figure 2-17: Remove Waiting List example

Schedule a Waiting List Entry

1. Select a patient from the **Waiting List** pane.
2. Right-click the entry and select **Schedule**.
3. Select a clinic.
4. Select an **Appointment Length** if the clinic is set up utilizing a variable appointment length.
5. Search for, and select, the appropriate **Access Type**.
6. Select the **Time of Day**.
7. Click **Search** to view open appointment slots.
8. Select an open slot and click **Schedule** at the bottom of the dialog (Figure 2-18). A dot displayed in the calendar also indicates an open slot.

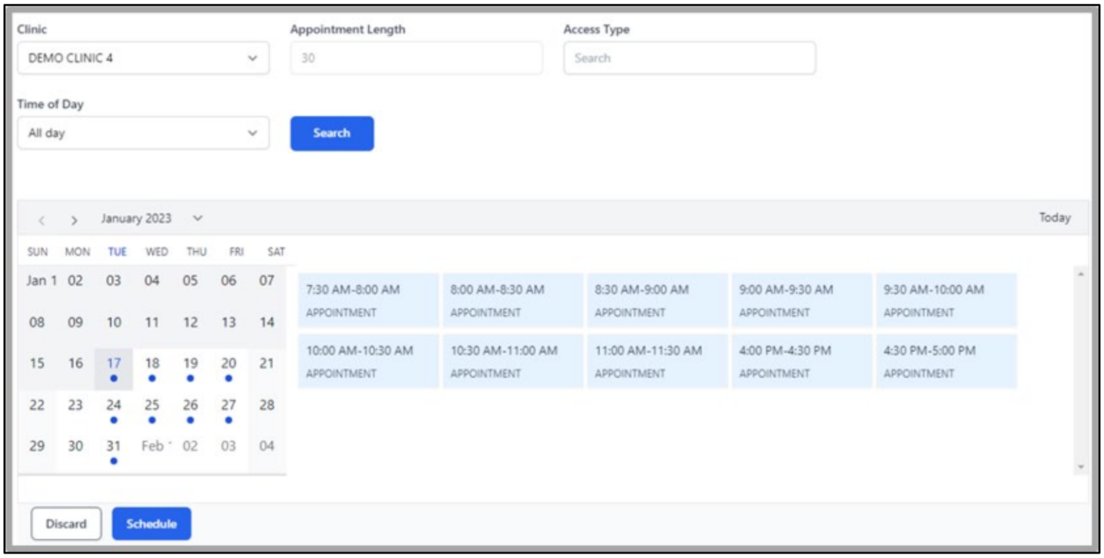


Figure 2-18: Schedule Appointment from Waiting List

9. A **Scheduling** dialog displays (Figure 2-19) with patient name, date, time, and appointment length. The option to remove the patient from the waiting list for a specific clinic is defaulted or the user can choose to leave the patient on the waiting list. The user may choose to do this because the patient was scheduled into another clinic.

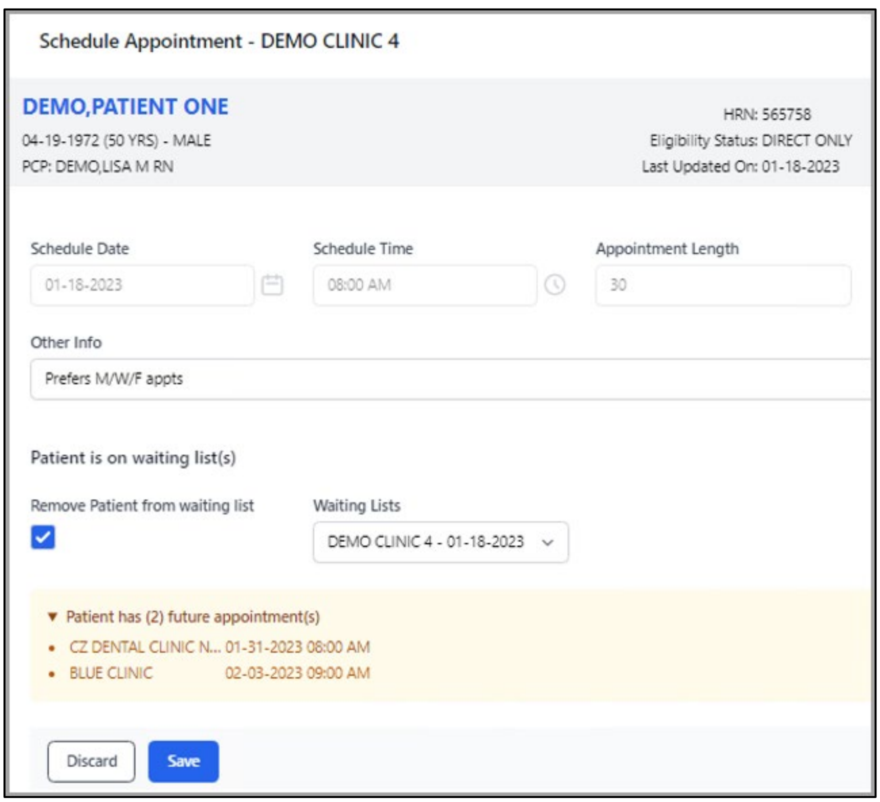


Figure 2-19: Schedule Appointment dialog

10. Click **Save** to create the scheduled appointment for the patient and remove the patient from the Waiting List (if checked) or click **Discard** to ***not*** create the appointment keep the patient on the Waiting List.

2.1.6 Search Slot Availability

The **Slots** search field (Figure 2-20) allows a user to search for open slots to schedule new appointments.

Figure 2-20: Slots search button

Click **Slots** to open the **Search Appointment Slots** dialog (Figure 2-21).

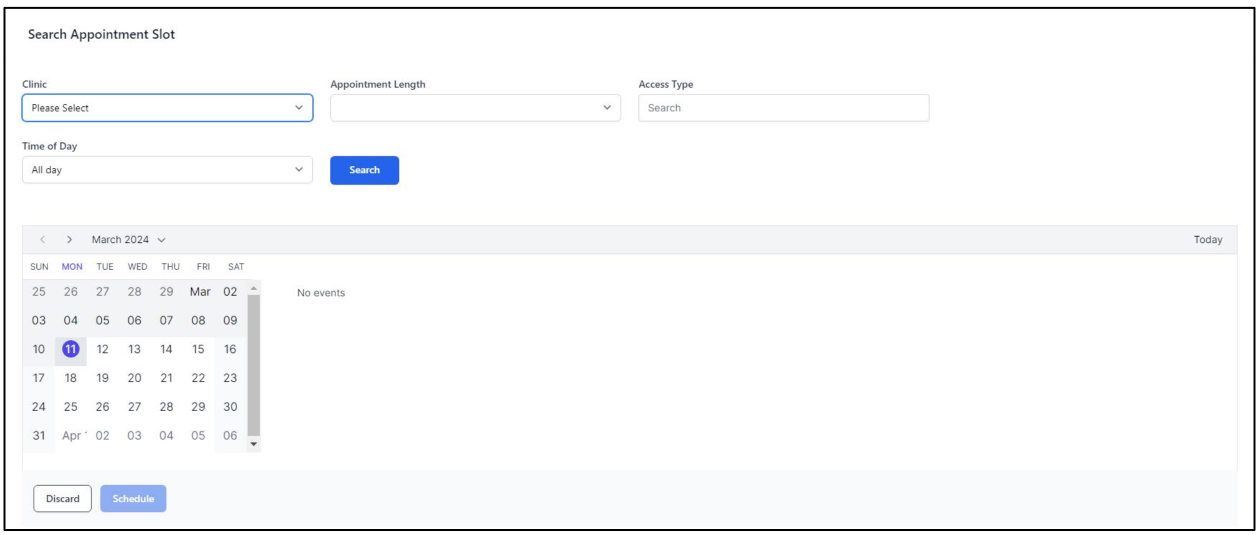


Figure 2-21: Search Available Slots dialog

To set up a search for available appointment slots, use the following steps:

1. Select a clinic from the list of available clinics.
2. If the selected clinic is set up utilizing a variable appointment length, select an appointment length that is needed for the appointment (for example, 15 minutes or 30 minutes). Otherwise, the selected clinic's default appointment length will be displayed and not editable.
3. Search for, and select, the appropriate **Access Type**, if applicable, to limit the search to a specific appointment type.
4. Select **All Day**, **AM**, or **PM** to further limit the search.

5. Click **Search**. When complete, a listing of available appointment times and dates displays (Figure 2-22). Dots on the calendar indicate availability on those days.

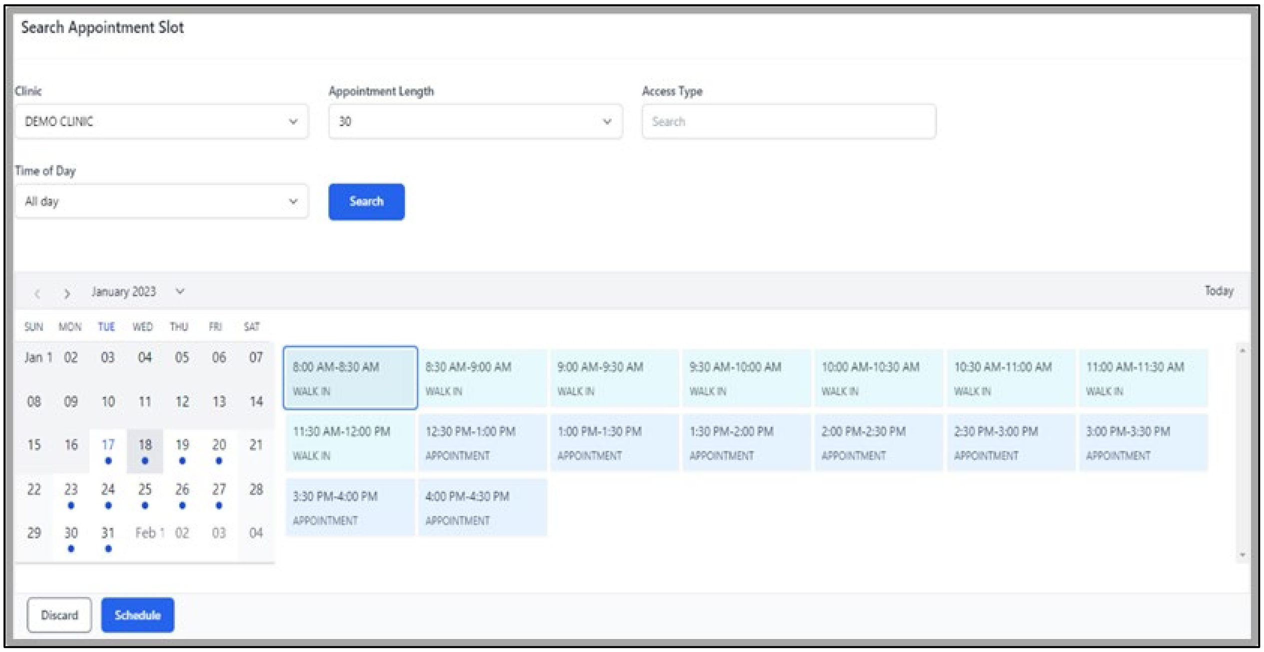


Figure 2-22: Select an available slot

6. Select the desired available appointment to highlight it, and then click **Schedule**. The **Schedule Appointment** dialog (Figure 2-23) displays.

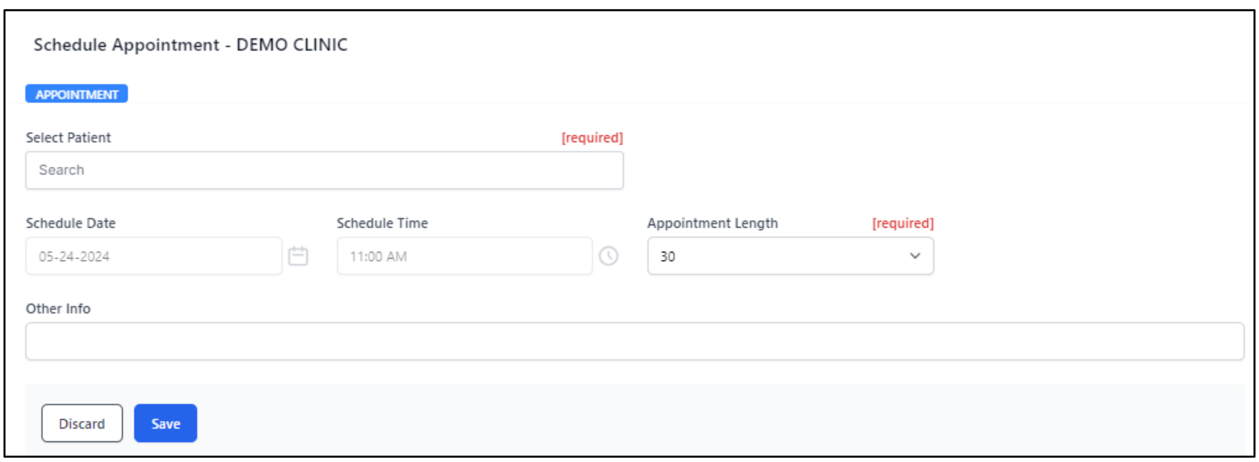


Figure 2-23: Schedule Appointment dialog

7. Click **Select Patient** to schedule for this slot or use the **Recent Patient** list to select a patient. Refer to Section 2.6 for additional information. Patient selection is a required field.

8. Verify the **Schedule Date**, **Schedule Time**, and **Appointment Length** fields and add any additional information necessary. **Appointment Length** is required.

9. **Other Info** is a free text field.

10. Click **Save** to create the appointment or click **Discard** to exit without creating the appointment.

2.1.7 Letters

Figure 2-24: Letters button

The **Letters** button on the scheduling toolbar provides the user with batch letter printing ability for all letter types (**Pre-Appointment**, **Clinic Cancelled**, **Appointment Cancelled**, and **No-Show**).

Batch letter printing provides the ability to print one or more pre-configured appointment letters to be sent to patients. These letters can serve as reminders about upcoming or missed appointments.

The **Print Letters** option on the **Scheduling Reports** menu works the same as the **Letters** button on the scheduling toolbar. See Section 4.2.6 for additional details on batch letter printing.

Note:	Each letter type must be configured before it can be used at the clinic. See Section 3.5 for more information about configuring letter templates in the **Settings** module.

2.1.8 Zoom

Use the **Zoom** button (Figure 2-25) to zoom in and out of the Scheduling Workspace.

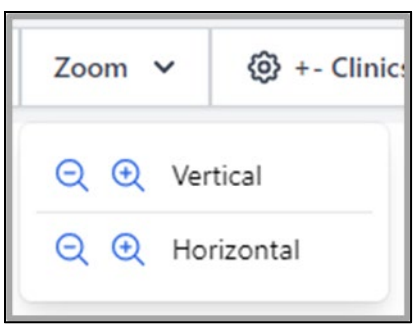


Figure 2-25: Zoom buttons

Zoom provides following options:

- **Vertical**: Use the vertical (+) and (-) buttons to zoom in and out of the vertical view of the Scheduling Workspace.

- **Horizontal**: Use the horizontal (+) and (-) buttons to zoom in and out of the horizontal view of the Scheduling Workspace.

2.1.9 Assigned Clinics

Use the **Assigned Clinics** option on the scheduling toolbar (Figure 2-26) to add or remove clinics from the user's preferred resource list.

Figure 2-26: Clinics button

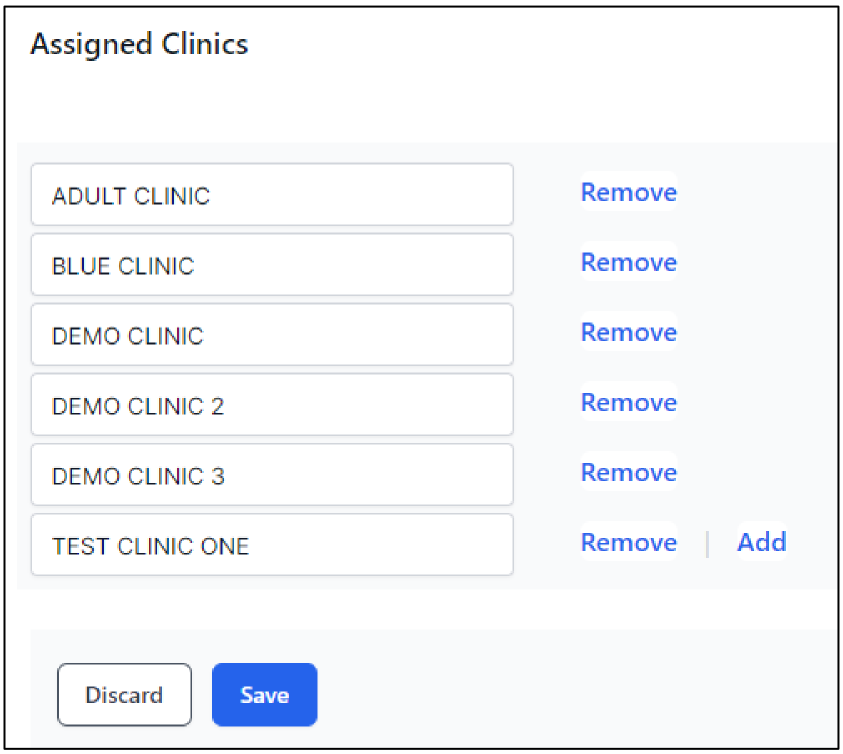


Figure 2-27: Assigned Clinics dialog, add or remove clinic

The **Assigned Clinics** group has these options:

- **Add**. Click **Add**, then enter the desired clinic to add to the user's preferred resource list. Only "active" clinics will display for selection.
- **Remove**. Click **Remove** next to the clinic to remove it from the user's preferred resource list.

Click **Save** for added or removed clinics or click **Discard** to exit.

2.1.10 Refresh

Use the **Refresh** button (Figure 2-28) to refresh the schedule listing. This is useful to ensure that the latest scheduling changes are displayed, including those made by others. It is recommended to use this refresh option verses the web browser refresh.

Figure 2-28: Refresh button

2.2 Status Panel

To view the appointment status (Figure 2-29) look at the top of the page to the right of the scheduling toolbar.

Figure 2-29: Status Legend

Use the **Status** panel to identify the appointment status, as each type is identified by color. Each option on the **Status** panel is an option button. Select or clear these options to filter appointments that display in the Scheduling Workspace based on the status.

The different status options shown are listed below:

- Scheduled: SC
- Checked In: CI
- Checked Out: CO
- Cancelled: CN
- No Show: NS

2.3 Selection and Filtering Pane

The **Selection and Filtering** pane (Figure 2-30) on the left side of the **Scheduling** module display provides a means to select dates and clinics, and filter the information displayed in the Scheduling Workspace.

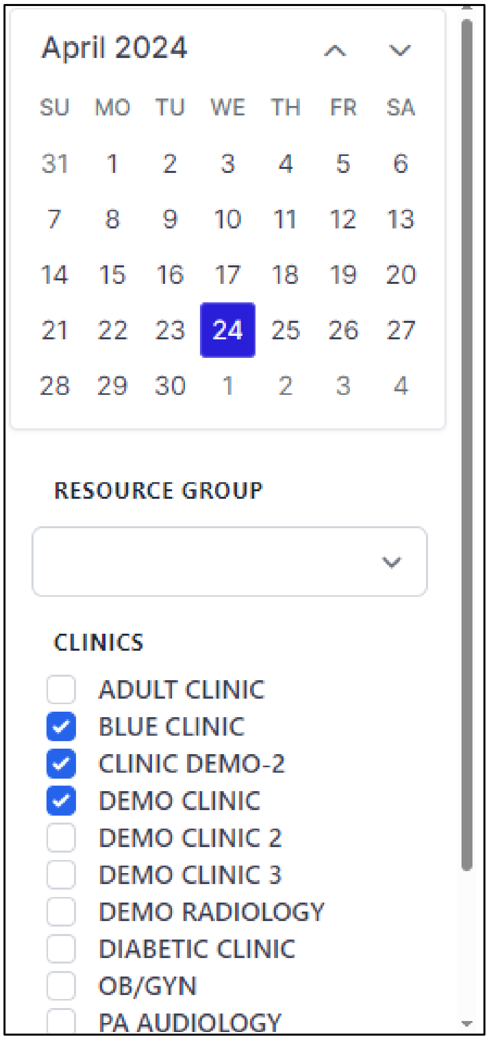


Figure 2-30: Selection and Filtering pane

2.3.1 Calendar Panel

The **Calendar** panel (Figure 2-31) is at the top of the **Selection and Filtering** pane.

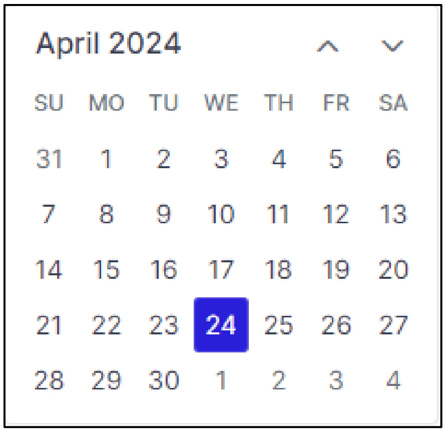


Figure 2-31: Calendar panel

In most cases, the **Calendar** panel shows the current month.

- Use the up and down arrows at the top of the calendar to navigate to a particular month (and year), then click the date to view.

2.3.2 Resource Group Panel

Use the **Resource Group** panel (Figure 2-32) to select the resource group that you want to view, which is a group of clinics assigned to a resource group.

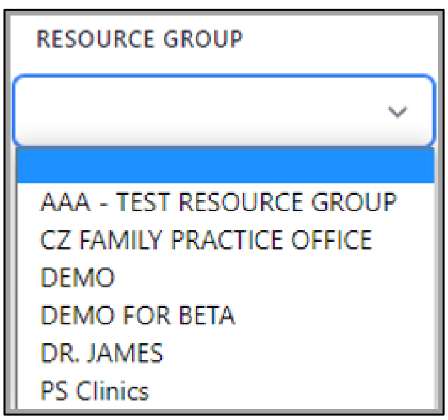


Figure 2-32: Resource Group panel

If you no longer want to view a particular resource group, clear the resource group drop-down selection by selecting the first entry that is blank.

2.3.3 Clinics Panel

Use the **Clinics** panel (Figure 2-33) to select the clinics that you want to view or set patient appointments. The list of clinics displayed in the **Clinics** panel is your preferred resource list.

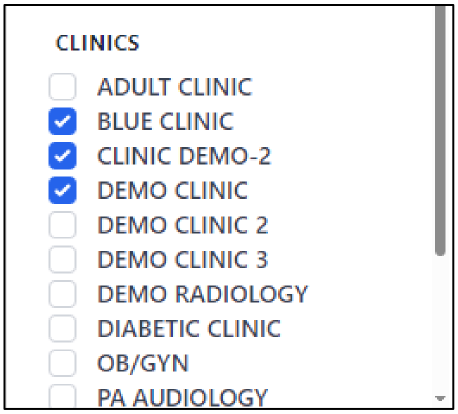


Figure 2-33: Clinics panel

The clinics included in the preferred resource list (and displayed in the **Clinics** panel) will vary, depending on the access level granted to you.

If you no longer want to view appointments for a particular clinic, clear the selection box to the left of the clinic name. To remove the clinic permanently from the preferred resource list, use the **Assigned Clinics** option in the scheduling toolbar.

A scroll bar will appear if there are many clinics for a user's assigned clinics.

2.4 Scheduling Workspace

The Scheduling Workspace (Figure 2-34) is the primary calendar and appointment display space of the **Scheduling** module.

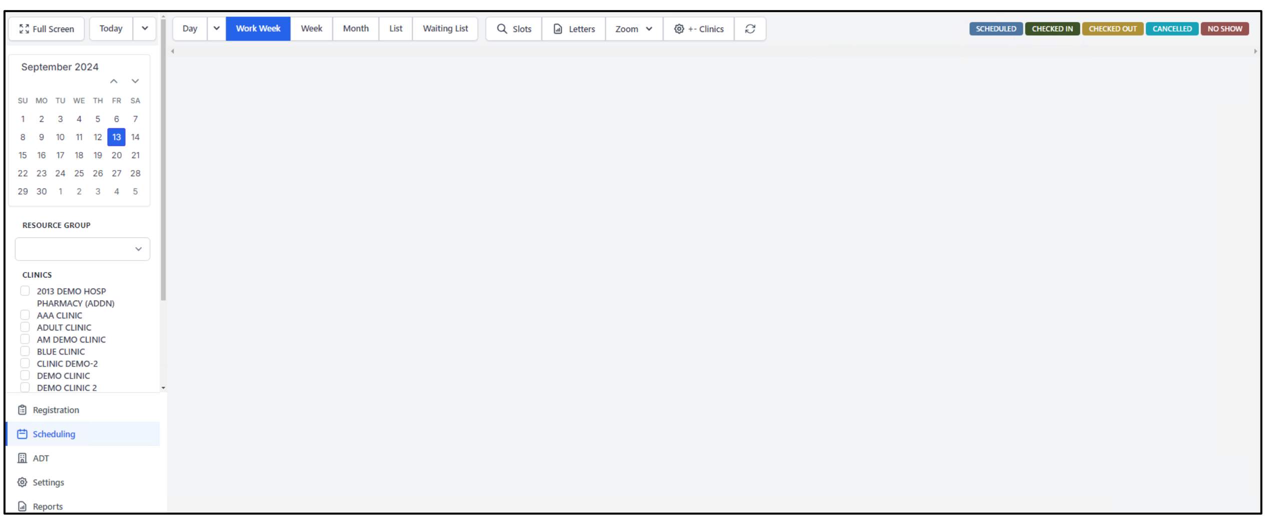


Figure 2-34: Scheduling Workspace with no clinics selected (default)

Select a clinic or multiple clinics, and select **Today**, **Day**, **Work Week**, or **Week**.

Once the clinic(s) and day/week are selected, clinics will display side by side on the Scheduling Workspace as depicted in Figure 2-35 and Figure 2-36.

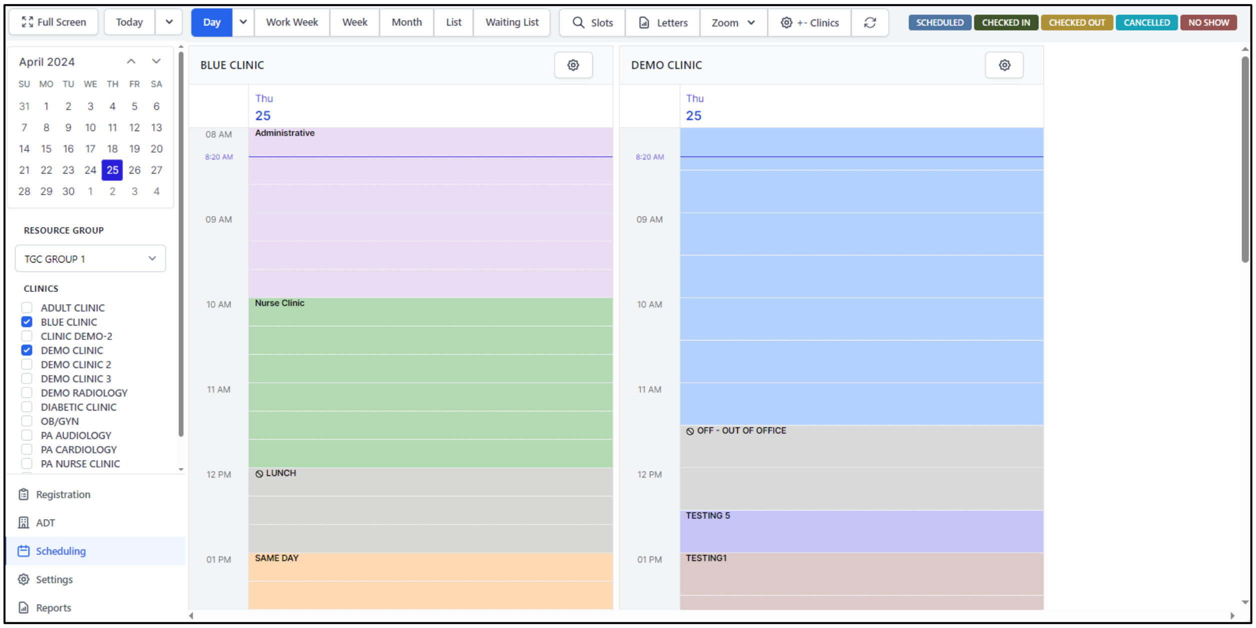


Figure 2-35: Scheduling Workspace with multiple clinics open using the Day view

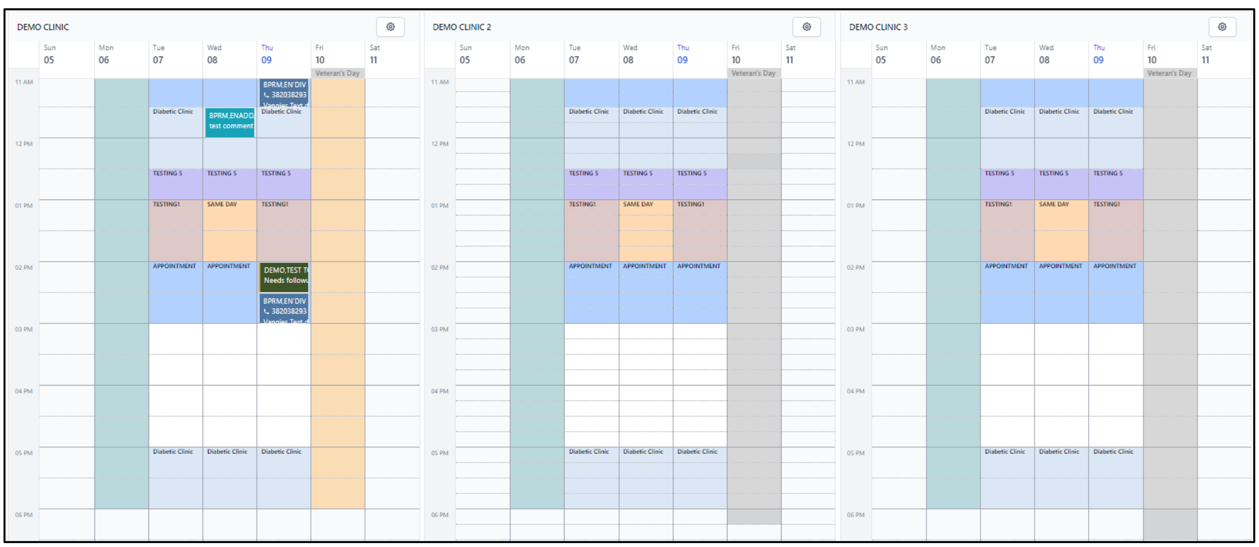


Figure 2-36: Scheduling Workspace with multiple clinics open for a work week

Scrolling down and up (or right to left) on the Scheduling Workspace will keep the clinic name and calendar header fixed at the top of the display.

At the top right of each clinic a gear setting icon will display (Figure 2-37).

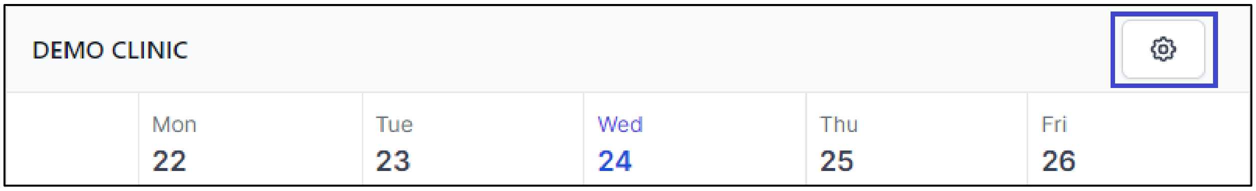


Figure 2-37: Gear setting icon on top right of each clinic

Selecting the gear setting icon will open the **Edit Availability** screen for the clinic (within the **Settings** tab). Users will be able to edit the availability for the clinic with the appropriate privileges or key.

Once the user is in **Edit Availability** screen for the clinic, selecting the **Back** button in the top left corner will bring the user back to the Scheduling Workspace in Scheduling—displaying appointments using the same view.

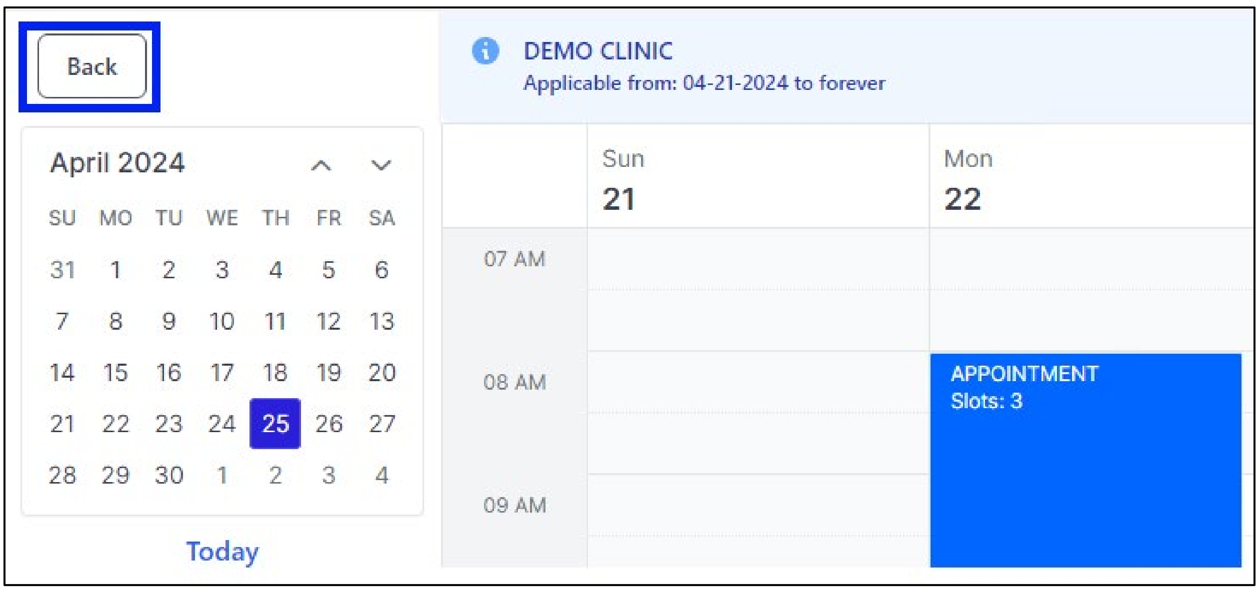


Figure 2-38: Back button on the Edit Availability screen

2.4.1 Appointment Slots

Each appointment slot (Figure 2-39 and Figure 2-40) within the Scheduling Workspace shows the patient name and HRN, and when sufficient space permits, the patient's phone number and other appointment info.

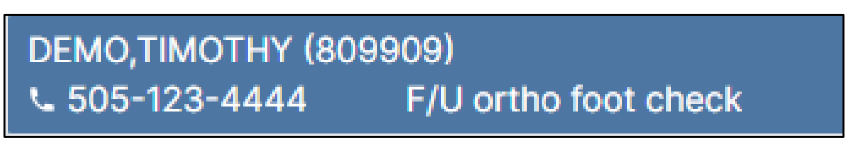


Figure 2-39: Regular scheduled appointment slot example

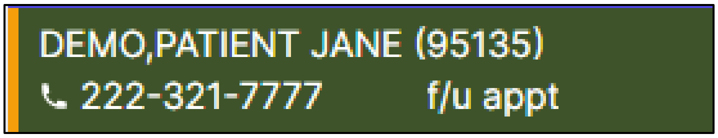


Figure 2-40: Walk-in appointment slot example with orange bar

The color of each appointment slot varies depending on the status of that appointment. Different colors display for scheduled, checked-in, checked-out, cancelled, and no-show appointments. See Section 2.2 and Figure 2-23.

To see more details about an individual appointment, hover the mouse cursor over the **Appointment** panel. This displays a pop-up window showing additional details about the appointment.

Figure 2-41 shows examples of a typical **Appointment Details** pop-up window.

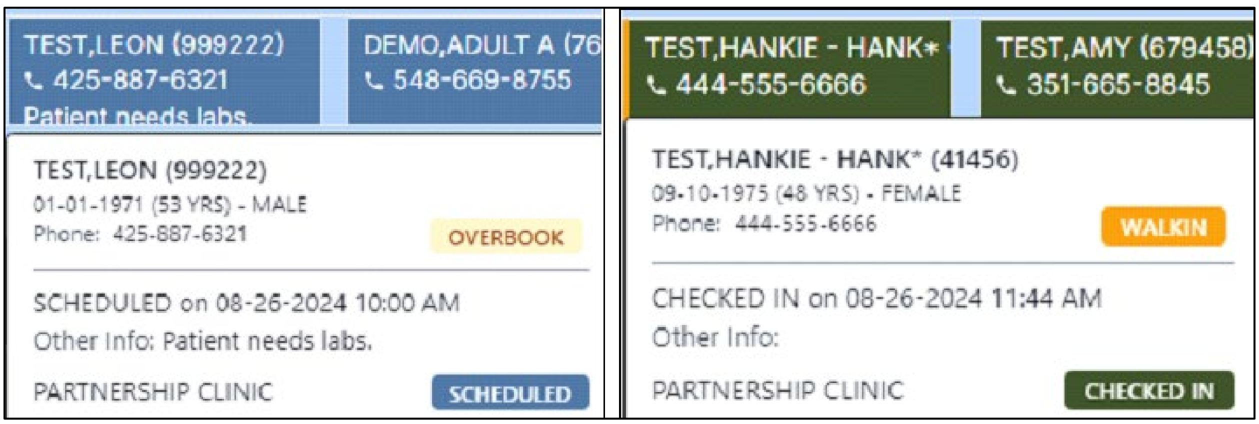


Figure 2-41: Appointment Details examples

The **Appointment Details** pop-up window includes the following information:

- Patient Name (Patient HRN)
- DOB (Age)
- Sex
- Patient home phone number
- Overbook indicator if the appointment is an overbook
- Walk-in indicator if the appointment is a walk-in
- Appointment date (or last action) and time
- Other Info (such as any comments added to the appointment listing)
- Remarks (if available) for no-show and cancelled appointments
- Clinic name

- Appointment status

2.5 Manage Scheduling Workspace

Right-click within the Scheduling Workspace to open a context menu (Figure 2-42) with options for creating and working with patient appointments. The options available will vary, depending on whether you right-click a blank appointment slot or a previously scheduled appointment slot.

2.5.1 Appointment Slot Context Menu

When right-clicking a blank appointment slot, the options shown in Figure 2-42 display.

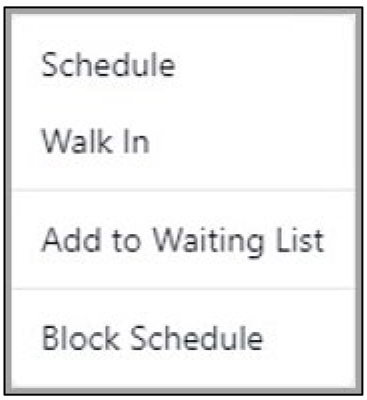


Figure 2-42: Appointment slot context menu

In this example, the context menu offers the options shown in Table 2-2.

Table 2-2: Blank appointment slot context menu options

Option	Description
Schedule	Select this option to schedule an appointment for a patient.
Walk-In	Select this option to schedule a walk-in appointment for a patient. Note that this option is only available for the current day. Once the walk-in appointment is scheduled, the appointment workspace tile will display an orange bar along the left border as well as the text Walk-in indicator on the hover and when you select **View Appointment Details**.
Add to Waiting List	Select this option to add a patient to the Waiting List. Once a patient is added to the Waiting List, the patient can be given an appointment slot from the Waiting List option in the scheduling toolbar. See Section 2.7.2 for how to move patients off the waiting list.

Option	Description
Block Schedule	Select one or more unscheduled appointment slots that are NOT already blocked. Right click to use this option to block schedule availability for the selected appointment slots. The user must select **Show As** to indicate which access type to display for the blocked time. This access type must be previously set up with Prevent Access = Yes (i.e., Block). The user may enter a note (limited to 120 characters) to provide additional information indicating why the slots are blocked. This option is only available to scheduling supervisors (requires SDZSUP key) and for the current date/time into the future. This action also creates a new schedule entry in clinic availability that is only in effect for that specific week.
Block Detail	Note that this option is only available for a blocked appointment slot. Right-click to use this option to view the details of the blocked availability.

2.5.2 Schedule an Appointment

To create a patient appointment, use the following steps:

1. Select the clinic in which you want to create the appointment from the **Clinics** panel (see Section 2.3.3).
2. Right-click the **Access Block** for the time and day the appointment will start and select **Schedule**. (Select **Schedule Parallel** if there are already one or more appointments scheduled during the desired time slot.)

   Any free text entered in the **Other Info** field can be copied. If another appointment is entered in another clinic or division, the same text can be pasted.

   The **Schedule Appointment** dialog (Figure 2-43) displays.

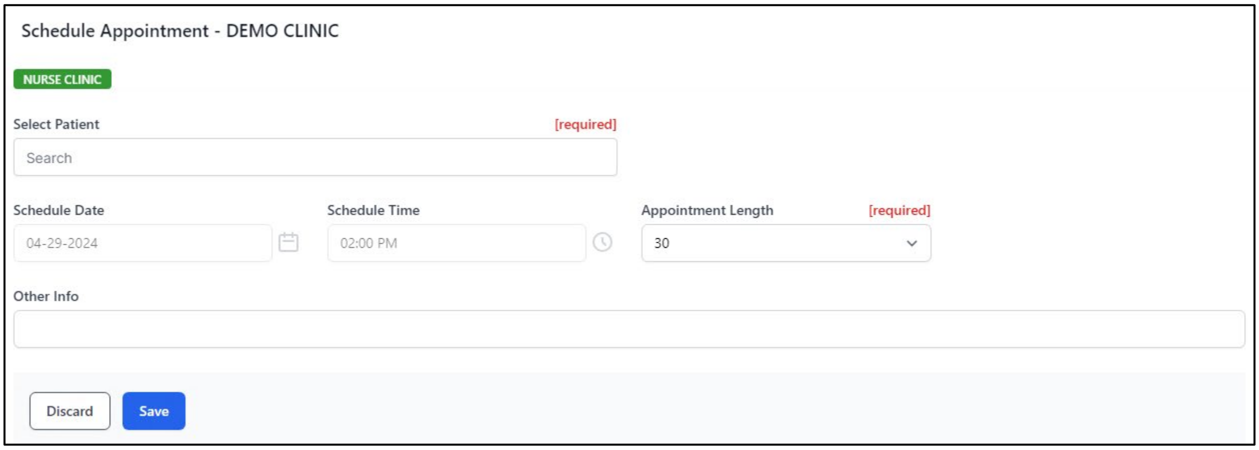


Figure 2-43: Schedule Appointment dialog

3. Type all or part of the patient's name (using a LAST,FIRST format) in the **Select Patient** field. If the name is found, click the patient's name in the listing displayed. If the name is not found, you have the option to register the patient via the **Mini Registration** option as described in Section 2.5.3.

   A recent patients list (Figure 2-44) is also available when selecting a patient. The list includes patients that have been recently selected. The list displays a maximum of five patients, with the latest patient accessed displaying first on the list.

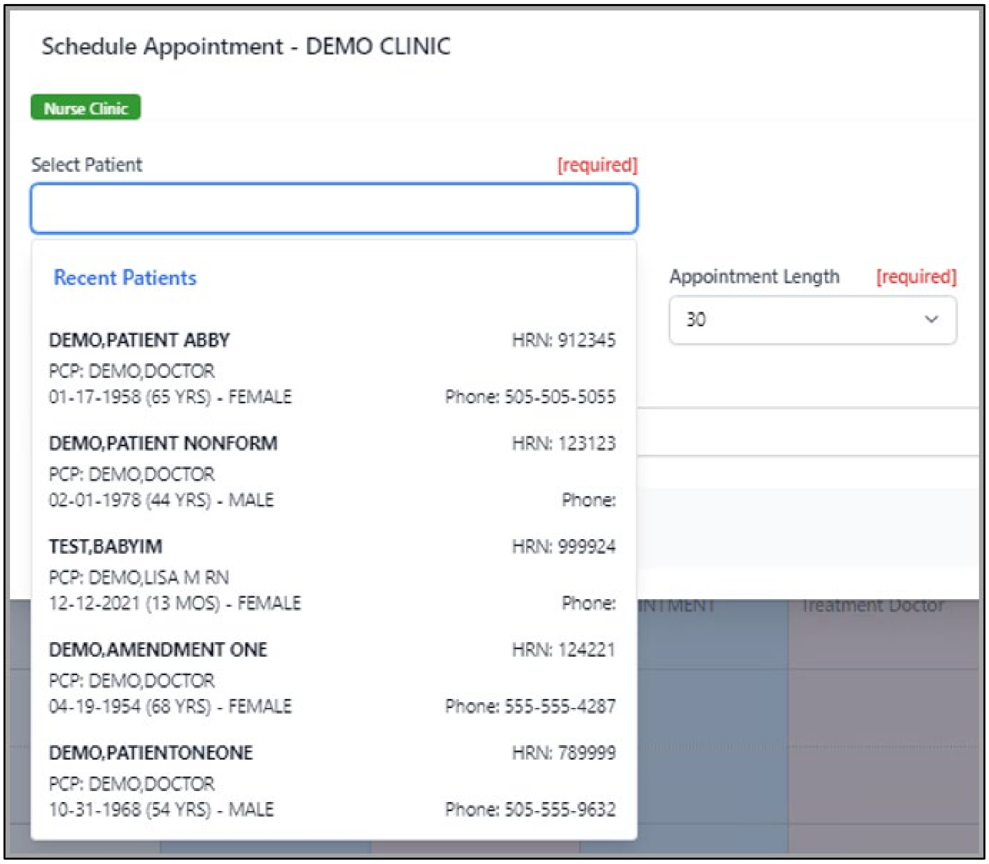


Figure 2-44: Recent Patients list

4. After selecting the patient, verify the schedule date and time in the respective fields and specify the appointment length.

   For a variable length clinic, you can use the drop-down option to lengthen or shorten the appointment length if needed. The **Appointment Length** drop-down options are based on the specified display increments up to the maximum appointment length defined for your clinic. An appointment can be increased up to 240 minutes if the clinic has been defined to allow up to 240 minutes for appointment length.

For example, if a clinic is set with a default appointment length of 30 and increments/display of 30, the drop-down options will show 30, 60, 90, 120, 150, 180, 210, and 240.

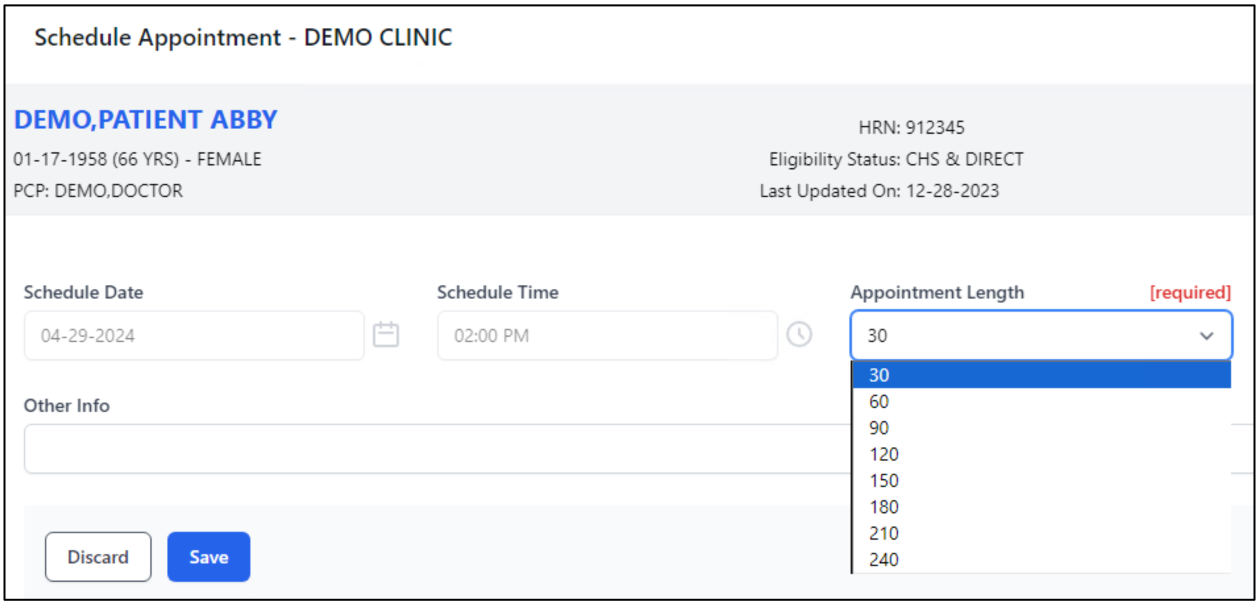


Figure 2-45: Schedule Appointment dialog with Appointment Length drop-down

5. Use the **Other Info** field to enter additional information if necessary. This is not a required field.
6. Conditional: If the patient is on one or more waiting lists, users may choose to remove the patient from any waiting list by clicking the **Remove Patient from Waiting List** check box (Figure 2-46).

Note:	If the patient is on multiple waiting lists, the user must choose the correct waiting list entry by selecting the appropriate clinic name and recall date.

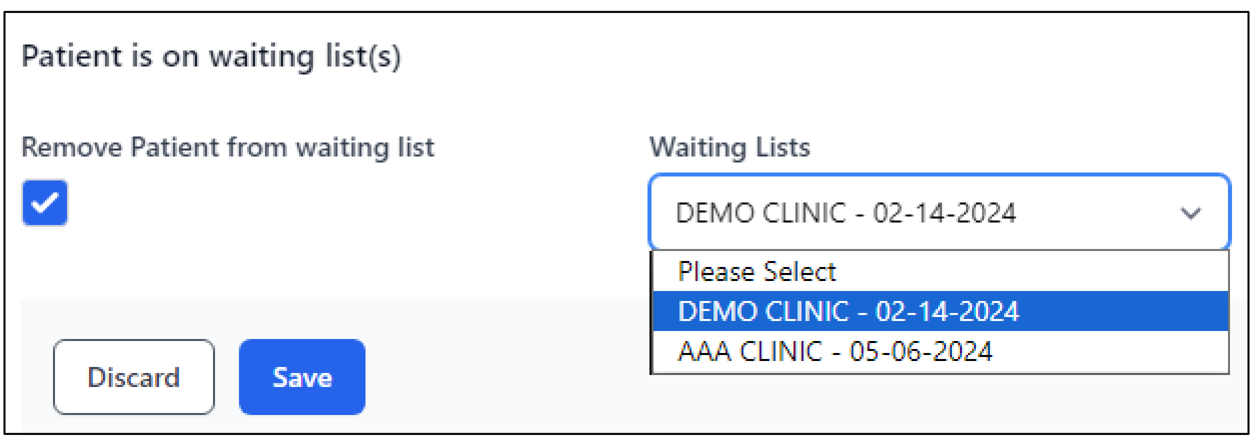


Figure 2-46: Remove Patient from Waiting List check box

7. Conditional: If the patient has one or more future appointments, the appointments display when clicking the down-arrow (Figure 2-47).

Figure 2-47: Future appointment list

8. Click **Save** to save the scheduled appointment or click **Discard** to return to the Scheduling Workspace without saving the appointment.

Note:	If a **Waiting List** entry is selected, **Save** will remove the patient from the selected waiting list and **Discard** will leave the patient on all waiting list(s).

2.5.3 Schedule an Appointment: Register New Patient

To schedule a patient appointment for a specific clinic, the patient must first be registered at that facility. If the patient is not registered or the patient record cannot be found when attempting to schedule an appointment, the **Register New Patient** option (Figure 2-48) displays.

Note:	The **Register New Patient** option only displays for users with the SDZREGMENU key. Sites that prefer not to utilize the mini registration can remove or not assign the key.

Figure 2-48: Register New Patient option

Select the patient's name to open the **Mini Registration** dialog (Figure 2-49).

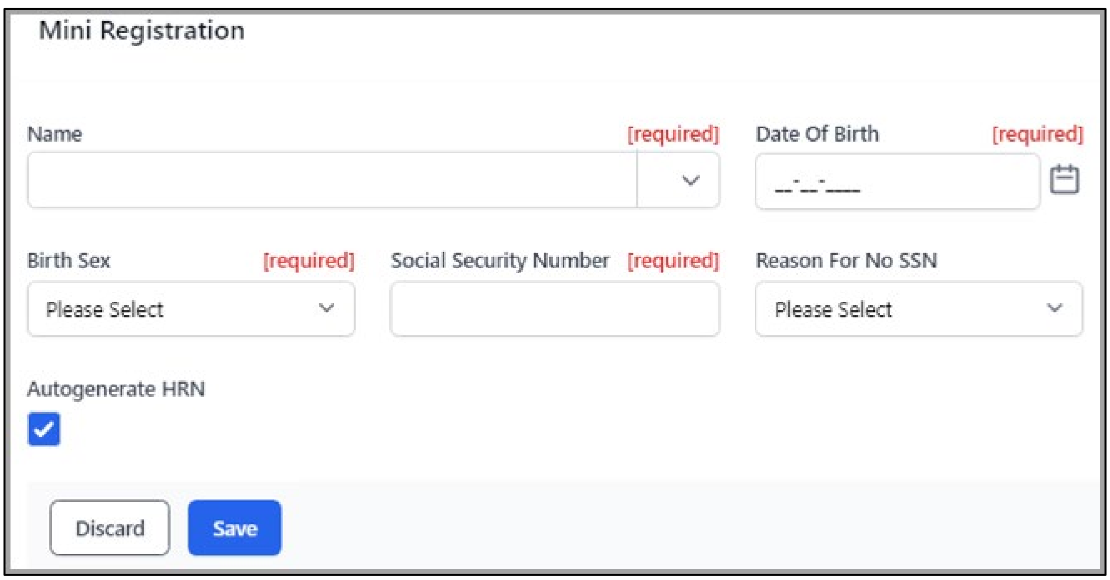


Figure 2-49: Mini Registration form

Enter the patient's registration information in the appropriate fields on the form. Required fields are noted. If the **Auto generate HRN** option is enabled, a temporary health record number is automatically generated for the patient. If the option is not enabled, a field is provided for you to enter the patient's HRN.

Note:	Check with your HIMS department for HRN policy and procedures.

Once the form is completed, click **Save** to save the new patient registration, or click **Discard** to cancel the registration and return to the Scheduling Workspace without saving the registration.

After the patient is successfully registered using the **Mini Registration** form, the user may schedule appointments like any other patient. It is recommended to enter additional information for the patient in the **Registration** module.

Note:	Once the patient appointment is complete, the user (who possesses the AGZMENU Registration key) can right-click on the appointment then select **View Patient Demographics** to quickly jump to the **Registration** module to enter additional information.

2.5.4 Walk-In

For a clinic that accepts walk-in patients, the user can select **Walk-In** to schedule the patient that has presented to the clinic on the same day. The walk-in option is only available for the current day.

Note:	When the user schedules a walk-in appointment, the patient is automatically checked-in because additional data is gathered when scheduling a walk-in appointment.

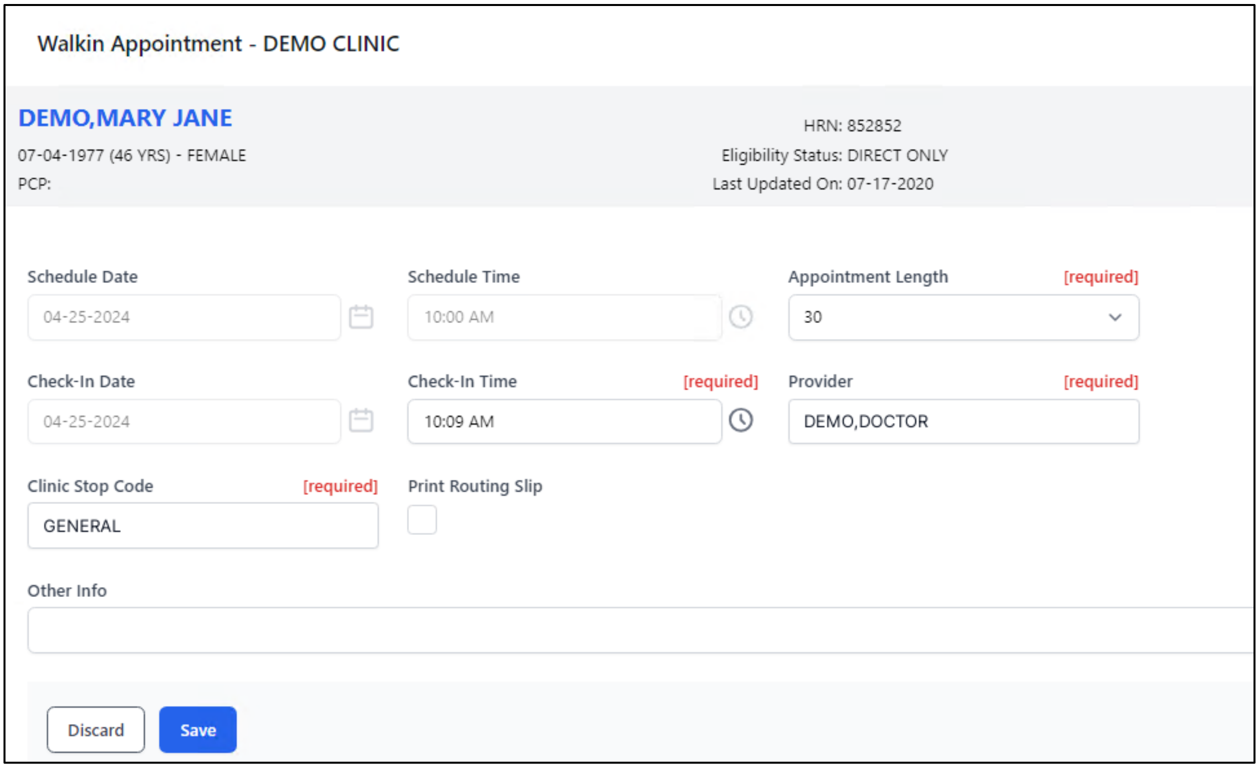


Figure 2-50: Walk-In Appointment form

Once the walk-in appointment is scheduled, the appointment workspace tile will display an orange bar along the left border as well as the text Walk-in indicator on the hover text when the user selects **View Appointment Details** as seen in Figure 2-51 and Figure 2-52. See Section 2.6.5 for additional information on the **View Appointment Details** screen.

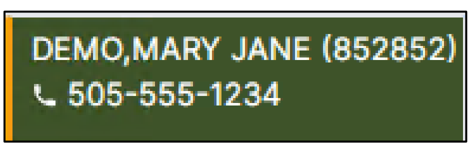


Figure 2-51: Walk-In Appointment tile

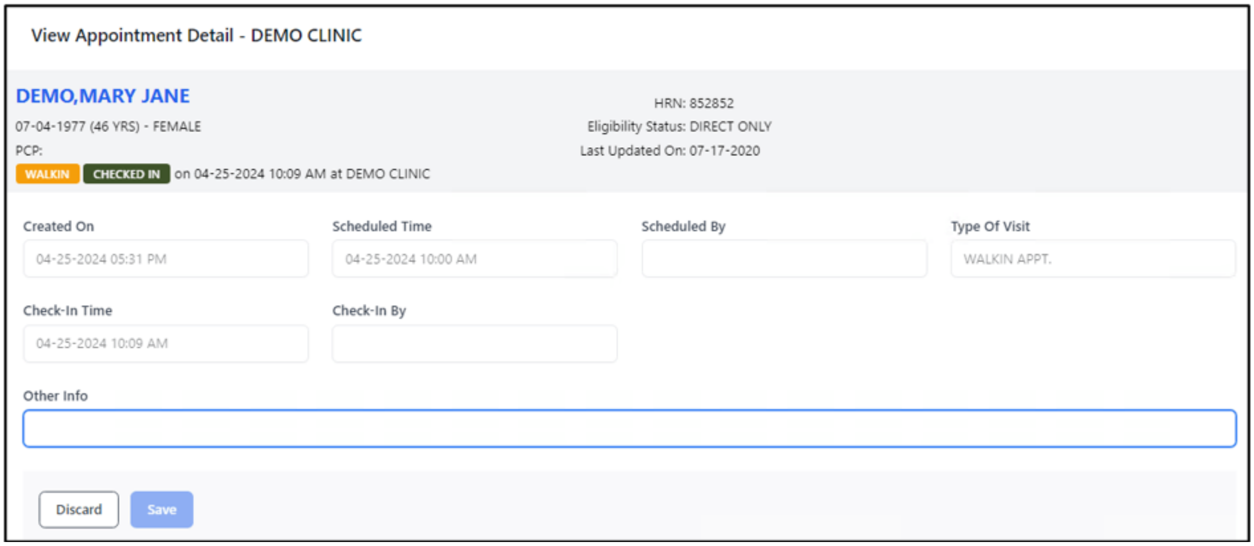


Figure 2-52: View Appointment Detail screen, walk-in appointment

2.5.5 Schedule Parallel Appointments

Parallel appointments can be scheduled within the same time slots for multiple patients as long as the number of available slots for the Access Block allows for the additional appointment. See Section 3.3.2 for additional information on setting up Access Blocks.

Parallel appointments can be a regular scheduled appointment or a walk-in appointment. The process for setting up parallel appointments is the same as described for regular scheduled or walk-in appointments. See Sections 2.5.2–2.5.4 for additional information on scheduling appointments.

Parallel appointment tiles are displayed by Status as follows and is depicted in Figure 2-53 below:

CHECKED IN / SCHEDULED / CHECKED OUT / NO SHOW / CANCELLED

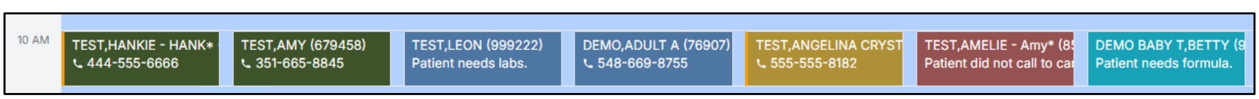


Figure 2-53: Parallel Appointments ordered by status

CHECKED IN appointments will display from left to right by TIME (ascending). Next, SCHEDULED appointments will display from left to right by TIME (ascending). Finally, CHECKED OUT appointments will display next followed by NO SHOW then CANCELLED.

Date and time will display in the hover for ALL status types as seen in the examples below:

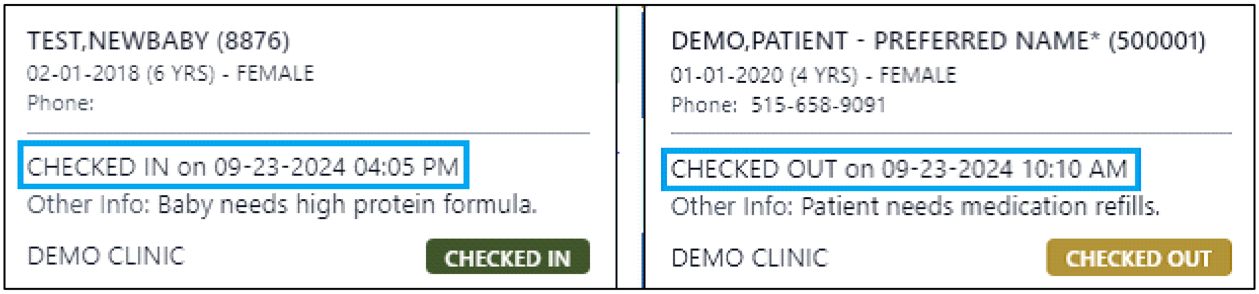


Figure 2-54: Date/Time displays when user hovers over Appointment

2.5.6 Change the Length of an Appointment

Once the appointment is successfully scheduled for a variable length clinic, you can drag the bottom of the appointment (up or down) to length or shorten the appointment length if needed.

1. Position the mouse cursor on the bottom edge of the scheduled appointment.
2. Click and hold the left-mouse button and drag the edge of the appointment to the desired time.
3. A confirmation message will display indicating the change to the appointment length.
4. Click **OK** to change the appointment length. Click **Cancel** to disregard the change.

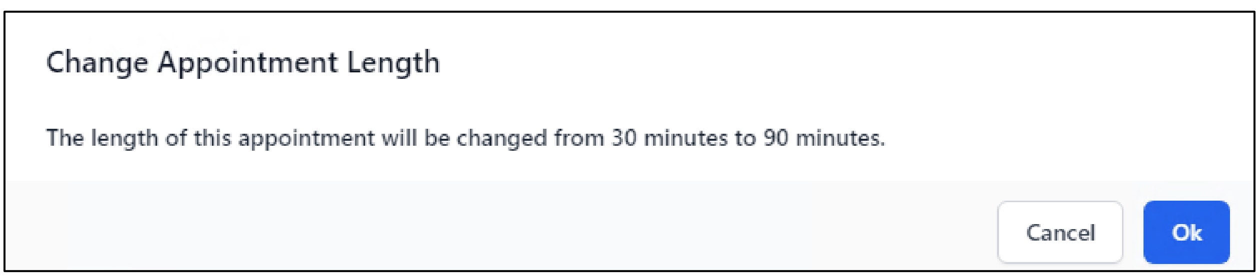


Figure 2-55: Change Appointment Length dialog

2.5.7 Add to Waiting List

The user can add a patient to any waiting list by using a variety of methods. The user may do any of the following:

1. Click the **Waiting List** button in the scheduling toolbar, then click the **Add to Waiting List** button. See Section 2.1.5.2 for full details on how to add a patient to a clinic’s waiting list.

2. Right-click on an empty appointment slot, then use the context menu to select **Add to Waiting List**. This option works exactly as stated in #1 above. See Section 2.1.5.2 for full details on how to add a patient to a clinic's waiting list.

3. Right-click on an existing appointment, then use the context menu to select **Add to Waiting List**. This option also works the same as stated in #1 above. The only difference is that the patient information is pre-populated using patient data from the selected appointment. See Section 2.1.5.2 for full details on how to add a patient to a clinic's waiting list.

2.5.8 Block Schedule and Block Detail

The user can block a portion of the schedule by selecting one or more unscheduled appointment slots that are *not* already blocked. Right-click on the appropriate slot(s) and select **Block Schedule**.

> **Note:** This option is only available to scheduling supervisors (requires SDZSUP key) and for the current date/time into the future.

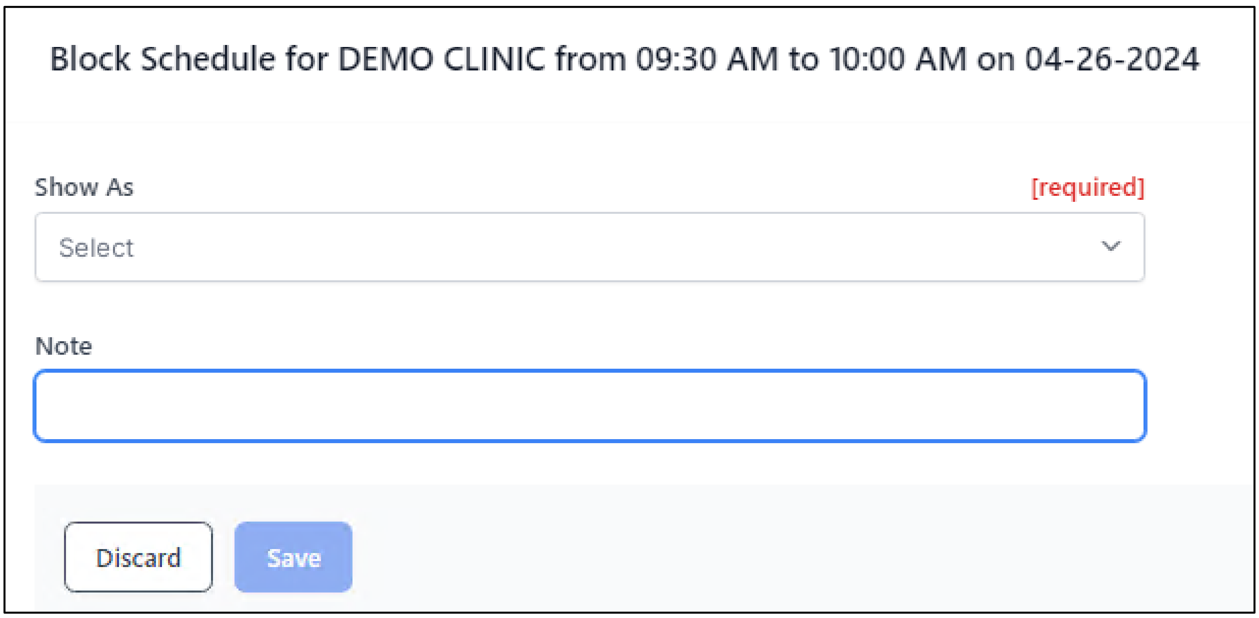


Figure 2-56: Block Schedule form

The user must select **Show As** to indicate which access type to display for the blocked time. This access type must be previously set up with Prevent Access = Yes (i.e., Block). The user may type a note (limited to 120 characters) to provide additional information indicating why the slots are blocked.

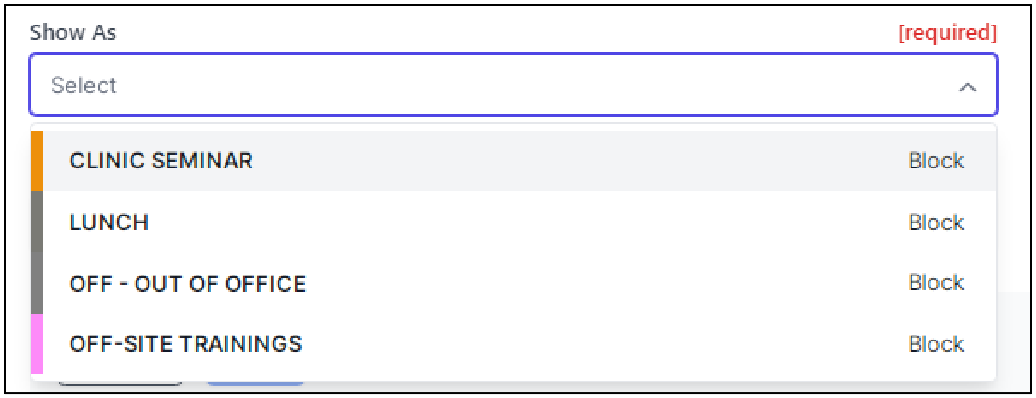


Figure 2-57: Block Schedule, Show As drop-down

Once the Block is saved, the user can right-click on the blocked portion of the schedule and select **Block Detail**. The Block Schedule dialog displays the details of the blocked availability (Figure 2-58).

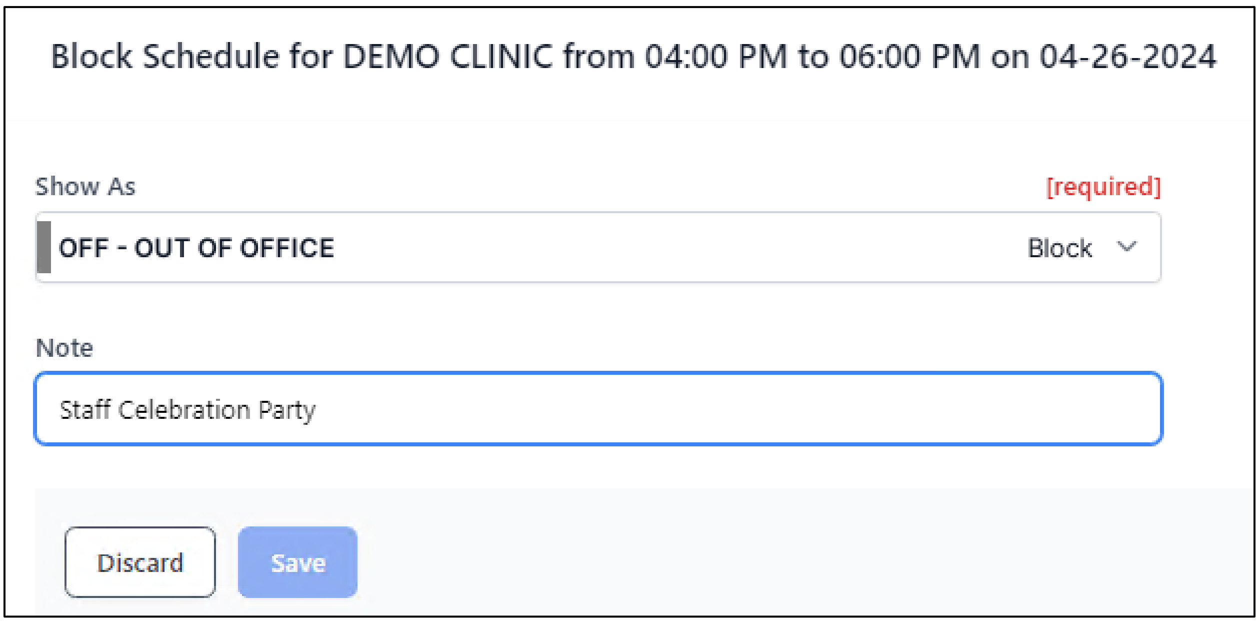


Figure 2-58: Block Schedule dialog

2.6 Manage Scheduled Appointments

The **BPRM Scheduling** module has several features to simplify how you manage patient appointments. These features are discussed in this section.

The context menu options for scheduled appointment slots change based on the actions that can be taken on the appointment. The options shown in Figure 2-59 are offered when the initial appointment is made. These options will change as the appointment status changes.

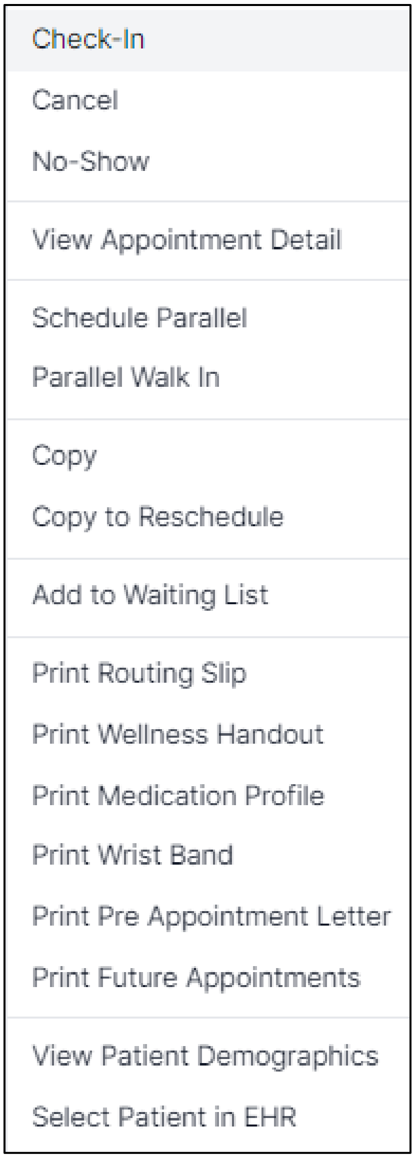


Figure 2-59: Scheduled appointment slot context menu example

Table 2-3 lists the available context menu options depending on the status of the appointment.

Table 2-3: Context menu options

Option	Description
Check-In	Select this option to mark an appointment as checked in. Note that this option is only available for the current day or earlier. This action also creates the visit for this appointment in PCC if the Create Visit at Check In option has been selected in the Clinic Configuration. See Section 3.2 for more information about Clinic Configuration. In EHR, the status will update to Ambulatory once that appointment has been checked in.
Check-Out	Select this option to mark an appointment as checked out. This will only show as an option for a patient who has already been Checked-In. Note that this option is only available for the current day or earlier.
Cancel	Select this option to mark an appointment as cancelled.
No-Show	Select this option to mark an appointment as a no-show. This option only shows for an appointment where the patient has not been Checked In/Checked Out. Note that this option is only available for the current date/time or earlier.
Undo Check-In	Select this option to reverse a checked in appointment. In EHR, the status will be removed. This option will only show for patients who have been Checked-In.
Undo Check-Out	Select this option to reverse a checked-out appointment. This option will only show when a patient has been Checked-Out.
Undo Cancel	Select this option to reverse a cancelled appointment. This option only shows when an appointment has been Cancelled.
Undo No-Show	Select this option to reverse a no-show appointment. This option will only show when an appointment has been marked as a No-Show.
View Appointment Detail	Select this option to see detailed information about the selected appointment.
Schedule Parallel	Select this option to schedule an appointment for an additional patient in the selected appointment slot. The number of allowable parallel appointments is controlled by the number of slots designated for that Access Block. See Section 3.3.2 for more information about Access Blocks.

Option	Description
Parallel Walk-In	Select this option to schedule a walk-in appointment for an additional patient in the selected appointment slot. Note that this option is only available for the current day. The number of allowable parallel appointments is controlled by the number of slots designated for that Access Block. See Section 3.3.2 for more information about Access Blocks.
Copy	Use this option to copy the selected patient’s information for an appointment in order to pasted into one or more other appointment slots on the same clinic or another clinic.
Copy to Reschedule	Select this option to copy the appointment details and reschedule the appointment to a different date and/or time. This option will cancel the original appointment as well as create the new appointment.
Add to Waiting List	Select this option to add the patient to the Waiting List. This Clinic will default to the appointment Clinic but can be changed by the user.
Print Routing Slip	Select this option to print a routing slip for the selected patient. The routing slip includes current appointment information including checked-in time and future appointments.
Print Wellness Handout	Select this option to print a patient wellness handout (PWH) for the selected patient. Depending on the PWH setup at your site, the list of handouts may vary.
Print Medication Profile	Select this option to print the patient’s Rx Profiles (Medication Profile).
Print Wrist Band	Select this option to print a Wrist Band for the patient.
Print Pre-Appointment Letter	Select this option to print the Pre-Appointment letter. This option shows when an appointment has been scheduled but the patient has not been Checked-In. This letter includes a list of Future appointments for the patient up to 999 days or up to the Clinic Future Booking Max Days limit. The appointments listed are for the selected clinic only. These letters can serve as reminders about upcoming appointments and are configured in the Settings module via Letter Templates described in Section 3.5. If a Letter Template default is NOT set for the clinic for the Pre-Appointment letter type, the user will be given a drop-down list to select the appropriate Pre-Appointment Letter Template to use for printing. See Section 3.2.7 for information on setting Letter Defaults for the clinic.

Option	Description
Print Cancellation Letter	Select this option to print the Cancellation letter. This option shows when an appointment has been updated to Cancellation status. Cancellations can be made by the Clinic or by the Patient. This letter includes details of the Cancelled appointment. These letters can serve as reminders about upcoming or missed appointments and are configured in the Settings module via Letter Templates described in Section 3.5. If a Letter Template default is NOT set for the clinic for the Clinic Cancelled/Appointment Cancelled letter type, the user will be given a drop-down list to select the appropriate Clinic Cancelled/Appointment Cancelled Letter Template to use for printing. See Section 3.2.7 for information on setting Letter Defaults for the clinic.
Print No-Show Letter	Select this option to print the No-Show letter. This option shows when an appointment has been updated to No-Show status. This letter includes details of the No-Show appointment. These letters can serve as reminders of missed appointments and are configured in the Settings module via Letter Templates described in Section 3.5. If a Letter Template default is NOT set for the clinic for the No-Show letter type, the user will be given a drop-down list to select the appropriate No-Show Letter Template to use for printing. See Section 3.2.7 for information on setting Letter Defaults for the clinic.
Print Future Appointments	Select this option to print a Future Appointments report for the selected patient. The report will display a list of the patient's upcoming appointment date and times across all Divisions and all clinics.
View Patient Demographics	Select this option to view and edit patient demographics for the scheduled patient. Requires user to possess the Registration Key (AGZMENU).
Select Patient in EHR	Select this option to open the patient's record in the Electronic Health Record (EHR) application. Requires EHR access with EHR running for the same user in order to allow the BPRM user to jump to the patient in EHR.

2.6.1 Appointment Check-In

The appointment **Check-in** option can be used to update the appointment status to Check In, and to create a PCC/EHR visit if this is setup under the **Clinic Configuration**.

Right-click the appointment and select **Check-in**.

Figure 2-60 shows an example of the **Check-In Appointment** dialog.

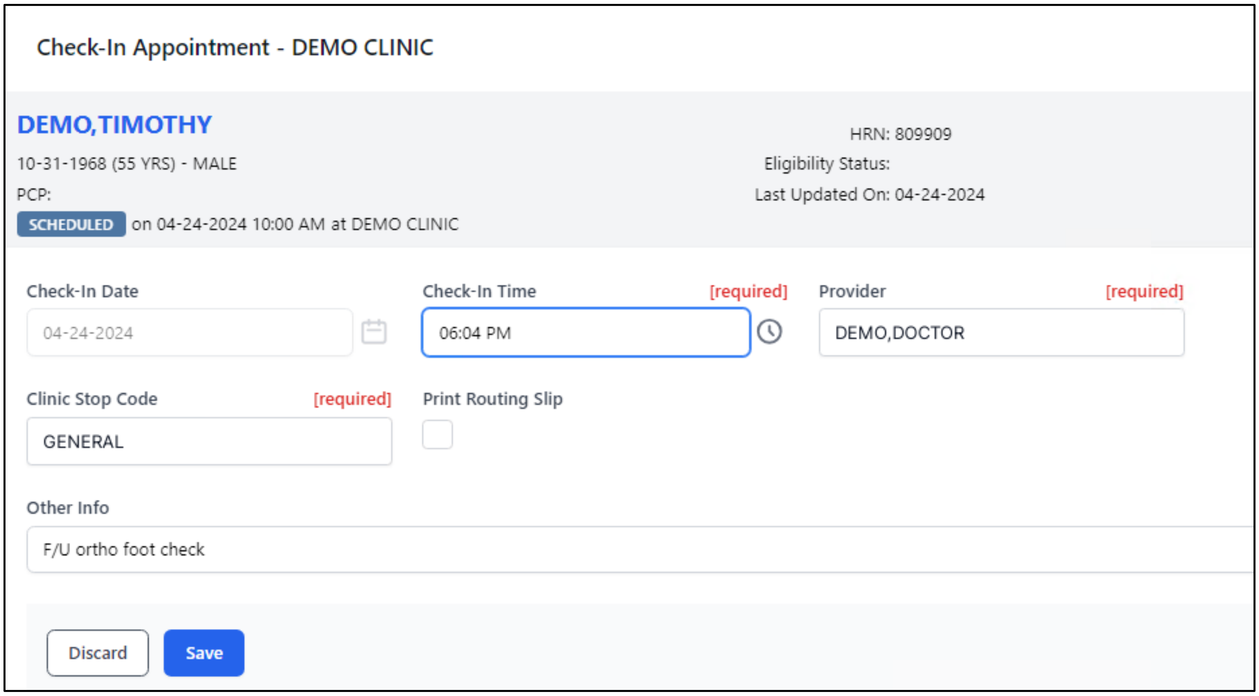


Figure 2-60: Check-in Appointment dialog

The form displays the clinic and appointment date/time that is selected. Information from the patient header also displays at the top of the form. The form contains the fields listed in Table 2-4.

Table 2-4: Fields on the Check-in Appointment form

Field	Description
Check-In Date	This field defaults to today and is not editable by the user.
Check-in Time	This date field defaults to the current time. Users can change the time if needed for a clinic set up to **Ask For Check-In/Check-Out Time**. See Section 3.2.3 for more information on clinic configurations.

Field	Description
Provider	This field will auto-populate if a default provider is specified in clinic configurations. The user can change the default provider or search for a different provider if needed. This field can be set as required under clinic configurations and is needed to create a visit. See Section 3.2.3 for more information on clinic configurations.
Clinic Stop Code	Field will auto-populate with the specified clinic code set in the clinic configuration. If the **Multiple Clinic Code Used** field is selected under clinic configurations, then the user is allowed to search for and select other clinic codes. See Section 3.2.3 for more information on clinic configurations.
Print Routing Slip	Select this check box to print the routing slip on an RPMS device printer after clicking **Save**. The routing slip includes current appointments, future appointments, and check-in time. See Figure 2-61.
Other Info	Use this field to enter additional information related to the appointment.

Once the fields have been populated, click **Save** to complete the check-in or click **Discard** to return to the previous window.

Note: At this point, the user can choose to reverse a checked-in appointment if an error was made. After confirmation to undo the check-in, the appointment status will return to Scheduled. In EHR, the status will be removed.

2.6.2 Appointment Check-Out

The appointment **Check-Out** option can be used to update the appointment status to Checked Out. To do this, right-click the checked-in appointment and select **Check-Out**. The **Check-out Time** field auto-populates with the current time. You can also select a different time for a clinic set up to **Ask for Check-In/Check-Out Time**. See Section 3.2.3 for more information on clinic configurations.

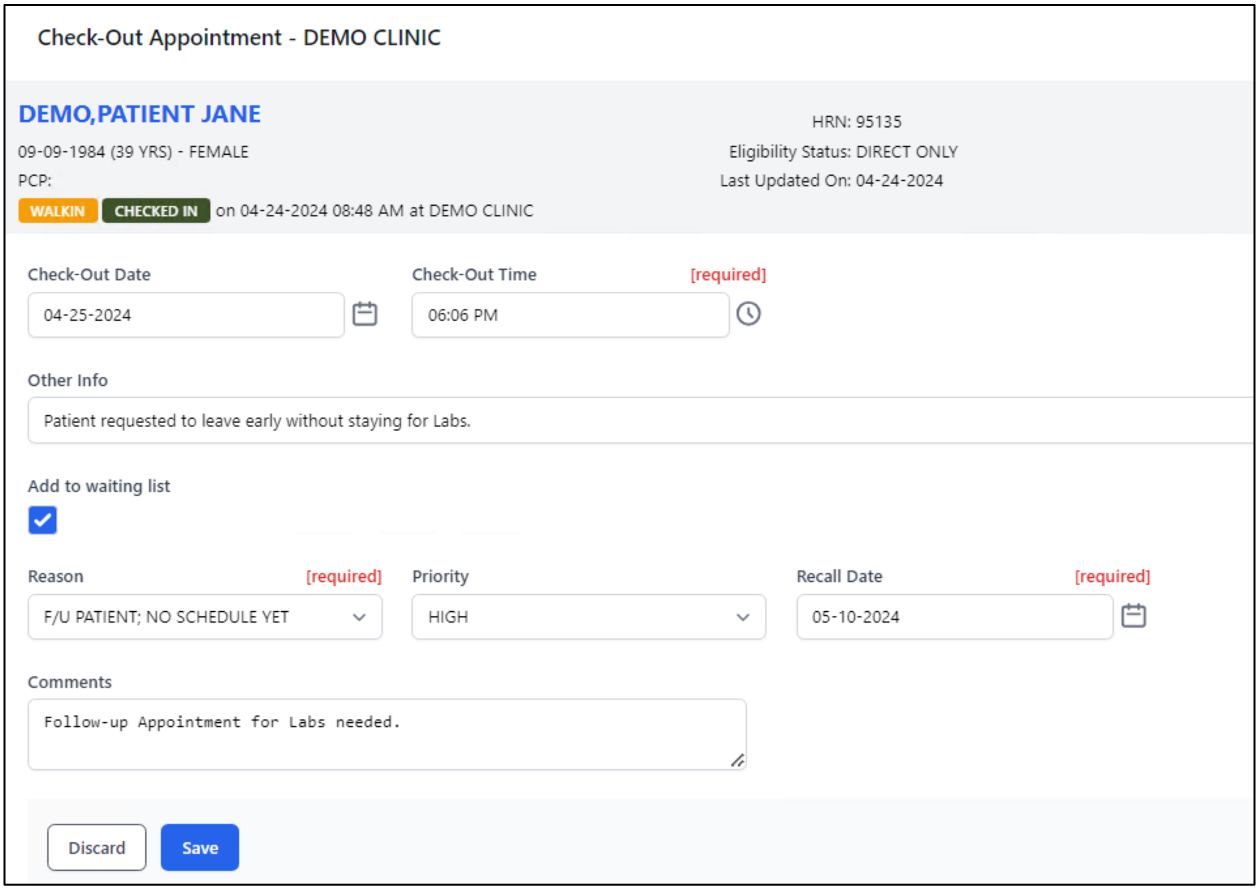


Figure 2-61: Check-out Appointment dialog with Add to waiting list check box

The user may choose to add the patient to the clinic waiting list during check-out by clicking the **Add to Waiting List** button. If selected, the user must complete the **Reason** and **Recall Date** fields; the **Priority** and **Comments** fields are optional.

Once the fields have been populated, click **Save** to complete the check-out or click **Discard** to return to the previous window.

Note:	At this point, the user can choose to reverse a checked-out appointment if an error was made. After confirmation to undo the check-out, the appointment status will return to Checked-In.

2.6.3 Appointment Cancel

The appointment **Cancel** option can be used to update the appointment status to **Cancelled.** There are two types of cancelled appointments: cancelled by patient or cancelled by clinic. To do this, right-click the scheduled appointment and select **Cancel**. Select the appropriate cancellation type and cancellation reason. Enter cancellation remarks as needed.

Figure 2-62 shows an example of the **Cancel Appointment** dialog.

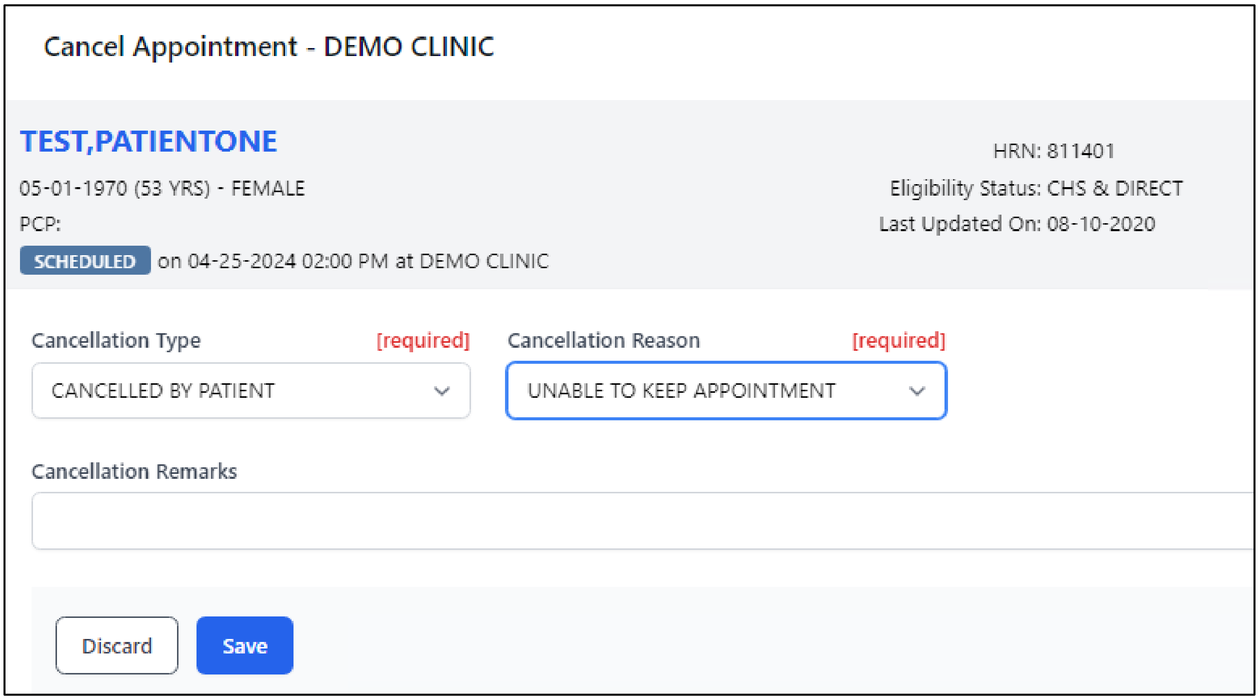


Figure 2-62: Cancel Appointment dialog

Once the fields have been populated, click **Save** to complete the cancellation or click **Discard** to return to the previous window.

Note:	At this point, the user can choose to reverse a cancelled appointment if an error was made. After confirmation to undo the cancellation, the appointment status will return to Scheduled.

2.6.4 Appointment No-Show

The appointment **No-Show** option can be used to update the appointment status to **No-Show.** To do this, right-click the scheduled appointment and select **No-Show**. Enter no-show remarks as needed.

Figure 2-63 shows an example of the **No-Show Appointment** dialog.

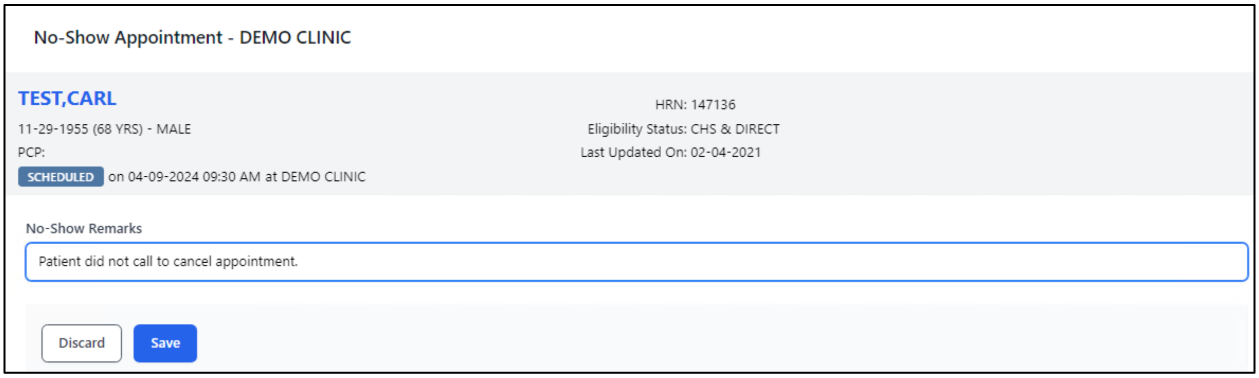


Figure 2-63: No-Show Appointment dialog

Once the fields have been populated, click **Save** to complete the no-show or click **Discard** to return to the previous window.

> **Note:** At this point, the user can choose to reverse a no-show appointment if an error was made. after confirmation to undo the no show, the appointment status will return to Scheduled.

2.6.5 View Appointment Detail

Select this option to see detailed information about the selected appointment. Users are also able to add or edit the **Other Info** field for an appointment or add/edit remarks for no-show and cancelled appointments. The walk-in indicator will now display next to the status of the appointment under the PCP (i.e., Walkin, Checked in).

2.6.5.1 Add/Edit Other Info to an Existing Appointment

When users create an appointment, the **Other Info** field is used to add comments about the appointment. You can add/edit comments to an existing appointment in a similar manner. To do this, right-click the appointment and select **View Appointment Detail**. The **View Appointment Detail** (Figure 2-64) dialog displays. Use the **Other Info** field to add comments about the appointment in the dialog displayed.

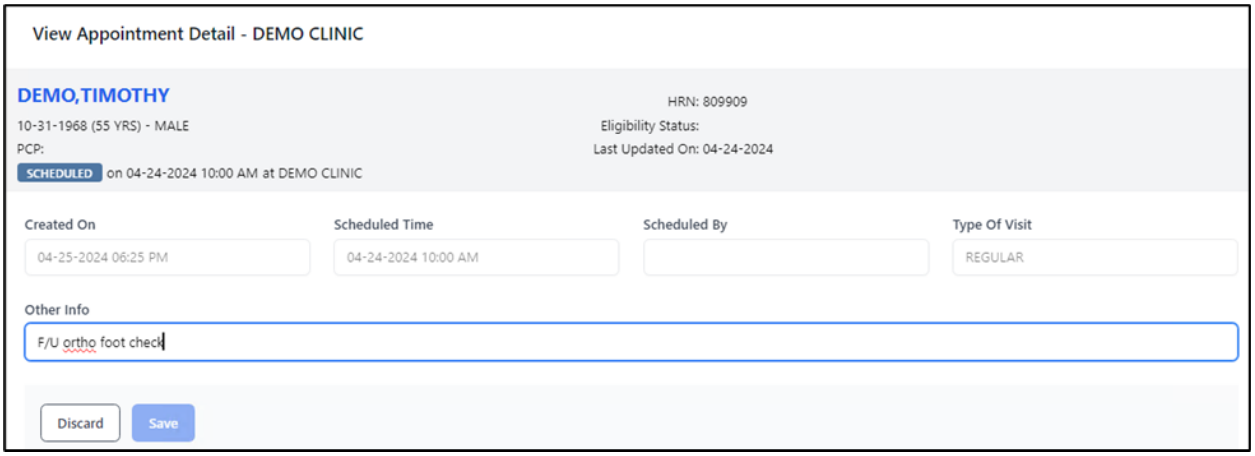


Figure 2-64: View Appointment Detail dialog

2.6.5.2 Add/Edit Cancelled Remarks and Other Info

When an appointment is cancelled users can also add or edit comments in the dialog in the **Cancelled Remarks** and **Other Info** fields (Figure 2-65). Click **Save** once all comments have been added.

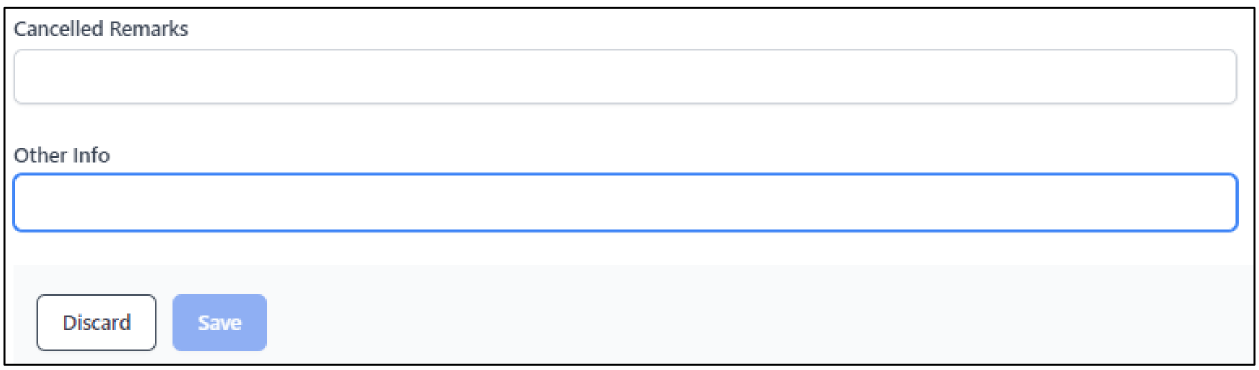


Figure 2-65: Cancelled Remarks field example

2.6.5.3 Add/Edit No Show Remarks and Other Info

When a patient is a no show, users can also add/edit comments to the dialog in the **No Show Remarks** and **Other Info** fields (Figure 2-66). Click **Save** once all comments have been added.

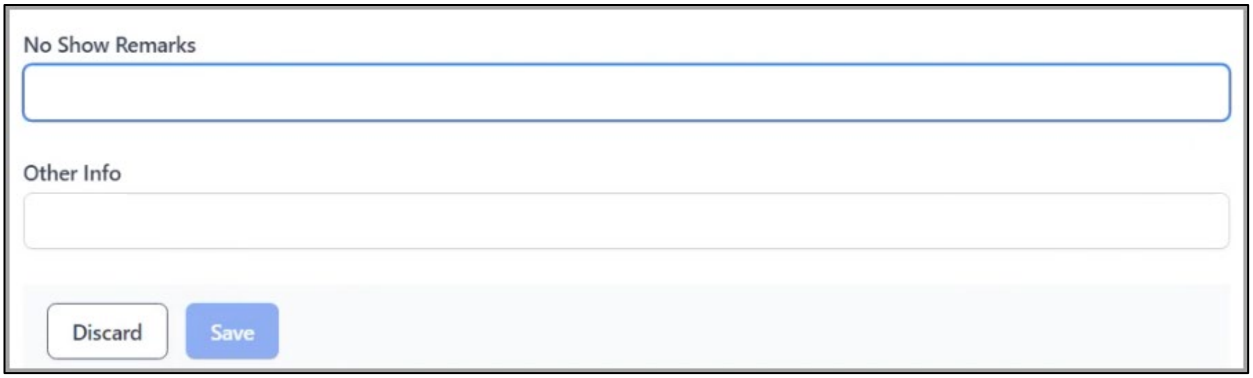


Figure 2-66: No Show Remarks field example

2.6.6 Copy Appointment with Patient Information

Use this option to copy any patient's information within an appointment. It will also copy any other information entered on the appointment being copied. The copied appointment can be pasted on another appointment slot from one day to another or to a different week at the same clinic or another clinic. Only one patient appointment can be copied at a time within the same division.

To copy and paste an appointment (one patient appointment only at a time), do the following:

1. Right-click the current patient appointment and select the **Copy** option from the context menu.
2. Search for an appointment slot in the desired clinic schedule.
3. Right-click the appointment slot and select the **Schedule Lastname,Firstname (HRN #)** option (Figure 2-67).

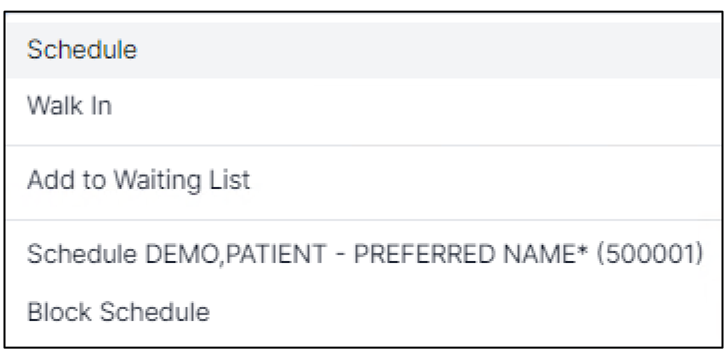


Figure 2-67: Copy context menu example

The **Schedule Appointment** dialog (Figure 2-43) displays.

4. Click **Save** to schedule the appointment or **Discard** to return to the Scheduling Workspace without saving.

2.6.7 Copy to Reschedule

Use this option to move (reschedule) an appointment from one appointment slot to another:

1. Right-click the old appointment and select **Copy to Reschedule**.
2. Right-click the new appointment slot and select **Reschedule Patient Name**. The **Reschedule Appointment** dialog (Figure 2-68) displays.
    - Optional. Using an alternate method, the user can drag and drop the original appointment to the new slot. Once the appointment is in the new slot, the **Reschedule Appointment** dialog (Figure 2-68) displays.

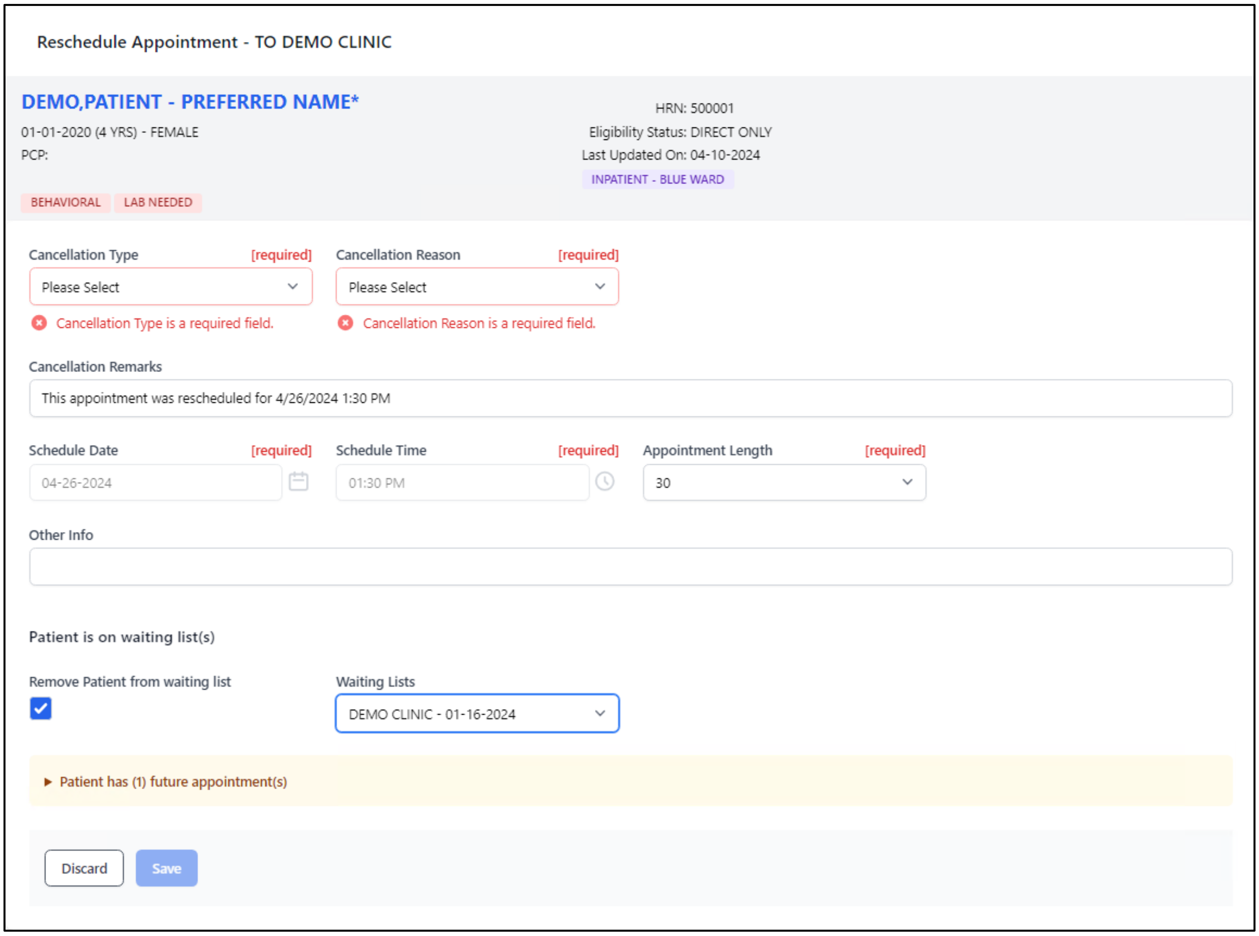


Figure 2-68: Reschedule Appointment dialog

3. Complete the required **Cancellation Type** and **Cancellation Reason** fields from the drop-down options in the **Reschedule Appointment** dialog. The cancellation remarks defaults with a reschedule comment for date/time.
4. Verify the new date/time, appointment length, and provide other information as needed.

5. If the patient is on one or more waiting list, the user may remove the patient by selecting the **Remove patient from waiting list** check box and choosing the appropriate waiting list using the clinic name and recall date.

6. If the patient has one or more future appointments, the appointments will be listed when the down-arrow key is selected.

7. Click **Save** to save the scheduled appointment or click **Discard** to return to the Scheduling Workspace without cancelling the original appointment or creating the new appointment.

> **Note:** The rescheduled appointment will display in two locations (and two different colors). The original appointment slot will display as Canceled, and the new appointment slot will display as Scheduled.
>
> If you are moving an appointment to the same date and time, but to a different clinic, the original appointment will be deleted instead of cancelled.
>
> Also, appointments can only be moved in the Day or Week display modes.

2.6.8 Print Routing Slip

Use this option to print a routing slip for the selected patient. The routing slip includes current appointment information including checked-in time and future appointments.

```
                             **Confidential Patient Data**
FACILITY: 2020 DEMO HOSPITAL
PAGE 1    OUTPATIENT ROUTING SLIP

DEMO,PATIENT                                          HRCN:   500001
DOB: 01/01/2020                                    APPT DT:   4/26/2024
MAIN STREET  1234
YOURTOWN, OKLAHOMA  76777

Current Status:  INPATIENT on ward BLUE WARD
Current Status:  ACTIVE INCOMPLETE CHART

         **CURRENT APPOINTMENTS**
TIME      CLINIC                      CHECK-IN  LOCATION            PHONE
9:00 AM   TO DEMO CLINIC              09:37 AM
12:30 PM  TO DEMO CLINIC

         **FUTURE APPOINTMENTS**
===============================================================================
DATE         TIME      CLINIC                           LOCATION

05/08/2024   8:30 AM   DEMO CLINIC                      DEMO CLINIC

DATE PRINTED: Apr 26, 2024@09:39:35
Requested by: TOCLERK,BPRM
```

Figure 2-69: Sample Patient Routing slip displaying current and future appointments

2.6.9 Print Wellness Handout

Use this option to print a patient wellness handout (PWH) for the selected patient. Depending on the PWH setup at your site, the list of handouts may vary.

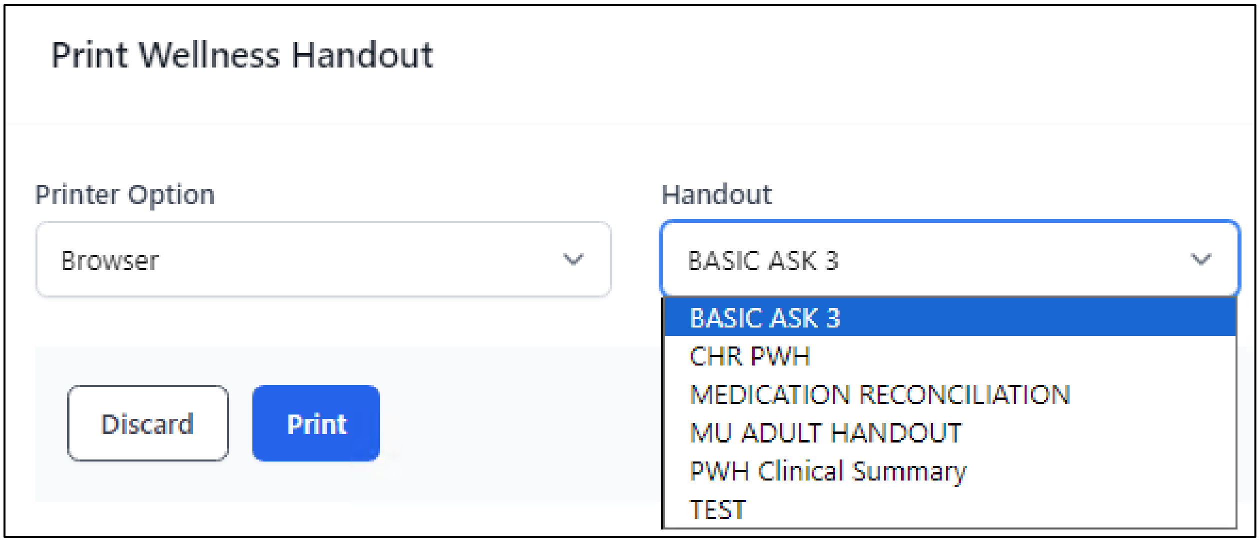


Figure 2-70: Sample wellness handout selection list

```
My Wellness Handout                           Report Date: Apr 25, 2024  Page: 1
--------------------------------------------------------------------------------

********** CONFIDENTIAL PATIENT INFORMATION [TW]  Apr 25, 2024 **********

TEST,PATIENTONE   HRN:  811401                   2021 DEMO HOSPITAL
1357 AMBER DRIVE                                 ALBUQUERQUE, NM  89701
BEAVERTON,  OREGON   97006
5557231544                                       202-555-1212

Thank you for choosing 2021 DEMO HOSPITAL.
This handout is a new way for you and your doctor to look at your health.

________________________________________________________________________
Emergency Contact:                                         My Blood Type:
Address:
City/State:
Phone:

Last Hospital Admission: Aug 11, 2020
   Reason for admission:

________________________________________________________________________

5 Immunizations Due:
    Tdap
    HEP B,NOS
    FLU,NOS
    ZOS-Shgrx
    COV,NOS

________________________________________________________________________
HEIGHT/WEIGHT/BMI - Weight and Body Mass Index are good measures of your
health.  Determining a healthy weight and Body Mass Index also depends on
how tall you are.

No recent weight on file.  We recommend that you have your weight rechecked at
your next visit.
No recent height on file.  We recommend that you have your height rechecked at
your next visit.
```

Figure 2-71: Sample wellness handout

2.6.10 Print Medication Profile

Use this option to print a patient's Rx profiles (medication profile).

```
DEMO,TIMOTHY                                  ID#:    809909
104 WEST RD STE 100                           DOB:    OCT 31,1968
WINSLOW                                       PHONE:  505-123-4444
ARIZONA  13458                                ELIG:

WEIGHT(Kg): 108.862 (08/15/2022)         HEIGHT(cm): 182.88 (08/15/2022)
DISABILITIES:

ALLERGIES: NKA

ADVERSE REACTIONS:


                    Medication Profile Sorted by ISSUE DATE
                                                                REF
 Rx#         Drug                                            ST REM  Issued  Last Fill
-------------------------------------------------------------------------------
 10001511    APAP/CODEINE 300MG/30MG TAB                      A   5 04-15-24 04-15-24
     QTY: 3             SIG: TAKE 1 TABLET BY MOUTH THREE TIMES A DAY FOR PAIN
 10001512    OXYCODONE 5MG TAB                                A   0 04-15-24 04-15-24
     QTY: 2             SIG: TAKE ONE (1) TABLET BY MOUTH TWO TIMES PER DAY
 10001513    diazePAM 5 mg oral tablet                        A   5 04-15-24 04-15-24
     QTY: 3             SIG: TAKE ONE (1) TABLET BY MOUTH THREE TIMES A DAY FOR
                             ANXIETY
 10001514    DIPHENOXYLATE/ATROPINE 2.5/.025MG TAB            A   5 04-15-24 04-15-24
     QTY: 3             SIG: TAKE 1 TABLET BY MOUTH THREE TIMES A DAY FOR
                             DIARRHEA
```

Figure 2-72: Sample medication profile

2.6.11 Print Wrist Band

Use this option to print a wrist band for the patient.

```
DEMO,TIMOTHY
10/31/1968
55 Y     M
#809909   TST
232101809909
```

Figure 2-73: Sample wrist band

2.6.12 Print Individual Letters: Pre-Appointment, Cancel, No Show

Use this option to print a single letter for the current patient in the appointment. The letter available to print is dependent on the appointment status.

An appointment with Scheduled status will allow the user to print the pre-appointment letter. An appointment in Cancelled status will allow the user to print the cancellation letter. An appointment in No-Show status will allow the user to print the no-show letter.

From the context menu, right-click to print the individual letter.

1. **Pre-Appointment Letter:** This letter includes a list of future appointments for the patient up to 999 days or up to the clinic future booking max days limit. The appointments listed are for the selected clinic only. These letters can serve as reminders about upcoming appointments and are configured in the **Settings** module via letter templates described in Section 3.5. Figure 4-19 shows an example of a pre-appointment letter.

2. **Cancellation Letter:** This letter includes details of the cancelled appointment. These letters can serve as reminders about upcoming or missed appointments and are configured in the Settings module via letter templates described in Section 3.5.

3. **No-Show Letter:** This letter includes details of the no-show appointment. These letters can serve as reminders of missed appointments and are configured in the **Settings** module via letter templates described in Section 3.5.

> **Note:** If a letter template default is *not* set for the clinic for *any* of the letter types, the user will be given a drop-down list to select the appropriate letter templates to use for printing. See Section 3.2.7 for information on setting letter defaults for the clinic.

2.6.13 Print Future Appointments

Use this option to print future appointments for the current patient in the appointment. This report will display a list of the patient's upcoming appointment dates and times across all divisions and all clinics.

```
              ***Confidential Patient Data Covered by Privacy Act*** Page: 1
               Future Appointments List for DEMO,PATIENT #500001
                          Printed on: 4/26/2024@09:45:13
----------------------------------------------------------------------------
Date              Time     Clinic                        Scheduled By
============================================================================
                           2021 DEMO HOSPITAL (INST)
                           -------------------------
Mon Apr 29, 2024  09:30AM  TO DEMO CLINIC                TOCLERK,BPRM
Wed May 08, 2024  08:30AM  DEMO CLINIC                   TOCLERK,BPRM
```

Figure 2-74: Sample Future Appointments List

2.6.14 View Patient Demographics

Select this option to view and edit patient demographics for the scheduled patient. Requires user to possess the AGZMENU Registration key.

2.6.15 Select Patient in EHR

Select this option to open the patient's record in the Electronic Health Record (EHR) application. Requires EHR access with EHR running for the same user in order to allow the BPRM user to jump to the patient in EHR.

2.7 Clinic Waiting List

There are multiple ways to access the Clinic Waiting List.

1. The Waiting List from the Scheduling Tool bar will access the list of patients on a specific Clinic or multiple Clinics. Add Waiting List button can be used to add a patient to any Clinic.
2. Select a clinic and click the **Clinic Waiting List** icon (clipboard), and the clinic will display in the right-side pane. The user can drag and drop a patient from the waiting list to the Scheduling Workspace. The option is available on the **Clinic**, **Day**, and **Week/Work week** modes, and when only one clinic is selected in the **Scheduler Workspace**.

> **Note**: Patients can also be added to the clinic's waiting list from the clinic's Scheduling Workspace. Right-click on any blank slot or appointment and the **Add to Waiting List** option will display on the context menu.

2.7.1 Open/Close Clinic Waiting List

After selecting a clinic, click the **Clinic Waiting List** icon (clipboard) button to alternately display or hide the **Clinic Waiting List** pane (Figure 2-75) on the right side of the Scheduling Workspace. The **Clinic Waiting List** pane shows patients (if any) waiting for an appointment at the selected clinic sorted by **Recall Date**, then **Priority**.

Figure 2-75: Open/Close Waiting List example

2.7.2 Using the Clinic Waiting List

When enabled in the clinic setting (see Section 3.2.5), the clinic waiting list displays on the right side of the Scheduling Workspace. An example of a typical waiting list is shown in Figure 2-76.

The waiting list displayed defaults to the selected clinic. However, the user may access the waiting list of a different clinic by using the drop-down.

Figure 2-76: Clinic Waiting List example

Each entry in the waiting list shows the following information (if available):

- Patient Name
- Patient HRN
- Appointment Priority (HIGH, MIDDLE, LOW)
- Patient Phone Number
- Recall Date
- Added By
- Added On
- Reason
- Comments (if entered)

When an appointment becomes available, select a patient from the **Waiting List**, then drag and drop the selection into the appropriate time slot for the clinic.

To remove the patient from waiting list without scheduling an appointment, right-click an entry and click **Remove**. The entry can also be edited by clicking **Edit**.

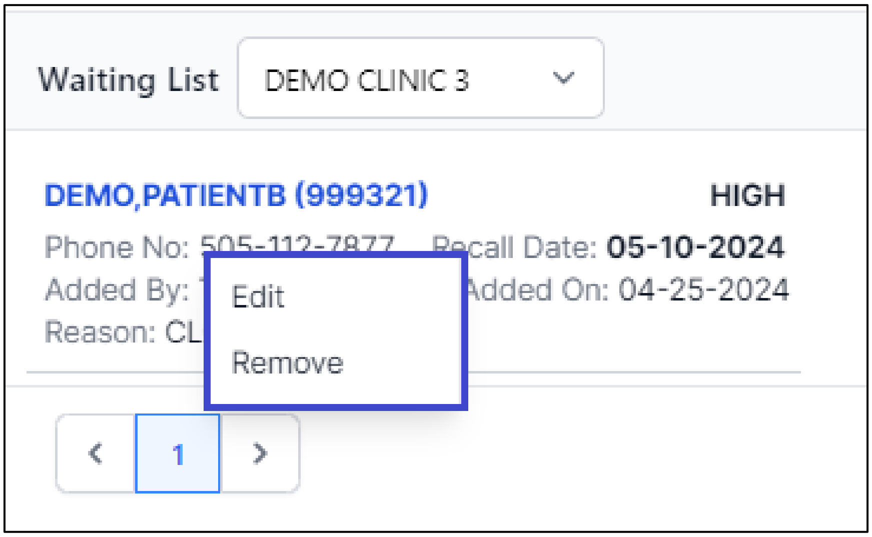


Figure 2-77: Waiting List Menu example

The clinic Waiting List context menu includes the options listed in Table 2-5.

Table 2-5: Clinic Waiting List context menu options

Option	Description
Edit	Use this option to edit the details for an existing Waiting List entry.
Remove	Use this option to remove a patient from the Waiting List.

The following are some important points about using the clinic waiting list.

- Use the drop-down at the top of the clinic **Waiting List** to select the clinic for which the waiting list is displayed.
- The waiting list displays five entries per page and a pager will display at the bottom to select more entries.

The waiting list is sorted based on the **Recall Date**, then **Priority**.

3.0 Scheduling Configuration

The Scheduling settings control a variety of application settings for scheduling, allowing users to change or add such things as access types, holiday configurations, letter templates, resource groups, and clinics. Changes made within the **Settings** module are typically done by a supervisor or site manager. In most cases, once these settings have been established, they will rarely need to be changed.

> **Note:** The options available in the **Settings** module may vary for different users, depending on the RPMS functionality enabled at your site, and the access permissions granted to each user.
>
> You must log off and log back in to the BPRM application for any scheduling configuration changes to take effect.

Open the **Settings** module by clicking **Settings** in the lower-left corner, as shown in Figure 3-1.

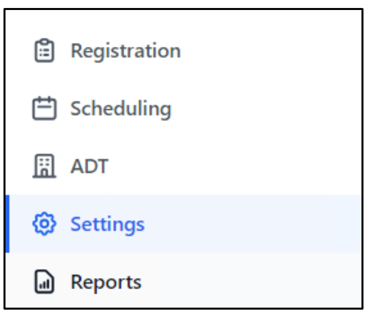


Figure 3-1: Taskbar with Settings module highlighted

The **Scheduling** selection pane (Figure 3-2) located above the **Settings** module displays a list of available options. The information displayed on the right side of the window varies, depending on the option selected.

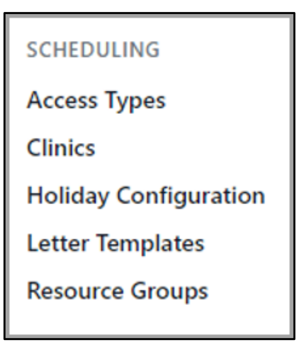
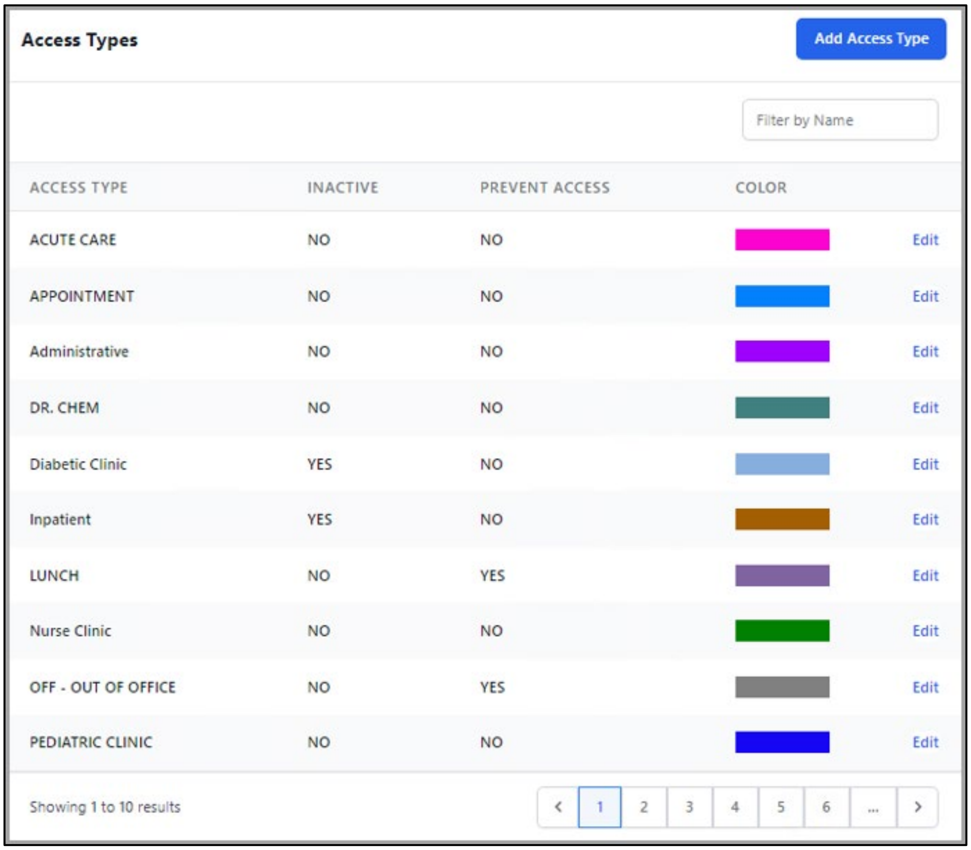


Figure 3-2: Scheduling Selection pane

3.1 Access Types

As described in Section 3.3.2, scheduling availability for a clinic is divided into Access Blocks, which are color-coded representations of the amount of time allotted for a specific type of clinic access (such as appointments).

Selecting the **Access Types** option on the **Settings** module opens the **Access Types** window (Figure 3-3). This provides a way to define the types of Access Blocks available. You can add new Access Types and edit existing ones.


Access Types
Add Access Type
Filter by Name

ACCESS TYPE	INACTIVE	PREVENT ACCESS	COLOR	
ACUTE CARE	NO	NO		Edit
APPOINTMENT	NO	NO		Edit
Administrative	NO	NO		Edit
DR. CHEM	NO	NO		Edit
Diabetic Clinic	YES	NO		Edit
Inpatient	YES	NO		Edit
LUNCH	NO	YES		Edit
Nurse Clinic	NO	NO		Edit
OFF - OUT OF OFFICE	NO	YES		Edit
PEDIATRIC CLINIC	NO	NO		Edit

Showing 1 to 10 results
‹ 1 2 3 4 5 6 ... ›

Figure 3-3: Access Types window

3.1.1 Add an Access Type

To add a new Access Type, do the following:

1. From the **Access Types** window of the **Settings** module, select **Add Access Type** in the upper-right corner of the window. The **Access Type** dialog (Figure 3-4) displays.

Figure 3-4: Access Type dialog

2. Type a name for the new Access Type in the **Access Type** field.
    - The **Inactive** toggle default is set to No for an active Access Type. Selecting Yes will make the Access Type inactive.
    - The **Prevent Access** toggle default is set to No to allow clinic scheduling for the Access Type. Selecting Yes will make the Access Type unavailable for clinic scheduling. This would be used to block a schedule for a particular day or part of the day.
3. Select a color from the **Color** selection dialog (Figure 3-5).

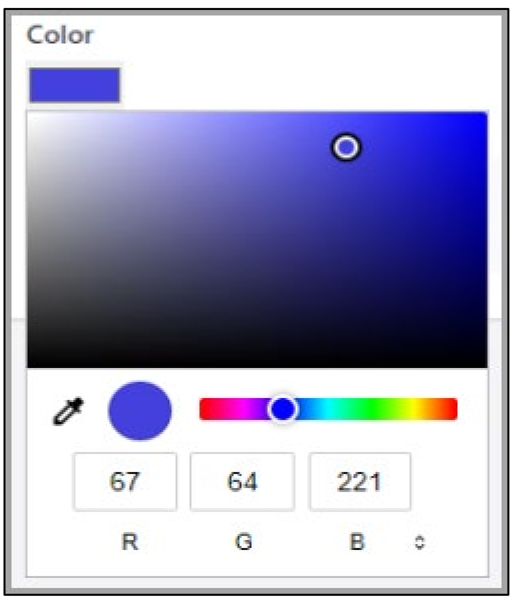


Figure 3-5: Color Selection dialog

4. When done, click **Save** to save the new Access Type or click **Discard** to close the window without saving.

3.1.2 Edit an Access Type

To edit an existing Access Type, use these steps:

1. On the **Access Types** window of the **Settings** module, select the Access Type to edit. One of these methods can also be used to find the Access Type you want to edit:
   - Use the left and right arrows in the lower-right corner of the window to navigate through each window of the Access Type listing.
   - Type the first few letters of the Access Type name in the **Filter by Name** field in the upper-right corner of the window, and then press Enter.
2. Select the Access Type to edit and click **Edit** to the right of the name. The **Access Type** dialog (Figure 3-3) displays again and can be edited.
3. Make any changes necessary to the Access Type name, color, Inactive status, and Prevent Access.
4. Click **Save** to save the changes or click **Discard** to close the window without saving the changes.

3.2 Configure Clinics

Click **Settings** then **Clinics** (under **Scheduling**) to access the **Clinics** window. An example of the **Clinics** window is shown in Figure 3-6.

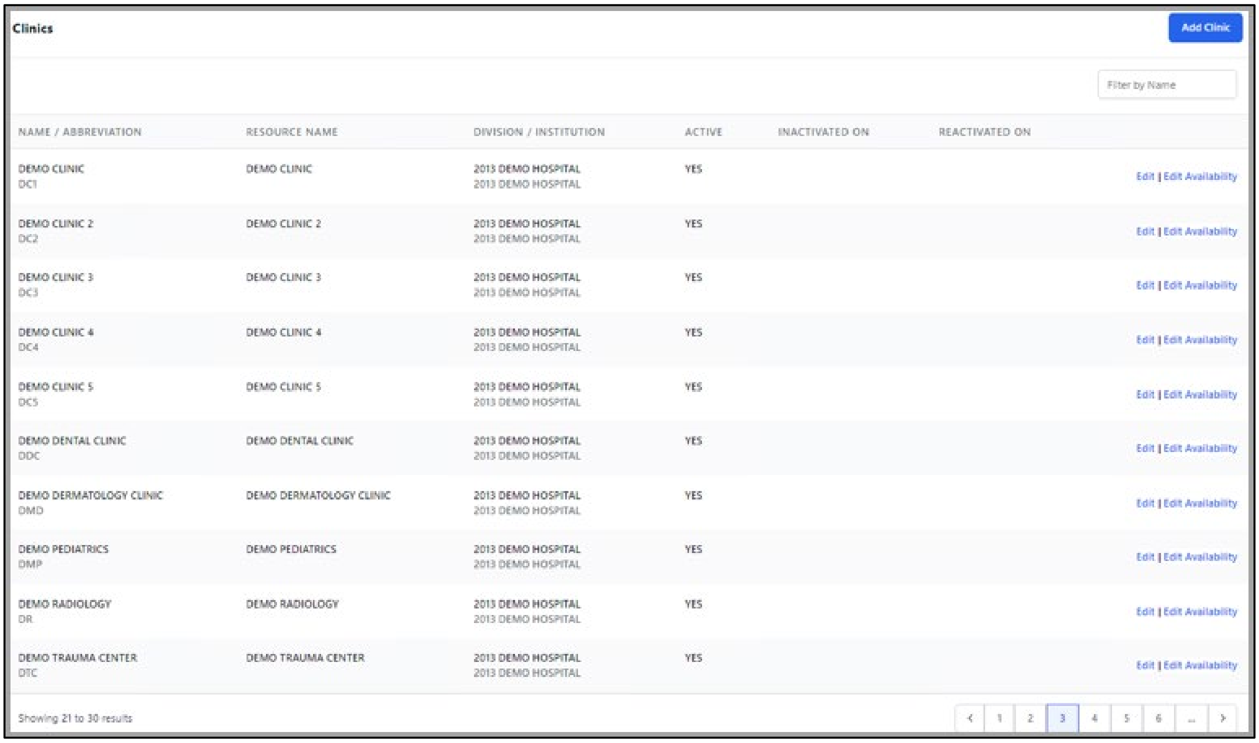


Figure 3-6: Settings module, Clinics window

Use the **Clinics** window of the **Settings** module to add or remove clinics from those available to the BPRM suite and to set or modify various parameters for each clinic.

3.2.1 Search for a Clinic

The **Clinics** window of the **Settings** module lists all the clinics in the RPMS database. Each window of the display shows 10 clinics. Use the left and right arrows or select a number at the lower-right corner of the window (Figure 3-7) to navigate to other windows. The current window number is highlighted.

Figure 3-7: Clinic window navigation

Use the **Filter by Name** field (Figure 3-8) in the upper-right corner of the window to narrow down the search for a specific clinic. Type any part of a clinic name in the field and press Enter. The filtered list of clinics displays.

Once clinic edits are complete, the user will return to the filtered results without having to re-enter the search text. The **Filter by Name** criteria that was last entered will continue to display and will not be cleared.

Figure 3-8: Filter by Clinic field

3.2.2 Add a New Clinic

To add a new clinic, click the **Add Clinic** button (Figure 3-9) in the upper-right corner of the **Clinics** window to set up a new clinic.

Figure 3-9: Add Clinic button

The **Add Clinic** dialog (Figure 3-10) displays.

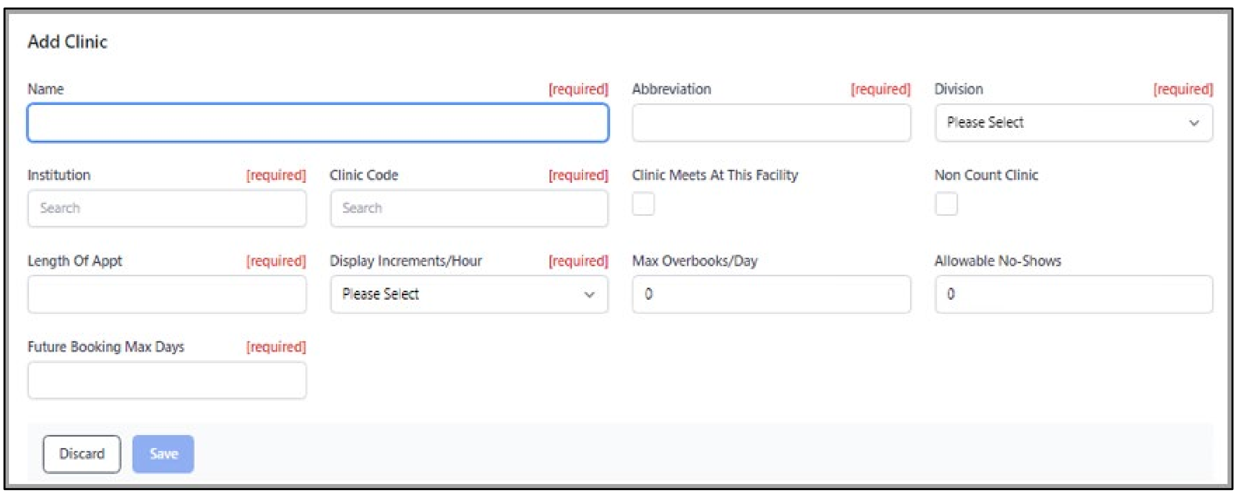


Figure 3-10: Add Clinic dialog

3.2.2.1 Fields On the Add Clinic Dialog

The fields on the **Add Clinic** dialog are listed in Table 3-1. Many of these fields affect the **Scheduling** module in regard to this clinic. Required fields are noted on the dialog.

Table 3-1: Fields on the **Add Clinic** dialog

Field	Description
Name	Required field. Use this field to enter the name of the clinic. **Note:** BPRM automatically assigns the clinic name to the resource name. Some earlier versions of scheduling software allowed the clinic and resource names to be different. This is no longer the case.
Abbreviation	Required field. Use this field to enter the abbreviated name of the clinic.
Division	Required field. Use this field to specify the division with which the clinic is associated. Click within the field, then choose one of the divisions shown on the list to populate this field.
Institution	Required field. This field can be different from the division mostly used for multi-divisional sites.
Clinic Code	Required field. Use this field to specify the Stop Code for the clinic. Click within the field then choose one of the codes shown on the list to populate this field, or enter the Stop Code and select the appropriate entry.
Clinic Meets at This Facility	Select this check box if the clinic meets at this facility.
Non-Count Clinic	Select this check box if the clinic is a non-count clinic for workload purposes. Clear the check box if this clinic is to be included in workload statistics.
Length of Appt	Required field. Use this field to specify the default length of appointment (in minutes) used by the clinic. The maximum length allowed is 240 minutes.
Display Increments / Hour	Required field. Use this field to specify the number of increments per hour to show when viewing schedules set for the clinic. Click within the field, then choose one of the increments shown on the list to populate this field.
Max Overbooks / Day	Use this field to set the maximum number of overbooks that will be allowed per day. If overbooks are not allowed at this clinic, set this field to zero.
Allowable No-Shows	Use this field to set the number of times in a row a patient can be a no-show before being flagged for possible discharge from the clinic. The **Allowable No-Shows** number is used in combination with the **No-Show Waiting Period** field described in Clinic Configuration-Scheduling Parameters.
Future Booking Max Days	Required field. Use this field to specify the number of days into the future that appointments can be booked. This will be the maximum number of days that will be available when searching for open appointment slots in the future.

After entering the appropriate information, click **Save** to save the new clinic or click **Discard** to close the form without saving the entries.

3.2.3 Edit Clinic Configuration

Select a clinic from the **Clinics** window as described in Section 3.2.1 and then click **Edit** to the right of the clinic name to edit the parameters for that clinic. This opens the **Clinic Configuration** dialog.

The **Clinic Configuration** dialog provides access to a variety of clinic parameters and displays in multiple sections:

- General Parameters
- Waiting List
- Scheduling Parameters
- Letters Templates
- Clinic Users
- Clinic Providers

The parameters available in each pane are described in the following sections:

- Section 3.2.4 Clinic Configuration: General Parameters
- Section 3.2.5 Clinic Configuration: Waiting List
- Section 3.2.6 Clinic Configuration: Scheduling Parameters
- Section 3.2.7 Clinic Configuration: Letter Defaults
- Section 3.2.8 Clinic Configuration: Clinic Users
- Section 3.2.9 Clinic Configuration: Clinic Providers

When editing the parameters, you are given these options at the bottom of the window:

- **Save**. Use this option to save the changes, close the **Clinic Configuration** dialog, and return to the **Clinics** window.
- **Discard**. Use this option to close the **Clinic Configuration** dialog and return to the **Clinics** window without saving any of the changes.

3.2.4 Clinic Configuration: General Parameters

When first opened, the **Clinic Configuration** dialog initially displays the general parameters section as shown in Figure 3-11.

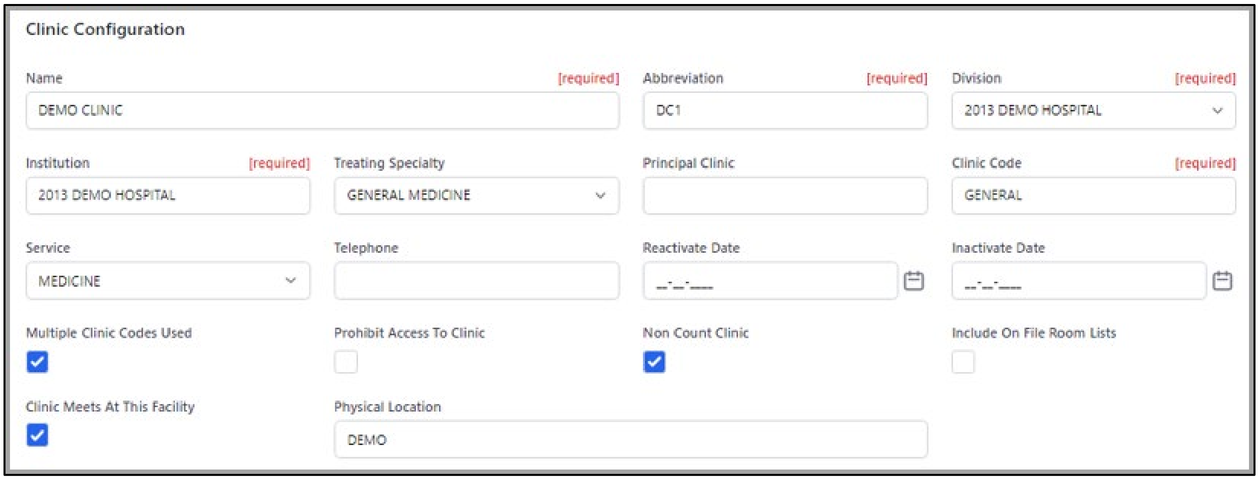


Figure 3-11: General parameters dialog

The parameters in the **General** section of the **Clinic Configuration** dialog are listed in Table 3-2. Some of these fields are populated when the clinic is first added to the RPMS system. Required fields are noted in the dialog.

Table 3-2: Clinic configuration—General tab fields

Field	Description
Name	Required field. Shows the name of the clinic, as entered when the clinic was added to the system.
Abbreviation	Required field. Shows the abbreviated name of the clinic, as entered when the clinic was added to the system.
Division	Required field. Shows the division with which the clinic is associated, as entered when the clinic was added to the system.
Institution	Required field. This field shows the institution with which the clinic is associated, as determined when the clinic was added to the system. This field can be different from the division mostly used for multi-divisional sites.
Treating Specialty	Use this field to specify the treating specialty of the clinic. Click within the field then choose one of the specialties shown on the list to populate this field.
Principal Clinic	Use this field to specify the principal clinic with which this clinic is associated (if any). If enrollment in this clinic is equivalent to enrollment in a larger one, this field should contain the name of the larger clinic. To search for a principal clinic, click within the field and type one or more of the letters contained in the clinic name to display a list of search results. Select a clinic name to populate the field.
Clinic Code	Required field. This is the clinic stop code assigned to a specific location, as entered when the clinic was added to the system.
Service	Use this field to specify the service provided by the clinic. Click within the field then choose one of the options shown on the list to populate this field.

Field	Description
Telephone	Use this field to enter the telephone number for the clinic.
Reactivation Date	Use this field to indicate the date on which an inactivated clinic was reactivated.
Inactivation Date	Use this field to indicate the date on which the clinic was inactivated.
Multiple Clinic Codes Used	Select this check box to allow the user to select a clinic stop code when a patient is checked in for an appointment.
Prohibit access to clinic	Select this check box to allow only users with sufficient access rights to add this clinic to the preferred resource list or book appointments at this clinic.
Non-Count Clinic	Select this check box if the clinic is a non-count clinic for workload purposes. Clear the check box if this clinic is to be included in workload statistics.
Include on File Room list	Select this check box if this is a non-count clinic that should be included on the file room lists.
Clinic Meets at this Facility	Select this check box if the clinic meets at this facility.
Physical Location	Use this field to show the physical location of the clinic.

After entering the appropriate information, click **Save** to save the clinic data or click **Discard** to close the form without saving the entries.

3.2.5 Clinic Configuration: Waiting List

Select the **Waiting List** check box to activate the **Waiting List** for the clinic. Activating this functionality allows users to add patients to the clinic’s **Waiting List**. Figure 3-12 shows the **Waiting List** check box.

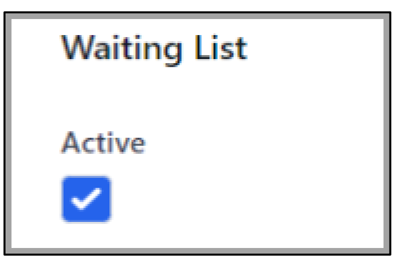


Figure 3-12: Waiting List pane

3.2.6 Clinic Configuration: Scheduling Parameters

Use the **Scheduling** portion of the **Clinic Configuration** dialog to configure various scheduling parameters for the selected clinic. Figure 3-13 shows an example of the **Scheduling** dialog.

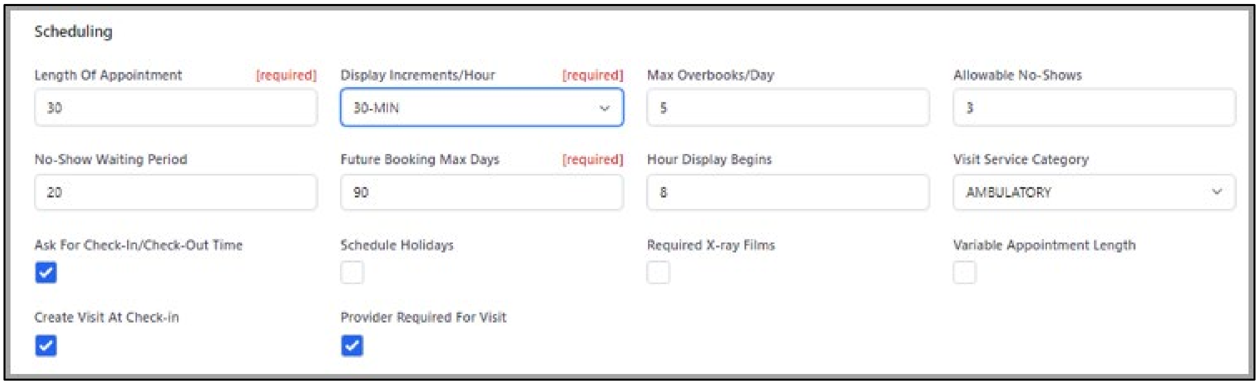


Figure 3-13: Scheduling Parameters dialog

The parameters in the **Scheduling** section of the Clinic Configuration are shown in Table 3-3. Some of these fields are populated when the clinic is first added to the RPMS system. These settings affect the **Scheduling** module in regard to the selected clinic. Required fields are noted in the dialog.

Table 3-3: Clinic configuration—Scheduling parameters

Field	Description
Length of Appointment	Required field. Use this field to specify the default length of appointment (in minutes) used by the clinic. The maximum length is 240 minutes.
Display Increments/Hour	Required field. Use this field to specify the number of increments per hour to show when viewing schedules set for the clinic. Click within the field, then choose one of the options shown on the list to populate this field. If a variable appointment length is set, this field will also set the display of the appointment length when scheduling an appointment.
Max Overbooks/Day	Use this field to set the maximum number of overbooks that will be allowed per day. If overbooks are not allowed at this clinic, set this value to zero.
Allowable No-Shows	Use this field to set the number of times in a row a patient can be a no-show before being flagged for possible discharge from the clinic. The **Allowable No-Shows** number is used in combination with the **No-Show Waiting Period** field.
No-Show Waiting Period	Use this field to specify the number of days in the past to be included when searching for previous no-shows at this clinic.
Future Booking Max Days	Required field. Use this field to specify the number of days into the future that appointments can be booked. This will be the maximum number of days that will be available when searching for open appointment slots in the future.

Field	Description
Hour Display Begins	Use this field to specify the time of day when the clinic availability schedule for this clinic begins. This field accepts whole numbers from 0 through 16, representing times from 12:00 a.m. (midnight) to 4:00 p.m., respectively. This parameter works in conjunction with the appointment Access Blocks established with the **Clinic Availability Configuration** window.
Visit Service Category	Use this field to specify the visit service category for the clinic. Click within the field, then choose one of the categories shown on the list to populate this field.
Ask for Check In / Out Time	This option is used during patient check-in and check-out events. The check-in/check-out date and time will default to the current date and time. When this option is enabled, the user can edit the time only. When this option is not enabled, the user cannot edit anything and must take the current date/time. If an appointment is scheduled retroactively, then the same rules apply. The only difference is that the default date will be the date of the appointment. The default time will be the current time.
Schedule Holidays	Select this check box to allow appointments to be scheduled on holidays at this clinic.
Required X-ray Films	Select this check box if x-ray films are required for patients at the selected clinic.
Variable Appt Length	Select this check box to allow appointments of variable lengths to be set at the selected clinic. This allows users to change the length of appointment.
Create Visit at Check In	Select this check box to automatically create a PCC/EHR visit when a patient checks in at this clinic.
Provider Required for Visit	Select this check box if the **Create Visit at Check In** option has also been selected. This will require that a provider is specified when checking in an appointment as part of the PCC visit creation process.

After entering the appropriate information, click **Save** to save the clinic data or click **Discard** to close the dialog without saving the entries.

3.2.7 Clinic Configuration: Letter Defaults

Once the letter template is created for a specific letter type, you can use the **Letter Templates** section of the **Clinic Configuration** dialog to set the default for these appointment letters for the clinic as shown in Figure 3-14. See Section 3.5 for additional information on how to create the letter templates.

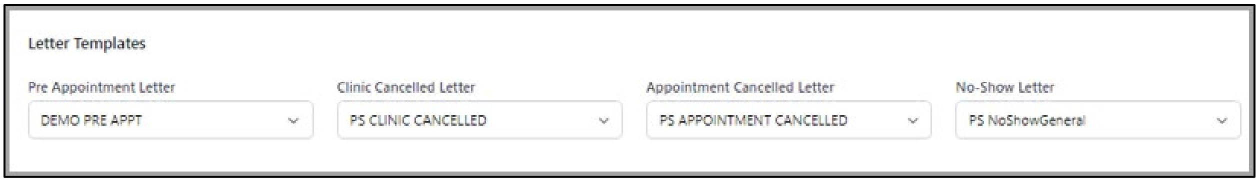


Figure 3-14: Letter Templates dialog

For each letter type, use the drop-down selection list to select the letter template to use for the selected clinic. Users should consider the information Table 3-4 when selecting the clinic default for each letter type.

Table 3-4: Clinic defaults for letter types

Field	Description
Pre-Appointment Letter	Use this letter type to print a letter for an appointment that was scheduled but the patient was not checked in (appointment status = SCHEDULED). This letter includes a list of future appointments for the patient up to 999 days or up to the clinic future booking max days limit. The appointments listed are for the selected clinic only.
Clinic Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled by the clinic (appointment status = CANCELLED BY CLINIC).
Appointment Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled (appointment status = CANCELLED BY PATIENT).
No-Show Letter	Use this letter type to print a letter for an appointment that was marked as no show due to the patient not showing up (appointment status = NO SHOW).

3.2.8 Clinic Configuration: Clinic Users

Use the **Clinic Users** section of the **Clinic Configuration** dialog to specify scheduling users for the selected clinic. **Clinic Users** display alphabetically by last name. Use the search box to quickly find a specific clinic user or the paging toolbar at the bottom.

Figure 3-15 shows an example of the **Clinic Users** section.

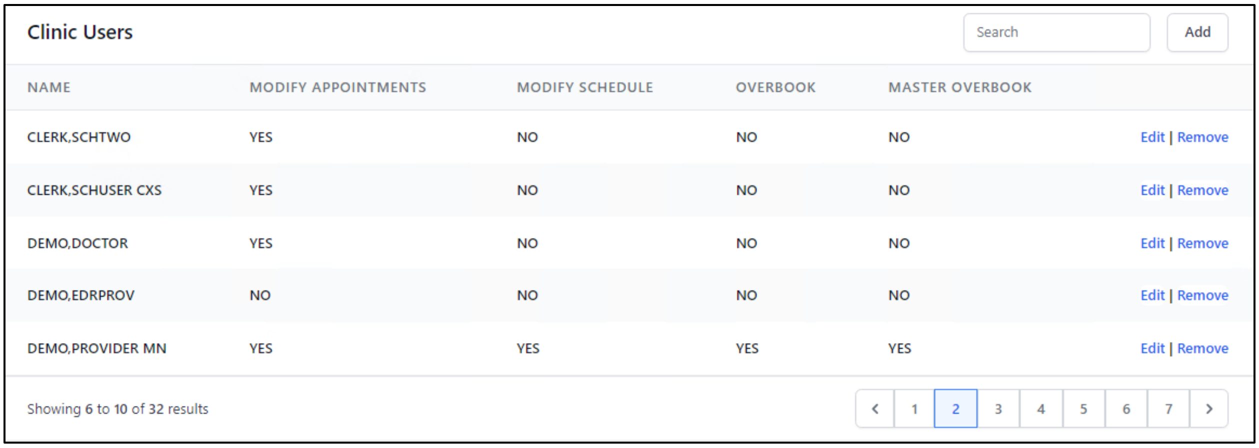


Figure 3-15: Clinic Users window

To access the **Clinic User** dialog (Figure 3-16), perform one of the following actions:

- Click **Add** in the upper-right corner of the **Clinics Users** section to add a new clinic user. In the **User** field, type some or all of the user's name, using a LAST, FIRST name format.
- Click **Edit** (on the right) for an existing user.

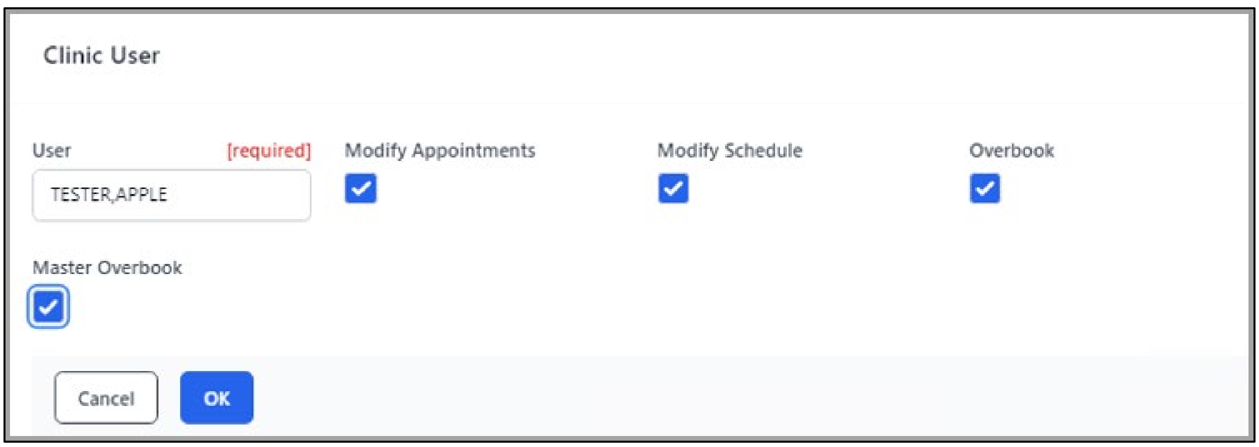


Figure 3-16: Clinic User dialog

The parameters in the **Clinic User** section of the Clinic Configuration are shown in Table 3-5. Required fields are noted in the dialog.

Enter or verify the user's name in the **User** field (required field) then select the appropriate check boxes (Table 3-5) for each user to grant these access rights.

Table 3-5: Clinic Configuration—Clinic User parameters

Field	Description
User	Required field. This is the clinic user's name.

Field	Description
Modify Appointments	Users with modify-appointment rights can change appointment times and dates, and also change other aspects of patient appointments.
Modify Schedule	Users with modify-schedule rights can add and change Access Blocks to manage clinic availability.
Overbook	Users with overbook rights are allowed to overbook appointment slots in the **Scheduling** module. They can overbook slots up to the limit established by the Max Overbooks/Day parameter set up as part of clinic configuration.
Master Overbook	Users with master-overbook rights are allowed to overbook appointment slots in the Scheduling module. They are also allowed to bypass any limits established by the Max Overbooks/Day parameter set up as part of clinic configuration.

Note: If a user is set up in a scheduling supervisor role via RPMS security keys, the security keys override any of the user settings established in the **Users** panel. See the *BPRM Technical Manual* for more information about security keys.

To remove a clinic user, click **Remove** to the right of the user's name on the list.

After entering the appropriate information, click **OK** to save the clinic user or click **Cancel** to close the dialog without saving the entries.

3.2.9 Clinic Configuration: Clinic Providers

Use the **Clinic Providers** section of the **Clinic Configuration** dialog to specify the medical providers associated with the clinic. Clinic providers display alphabetically by last name. Use the search box or the paging toolbar at the bottom to quickly find a specific clinic provider.

Figure 3-17 shows an example of the **Clinic Providers** section.

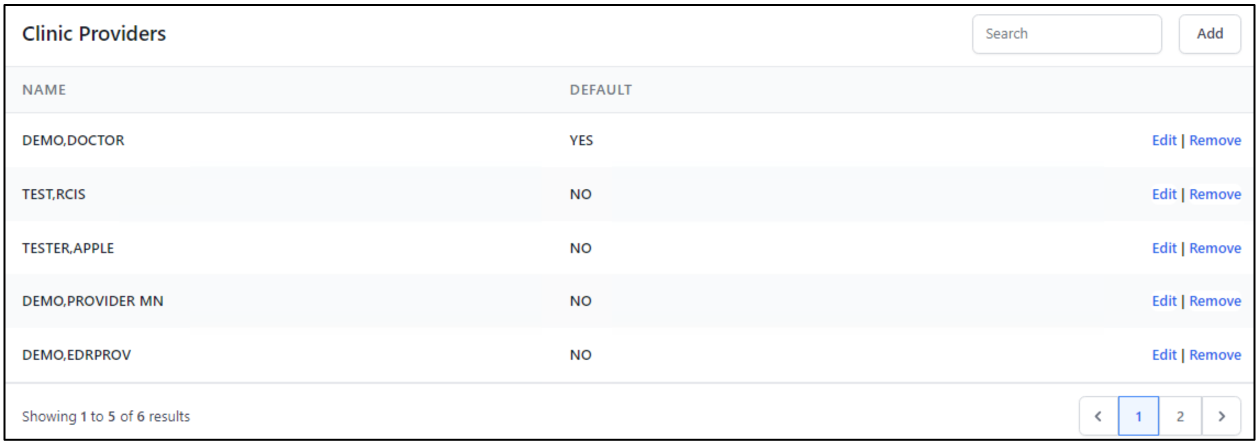


Figure 3-17: Clinic Providers window

To access the **Clinic Provider** dialog as shown in Figure 3-18, perform one of the following actions:

- Click **Add** in the upper-right of the **Clinic Providers** section to add a new clinic provider. Within the **Provider** field, type some or all of the provider's name, using a LAST,FIRST name format.
- Click **Edit** (on the right) for an existing provider.

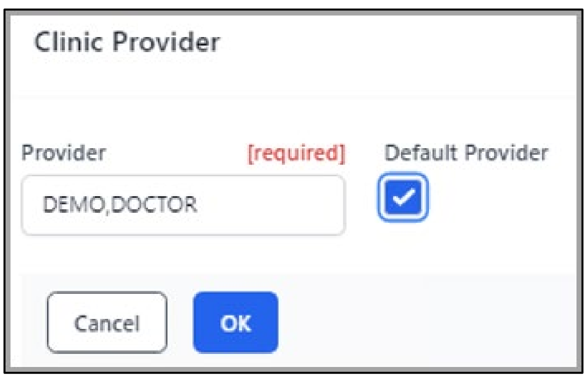


Figure 3-18: Clinic Providers dialog

- Select the **Default Provider** check box on the right side of the provider's name to designate as the default provider for the clinic.
  - To remove a provider from the list, click **Remove** to the right of the provider's name on the list.

    If you have enabled the **Create Visit at Check In** and **Provider Required for Visit** options on the **Scheduling** tab, it is recommended to specify a default provider. This helps to ensure that a visit is properly created when an appointment is checked in. Be aware however, that you still have the option to choose a different provider when you check in the appointment.

After entering the appropriate information, click **OK** to save the clinic provider or click **Cancel** to close the dialog without saving the entries.

3.3 Configure Clinic Availability

3.3.1 Select Clinic and Availability Timeframe

Click **Settings**, then **Clinics** to access the **Clinics** window. An example of the Clinics window is shown in Figure 3-19.

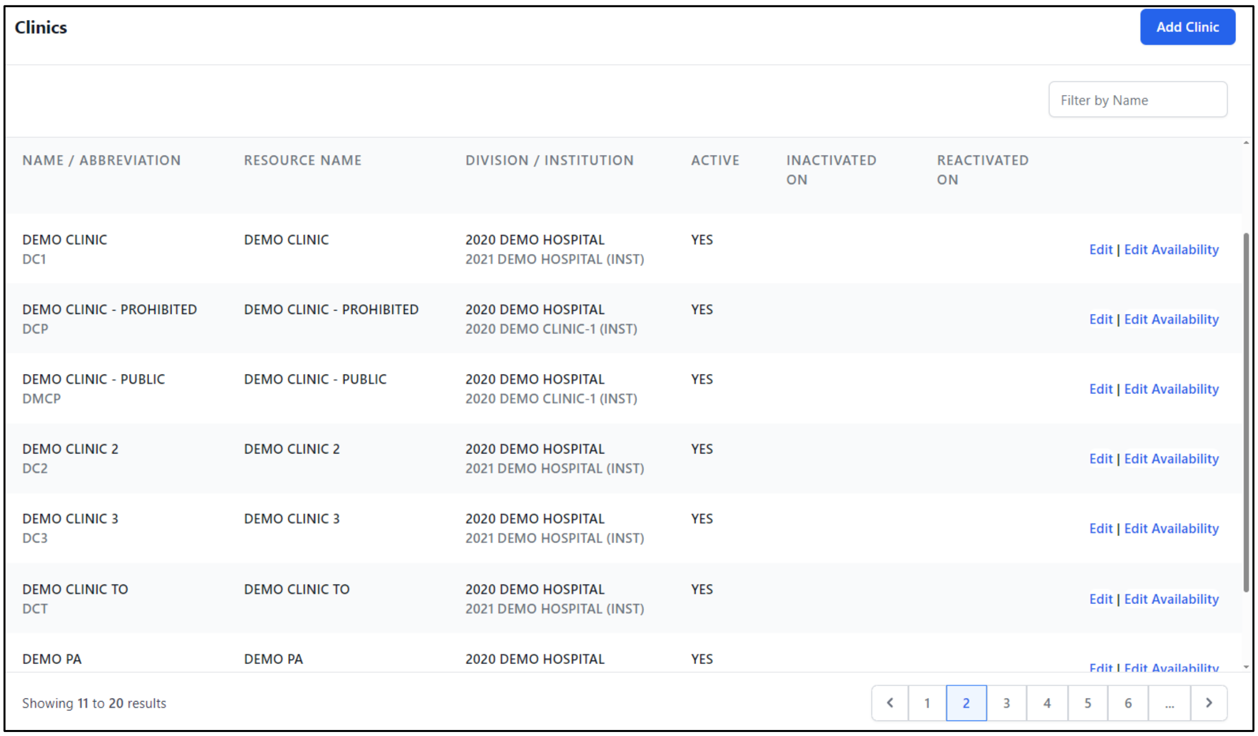


Figure 3-19: Settings Module, Clinics window

Click **Edit Availability** to the right of the desired clinic name to establish the periods of time the selected clinic will be available for patient appointments and other scheduled events.

> **Note:** The user can also access clinic availability from the Scheduling Workspace by clicking the gear icon in the top right corner.

Figure 3-20 shows an example of a clinic with no availability set up.

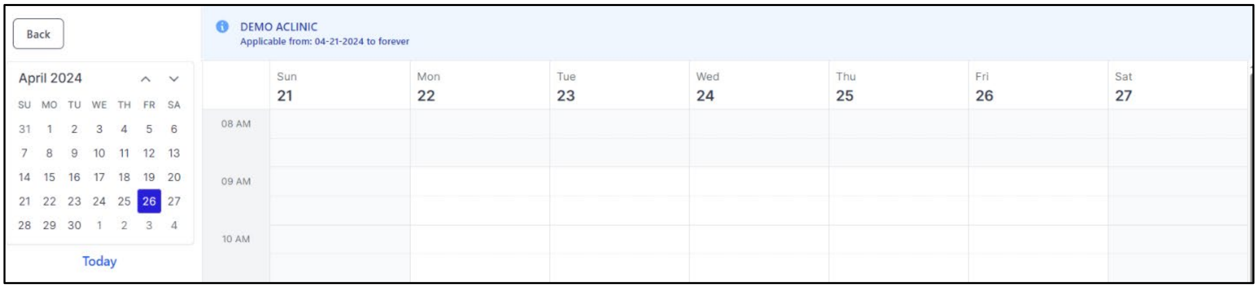


Figure 3-20: Clinic with no availability example

The top-left corner of the **Clinic Availability Configuration** window displays the clinic name and the applicable timeframe, which defaults to the current week.

Note:	If the user does not have the appropriate access rights to manage clinic availability for the selected clinic, the **Save** button will remain disabled.

Select the desired **Start Date**. Use the **Calendar** panel of the **Clinic Availability Configuration** window (Figure 3-21) to quickly navigate to a specific date.

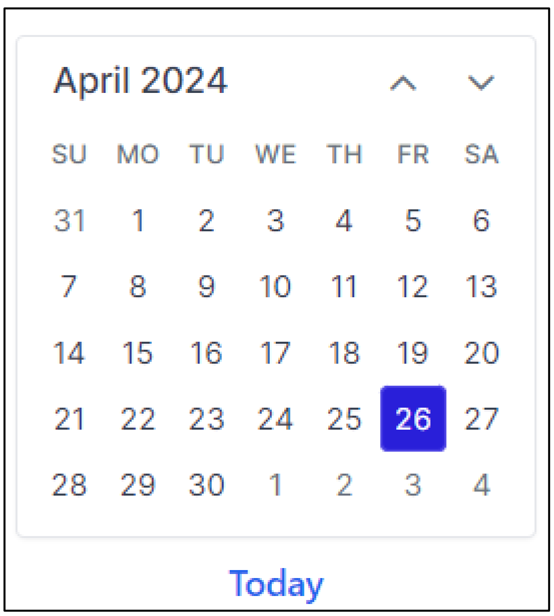


Figure 3-21: Calendar panel

Clinic availability for the selected date displays as a schedule in a week-long grid.

Note:	Once an availability schedule has been created, it will remain in effect week after week until a new one is created, or until a previous one is re-used. Also, when clinic availability is created and/or updated, the new availability displays in *real time* to all users.

Before setting appointment schedules for a clinic, it is necessary to establish the times of day when appointment slots are available. Scheduling availability for a clinic is divided into Access Blocks, which are color-coded representations of the amount of time allotted for a specific type of clinic access (such as appointments). See Section 3.1 for additional information.

Each Access Block can represent one or more appointment slots. In essence, Access Blocks are sections of the clinic schedule that are available for patient appointments or other events. Different colors represent different types of access, and the colors can be customized.

3.3.2 Create an Access Block

The user must create Access Blocks to specify the dates, times, and days of the week the clinic will be available, and what types of access will be available for the clinic.

To create a new Access Block, do the following:

1. In the blank grid displayed, select the grid cells for which you want to create an Access Block. To select multiple grid cells, right-click and drag the cursor through the cells you want to select or press and hold the Shift key and click the cells you want to select.

   In the example shown in Figure 3-22, clinic availability will begin on Monday 04/29/24 with the selected cells representing Mondays from 8:00 a.m. to 12:00 p.m.

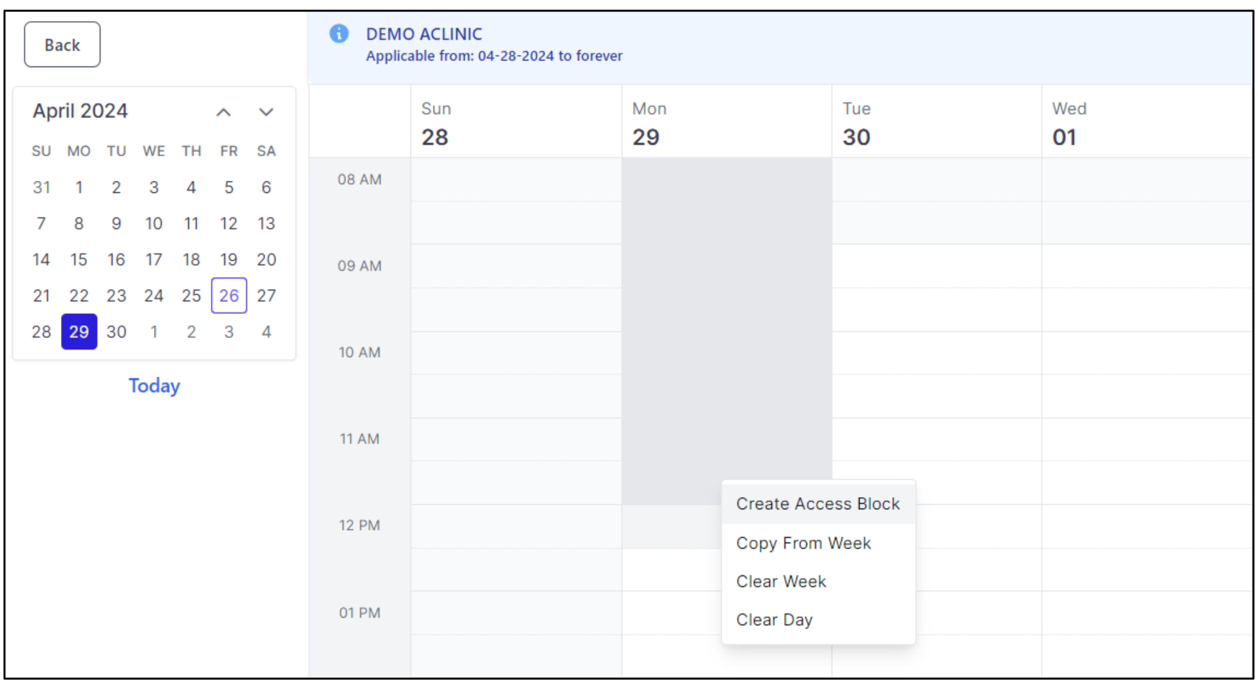


Figure 3-22: Access Block times selected

2. Select **Create Access Block** from the menu displayed to specify the access type. The **Configure Access Block** dialog shown in Figure 3-23 displays.

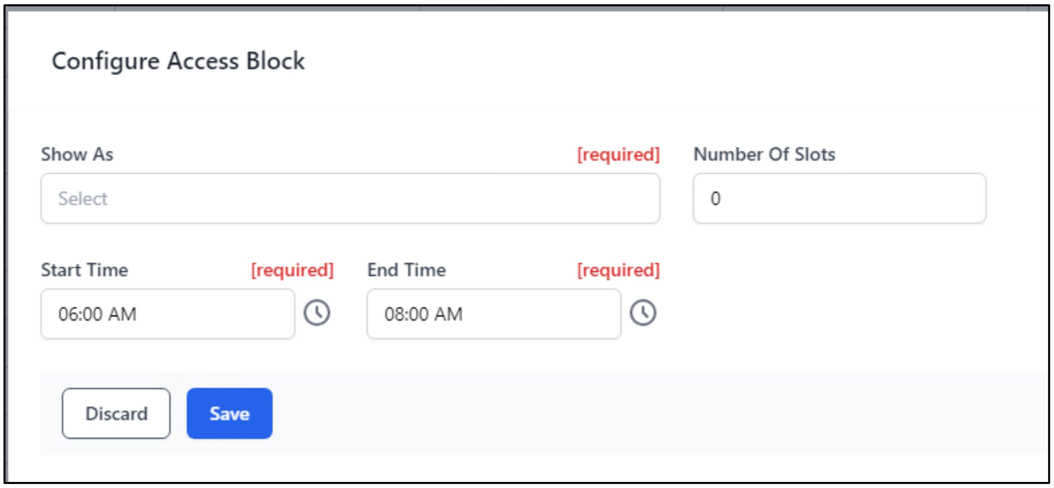


Figure 3-23: Configure Access Block dialog

3. Use the **Show As** field to select the access type for the selected cells. In the example shown in Figure 3-24, APPOINTMENT is being selected.

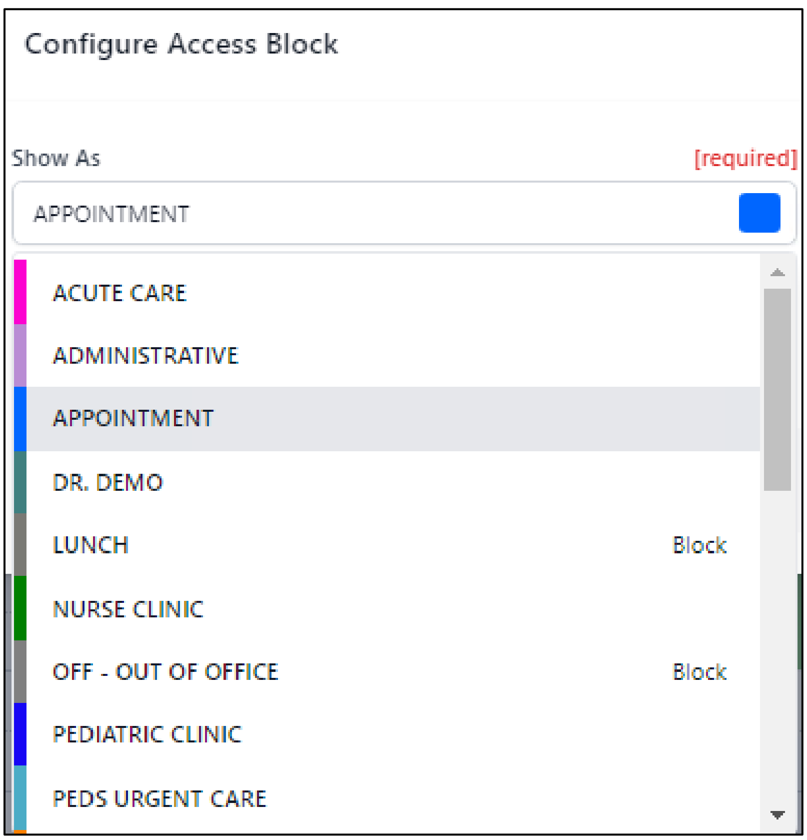


Figure 3-24: Configure Access Block dialog with Appointment selection

Note:	There are access types displayed with block. This indicates the Access Type is set with Prevent Access = YES. Prevent Access has no slots available. Use this type of Access Block for Lunch, Out of Office, etc. Otherwise, the Number of Slots will default to 1, or it can be set as the user specifies, for those access types not set to prevent access.

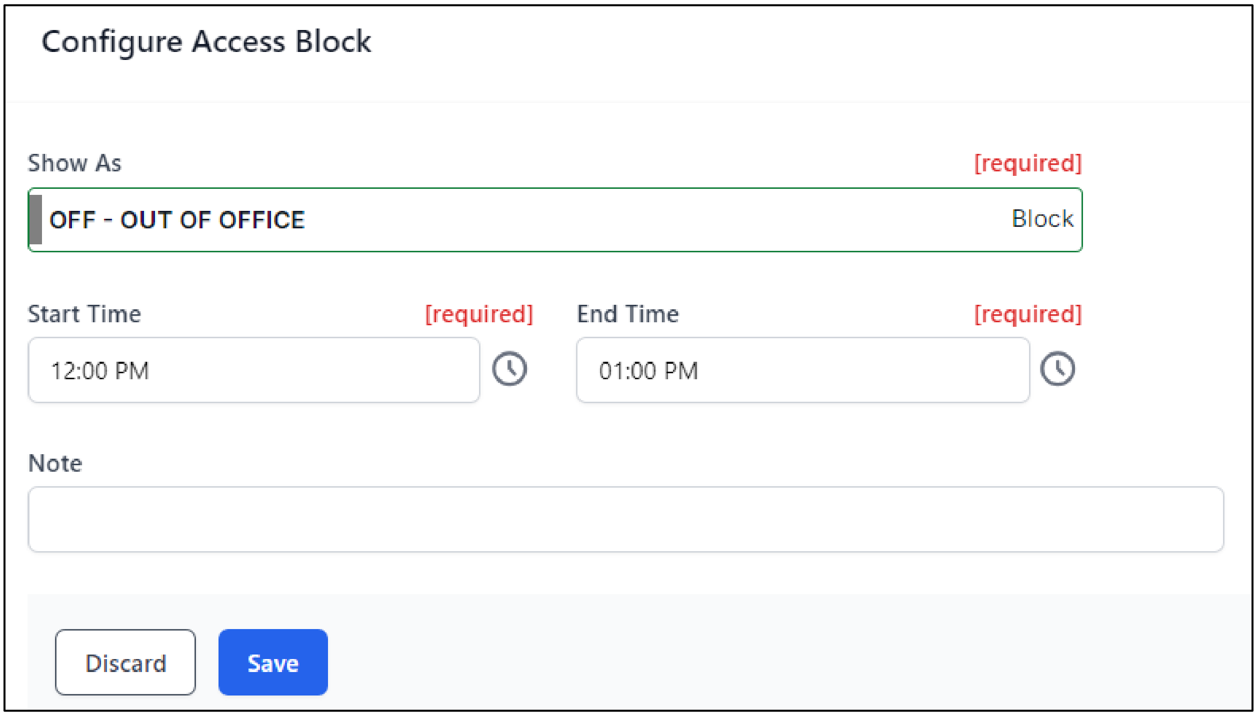


Figure 3-25: Access Type with block

4. After selecting the Access Type, specify the number of appointment slots for this Access Block in the **Number of Slots** field. The user can make changes to the **Start Time** and **End Time** fields by entering data or using the clock control.

   Figure 3-26 shows a typical **Configure Access Block** dialog after selecting the access type (APPOINTMENT) and number of slots.

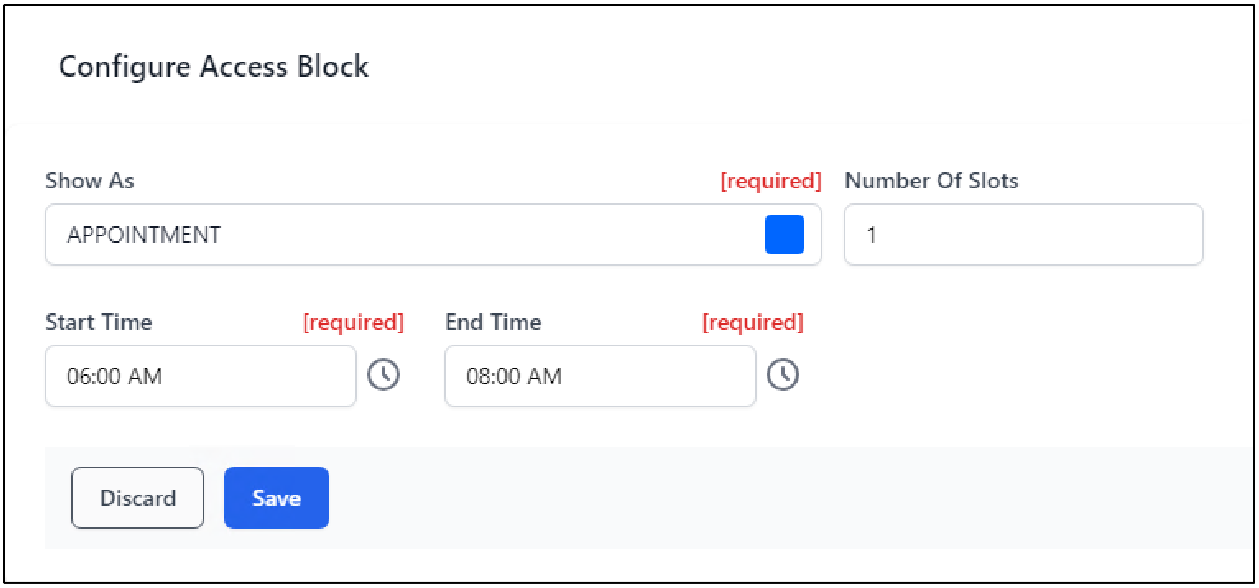


Figure 3-26: Configure Access Block dialog—completed

> **Note**: The **Number of Slots** field defaults to 1, the recommended setting. If the user sets it to zero, the appointments will only allow overbook appointments and only users with overbook capability can schedule appointments.
>
> The number of slots represents how many appointments can be made for *each* display increment/hour.
>
> For example: If the clinic is set up for 15-minute appointments with the number of slots = 3, three appointments between 8:00 and 8:15, three appointments between 8:15 and 8:30, etc.

5. When finished, click **Save** to accept the settings for the new Access Block and return to the schedule grid. The new Access Block displays in *real time* to all users.

   Figure 3-27 shows the results of adding the Access Block.

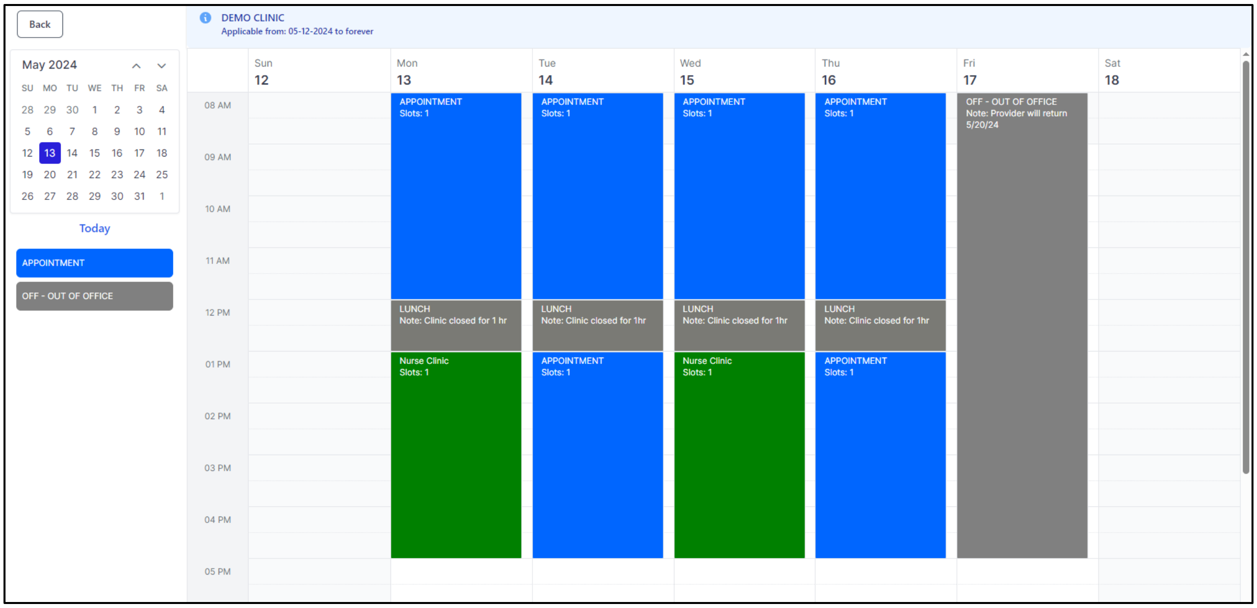


Figure 3-27: Availability week schedule sample

6. Create any other Access Blocks necessary to complete the clinic's availability schedule.

7. Use the **Copy from Day** or **Copy from Week** option to apply the same schedule for each day or week as needed.

8. Click the **Change end date** button at the top of the window to have the new availability schedule affect the selected week. Use this in cases where a clinic is only changed for a specific week. Otherwise, leave this button to cause the availability schedule for all other weeks afterward, until another availability schedule is established.

9. Once all updates are made to clinic availability, click **Save** to save the availability grid or click **Discard** to exit without saving the changes.

3.3.3 Change Access Block

To edit an Access Block after it has been created, right-click the block you want to edit and select **Change Access Block**. The **Configure Access Block** dialog displays (Figure 3-26) and allows you to change the Access Type within Show As and select other **Access Type**, **Number of Slots**, **Start time**, and **End time** fields. Click **Save** to close the dialog to save the changes or click **Discard** to close the dialog without saving any changes. The updated Access Block displays in *real time* to all users.

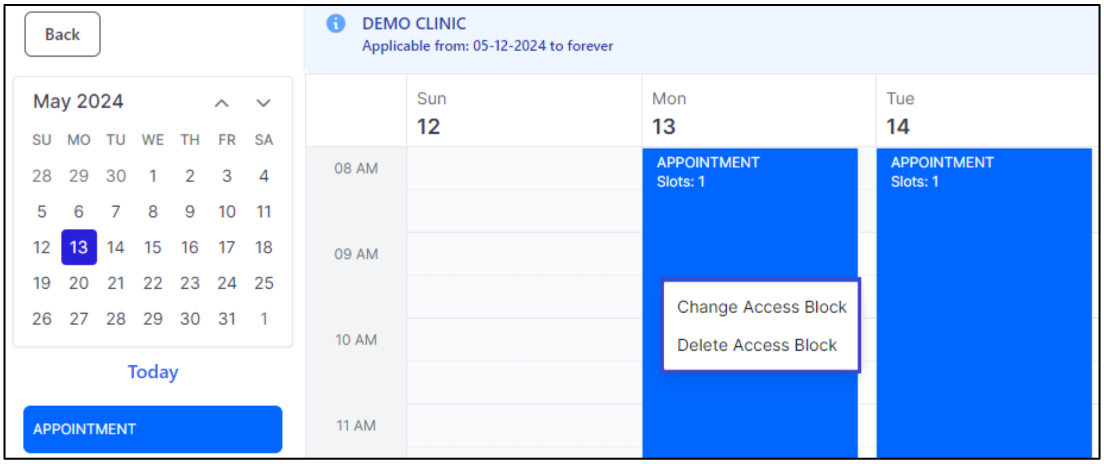


Figure 3-28: Change and Delete Access Block options

3.3.4 Delete Access Block

To delete an Access Block, right-click the block and select the **Delete Access Block** from the context menu. The **Confirm Delete** warning message (Figure 3-29) displays for the user to confirm the deletion.

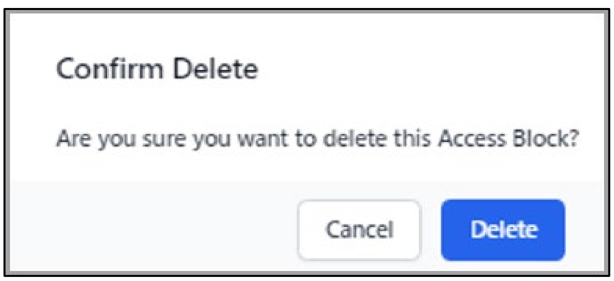


Figure 3-29: Confirm Delete warning message

- Select **Delete** to delete the Access Block or select **Cancel** to leave the Access Block intact.
- Click **Save** to save the changes and close the dialog or click **Discard** to close the dialog without saving any changes. The updated clinic configuration displays in *real time* to all users.

To delete multiple Access Blocks, press Ctrl on the keyboard and select Access Blocks. The **Confirm Delete** warning message displays for the user to confirm the deletion (Figure 3-31).

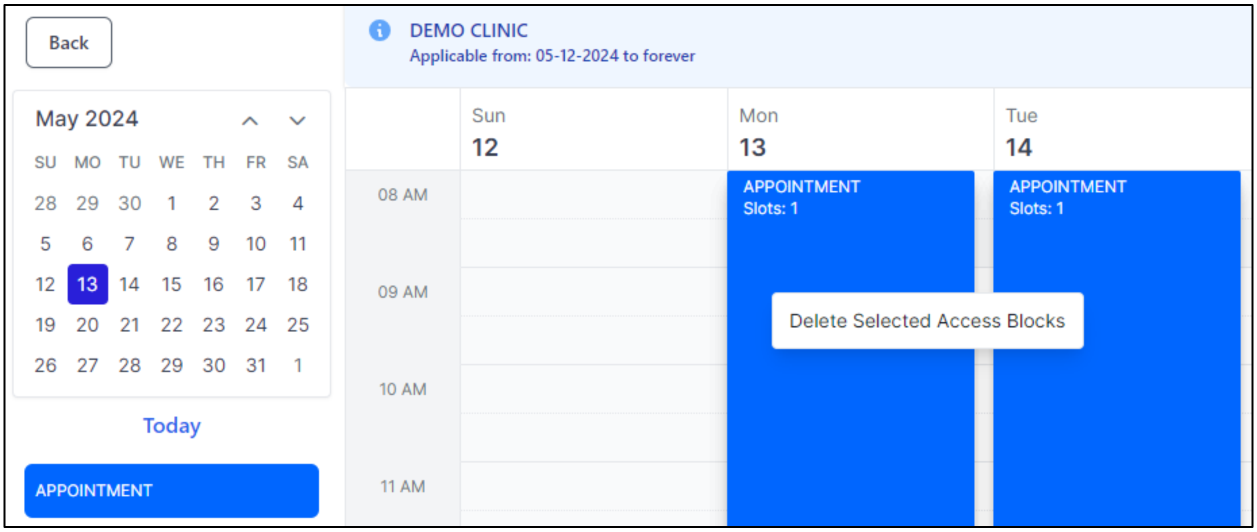


Figure 3-30: Selected Access Block deletion

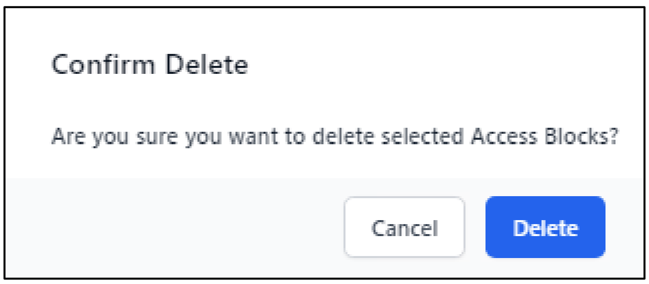


Figure 3-31: Delete multiple selected access blocks

- Select **Delete** to delete the selected Access Blocks or select **Cancel** to leave the selected Access Blocks intact.
- Click **Save** to close the dialog to save the changes or click **Discard** to close the dialog without saving any changes. When successfully deleted and saved, the updated clinic configuration displays in *real time* to all users.

3.3.5 Drag and Drop from the Existing Access Blocks Pool

As clinic availability is defined, the user may save the grid as needed. Once the user closes the clinic's availability and pulls it up again, the Access Blocks Pool will display under the calendar on the left side.

At this point, the user may drag and drop an Access Block from the pool to an empty grid cell in the availability schedule.

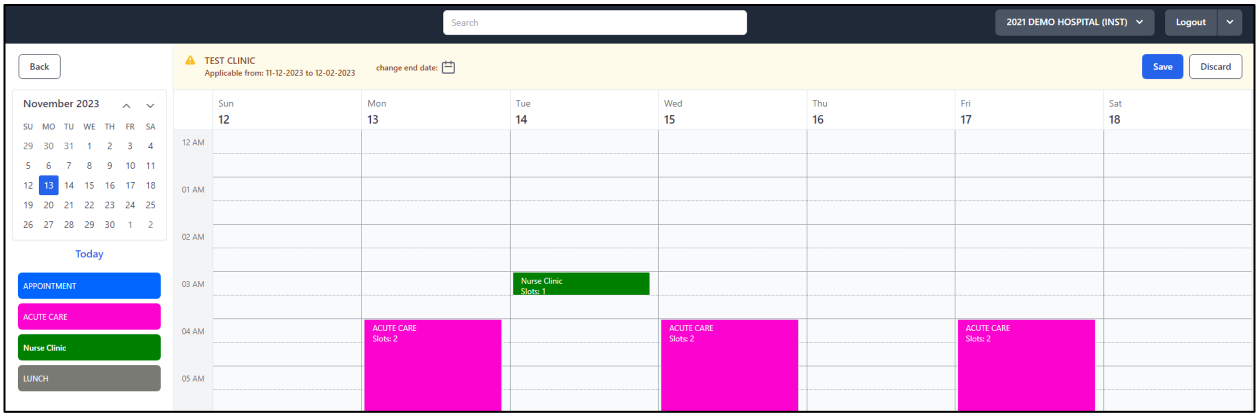


Figure 3-32: Example of a nurse clinic Access Block dragged and dropped to Nov. 14 at 3 a.m.

- Once the Access Block is dragged and dropped, the user may pull down the bottom of the Access Block to extend the time.
- The applicable date range and change end date display. The user can choose to change the end date or click **Save** to accept the applicable date range.
- Click **Save** to save the changes and close the dialog or click **Discard** to close the dialog without saving any changes. The updated clinic configuration displays in *real time* to all users.

3.3.6 Merge Access Blocks

If multiple Access Blocks of the same type with the same number of slots appear in consecutive grids, the **Merge** button will display next to the **Save** button. If the user wants to merge the concurrent blocks, select the Merge button. The concurrent blocks will now display as one Access Block (Figure 3-33).

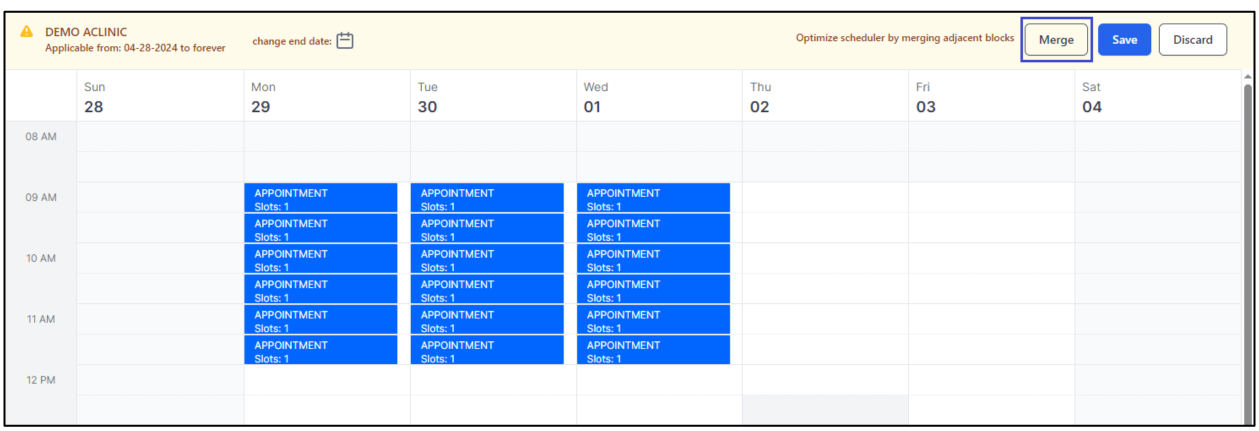


Figure 3-33: Multiple Access Blocks dragged/dropped in subsequent grid cells

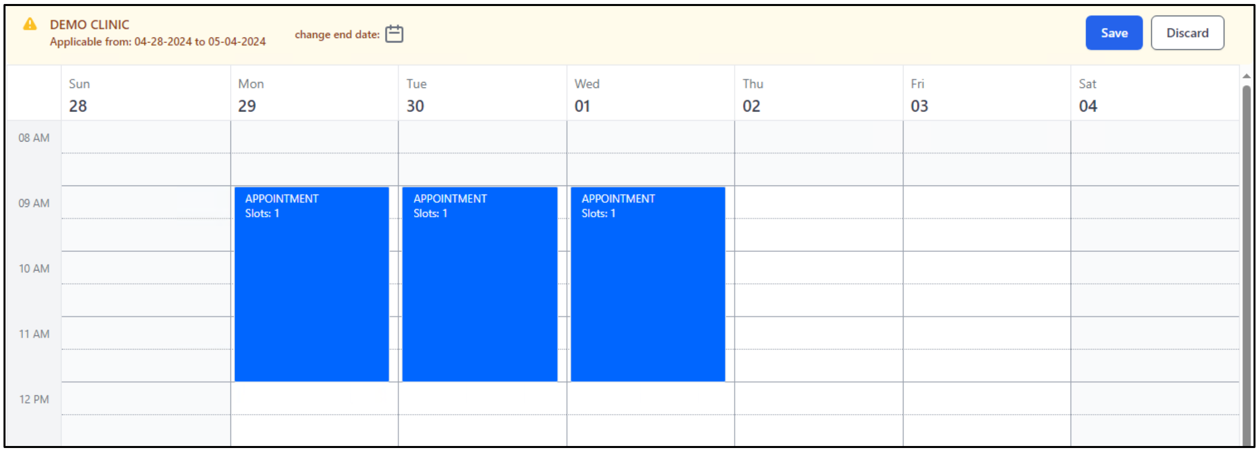


Figure 3-34: Merged slots into one Access Block

3.3.7 Move an Access Block

To move an Access Block from one place to another, click the block and hold the mouse key down as you drag the block to a new place on the grid. Once you release the mouse, the block will remain in the new place on the grid. When successfully saved, the updated Clinic Configuration displays in *real time* to all users.

3.3.8 Copy From Week

The user can copy all the Access Blocks of a week to another calendar week. To do so, right-click an empty grid cell for the week where you want to copy the Access Block to. Select the **Copy From Week** option. In the example shown in Figure 3-35, all the Access Blocks from the Sunday through Saturday columns of the week will be copied to the selected calendar week.

In this example, the week of April 29, 2024 is selected.

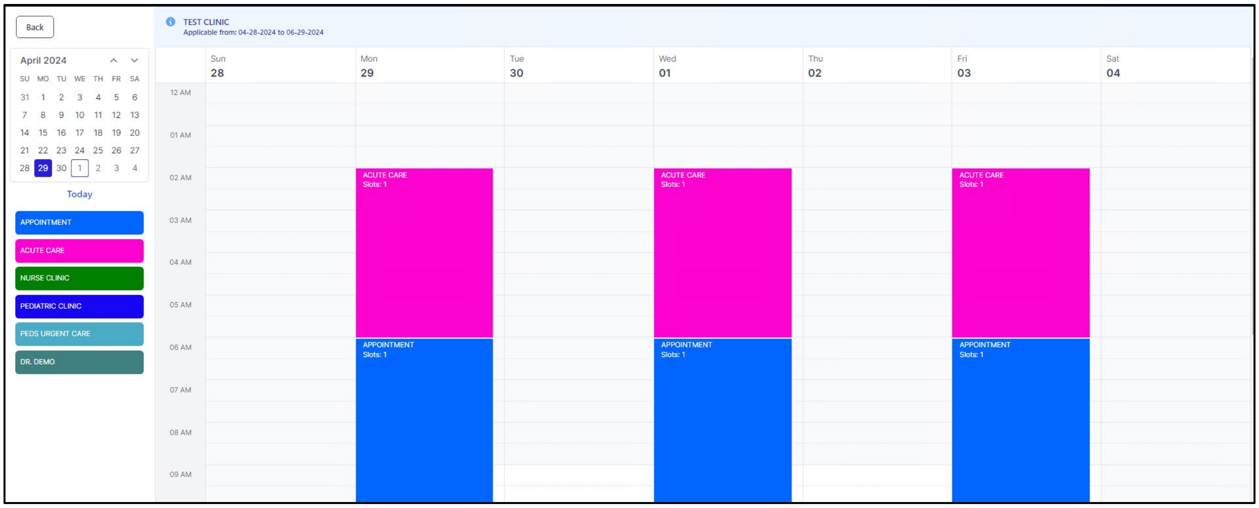


Figure 3-35: Copy From Week

Once the **Copy From Week** option is selected, the **Copy From** screen will display (Figure 3-36).

Figure 3-36: Copy From Dialog screen

Select the week to copy from by selecting the appropriate week from the calendar tool.

Note:	Once the week is selected from the calendar, the schedule displays at the bottom half of dialog.

Select **Save** to accept the week to copy or **Discard** to leave the changes.

Once Save is selected in this example, the Access Blocks for the week of 04/29/2024 are copied to the week of 05/06/2024. When successfully saved, the updated clinic configuration displays in *real time* to all users.

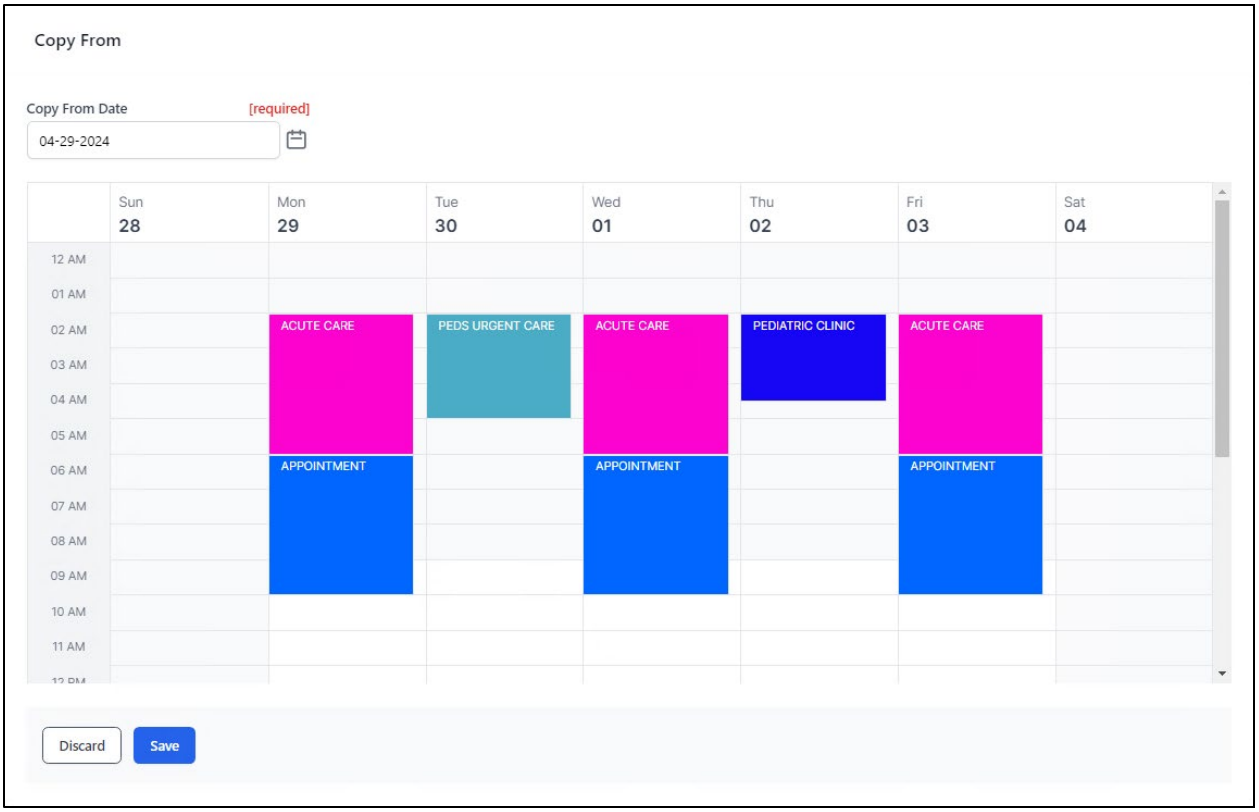


Figure 3-37: Copying Access Blocks

Click **Save** in the top-right corner of the Clinic Availability window to accept the end date or change the end date using the calendar tool and then click **Save**.

3.3.9 Copy From Day

The user can copy a single Access Block or a day's worth of Access Blocks to a different day of the schedule availability grid. To do so, right-click an empty grid cell for the day where you want the Access Block(s) to be copied. Select the **Copy From** option, then select the day you want to copy.

In the example shown in Figure 3-35, all the Access Blocks from the Monday column of the grid will be copied to the selected day. When successfully saved, the updated Clinic Configuration displays in *real time* to all users.

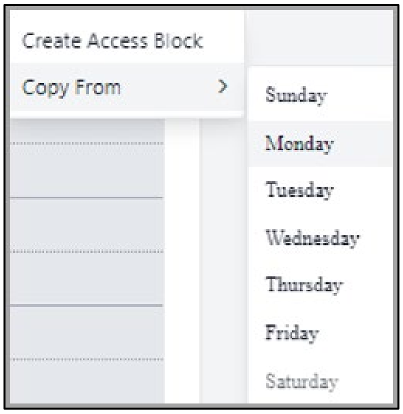


Figure 3-38: Copying Access Blocks

3.3.10 Clear Week

To clear a week, right-click on any empty grid cell and select **Clear Week**. If confirmed, all Access Blocks defined for the week will be deleted.

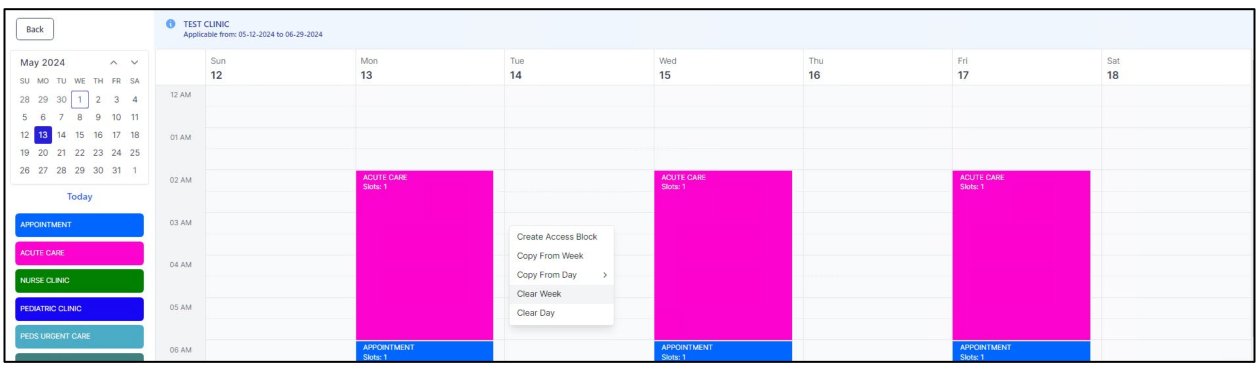


Figure 3-39: Clear Week option

In this example, the user wants to delete the week of 05/13/2024 timeframe from the clinic availability schedule.

Once the user clicks **Clear Week**, a warning message (Figure 3-40) displays for the user to confirm the removal of the Access Blocks for the selected week.

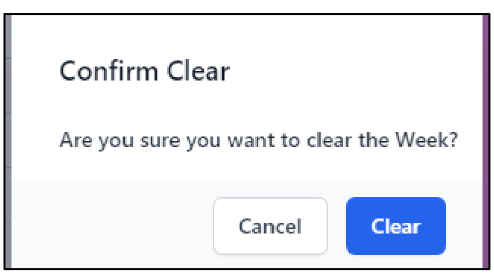


Figure 3-40: Confirmation for clearing the week

The user should select **Clear** to remove the blocks for the week or select **Cancel** to leave the blocks intact.

Warning: This process is irreversible. Once the Access Blocks are cleared, replaced with a new schedule, and saved, they cannot be retrieved. If necessary, the blocks will have to be rebuilt or copied from a previous schedule.

Once the user confirms that the timeframe should be cleared, the timeframe is removed, and the clinic availability is now clear and becomes open-ended as displayed in Figure 3-41. When successfully cleared and saved, the updated clinic configuration displays in *real time* to all users.

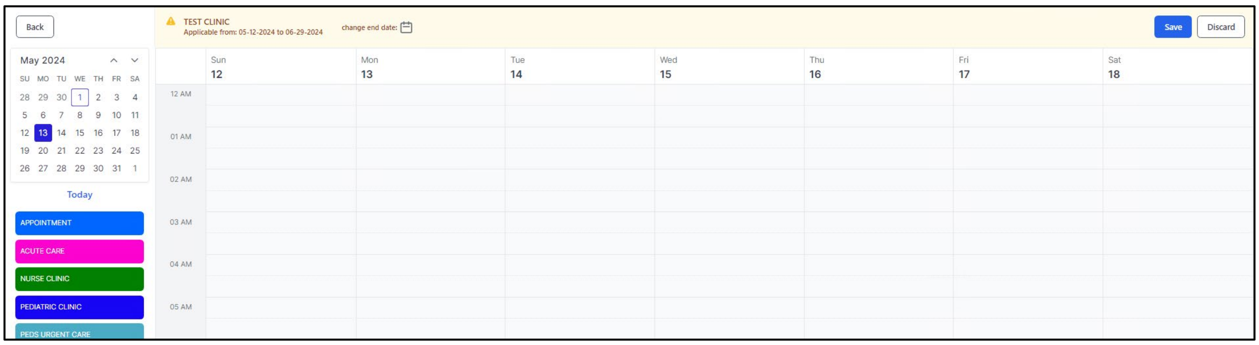


Figure 3-41: Availability timeframe after deletion

3.3.11 Clear Day

To clear a day, right-click on any empty grid cell on the day and select **Clear Day**. If confirmed, all Access Blocks defined for the day will be deleted.

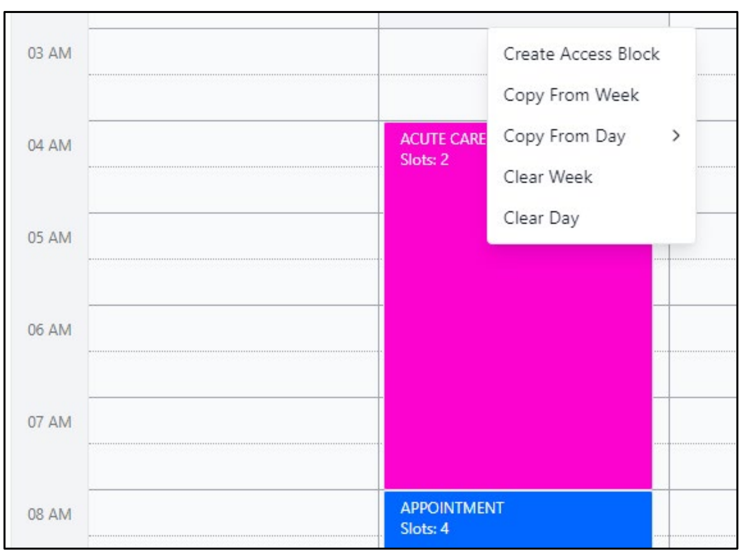


Figure 3-42: Clear Day option

Once the user clicks **Clear Day**, warning message (Figure 3-43) displays for the user to confirm the removal of the Access Blocks for the selected day.

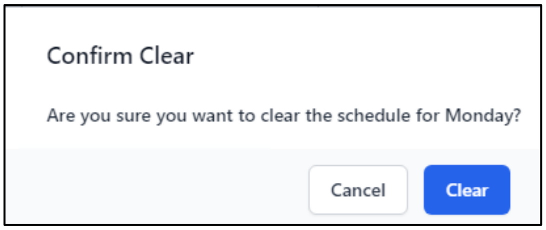


Figure 3-43: Confirmation for clearing the schedule for the selected day

Select **Clear** to remove the blocks for the day or select **Cancel** to leave the blocks intact. When successfully cleared and saved, the updated clinic configuration displays in *real time* to all users.

Warning: This process is irreversible. Once the Access Blocks are cleared, replaced with a new schedule, and saved, they cannot be retrieved. If necessary, the blocks will have to be rebuilt or copied from a previous schedule.

3.4 Holiday Configuration

Holiday configuration allows users to configure a customized list of holidays that are recognized by the site. The recognized holidays can be used in conjunction with the **Clinic Configuration–Schedule Holiday** parameter to restrict appointment scheduling on certain days.

To access the holiday configuration, select **Holiday Configuration** in the **Settings** module. A **Holidays** listing window similar to the one shown in Figure 3-44 displays.

Use the **Year** filter list at the top of the window to display a list of holidays for the selected calendar year. The list can display up to five years of holidays from the current year.

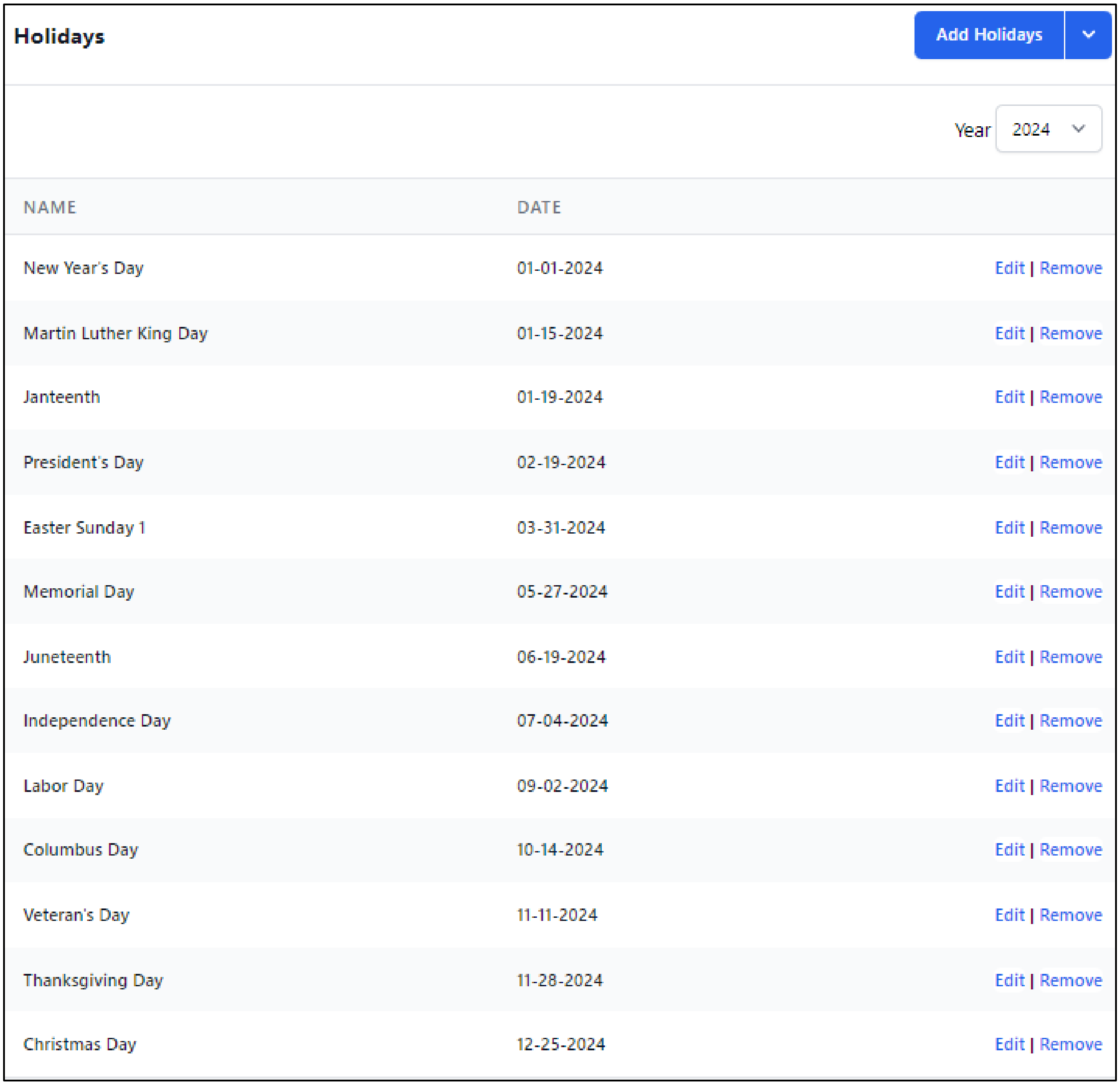


Figure 3-44: Sample Holidays listing window

Use the **Year** filter list at the top of the window (Figure 3-45) to display a list of holidays for the selected calendar year.

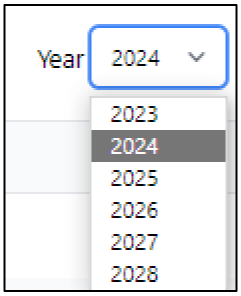


Figure 3-45: Year filter list

The list can display up to five years of holidays starting with the current year.

3.4.1 Add Federal Holidays

To add federal holidays to a clinic's schedule, do the following:

1. Click the **Add Holidays** drop-down arrow (Figure 3-46) in the upper-right corner of the **Holidays** window.

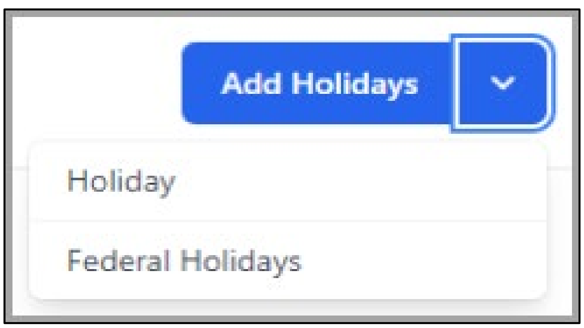


Figure 3-46: Add Holidays drop-down list

2. Select **Federal Holidays** to display the **Federal Holidays** dialog (Figure 3-47). The system defaults to the current year.

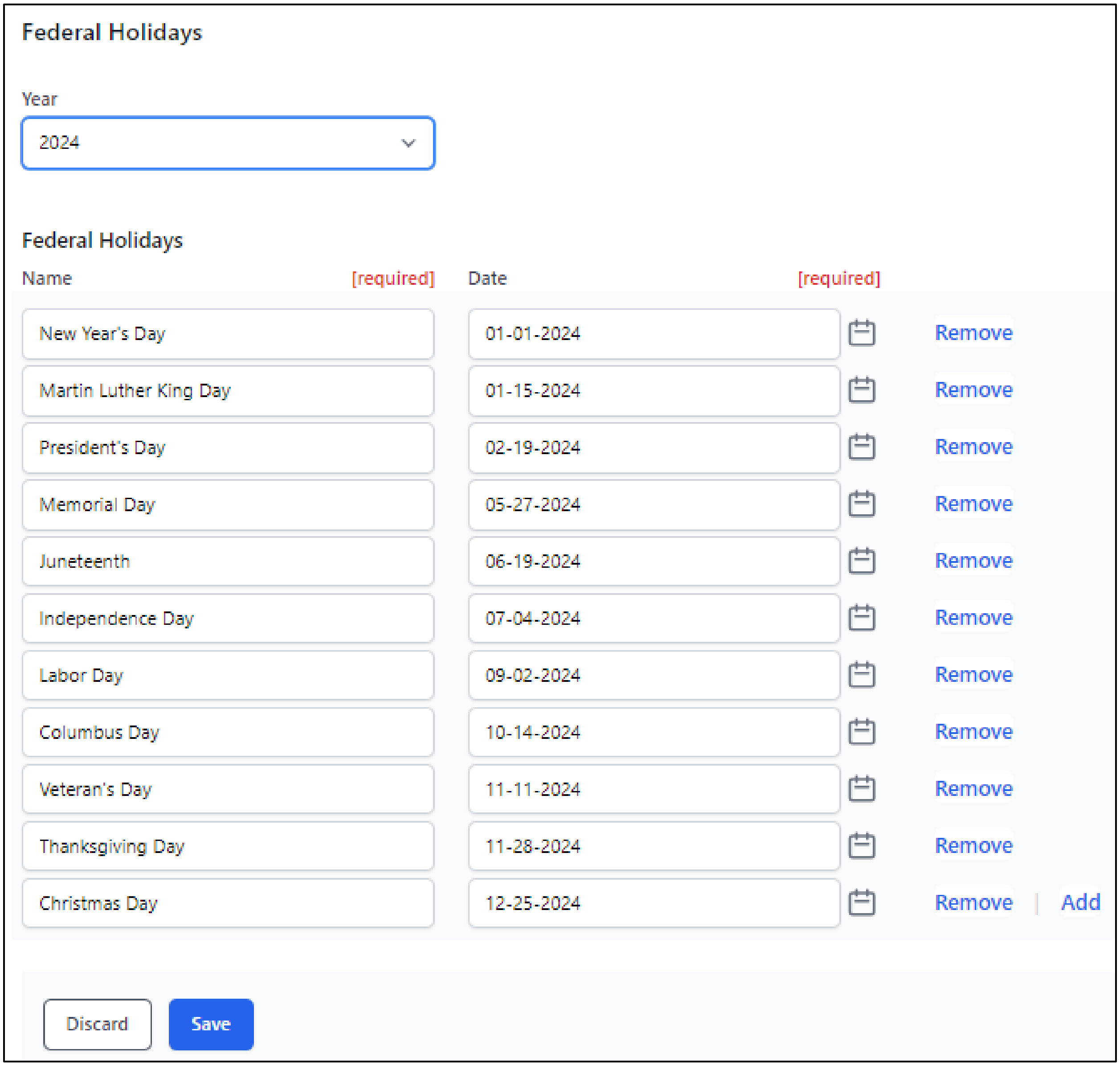


Figure 3-47: Federal Holidays listing dialog

3. Use the **Year** drop-down to select the calendar year to apply the federal holidays for all clinic schedules.

4. Click **Remove** to the right of any holiday date that is not recognized as a federal holiday for the particular clinic schedule.

5. Click **Add** at the bottom right of the dialog to add a holiday not listed in the current federal holidays. The **Add Holiday** dialog (Figure 3-48) displays with two required fields.

Figure 3-48: Add Holiday dialog

- **Name:** This is a required field. Add the name of the new holiday.
- **Holiday Date:** This is a required field. Add the date of the new holiday.

6. Once you have completed the edit, click **Save** to confirm the changes or **Discard** to close the section without saving.
7. The federal holidays will display with any changes applied to the clinic schedules for the selected year.

3.4.2 Add Site-Specific Holidays

To add non-federal holidays to clinic schedules, use these steps:

1. Click **Add Holidays** in the upper-right corner of the **Holiday** window and then select **Holiday** to display the **Holidays** dialog (Figure 3-49).

Figure 3-49: Add Holidays dialog

2. Type a name for the site-specific holiday in the **Name** field (Figure 3-50) and select on which date the holiday will occur.

Figure 3-50: Add Holiday dialog new holiday

3. Once you have completed the edit, click **Save** to confirm the changes or click **Discard** and the changes will not be saved.

The **Holidays** window now displays the newly added holiday for the selected year (Figure 3-51).

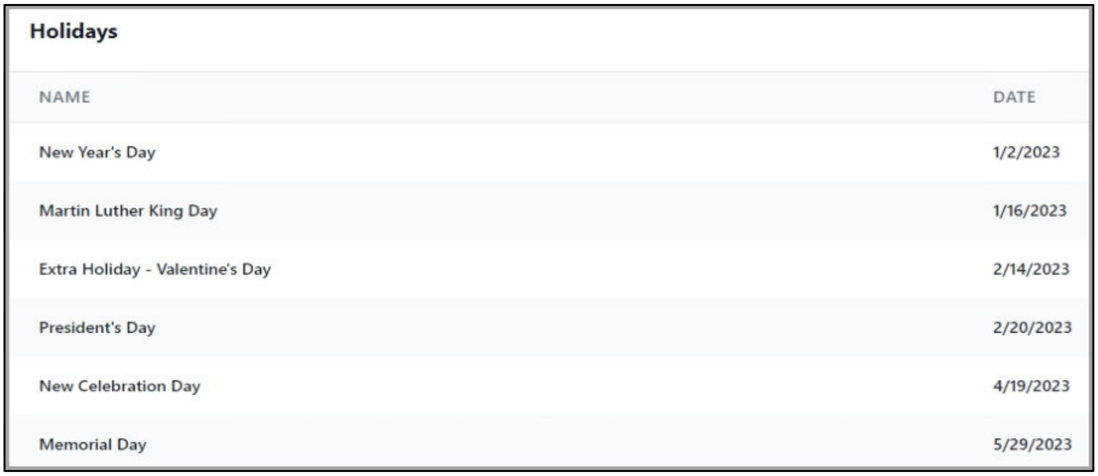


Figure 3-51: Holidays listing window, new holiday added

3.4.3 Edit Holiday Name

To edit the name for an existing holiday, do the following:

1. Click **Edit** to the right of the holiday name to edit. The **Holiday** dialog displays (Figure 3-52).

Figure 3-52: Editing an Access Type

2. Make any changes necessary to the holiday name. Then, click **Save** to save the changes or click **Discard** to close the window without saving the changes.

3.4.4 Delete Holidays

To delete an existing holiday and remove it from the clinic schedules, use the following steps:

1. Click **Remove** to the right of the holiday you want to delete. An alert message displays (Figure 3-53).

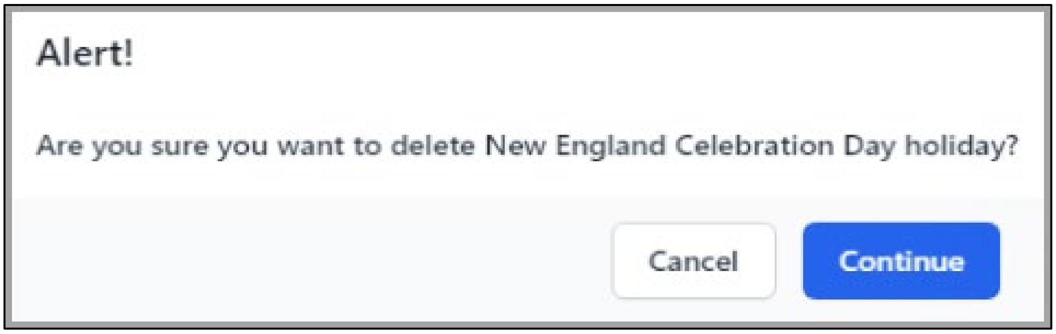


Figure 3-53: Confirm Holiday deletion warning message

2. Click **Continue** to confirm deletion or click **Cancel** to close the window without saving changes.

3.5 Letter Templates

Users can generate and print a variety of appointment letters. The **Letter Templates** option allows users to create the following types of appointment letter templates as described in Table 3-6. These letters can serve as reminders about upcoming or missed appointments.

Table 3-6: Clinic Letters pane fields

Field	Description
Pre-Appointment Letter	Use this letter type to create a letter template for an appointment that was scheduled but for which the patient has not yet been checked in. (Appointment status = SCHEDULED) This letter includes a list of future appointments for the patient up to 999 days or up to the Clinic Future Booking Max Days limit. The appointments listed are for the selected clinic only.
Clinic Cancelled Letter	Use this letter type to create a letter template for an appointment that was cancelled by the clinic. (Appointment status = CANCELLED BY CLINIC)
Appointment Cancelled Letter	Use this letter type to create a letter template for an appointment that was cancelled. (Appointment status = CANCELLED BY PATIENT)
No-Show Letter	Use this letter type to create a letter template for an appointment that was marked a no show due to the patient not showing up. (Appointment status = NO SHOW)

Once the letter templates are created, users can print both batch and individual letters in the following ways:

- Print batch letters from the **Reports–Print Letters** option (see Section 4.2.6) or from the Scheduling Workspace, using the **Letters** button (Section 2.1.6).
- Print individual letters by using the context menu (See Section 2.6) from the Scheduling Workspace and **List** views.

Note:	Once the letter templates are created, the user should pre-select the letter template to use at the selected clinic for each letter type as described in Section 3.2.7.

3.5.1 Create a New Letter Template

Each type of appointment letter template uses a similar format. The date printed, patient HRN, patient name, appointment date and time, and clinic name are automatically inserted into the text of the letter. You can add or edit additional text as necessary for each type of appointment letter template.

The examples shown in this section show the creation of a new **No-Show** letter template. The steps are the same for each of the different letter types.

To create a new letter template:

1. Click **Settings** and then **Letter Templates**.
2. Click **Add Letter Template** on the top-right side of the window. The **Add Letter Template** dialog (Figure 3-54) displays. **No-Show** has been selected.

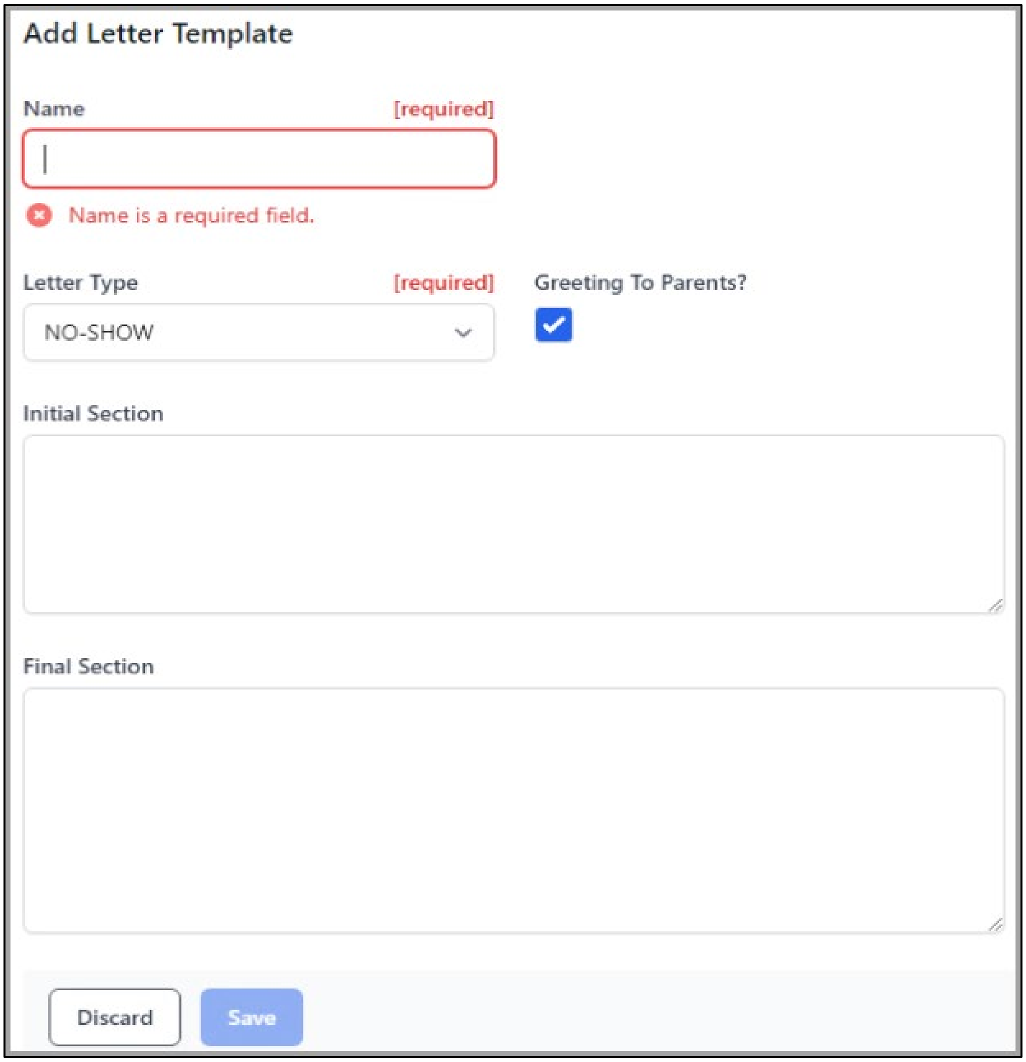


Figure 3-54: Add Letter Template dialog

3. Select the letter type from the list (Figure 3-55) and type the name you want to give the new letter template in the **Name** field.

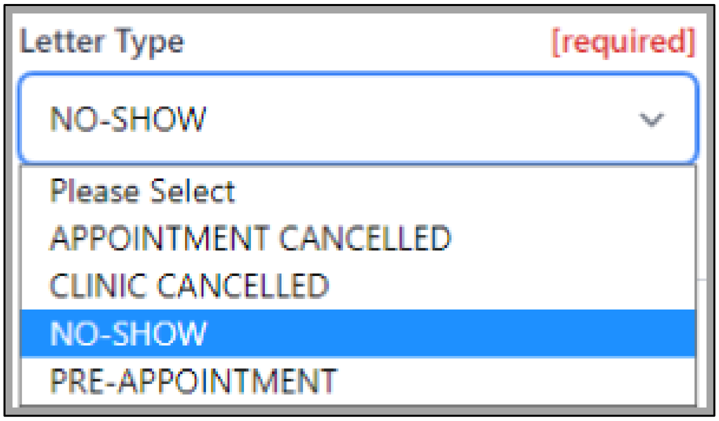


Figure 3-55: Letter Type drop-down list

For this example, the letter template is named **NO SHOW EXAMPLE**.

4. Select the **Greetings to parents?** check box if you want the salutation of the letter to be addressed to the patient's parents. This is useful for letters sent to pediatric patients.

5. Type the text you want to appear in the letters in the **Initial Section** and **Final Section** fields of the **Letter Configuration** dialog.

   The text you type in the **Initial Section** field displays after the salutation of the letter, but before the appointment date, time, and clinic section (which is automatically generated by the system). Text in the **Final Section** field displays after the appointment date, time, and clinic section.

   Figure 3-56 shows an example of the letter configuration dialog after adding text to the appropriate fields.

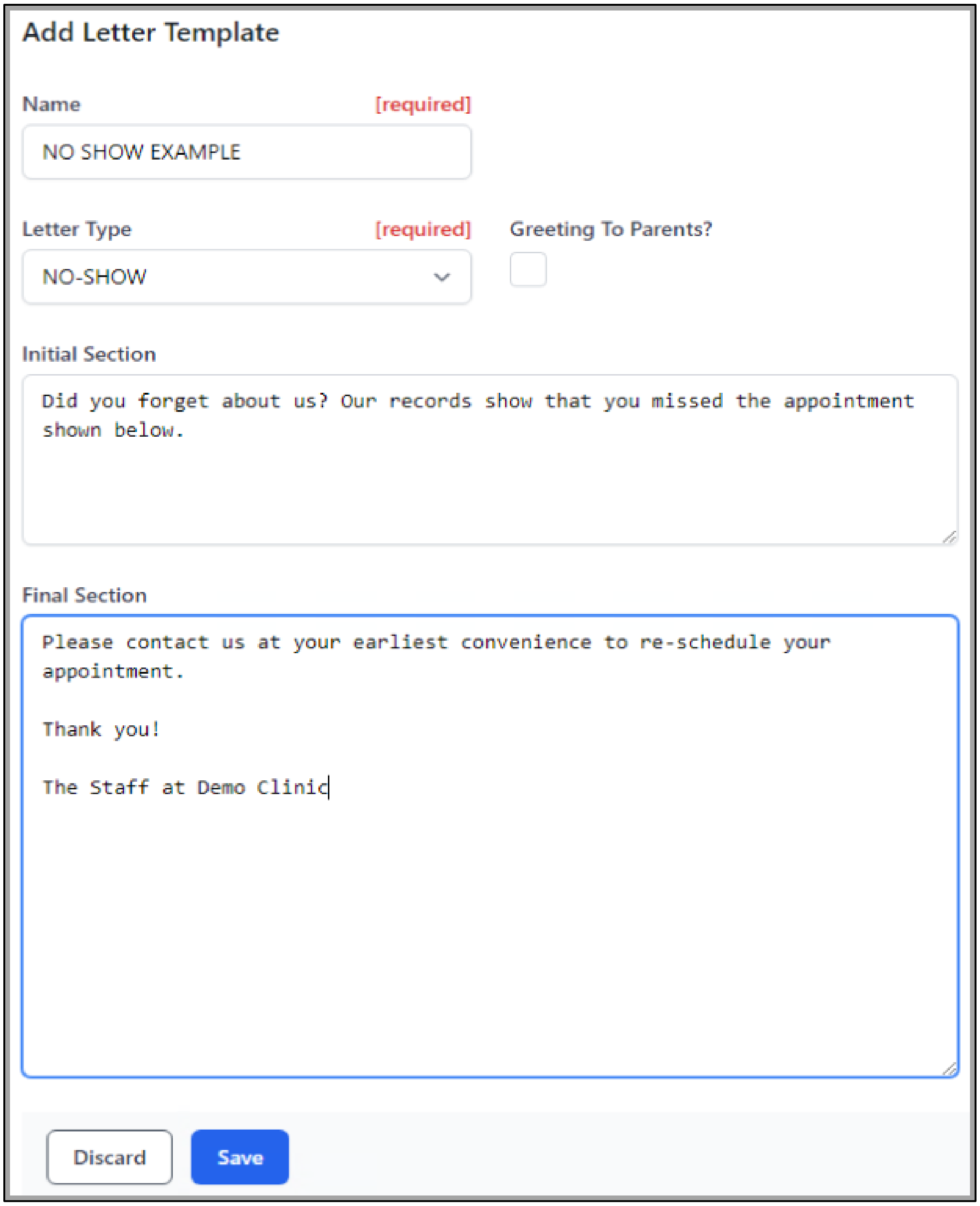


Figure 3-56: Completed Letter Template Configuration dialog

6. After adding the desired text, click **Save** to save the new letter template and close the dialog or click **Discard** to close without saving.

3.5.2 Modify an Existing Letter Template

Existing letter templates are modified in a manner similar to creating a new one. To edit a letter template, do the following:

1. Click **Settings** and then **Letter Templates**.

2. Use the **Filter by Name** search field to find the letter template to modify. You can also use the scroll bar at the bottom of the screen.

3. Select **Edit** for the letter template you want to modify.

4. Make any desired changes to the text of the letter template.

5. Click **Save** to save the letter template and close the **Letter Configuration** dialog or click **Discard** to close without saving.

3.6 Resource Groups

Resource Groups (Figure 3-57) are user-defined lists of clinic resources grouped together to streamline appointment scheduling for those resources.

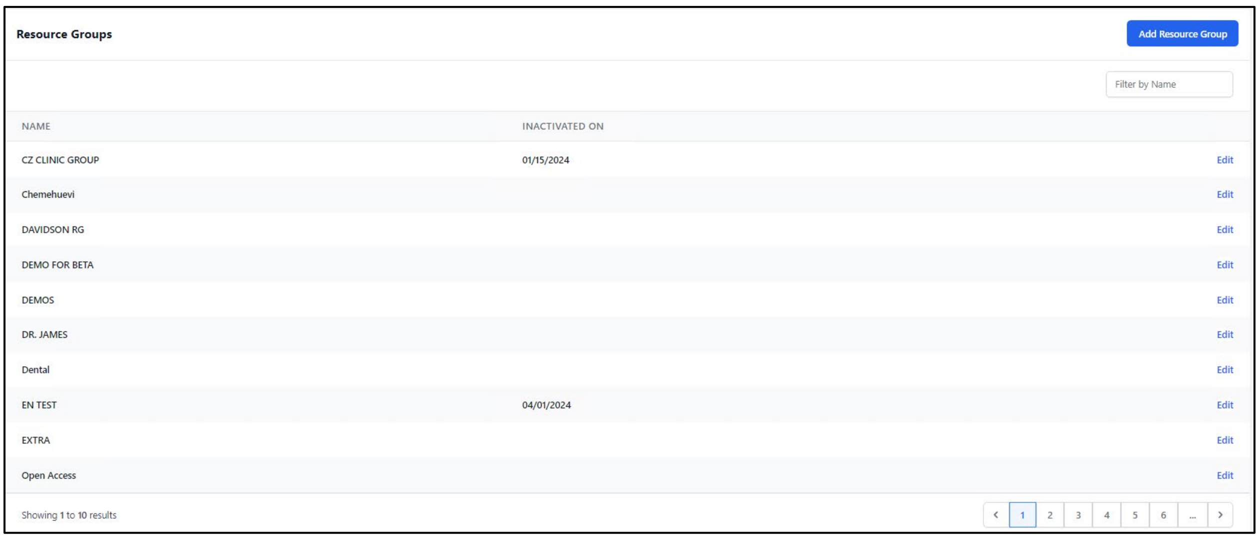


Figure 3-57: Resource Groups window

These resources can include providers (such as dentists and physicians), facilities, equipment, or other kinds of scheduled services.

Note:	A resource must first be on the **Clinics** list before it can be included in a resource group.

By grouping resources/clinics together, appointment schedules for these combined resources can be easily selected and displayed at the same time in the **Scheduling** module.

3.6.1 Add a Resource Group

To add a new **Resource Group**, use the following steps:

1. Click **Settings** and then **Resource Groups**.

2. Click **Add Resource Group** on the top-right side of the window. The **Resource Group** dialog (Figure 3-58) displays.

Figure 3-58: Resource Group dialog

3. Type the name of the resource group and in the **Name** field.
4. Click **Add** under **Resources** in the lower-left corner of the **Resource Group Name** dialog to add a resource name (Figure 3-59).

Figure 3-59: Resource Group name dialog

5. Type a name for the **Resource Group** in the **Name** field.
6. Use the **Group Resources** search field to find and select one or more clinics or resources to add to the resource group.

   In the example shown in Figure 3-60, a resource group named **XYZ GROUP** was created. The **DEMO CLINIC** has been added to the group.

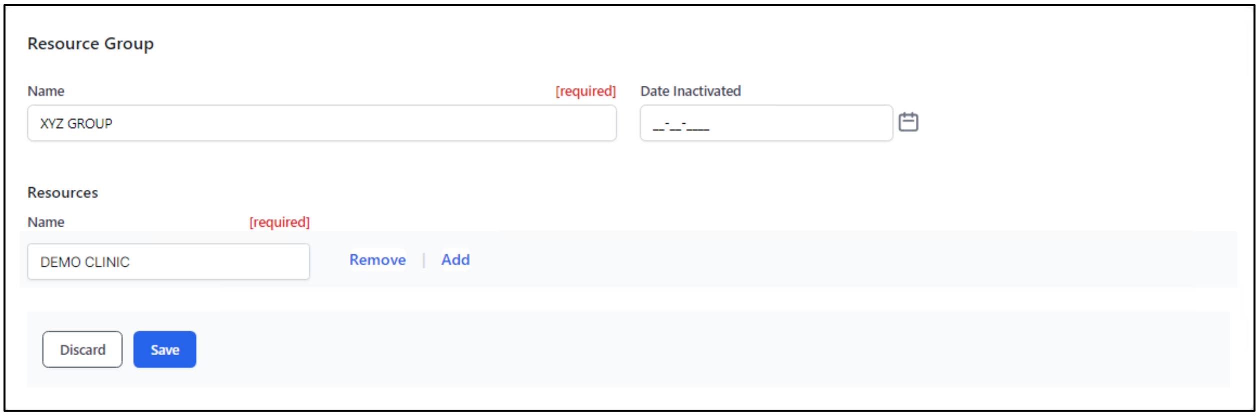


Figure 3-60: Adding a Group Resource

7. When all the desired resources have been added to the group, click **Save** to save the group or click **Discard** to close the window without saving the changes.

3.6.2 Edit a Resource Group

To edit an existing **Resource Group**, use the following steps:

1. Select **Settings** and then **Resource Groups**.
2. Use the **Filter by Name** search field to find the resource group to modify. You can also use the scroll bar at the bottom of the screen.
3. Select **Edit** for the resource group you want to edit. The **Resource Group** edit dialog (Figure 3-61) displays.

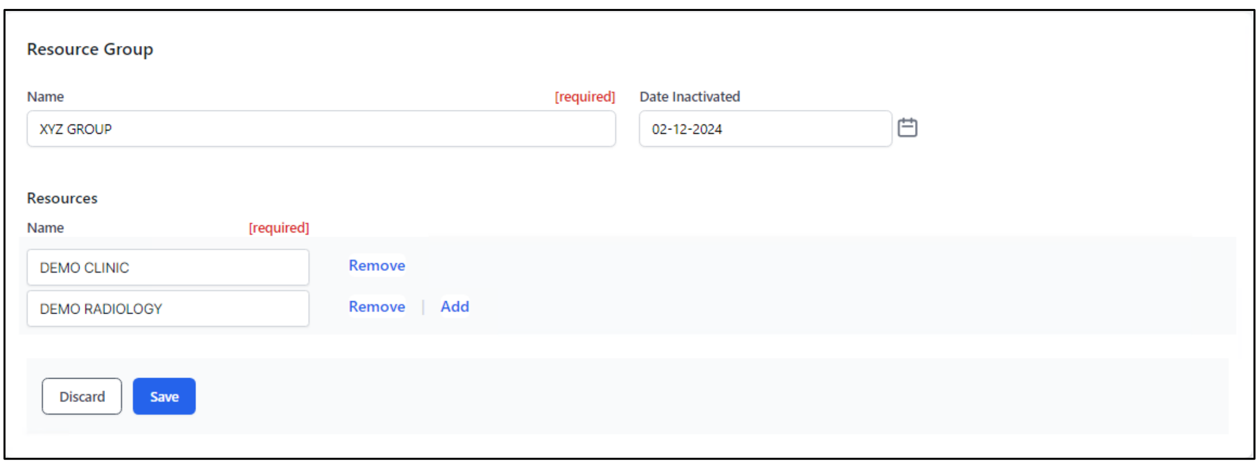


Figure 3-61: Resource Group edit dialog

4. From this window, you can edit the name of the resource group, add resources to the group as described in Section 3.6.1, or remove resources by clicking **Remove** to the right of the resource name.

- Optionally, you can inactivate the resource group by entering a date in the **Inactivation Date** field. To re-activate a resource group, clear the date in this field.

5. When the desired changes are complete, click **Save** to save the changes or click **Discard** to close the window without saving the changes.

Note:	You must log out and then log back in to BPRM for any changes made to take effect.

4.0 Scheduling Reports

The Practice Management Application Suite includes the **Reports** module, which produces a variety of reports regarding practice management. This section describes the scheduling-related reports available from the **Reports** module.

4.1 Reports Module Overview

The **Reports** module collects specific information from the RPMS database, and then formats the information for on-screen viewing or printing. You can also print reports as well as save them in a variety of different file formats.

Open the **Reports** module by clicking **Reports** (lower-left corner), as shown in (Figure 4-1).

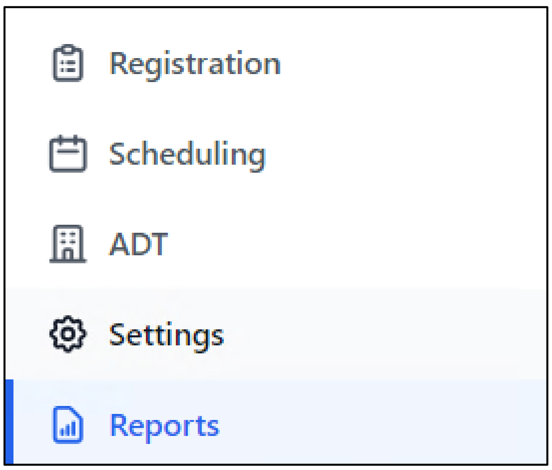


Figure 4-1: Accessing the Reports module

4.1.1 Reports: Preview and Print Options

For every report in **Reports** module, the user can view the report results in a few ways. After selecting the appropriate report parameters:

- Click **Preview** to view the report on the screen.
- Click **Print** to print the report to an RPMS device or a browser.

Figure 4-2 shows the **Preview** and **Print** options for all reports.

Figure 4-2: Preview and Print options

> **Note:** Printers can be searched by printer name or printer mnemonic (will display within search results) or local synonym. See *BPRM Application Overview User Manual* for more information.

4.1.2 Reports: Page Selection

For every report in the **Reports** module, the user can utilize the following page-selection buttons (Figure 4-3) to navigate through multi-page reports.

- Use the middle arrows () to move through the report one page at a time.
- Use the arrows with bars ( ) to quickly go to the beginning or the end of the report.

Figure 4-3: Page selection buttons

4.1.3 Reports: Zoom Options

For every report in the Reports module, the user can utilize the following zoom-in and zoom-out functions (Figure 4-4) to either zoom in or zoom out within the page view of the report.

- Use the minus () and plus () buttons to manually adjust the report view.
- Use the 100% picklist option to set a specific report view (includes Fit Page and Fit Width).

Figure 4-4: Zoom buttons

4.2 Scheduling Report Types

Once the **Reports** module is open, a listing of the available scheduling-related reports displays as shown in Figure 4-5.

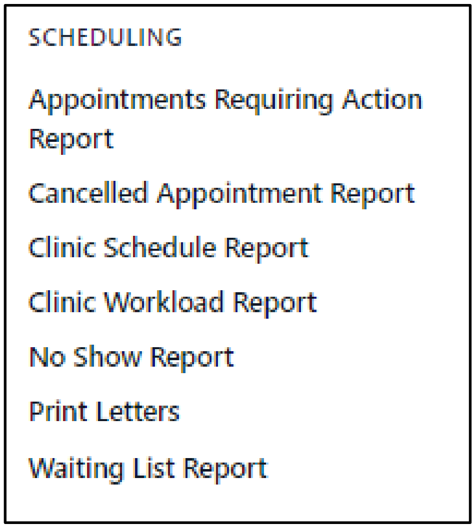


Figure 4-5: Scheduling Reports

Click any report name to open that report. After opening a report, you must provide additional parameters (such as start and end dates, status, sort by, etc.) to view the report.

4.2.1 Appointments Requiring Actions Report

The Appointments Requiring Actions Report shows detailed information about patient appointments for a specific date.

4.2.1.1 Appointments Requiring Actions Report Parameters

The Appointments Requiring Action Report has fields for these parameters:

- Clinics
- Start Date
- End Date

Figure 4-6 shows the parameters of the Appointments Requiring Actions Report.

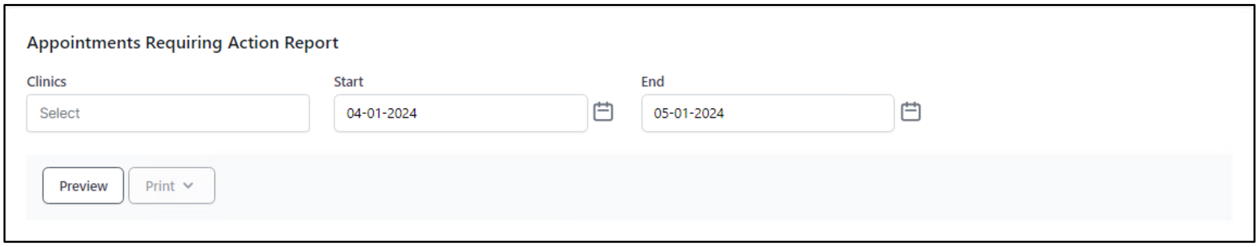


Figure 4-6: Appointments Requiring Action Report parameters dialog

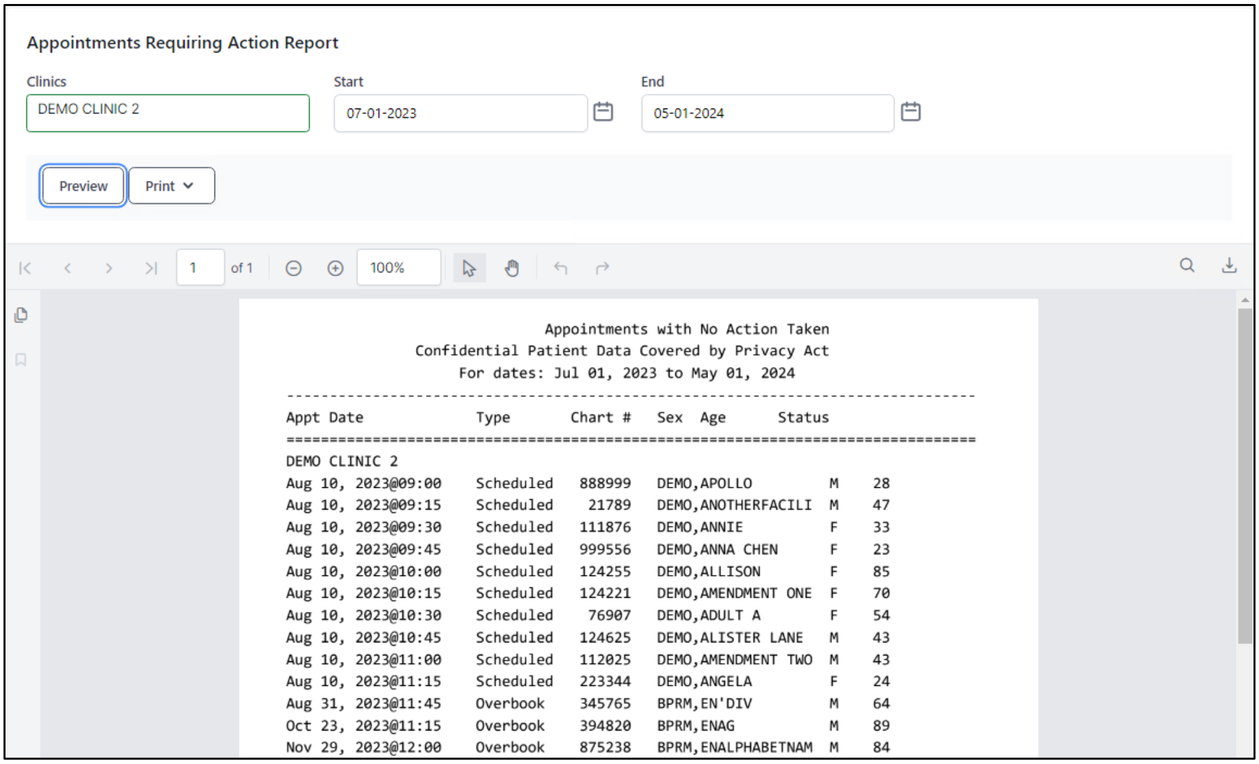
1. Select a single clinic or multiple clinics from the **Clinics** list or choose **Select All** to quickly select all clinics.
2. Specify the **Start** and **End** dates for the time period you want reflected in the report. By default, the start date is set to last month and the end date is set to today's date.
3. After selecting the appropriate report parameters, click **Preview** to view the report.

4.2.1.2 Information in the Appointments Requiring Action Report

The Appointments Requiring Action Report includes the following information for each appointment matching the specified report parameters:

- Clinic Name
- Appointment Date
- Appointment Time
- Appointment Type
- Patient Chart Number
- Patient name
- Sex

Figure 4-7 shows an example of an Appointments Requiring Action Report.




```
Appointments with No Action Taken
Confidential Patient Data Covered by Privacy Act
For dates: Jul 01, 2023 to May 01, 2024
--------------------------------------------------------------------------------
Appt Date              Type        Chart #   Sex  Age      Status
================================================================================
DEMO CLINIC 2
Aug 10, 2023@09:00     Scheduled   888999   DEMO,APOLLO          M     28
Aug 10, 2023@09:15     Scheduled    21789   DEMO,ANOTHERFACILI   M     47
Aug 10, 2023@09:30     Scheduled   111876   DEMO,ANNIE           F     33
Aug 10, 2023@09:45     Scheduled   999556   DEMO,ANNA CHEN       F     23
Aug 10, 2023@10:00     Scheduled   124255   DEMO,ALLISON         F     85
Aug 10, 2023@10:15     Scheduled   124221   DEMO,AMENDMENT ONE   F     70
Aug 10, 2023@10:30     Scheduled    76907   DEMO,ADULT A         F     54
Aug 10, 2023@10:45     Scheduled   124625   DEMO,ALISTER LANE    M     43
Aug 10, 2023@11:00     Scheduled   112025   DEMO,AMENDMENT TWO   M     43
Aug 10, 2023@11:15     Scheduled   223344   DEMO,ANGELA          F     24
Aug 31, 2023@11:45     Overbook    345765   BPRM,EN'DIV          M     64
Oct 23, 2023@11:15     Overbook    394820   BPRM,ENAG            M     89
Nov 29, 2023@12:00     Overbook    875238   BPRM,ENALPHABETNAM   M     84
```

Figure 4-7: Appointments Requiring Action Report example

4.2.2 Cancelled Appointment Report

The Cancelled Appointment Report shows information about appointments that were cancelled by the patient or the clinic over a specified time period.

4.2.2.1 Cancelled Appointment Report Parameters

The Cancelled Appointment Report has fields for these parameters:

- Clinic(s)
- Start Date
- End Date
- Cancelled By

Figure 4-8 shows the parameters of the Cancelled Appointment Report.

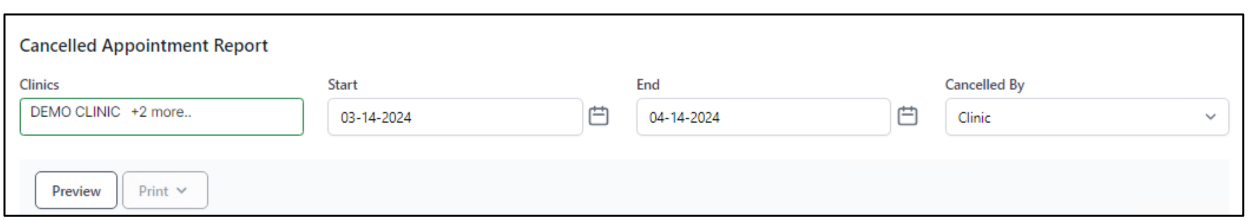


Figure 4-8: Cancelled Appointment Report parameters

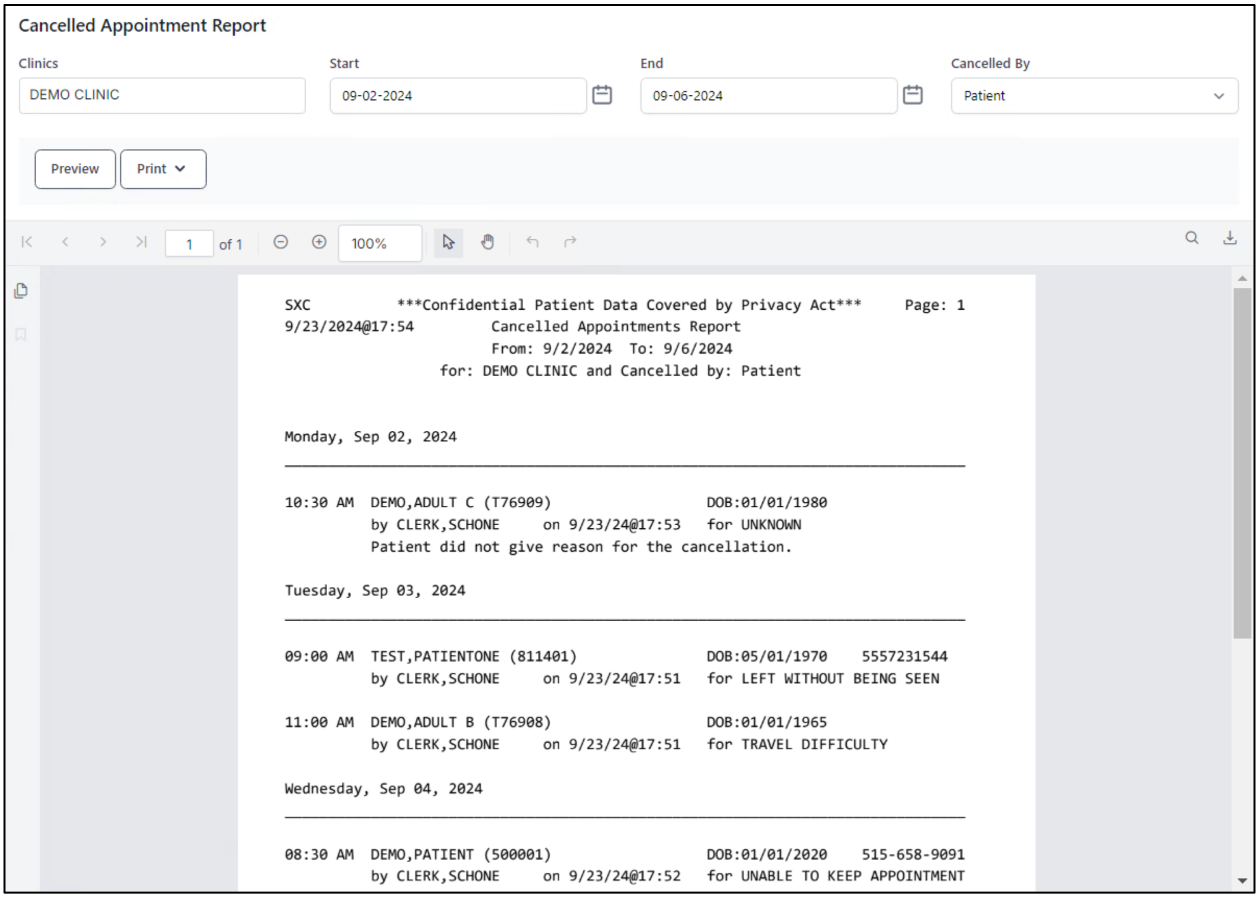
1. Select a single clinic or multiple clinics from the **Clinics** list or choose **Select All** to quickly select all of them.
2. Specify the **Start** and **End** dates for the period of time you want reflected in the report. By default, the start date is set to today's date and the end date is set to next month.
3. The **Cancelled By** field has the following options:
   - **Clinic**: This includes appointments marked as Cancelled By Clinic.
   - **Patient**: This includes appointments marked as Cancelled by Patient.
4. After selecting the appropriate parameters, click **Preview** to view the report.

4.2.2.2 Information in the Cancelled Appointment Report

The Cancelled Appointment Report includes the following information for each appointment matching the specified report parameters:

- Date range selected
- Clinic name
- Cancelled by Type (Clinic/Patient)
- Appointment Date and Time
- Patient Name
- HRN
- DOB
- Phone
- Cancelled by username and date/time
- Cancellation Reason
- Notes (if present)

Figure 4-9 shows an example of a Cancelled Appointment Report.




```
SXC         ***Confidential Patient Data Covered by Privacy Act***     Page: 1
9/23/2024@17:54         Cancelled Appointments Report
                        From: 9/2/2024  To: 9/6/2024
                  for: DEMO CLINIC and Cancelled by: Patient


Monday, Sep 02, 2024
________________________________________________________________________________

10:30 AM  DEMO,ADULT C (T76909)                 DOB:01/01/1980
          by CLERK,SCHONE     on 9/23/24@17:53   for UNKNOWN
          Patient did not give reason for the cancellation.

Tuesday, Sep 03, 2024
________________________________________________________________________________

09:00 AM  TEST,PATIENTONE (811401)              DOB:05/01/1970    5557231544
          by CLERK,SCHONE     on 9/23/24@17:51   for LEFT WITHOUT BEING SEEN

11:00 AM  DEMO,ADULT B (T76908)                 DOB:01/01/1965
          by CLERK,SCHONE     on 9/23/24@17:51   for TRAVEL DIFFICULTY

Wednesday, Sep 04, 2024
________________________________________________________________________________

08:30 AM  DEMO,PATIENT (500001)                 DOB:01/01/2020    515-658-9091
          by CLERK,SCHONE     on 9/23/24@17:52   for UNABLE TO KEEP APPOINTMENT
```

Figure 4-9: Cancelled Appointment Report example

4.2.3 Clinic Schedule Report

The Clinic Schedule Report shows the appointments for a clinic or clinics for a specified time period.

4.2.3.1 Clinic Schedule Report Parameters

The Clinic Schedule Report has fields for these parameters:

- Clinic(s)
- Start Date
- End Date
- Print Each Date On Separate Page

Figure 4-10 shows the parameters of the Clinic Schedule Report.

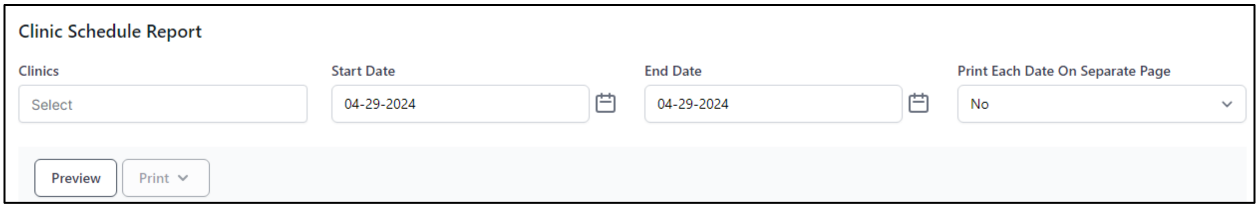


Figure 4-10: Clinic Schedule Report parameters

1. Select a single clinic or multiple clinics from the **Clinics** list or choose **Select All** to quickly select all of them.
2. Specify the Start Date and End Date for the period of time you want reflected in the report. By default, both the start and end dates are set to today.
3. Choose **Yes** or **No** in the **Print Each Date On Separate Page** field. The default is **No**.
4. After selecting the appropriate report parameters, click **Preview** to view the report.

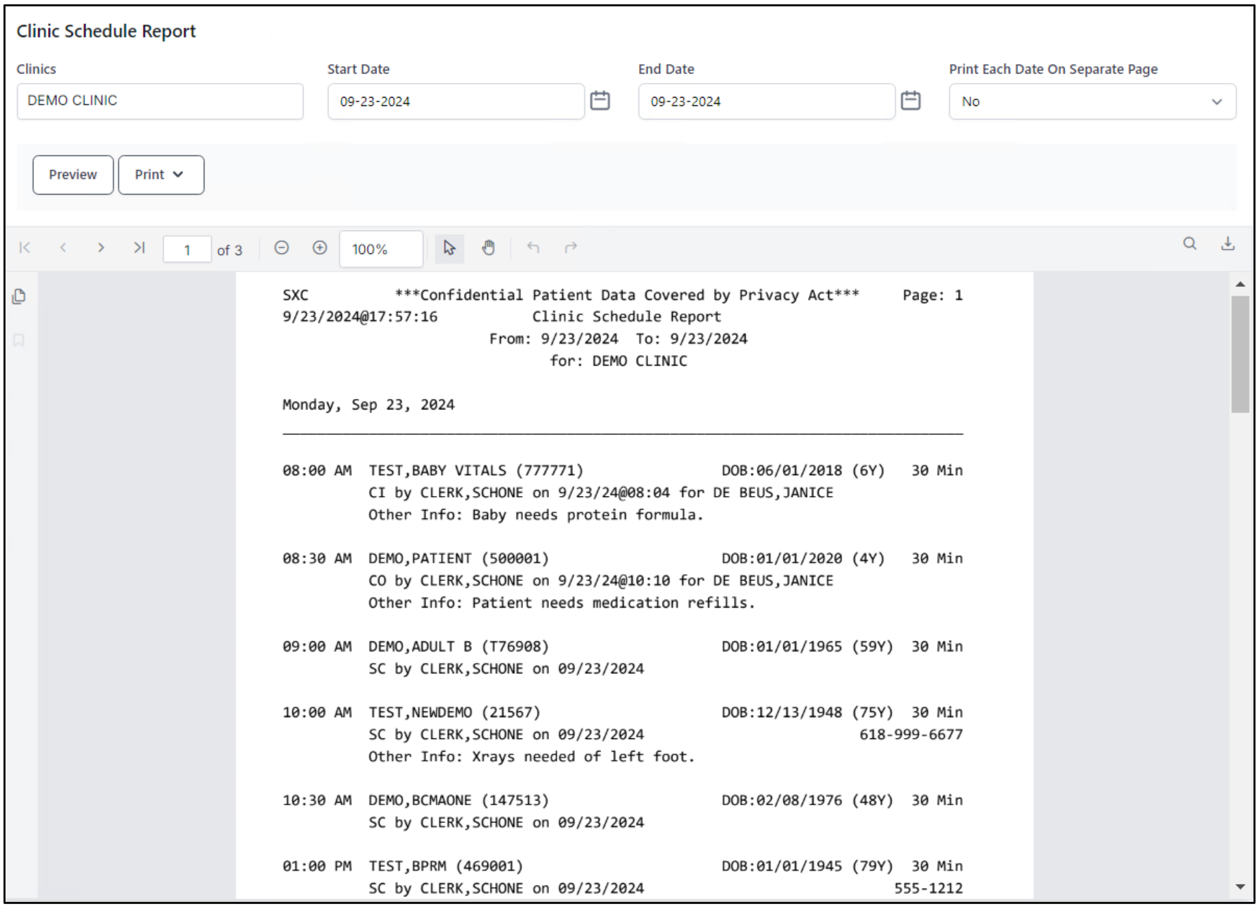
4.2.3.2 Information in the Clinic Schedule Report

The Clinic Schedule Report includes the following information for each appointment matching the specified report parameters:

- Date range selected
- Clinic name(s)
- Appointment date and time
- Patient’s name, chart number, DOB, age, appointment length
- Appointment status, updated by, and date (and time for check in/check out)
  - If the clinic (in Settings) is defined to create visit at check-in, the appointment status is Checked In/Checked Out, and a provider was entered, the provider name will display.
  - If the appointment status is Scheduled and the patient has a residence phone, the patient’s phone number will display.
- Other Info

> **Notes:** If the user selects multiple clinics, a page break forces the appointments for the next clinic to print on the next page.
>
> Also, if the user selects to print each date on a separate page, a page break forces appointments for the next date to print on the next page.

Figure 4-11 shows an example of a typical **Clinic Schedule** report.


Clinic Schedule Report

Clinics: DEMO CLINIC
Start Date: 09-23-2024
End Date: 09-23-2024
Print Each Date On Separate Page: No

Preview Print

1 of 3 100%

```
SXC           ***Confidential Patient Data Covered by Privacy Act***     Page: 1
9/23/2024@17:57:16             Clinic Schedule Report
                        From: 9/23/2024  To: 9/23/2024
                               for: DEMO CLINIC

Monday, Sep 23, 2024
_______________________________________________________________________________

08:00 AM  TEST,BABY VITALS (777771)               DOB:06/01/2018 (6Y)   30 Min
          CI by CLERK,SCHONE on 9/23/24@08:04 for DE BEUS,JANICE
          Other Info: Baby needs protein formula.

08:30 AM  DEMO,PATIENT (500001)                   DOB:01/01/2020 (4Y)   30 Min
          CO by CLERK,SCHONE on 9/23/24@10:10 for DE BEUS,JANICE
          Other Info: Patient needs medication refills.

09:00 AM  DEMO,ADULT B (T76908)                   DOB:01/01/1965 (59Y)  30 Min
          SC by CLERK,SCHONE on 09/23/2024

10:00 AM  TEST,NEWDEMO (21567)                    DOB:12/13/1948 (75Y)  30 Min
          SC by CLERK,SCHONE on 09/23/2024                      618-999-6677
          Other Info: Xrays needed of left foot.

10:30 AM  DEMO,BCMAONE (147513)                   DOB:02/08/1976 (48Y)  30 Min
          SC by CLERK,SCHONE on 09/23/2024

01:00 PM  TEST,BPRM (469001)                      DOB:01/01/1945 (79Y)  30 Min
          SC by CLERK,SCHONE on 09/23/2024                          555-1212
```

Figure 4-11: Clinic Schedule Report example

4.2.4 Clinic Workload Report

The Clinic Workload Report shows statistical information about scheduled and unscheduled appointments over a specified time period.

4.2.4.1 Clinic Workload Report Parameters

The Clinic Workload Report has fields for these parameters:

- Clinics
- Start Date
- End Date
- Report Format
- Compare to Previous Year

Figure 4-12 shows the parameters of the Clinic Workload Report.

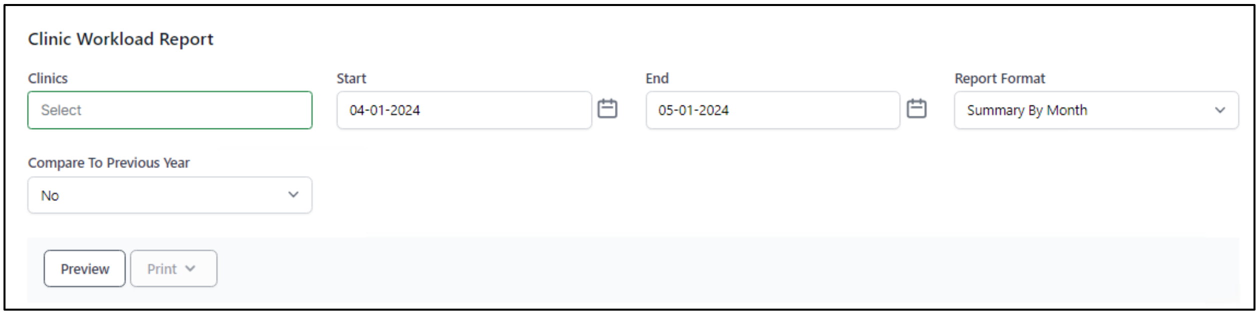


Figure 4-12: Clinic Workload Report parameters

1. Select a single clinic or multiple clinics from the **Clinics** list or choose **Select All** to quickly select all clinics.
2. Specify the **Start Date** and **End Date** for the period of time you want reflected in the report. By default, the start date is set to last month and the end date is set to today's date.
3. The **Report Format** field has the following options:
    - Summary by Month
    - Detail By Day

The default for the **Compare to Previous Year** field is **No**.

4. After selecting the appropriate report parameters, click **Preview** to view the report.

4.2.4.2 Information in the Clinic Workload Report

The Clinic Workload Report includes the following information for the specified report parameters:

- Clinic Name
- Date
- Number of Scheduled Appointments
- Number of Unscheduled Appointments
- Number of Over-books
- Number of Add/Edits
- Number of No-shows
- Number of Canceled Appointments
- Total Number of Patients Seen

Figure 4-13 shows an example of a **Clinic Workload Report**.

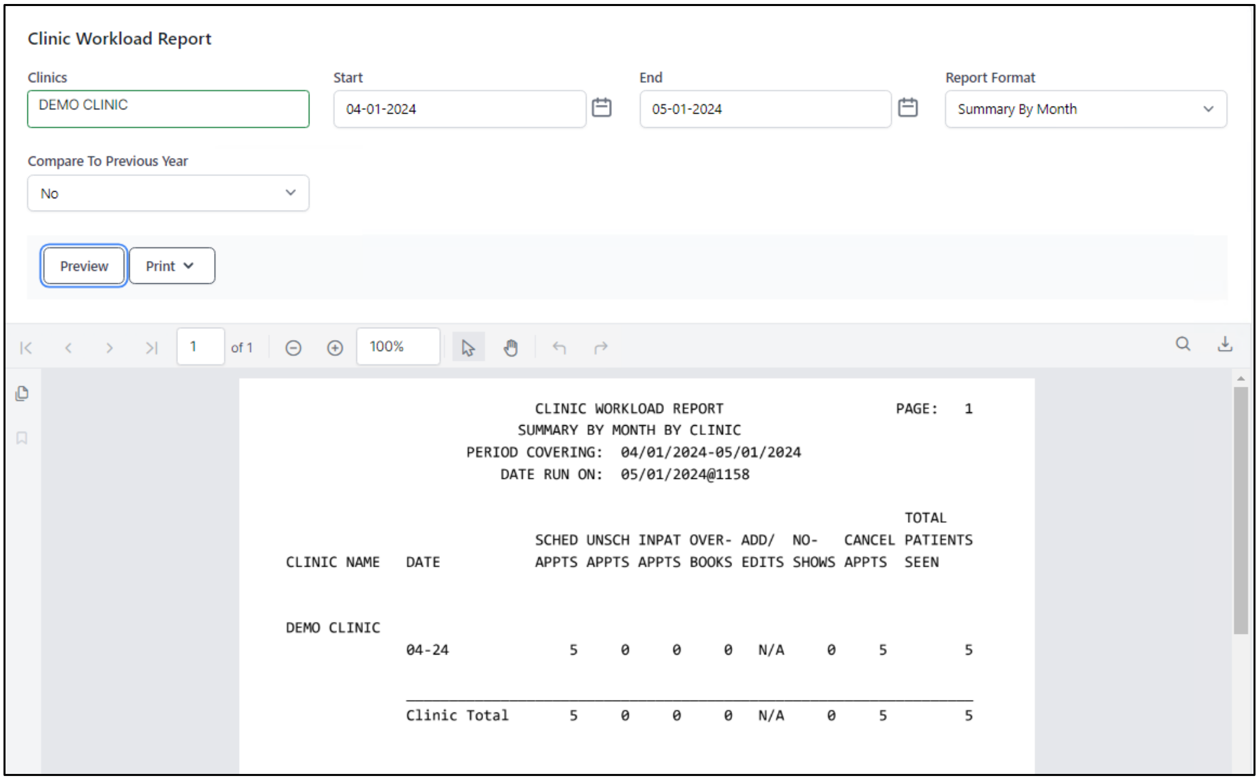


Figure 4-13: Clinic Workload Report example – summary by month

Figure 4-14 shows an example of a Clinic Workload Report–Comparison Summary page.

```
                  CLINIC WORKLOAD REPORT                    PAGE:    5
             COMPARISON OF VISITS TO PREVIOUS YEAR
           FOR PERIOD COVERING:  04/01/2024-05/01/2024
               REPORT RUN ON:   05/01/2024@121

 ________________________________________________________________________
|                        |                |                |        |        |
|                        |  # OF VISITS   |  # OF VISITS   |  NET   |   %    |
|      Clinic Name       |04/01/24-05/01/24|04/01/23-05/01/23| CHANGE | CHANGE |
|________________________|________________|________________|________|________|
|________________________|________________|________________|________|________|
|                        |                |                |        |        |
|2013 DEMO HOSP PHARMACY |              1 |              0 |   1.00 |    N/A |
|BLUE CLINIC             |              3 |              0 |   3.00 |    N/A |
|DEMO CLINIC             |              5 |              4 |   1.00 |  25.00 |
|TO DEMO CLINIC          |              4 |              0 |   4.00 |    N/A |
|________________________|________________|________________|________|________|
```

Figure 4-14: Clinic Workload Report, comparison summary page

4.2.5 No Show Report

The No Show Report shows information about appointments that the patient never showed up for and there was no cancellation by the patient over a specified date range.

4.2.5.1 No Show Report Parameters

The No Show Report has fields for these parameters:

- Clinics
- Start Date
- End Date
- Print Report Totals Only

Figure 4-15 shows the parameters of the No Show Report.

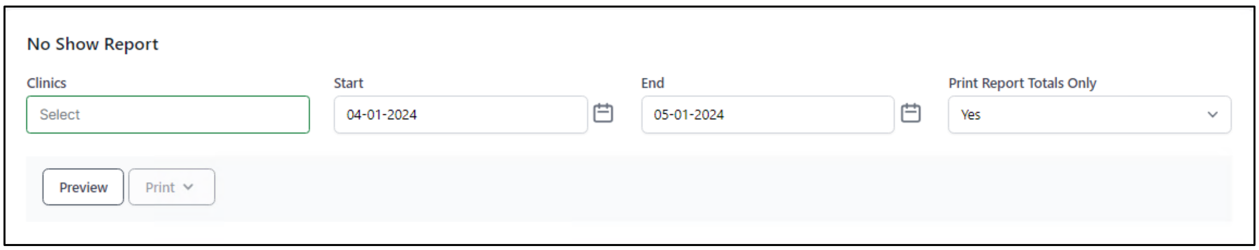


Figure 4-15: No Show Report parameters

1. Select a single clinic or multiple clinics from the **Clinics** list or choose **Select All** to quickly select all clinics.
2. Specify the **Start Date** and **End Date** for the period of time you want reflected in the report. By default, the start date is set to last month and the end date is set to today’s date.
3. The **Print Report Totals Only** field defaults to **Yes**.
4. After selecting the appropriate parameters, click **Preview** to view the report.

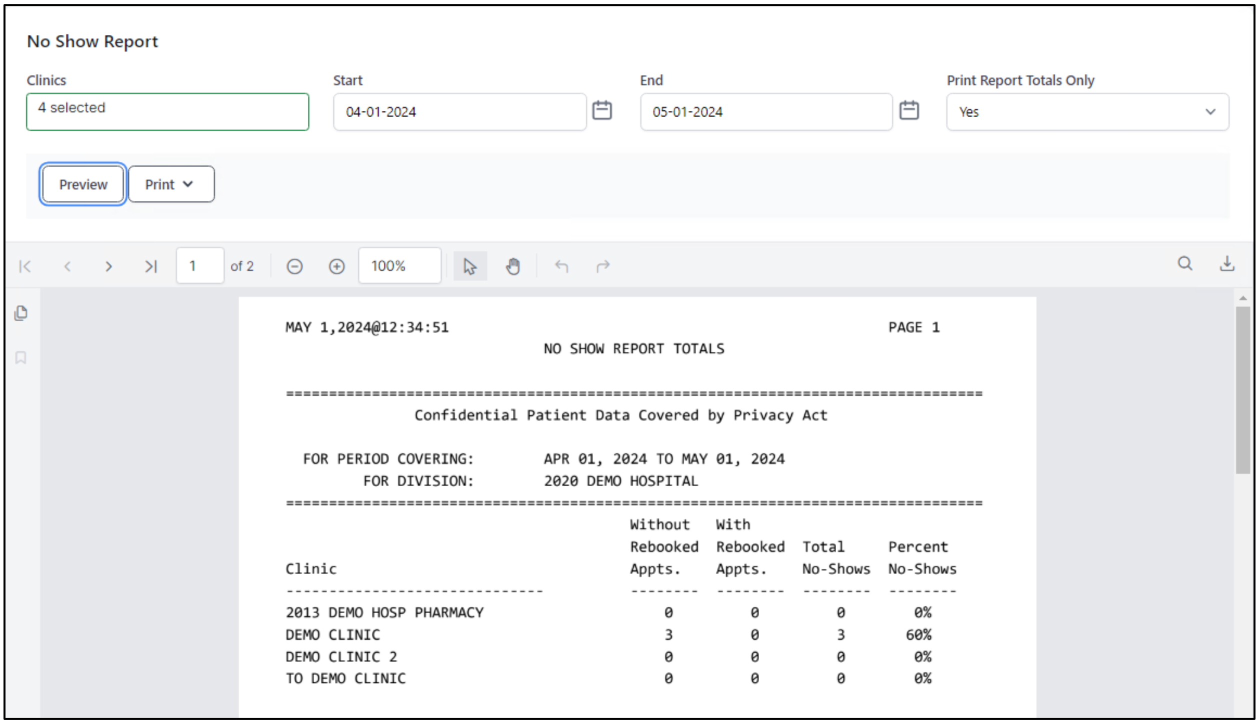
4.2.5.2 Information in the No Show Report

The No Show Report includes the following information for each appointment matching the specified report parameters:

- Date Range Selected
- Division
- Clinic Name
- Number of Without Rebooked Appointments

- Number of With Rebooked Appointments
- Total No-Show Appointments
- Percent No-Shows

Figure 4-16 shows an example of a No Show Report.




```
MAY 1,2024@12:34:51                                              PAGE 1
                              NO SHOW REPORT TOTALS

================================================================================
               Confidential Patient Data Covered by Privacy Act

  FOR PERIOD COVERING:        APR 01, 2024 TO MAY 01, 2024
         FOR DIVISION:        2020 DEMO HOSPITAL
================================================================================
                                        Without   With
                                        Rebooked  Rebooked  Total     Percent
Clinic                                  Appts.    Appts.    No-Shows  No-Shows
------------------------------          --------  --------  --------  --------
2013 DEMO HOSP PHARMACY                        0         0         0        0%
DEMO CLINIC                                    3         0         3       60%
DEMO CLINIC 2                                  0         0         0        0%
TO DEMO CLINIC                                 0         0         0        0%
```

Figure 4-16: No Show Report example—details

Figure 4-17 shows an example of a **No Show Report–Report Totals** page.

```
MAY 1,2024@12:34:51                                                PAGE 1
                              NO SHOW REPORT TOTALS

=================================================================================
               Confidential Patient Data Covered by Privacy Act

  FOR PERIOD COVERING:       APR 01, 2024 TO MAY 01, 2024
         FOR DIVISION:       2020 DEMO HOSPITAL
=================================================================================
                                       Without   With
                                       Rebooked  Rebooked  Total     Percent
Clinic                                 Appts.    Appts.    No-Shows  No-Shows
------------------------------         --------  --------  --------  --------
2013 DEMO HOSP PHARMACY                    0         0         0        0%
DEMO CLINIC                                3         0         3       60%
DEMO CLINIC 2                              0         0         0        0%
TO DEMO CLINIC                             0         0         0        0%
```

Figure 4-17: No Show Report—Report Totals page

4.2.6 Print Letters

The **Print Letters** option in the **Reports** module provides the user with batch letter printing ability for all letter types (pre-appointment, clinic cancelled, appointment cancelled, and no-show). Batch letter printing provides the ability to print one or more pre-configured appointment letters to be sent to patients. These letters can serve as reminders about upcoming or missed appointments.

> **Note:** Each letter type must be configured before it can be used at the clinic. See Section 3.5 for more information about configuring letter templates in the **Settings** module.

4.2.6.1 Print Letters Parameters

The Print Letters report has fields for these parameters:

- Clinic
- Letter Type
- Start Date
- End Date

Figure 4-18 shows the parameters of the Print Letters Report.

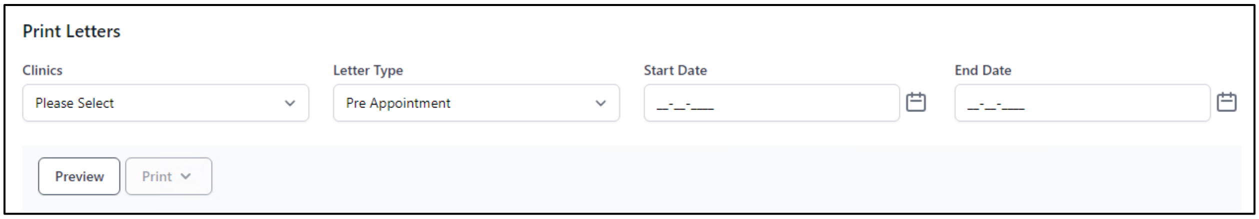


Figure 4-18: Print Letters parameters

1. Select a clinic from the **Clinics** list.
2. The **Letter Type** list offers these letter types:
   - Pre-Appointment (Default)
   - Clinic Cancelled
   - Appointment Cancelled
   - No-Show

Table 4-1 provides additional information for each letter type.

Table 4-1: Letter Type descriptions

Field	Description
Pre-Appointment Letter	Use this letter type to print a letter for an appointment that was scheduled but the patient was not checked in. (Appointment status = SCHEDULED). This letter includes a list of Future appointments for the patient up to 999 days or up to the Clinic Future Booking Max Days limit. The appointments listed are for the selected clinic only.
Clinic Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled by the clinic. (Appointment status = CANCELLED BY CLINIC).
Appointment Cancelled Letter	Use this letter type to print a letter for an appointment that was cancelled. (Appointment status = CANCELLED BY PATIENT).
No-Show Letter	Use this letter type to print a letter for an appointment that was marked a No Show due to the patient not showing up. (Appointment status = NO SHOW).

3. Specify the **Start Date** and **End Date** for the period of time for the appointments you want the letters generated.

After selecting the appropriate parameters, click **Preview** to generate the appointment letters and display a preview of them. Use the left and right arrows in the toolbar to navigate from one letter to the next.

4.2.6.2 Batch Print Letters

To batch print one or more appointment letters:

1. In the **Clinics** list, select a clinic for which to print the appointment letters.
2. Use the **Letter Type** list to select the type of letter to print.
3. In the **Start Date** and **End Date** fields, enter the start and end dates for the time period the appointment letters cover.
4. Click **Preview** to generate the appointment letters and display a preview of them. Use the left and right arrows in the toolbar to navigate from one letter to the next.

Figure 4-19 shows an example of a pre-appointment letter.

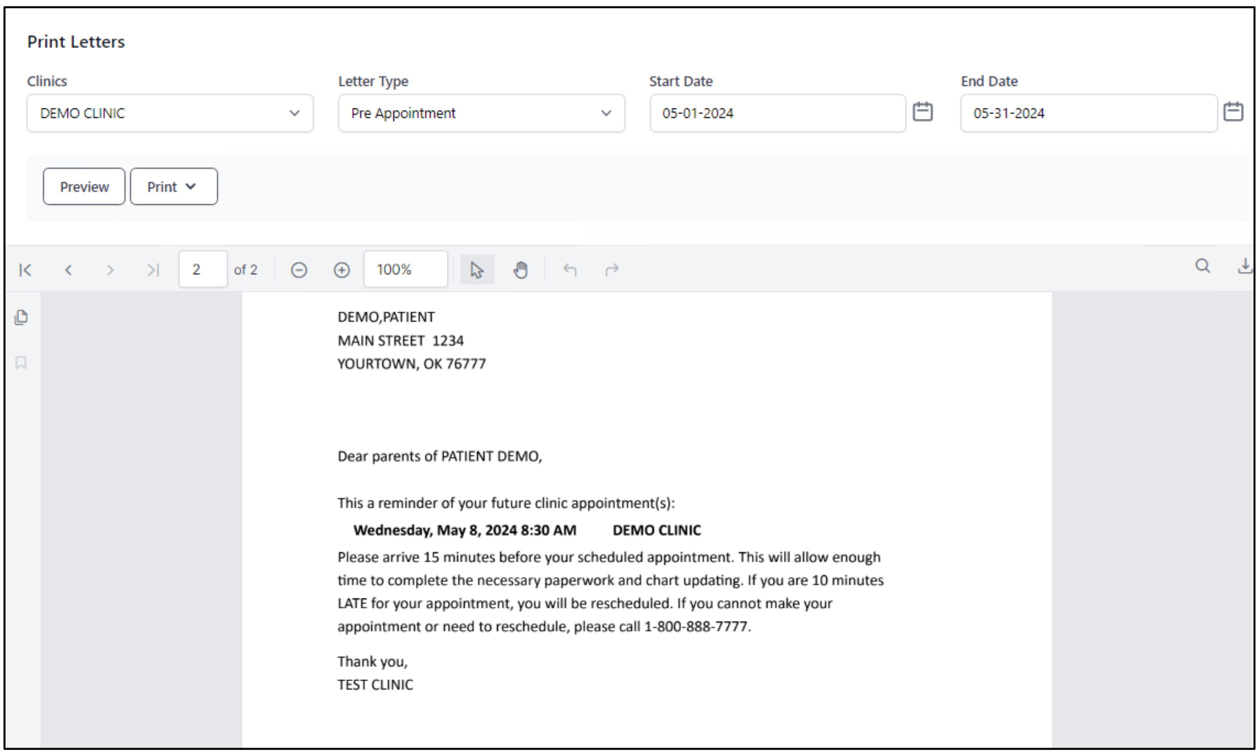


Figure 4-19: Print Pre-appointment letter example

4.2.7 Waiting List Report

The Waiting List Report shows information about appointment waiting lists at a specific clinic for a selected time period.

4.2.7.1 Waiting List Report Parameters

The Waiting List Report has fields for these parameters:

- Clinics
- Start Date
- End Date
- Date Range Type
- Include Removed Entries
- Group By
- Priority Filter
- Print Summary Only

Figure 4-20 shows the parameters of the Waiting List Report.

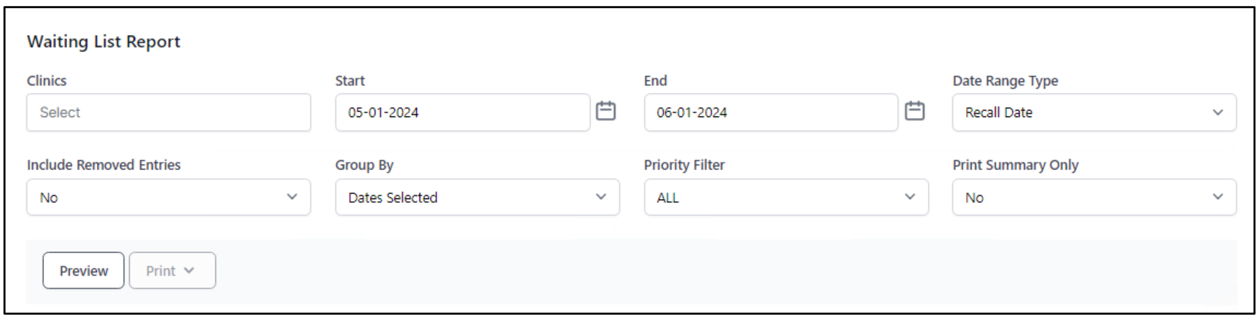


Figure 4-20: Waiting List Report parameters

1. Select a single clinic or multiple clinics from the **Clinics** list or choose **Select All** to quickly select all of them.

2. Specify the **Start** and **End** date fields for the period of time you want reflected in the report. By default, the start date is set to today's date and the end date is set to next month.

   - The **Date Range Type** field offers the following options:
     - Recall Date (Default)
     - Date Added To List
     - Date Removed From List
   - The **Include Removed Entries** field defaults to **No**.
   - The **Group By** field offers the following options:
     - Dates Selected (Default)
     - Priority

    - Provider
    - Reason Added
    - Resolution
  - Priority Filter
    - All
    - High
    - Middle
    - Low
  - The **Print Summary Only** option defaults to **No**.
3. After selecting the appropriate parameters, click **Preview** to view the report.

4.2.7.2 Information in the Waiting List Report

The Waiting List Report provides detailed waiting list information for each selected clinic found within the date range and group by parameters you specify. This information includes the following:

- Clinic name
- Date range type
- Group By
- Patient name
- Chart number
- Age
- Sex
- Priority
- Home phone
- Comments (if any have been added)
- Subtotals/Totals for groupings

Figure 4-21 shows an example of a Waiting List Report.

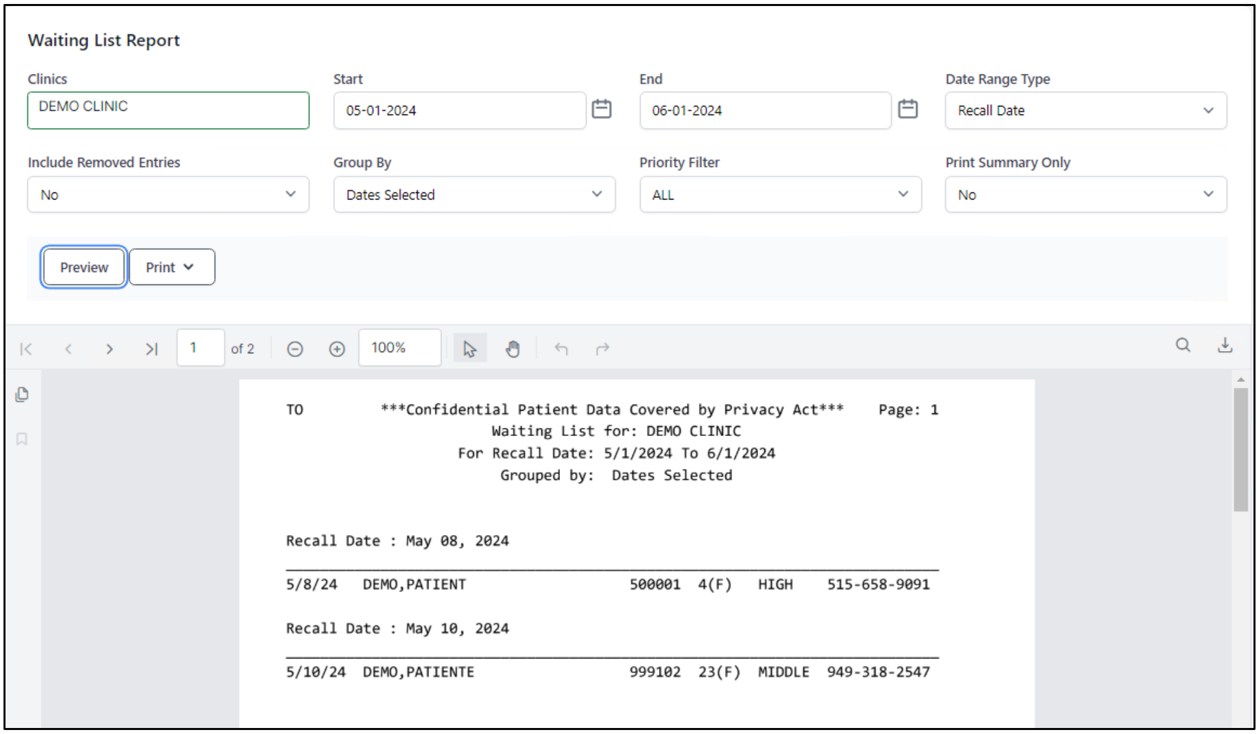


Figure 4-21: Waiting List Report example

```
TO          ***Confidential Patient Data Covered by Privacy Act***    Page: 1
                       Waiting List for: DEMO CLINIC
                   For Recall Date: 5/1/2024 To 6/1/2024
                        Grouped by:  Dates Selected


Recall Date : May 08, 2024
____________________________________________________________________________
5/8/24    DEMO,PATIENT                      500001  4(F)   HIGH    515-658-9091

Recall Date : May 10, 2024
____________________________________________________________________________
5/10/24   DEMO,PATIENTE                     999102  23(F)  MIDDLE  949-318-2547
```

Figure 4-22: Confidential Patient Data Covered by Privacy Act, Waiting List example

```
TO         ***Confidential Patient Data Covered by Privacy Act***    Page: 3
                                Summary Totals Page
                        For Recall Date: 5/1/2024 To 6/1/2024
                             Grouped by:  Dates Selected



  Subtotals for clinic BLUE CLINIC by Recall Date :

     May 31, 2024                                1
_____________________________________________________________________________
     BLUE CLINIC  Totals                         1
_____________________________________________________________________________

  Subtotals for clinic DEMO CLINIC by Recall Date :

     May 08, 2024                                1
     May 10, 2024                                1
_____________________________________________________________________________
     DEMO CLINIC  Totals                         2
_____________________________________________________________________________
_____________________________________________________________________________

  Report Totals                                  3
```

Figure 4-23: Summary Totals Page example

```
TO        ***Confidential Patient Data Covered by Privacy Act***    Page: 3
                           Summary Totals Page
                    For Recall Date: 5/1/2024 To 6/1/2024
                          Grouped by:  Priority



  Subtotals for clinic BLUE CLINIC by Priority :

     2-MIDDLE                                     1
_____________________________________________________________________________
     BLUE CLINIC  Totals                          1
_____________________________________________________________________________

  Subtotals for clinic DEMO CLINIC by Priority :

     1-HIGH                                       1
     2-MIDDLE                                     1
_____________________________________________________________________________
     DEMO CLINIC  Totals                          2
_____________________________________________________________________________
_____________________________________________________________________________

  Report Totals                                   3
```

Figure 4-24: Summary Totals Page example

5.0 Appointments Tab in the Registration Module

The **Appointments** tab (Figure 5-1) shows a comprehensive listing of appointments for the selected patient.

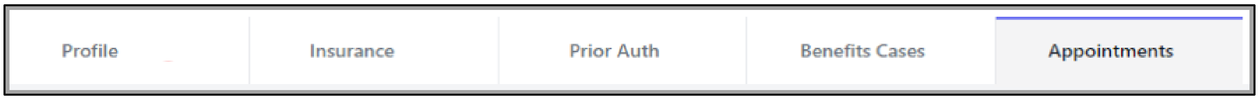


Figure 5-1: Appointments tab

An example of the **Appointments** tab window is shown in Figure 5-2.

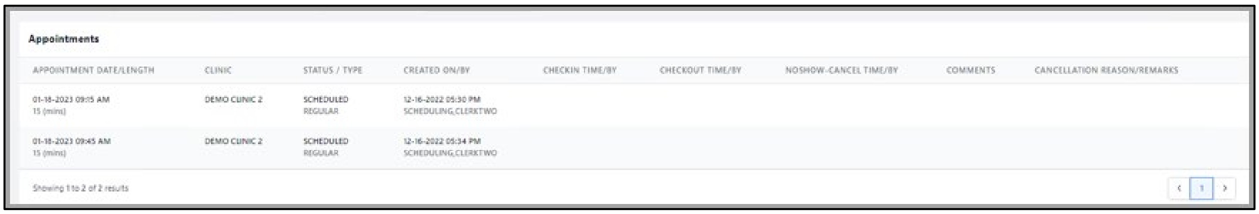


Figure 5-2: Appointments tab window example

> **Note:** Information about the **Appointments** tab is also listed in the Registration Manual.

5.1 User Access

- A REG user must possess either the SDZ ELIG REPORT, SDZMENU, or SDZSUP key for the **Appointments** tab to display (in addition to other Registration tabs: **Profile**, **Insurance**, etc.).
- A non-REG user may possess either the SDZMENU or SDZSUP key for ***only*** the **Appointments** tab to display (without display of other Registration tabs: **Profile**, **Insurance**, etc.).

The following SCH functions will also be available for a public or prohibited clinic where the user has the SDZSUP key or is assigned MODIFY APPOINTMENTS privileges.

- View Appt Detail
- Check-In Appt
- Check-Out Appt
- Cancel Appt
- No-Show Appt
- Print Routing Slip
- Print Medication Profile

- Print Pre-Appointment Letter

Note:	The exact options available are dependent on the appointment status. Also, these options are available for the *current division only* (i.e., the division the user is logged into).

5.2 Filter Appointments by Date

Use the **Date** panel to filter appointments (Figure 5-3). Users can select all, today's, past, or future appointments.

Figure 5-3: Date Panel Appointments Filter list

To filter, select one of the options on the **Date** panel and the **Appointments** window displays.

5.3 Appointment Information Listed

The following information is listed for each appointment (when applicable):

- Appointment Date/Length
- Clinic
- Status/Type
- Created On/By
- Check In Time/By
- Check Out Time/By
- No-Show—Cancel Time/By
- Comments
- Cancellation Reason/Remarks

5.4 Using the Context Menus

Context menus offer a variety of options for working with patient appointments. These options are only available if the patient is in a clinic that the user has access to.

Right-click anywhere on an existing appointment line to open a context menu. Availability and options of context menus are dependent on the appointment status.

Refer to Section 2.6, Figure 2-51 for additional information.

5.5 Print Options

From the **Appointments** tab, *all* users will be able to perform the following print options:

- Print Routing Slip
- Print Letter (Pre-Appointment, Cancelled, No Show)

> **Note:** These printings are available to the user for *all* divisions and for *all* clinics (prohibited/non-prohibited). For letter printings, if there is no letter template default for the clinic, the user will be able to select a letter template.

The **Print** option (Figure 5-4) in the upper-right corner of the **Profile** window gives the user the option to print the face sheet, the patient's index card, wrist band, wellness handout, and future appointments.

Refer to the *BPRM Registration User Manual*, *Print Options*, for additional information.

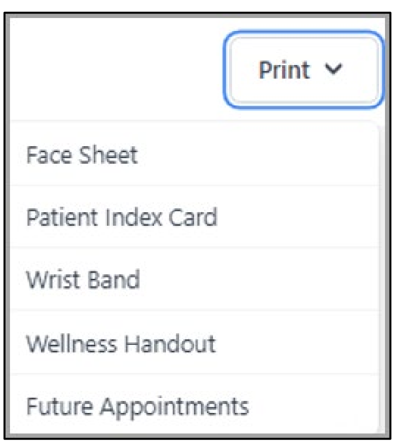


Figure 5-4: Print options drop-down list

Appendix A Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is ***FOR OFFICIAL USE ONLY***. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (ROB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general ROB for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS website: https://home.ihs.gov/security/index.cfmhttp://security.ihs.gov/.

Note:	Users must be logged on to the IHS D1 Intranet to access these documents.

The ROB listed in the following sections are specific to RPMS.

A.1 All RPMS Users

In addition to these rules, each application may include additional ROBs that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

A.1.1 Access

RPMS users shall:

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller’s identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.

- Be aware that personal use of information resources is authorized on a limited basis within the provisions Indian Health Manual Part 8, “Information Resources Management,” Chapter 6, “Limited Personal Use of Information Technology Resources.”

RPMS users shall not:

- Retrieve information for someone who does not have authority to access the information.
- Access, research, or change any user account, file, directory, table, or record not required to perform their *official* duties.
- Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their jobs or by divulging information to anyone not authorized to know that information.

A.1.2 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall:

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the functions they perform, such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

A.1.3 Accountability

RPMS users shall:

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Log out of the system whenever they leave the vicinity of their personal computers (PCs).
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)

- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.
- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4 Confidentiality

RPMS users shall:

- Be aware of the sensitivity of electronic and hard copy information and protect it accordingly.
- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.
- Erase sensitive data on storage media prior to reusing or disposing of the media.
- Protect all RPMS terminals from public viewing at all times.
- Abide by all Health Insurance Portability and Accountability Act (HIPAA) regulations to ensure patient confidentiality.

RPMS users shall not:

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- Store sensitive files on a portable device or media without encrypting.

A.1.5 Integrity

RPMS users shall:

- Protect their systems against viruses and similar malicious programs.
- Observe all software license agreements.
- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not:

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.

- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6 System Logon

RPMS users shall:

- Have a unique User Identification/Account name and password.
- Be granted access based on authenticating the account name and password entered.
- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

A.1.7 Passwords

RPMS users shall:

- Change passwords a minimum of every 90 days.
- Create passwords with a minimum of eight characters.
- If the system allows, use a combination of alpha-numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- Change vendor-supplied passwords immediately.
- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).
- Change passwords immediately if password has been seen, guessed, or otherwise compromised, and report the compromise or suspected compromise to their ISSO.
- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not:

- Use common words found in any dictionary as a password.
- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.
- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.
- Post passwords.

- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.
- Give a password out over the phone.

A.1.8 Backups

RPMS users shall:

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- Make backups of systems and files on a regular, defined basis.
- If possible, store backups away from the system in a secure environment.

A.1.9 Reporting

RPMS users shall:

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not:

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall:

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the screen after some period of inactivity.

A.1.11 Hardware

RPMS users shall:

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).

- Keep an inventory of all system equipment.
- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not:

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall:

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that:

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall:

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not:

- Disable any encryption established for network, internet, and Web browser communications.

A.2 RPMS Developers

RPMS developers shall:

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Follow industry best standards for systems they are assigned to develop or maintain and abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not:

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

A.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall:

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords and delete or reassign related active and backup files.

- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator’s database.
- Shall follow industry best standards for systems they are assigned to and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not:

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Glossary

Access Block

Access Blocks are color-coded representations of the amount of time allotted for a specific Access Type (or appointment).

Access Group

Access Groups are categories of Access Types. Assigning Access Types to Access Groups makes it easier to schedule and search for certain types of appointments.

Access Type

Access Types refer to the variety of different appointment types available in the RPMS. Each type of appointment, such as routine physical, dental, walk-in, or other specific appointment type is an Access Type.

Appointment Slots

Appointment slots are the number of appointments per defined appointment length. For example, if the number of slots is set to four and the clinic (resource) appointment length is 30 minutes, then there are four available appointments for every 30 minutes.

ASUFAC Number

ASUFAC numbers are unique identifiers for each facility within IHS. A six-digit number comprised of two digits for the area, two digits for the service unit, and two digits for the facility.

Health Record Number

Each facility assigns a unique number within that facility to each patient. Each HRN with its facility identification ASUFAC make a unique identifier within all of IHS.

Overbooking

Overbooking is a function that allows users to exceed the selected number of appointment slots in a particular Access Block.

Preferred Resource List

The list of clinics displayed in the Clinics section on the left side of the Scheduling module main window.

Resource Group

Resource Groups are categories that help to organize the variety of resources available at each location.

Waiting List

A list created because a specific clinic or resource does not have an open appointment, or the user (clinic staff) chooses not to schedule an appointment. Patients on the waiting list serve as a reminder that an appointment must be created for the patient listed.

Acronym List

Acronym	Definition
DOB	Date of Birth
EHR	Electronic Health Record
GUI	Graphical User Interface
HRN	Health Record Number
IHS	Indian Health Service
PCC	Patient Care Component
PWH	Patient Wellness Handout
RPMS	Resource and Patient Management System
SSN	Social Security Number

Contact Information

If you have any questions or comments regarding this distribution, please contact the IHS IT Service Desk.

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