This chapter discusses

- setting up the daily provider schedule.

- checking / finding scheduled appointments.

- managing the appointment scheduler.

- creating a patient appointment.

- Year 2000 friendly.

- tracking of user that made, changed or deleted an appointment.

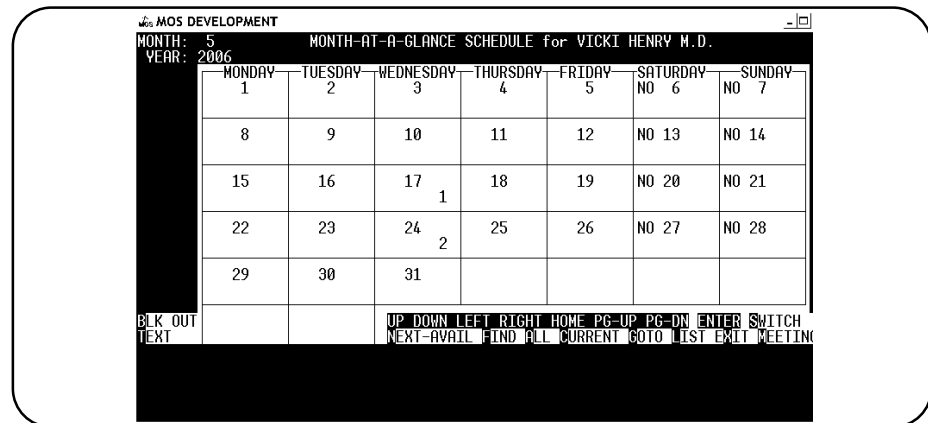**Calendar**: A Calendar is an electronic management system that will help plan appointments and activities.

Figure 19-1: Month-At-A Glance Screen

Calendar Parameters

The parameters set for each provider control the starting and ending times for each day. For example, the parameters can be defined to schedule appointments Monday, Tuesday, and Friday, from 9:00 until 5:00 for a particular week. If, for instance, an attempt is made to schedule an appointment Wednesday between 9:00 and 5:00 of the same week, the system will warn the user that the provider is not available for that time.

The calendar parameters also allow a password to be assigned to the parameters so they cannot be changed by other users. Once a password is set, it will be required each time the calendar parameters are accessed and each time the calendar for that provider is requested.

Setting Parameters

The calendar parameters are defined in the provider file. Press 6 2 to enter the provider file. Find the provider and press U ESC to move to the schedule screen.

> *Note:* **If a password has been created, it will be required before getting to this screen.**

Enter the provider's normal weekly schedule. The vertical columns specify the days of the week. The horizontal column specifies start and end times of three blocks for each day.

The cursor is found under Monday at the start column. Enter the start time to begin scheduling appointments Monday, and press ⌑ENTER⌑. The time will be entered and the cursor will be moved to End. Enter the quitting time for Monday and press ⌑ENTER⌑. The time is automatically entered military time (a 24-hour clock), and the cursor is moved to "Start." Continue to enter your "available" times until all days have been scheduled.

1.

Figure 19-2: Provider Schedule Screen

In the above example, the user will be accepting appointments Monday from 8:30 until 11:30 and then again from 1:00 until 4:00. The user does not want to schedule appointments Saturday or Sunday. Tuesday the schedule is from 9:00 to 12:00 and then from 3:00PM to 7:00PM. That should make the schedule clearer. A user can set appointments for any time, however, if they fall outside the provider's defined schedule a prompt will give warning.
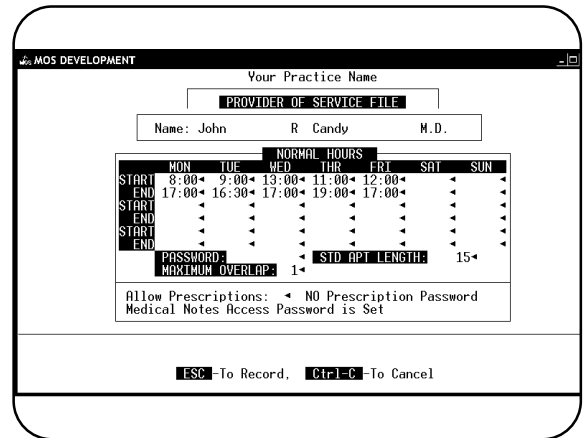
Passwords

After all parameter times have been entered, the calendar password can be modified. The password will be required each time this provider's calendar is requested to view or set appointments. It will also be required each time an attempt is made to get to the Parameters Screen.

Press ⌑ENTER⌑ until the cursor reaches the password prompt in the bottom of the box. Enter the password here. Remember it will be required each time the calendar is used, so make it easy to remember.

Standard Appointment Length

The standard appointment length suggests a default appointment length. The default is 15 minutes. Therefore, if an appointment starts at 9:00, the system will end the appointment at 9:15. The standard appointment length can be overridden when creating an individual appointment. To change the default Standard Appointment Length, press ⌑ENTER⌑ until the cursor reaches the prompt at the bottom of the box, and then enter the length of the appointment.

Max Overlap

The overlap on a calendar suggests how many appointments can occur at the same time. The default is one appointment. This means that if one appointment is set for 9:00 until 11:00 - one additional appointment can be entered during that time, say at 10:30. To change the overlap, press ⌑ENTER⌑ until the cursor is at the Max Overlap prompt, enter the number of overlaps and press ⌑ENTER⌑. It is suggested that this number remain small.

Saving the Parameters

Once the parameter screen is complete, press ⌑ESC⌑ to record the changes. Be sure not to modify any information on the main provider screen accidentally. Exit from making your parameter changes by pressing ⌑X⌑ to exit, until reaching the MOS Main Menu.

Using the Calendar

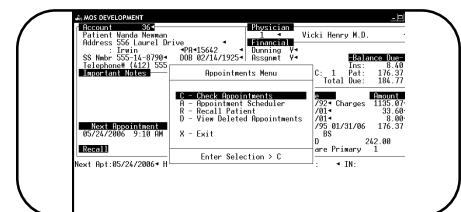Reach the calendar by pressing ⌑1⌑ at the main menu, then selecting a patient. From the Patient Sliding

Figure 19-3: Appointments Menu

Menu press $\boxed{A}$ at the Medical Office System menu. The menu at the right is displayed. The functions on this menu are used for scheduling appointments, checking your calendar and scheduling recalls.

Check Appointments

Press $\boxed{C}$ to Check the Appointments for the doctor assigned to this patient for today. The following screen is displayed:

```
MOS MOS DEVELOPMENT                                                    _ □

 Account           1◄              Physician
 Patient Ms. Helena M Adells        1    ◄    Vicki Henry M.D.        ·
 Address 556 Shady Grove          ◄  Financial
         : Pittsburgh      ◄PA◄15220     ◄ | Dunning  N◄
 SS ┌Beginning of File────────────────────────────────────────────┐ a─
 Te │  Date   Day   Time    Min Dctor Reason                       │ 16
 Im │                                                              │ 38
 TH │ 05/17/2006 Wed  9:00 AM  15  1                       FUTURE   │ 54
 HE │ 01/25/2006 Wed  9:00 AM  15  1     Check Up          MISSED   │
 NO │ 10/21/2004 Thu 11:00 AM  15  12                      MISSED   │ t
 CA │ 04/29/2003 Tue  9:20 AM  15  12                      MISSED   │ 40·
 <P │ 04/28/2003 Mon  8:30 AM  15  1                       MISSED   │ 92·
 WH │ 04/28/2003 Mon  8:00 AM  15  12                      MISSED   │ 00·
    │ 04/17/2003 Thu  9:00 AM  15  1                       MISSED   │ 38
 05 │ 12/23/2002 Mon  9:30 AM  15  11                      MISSED   │
    └──────────────────────────────────────────────────────────────┘
 Recall 05/2006 Follow Up On Zocor          |      Medicare Primary    1



        D -DELETE,  A -Appt Schedule,  G -GoTo,  H -Hardcopy,  W -Who,  X -Exit
                          Enter Selection >
```

Figure 19-4 : Check Appointments

Appt Schedule   Press $\boxed{A}$ to enter the Appointment Scheduler.

Delete   Press $\boxed{D}$ to delete the highlighted appointment, a prompt is displayed to request if you are sure you want to delete this appointment. Answer "Y" and press $\boxed{ENTER}$. The appointment will be deleted.

Goto   Press $\boxed{G}$ to go to the highlighted appointment's date and time. This will allow the appointment to be modified or verified.

Hardcopy   Press $\boxed{H}$ to hardcopy the appointment screen displayed.

Exit   Press $\boxed{X}$ to return to the Patient Sliding Menu.

Appointment Scheduler

Press $\boxed{A}$ to select the Appointment Scheduler. This will display the current month for the doctor assigned to the current patient. Use the "SWITCH" function to display a different doctor's calendar.

Remember: *If the calendar selected is password protected, it must be entered at this time before the calendar will be displayed.*
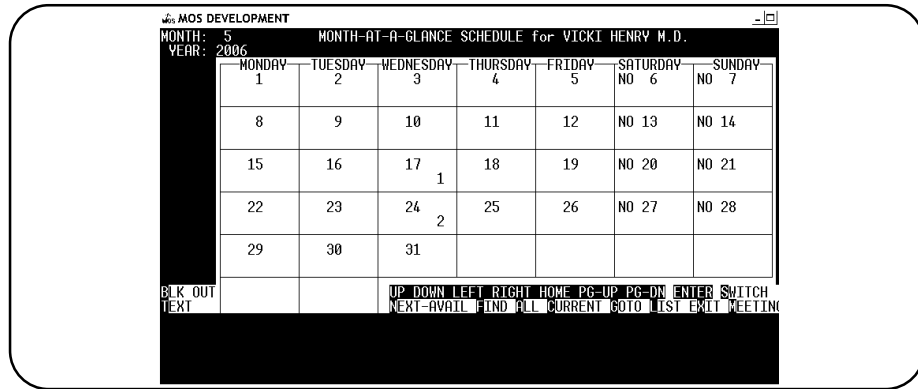
Figure 19-5 : Month-At-A-Glance

When using the calendar, the current month will be displayed and the cursor placed on the current date (current system date and time). The month and year of the calendar are displayed in the upper left corner in numerical format. The top of the screen shows the owner of the calendar displayed and the current month. Some days on the calendar will have the word "no" located in the box. This means that according to the scheduling parameters, no appointments should be scheduled for these days. However, the system will let an appointment be scheduled for those days and will remind the user that no appointments should be scheduled for the specified day or time.

The number in the lower right corner of the date box shows the number of appointments scheduled on this date. A special memo might also be displayed in the lower left. The date highlighted is always today's date.

Month at a Glance Functions

↑ → ↓ ←   The arrow keys can be used to move to another day or month. If the arrow points up past the top of the screen, the previous month will be displayed. If the arrow points down past the bottom of the screen, the next month will be displayed. If the right arrow points past the last day of the month, the cursor will move to the first day of the same month. Likewise, if the left arrow is pressed to pass the first day of the month, the cursor will move to the last day of the same month.

HOME   Press the HOME key to move to the first day of the currently displayed month.

PG UP , PG DN   Use PG UP and PG DN to shift to the previous or next month's calendar quickly. This will position the cursor on the first day of the month.

Switch   While viewing any calendar, another user's calendars can be used by pressing S for switch. The screen to the right is displayed showing a list of provider's names. Highlight the provider's calendar to be selected, then press ENTER . When finished with the alternate calendar, press S to switch back to this calendar. From this option the daily schedule for each provider can be verified.

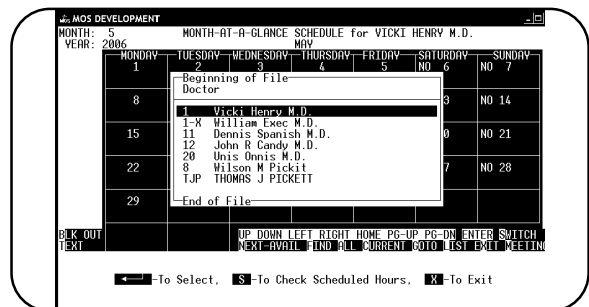**Figure 19-6**: Provider Switch Selection

Check Scheduled Hours

This option, activated by pressing S , will display all providers' scheduled hours, as defined by the parameter's screen.

| ENTER | Selects an alternate Provider's Schedule from this list.

Next Avail   By pressing [N] , the system will begin at the current cursor position and search for the next available appointment time. Then a prompt will request the preferred time of day with this prompt:

```
 SELECT BY:   ENTER-Any,   Time, Morning, Afternoon or Evening >
```

Press the appropriate time of day selection. Your choices are:

Press [ENTER] to search for any available time (based on the scheduling parameters, and where an appointment does not already exist).

Press [T] to request a specific time. Enter the time of day required for the appointment. Enter the time (i.e., 11:30). Then a prompt will ask "Is it PM?". Enter [Y] for PM or [N] for AM.

Press [M] to request a morning appointment.

Press [A] to request an afternoon appointment.

Press [E] to request an evening appointment.

The next prompt requests the length of the appointment.

```
NUMBER OF MINUTES?     >
         Or Press ENTER for 15
```

The default choice is displayed. Select it by pressing [ENTER] or type another length and press [ENTER] .

The system will begin on the current day (where the cursor was on the calendar when the Next Available function was requested) and will present the first match. The match suggests that the time requested does not interfere with the scheduling parameters set for the calendar and that an appointment does not already exist for that time.
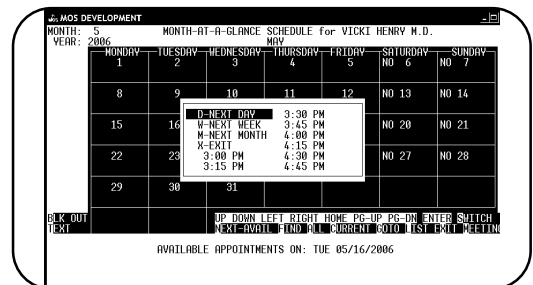
A list of the available appointments is displayed that meets your time of day criteria.

Figure 19-7 : Available Appointment Slots

From this list select one of the following to find another day quickly:

Press [D] to move to the next day's available appointments.

Press [W] to move one week in the future and list the available appointments.

Press [M] to move to the next month and list the available appointments.

Press [X] to end the selection without continuing.

These times are available on the day shown at the bottom of the screen and generally occur on the current calendar day (where your cursor was when this function was selected).

If no times are available on a specific day, the day and time will appear on the bottom of the screen. No times will appear on the screen. (See Figure at right.) If the list includes a time and day, that will work, highlight the time and press $\boxed{\text{ENTER}}$.
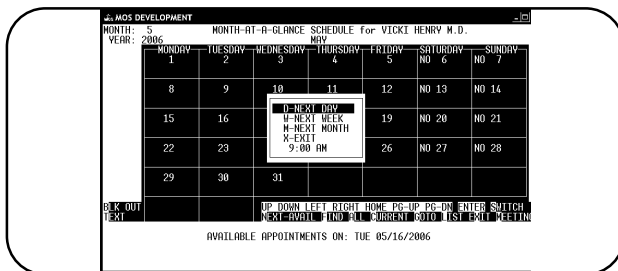

Figure 19-8 : Selection when NO Time is Available

Finish making the appointment from this point following the instructions on Page 19-8.

Find

This search option will allow previously created appointments to be found. For example, you can search for an appointment involving Tom Smith. The search will begin from the current cursor position and is based on the data entered in the "appointment with" field when the appointment was created. This search will find (beginning at the cursor position) the NEXT appointment that matches the entered criteria.

Press $\boxed{\text{F}}$ to access find. Enter the name that should be found.   After the name is entered, the system will search the current calendar (the one currently selected) from the current cursor position.
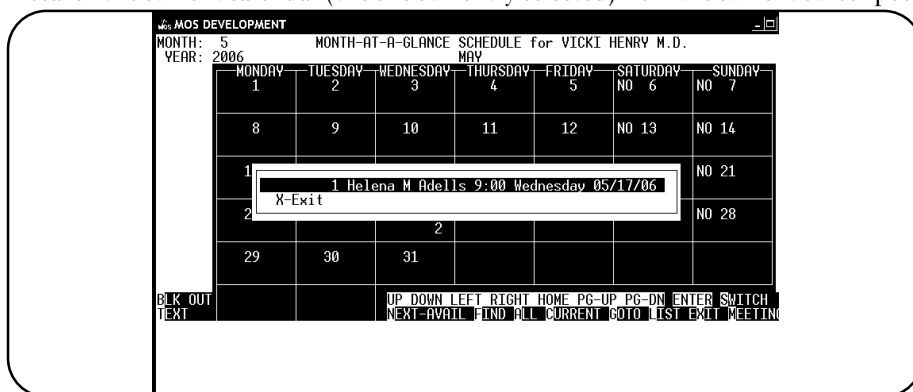

Figure 19-9: Find Appointments

If the name is found, a browse is displayed with all the appointments for that match listed. Highlight one and press $\boxed{\text{ENTER}}$ to move to that appointment. If the name has not been found, no current appointments are scheduled for that person.

All

Press $\boxed{\text{A}}$ to display all appointments matching the entered name. Enter the name of the patient to be found. Remember all matching appointments will be displayed. After the name is entered, the system will search the current calendar from the current cursor position. If the name is found, a list of matching appointments is displayed. Highlight any one appointment and press $\boxed{\text{ENTER}}$ to move to that appointment.

Current

By entering $\boxed{\text{C}}$ for current, the cursor will automatically be moved to the current date (as defined by the system).

Goto

GOTO will allow a specific date to be selected. Press $\boxed{\text{G}}$ to use GoTo. A box will appear.   Enter the date in the format MM/DD/YY. The cursor will move to that date. This is a quick way to get to a date and make or check appointments.

List   Display the appointments scheduled for the indicated day. If the cursor is located on the Month-at-a-Glance screen and the day displays a number it indicates appointments are scheduled on that day. Press ⎣L⎦ to display a pop-up screen with the day's appointments listed.
                  The list will contain the time of the appointment, whom the appointment is with, the number of minutes the appointment should last, and any comments entered when the appointment was made.

                  The columns can be changed to display the reasons for the appointment by pressing ⎣R⎦ . Return to the appointment browse with the names displayed by pressing ⎣N⎦ . Each of these displayed can be printed by pressing ⎣H⎦ . A report version of this information is available on the Provider/Practice Reports Menu, called "Print a Short Schedule."

                  Press ⎣ENTER⎦ or ⎣ESC⎦ to remove the pop-up listing from the screen.

Blk Out   This will allow a block of time to be removed from the schedule for that day. Move to the correct day on the calendar and press ⎣B⎦ to start this function. The following prompt will be displayed:

```
      ENTER START TIME TO BLOCK OUT >
```

                  Enter the time of day in military time or standard time. If a time is entered, such as 1:00, it will presume PM as reasonable. The following question appears:

```
      NUMBER OF HOURS >
```

                  Enter the number of hours. Decimals are acceptable, for 30 minutes enter ".5". Then it will prompt:

```
      REASON >
```

                  Enter the reason and press ⎣ENTER⎦ . The time will be blocked out from the schedule.

Text   This will accept a short word to be displayed on the calendar for quick reference. This could be used to display holidays, reminders to staff, or other comments. Press ⎣T⎦ to enter text, and the following prompt appears:

```
      TEXT >
```

                  Type the text and press ⎣ENTER⎦ . The text is displayed on the screen. To correct or erase text already entered, move to the correct day and press ⎣T⎦ to change the text. Now press ⎣ENTER⎦ to replace it with nothing or type in new text and press ⎣ENTER⎦ .

Meeting   To schedule a meeting for one or all doctors, select this prompt by pressing ⎣M⎦ . The following will be displayed:
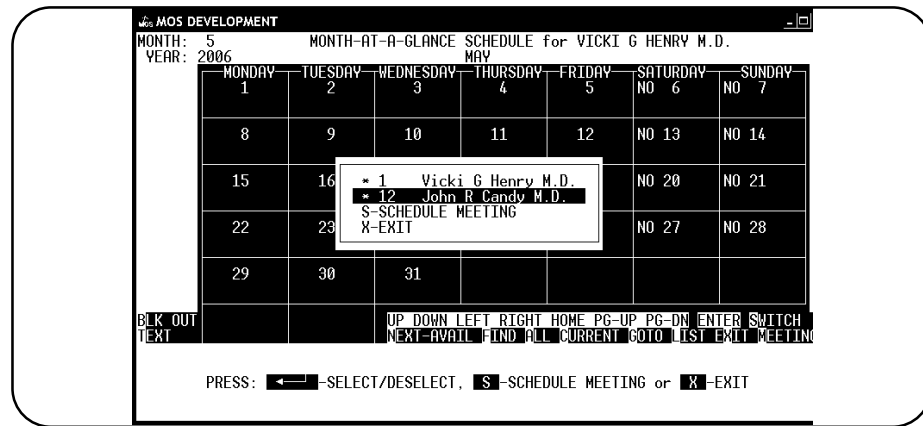
Figure 19-10: Selecting Meeting Attendees

Highlight the doctor attending the meeting and press ENTER . Repeat for each doctor attending the meeting. If a doctor is marked in error, highlight it again and press ENTER to remove the asterisk. When all doctors have an asterisk that will be attending press S to schedule the meeting. The following prompt will appear:

```
ENTER NUMBER of MINUTES or ENTER to Cancel >
```

Enter the number of minutes and press ENTER . The next prompt appears:

```
STARTING DATE or PRESS ENTER for MM/DD/YY >
```

where MM/DD/YY is the current date. Type the date as necessary and the following prompt will appear:

```
Is Wednesday 08/17/94 At: 16:30 OK? >
```

Type Y to record the meetings and the last prompt appears:

```
Description of Meeting >
```

Enter the description and press ENTER . The meeting will be added to the schedule of each indicated doctor.

Exit   Press X to end the appointment scheduler and return to the Patient Sliding Menus.

Creating an Appointment

Begin by placing the cursor on the correct day. Use the functions explained in the previous section to find the correct day. With the cursor on the date of the appointment, press ENTER . The daily appointment calendar is displayed.
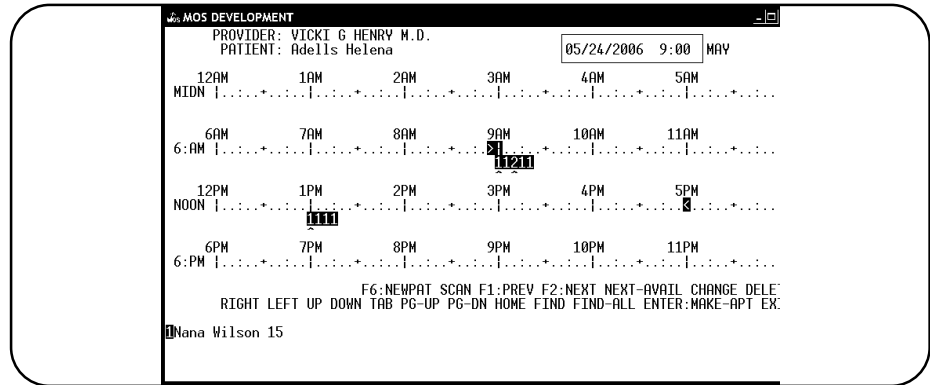
Figure 19-11 : Daily Appointment Calendar Screen

The calendar owner is listed at the top of the screen along with the date of this daily calendar. The cursor will automatically be positioned on the first appointment time scheduled for this day. To make an appointment, use the arrow keys to place the cursor on the time the appointment will begin. Notice at the top of the screen, the time changes as the cursor moves across the calendar.

Patient Appointments

Existing Patient An appointment can be made for any patient currently in the data base. If the patient name appears at the top of the screen, then any appointment made at this point will be for that patient if no other patient is first located. To locate an existing patient, If the appointment is to be for the currently displayed patient then just press [ENTER] at this point and jump to the heading Appointment Name below.

New Patient Create a new patient and make an appointment for this new patient at this time. The patient can be created the normal way in the Daily Input or continue to the steps below labeled "Adding a New Patient".

Miscellaneous Appt An appointment can be made for someone that is not currently added to the patient database.

Meetings Meetings between doctors in the practice. No patient is involved.

Block Out Block out time for administrative duties, out of office time, other events in the doctors life that would require that no appointments be scheduled.

Making an appointment

Finding a Patient If the current patient displayed at the top of the screen is the correct patient continue to the prompt below that says "Current Patient". To find another patient, press `F6` - NEWPAT selection to move to another patient, add a patient or start a miscellaneous appointment. A prompt will request the patient name.

```
Enter Name (LAST FIRST) >
```

Enter the last name, a space and then the first name of the patient. An alphabetical list of patients will be displayed, to allow you to select an existing patient. Highlight the correct patient and press `U` to "Use Selected Patient" and continue to the TIME prompt below. Press `V` to view the patient information screen if you are not sure of a choice and need to check additional information. Press `F` to look for the name on a fuzzy search instead of an alphabetical search. A fuzzy search will find similar spellings, that may be overlooked when displaying in alphabetical order.
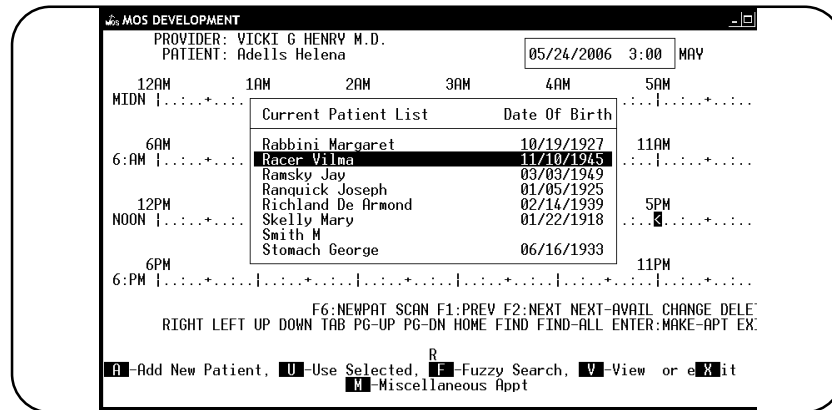

Figure 19-12 : Finding A Patient

If the patient is not currently in the system, you have two options. The patient can be added, or a miscellaneous appointment can be added that is not attached to any patient. This is determined by you office procedures.

Adding a Patient Press `F6` for a New Patient. Enter the Last Name and First Name. Verify that the patient is not currently in the file. If not and the patient will be added, press `A` from this screen to add the patient. A new patient is added to your system using the next account number. The first name and last name supplied are used. Then prompts will ask for the HOME PHONE and the WORK PHONE of the patient. Enter this information to properly complete the minimum information for a patient to be called back and reminded of the appointment. Then continue to the prompt that indicates the time of the appointment.

Miscellaneous Appointment

Press `F6` for a New Patient. Enter the Last Name and First Name. Verify that the patient is not currently in the file. If not and the patient will not be added, press `M` to add a miscellaneous appointment A prompt will request the PHONE number to verify the appointment.

Current Patient Press `ENTER` from the Daily Schedule Screen to create an appointment. The appointment pop-up window will appear next.

```
02/17/95 2:30 PM  APPOINTMENT NAME >
Press ENTER for CURRENT PATIENT,    Or X to CANCEL
```

Appointment Name Press ⌈ENTER⌉ to use the current patient for this appointment. Press ⌈X⌉ to cancel the appointment or type a name to create a miscellaneous appointment. The name should be entered Last Name First Name.

```
02/17/95 2:30 PM  APPOINTMENT NAME > Mary Smith
Press ENTER for CURRENT PATIENT,    Or X to CANCEL
```

Enter the person or company name whom the appointment will be with and press ⌈ENTER⌉ .

Time Notice when the cursor is moved to "Time", the time is inserted from the location of the cursor. To change the time, enter the new time including the colon (i.e., 11:20). The cursor will move to the next prompt "In the PM?". If the appointment is in the afternoon, enter ⌈Y⌉ , if it is in the morning, enter ⌈N⌉ .

```
ENTER TIME >
Press ENTER for 2:50 PM
```

If this time is not within the normal schedule times for this provider, a beep will sound. The appointment can still be created, however.

Minutes The next prompt "Number of minutes" indicates the number of minutes listed as a default for the length of an appointment.

```
NUMBER OF MINUTES >
OR Press X to CANCEL,    ENTER for 15
```

The default appointment length is displayed and can be selected by pressing ⌈ENTER⌉ . This means the appointment you are creating will end 15 minutes from the start time. If the length of the appointment should be different, enter that number here and press ⌈ENTER⌉ . If the number of appointments entered in the Provider Scheduler setup parameters is exceeded, a warning is displayed at this point: "MAX # APPOINTMENTS EXCEEDED, OK?" Type ⌈Y⌉ to allow the appointment anyway.

Location The next prompt allows the location of the appointment to be specified. The default location of the current patient is assumed. Change the location code when appropriate. This will allow schedules to be printed by location, also.

```
Location: >
```

Reason The Reason field is used to enter details about the appointment.

```
APPOINTMENT REASON >
```

Start this field with # to cause the appointment count to list in red when the variable PFCOLOR is set to ON in the configuration file. This can flag an appointment slot for no overlap or special needs. If you do overlap appointments and some have this code (#) the color display can be unpredictable.

An entry in this field is not required, but use it to give a reason for the appointment if you wish. Once the screen is complete, press ENTER to place the appointment in the calendar and be returned to the daily calendar.

Appointment Questions Completed.

View Daily Appointment Screen

When the appointment scheduling for the day is complete, press X to exit from the daily calendar and return to the 'Month-At-A-Glance' calendar.

Notice that at the appointment time, a highlighted number appears. If this is the only appointment for that time, the number 1 appears for the duration of the appointment (1:00 - 1:15). If an overlapping appointment exists, the number 2 (showing the second appointment) will appear when the appointments overlap.
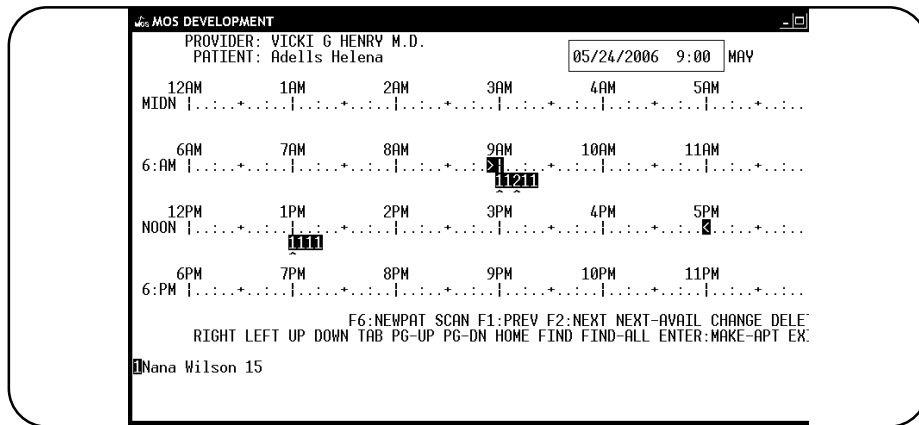

Figure 19-13: Daily Appointment Calendar Screen

As your cursor moves around the daily display of your calendar, it will move across an existing appointment. When it does, a brief description of the appointment(s) will appear on the bottom left of your screen. The appointment number will be listed first, followed by the appointment name, length and reason.

Daily Calendar: Functions

The following functions are displayed at the bottom of the Daily Calendar.

Scan
Scan is used to find the next available time for an appointment. By entering $\boxed{S}$, the system will begin at the current cursor position and search for the next available appointment time based on a number of parameters.

Press $\boxed{S}$ to begin the search for the next available time. Indicate a preferred time of day with this prompt:

```
SELECT BY:   ENTER-Any,   Time,  Morning,  Afternoon or Evening  >
```

Press the appropriate time of day selection. Your choices are:

Press $\boxed{\text{ENTER}}$ to search for any available time (based on the scheduling parameters, and where an appointment does not already exist).

Press $\boxed{T}$ to request a specific time.

If $\boxed{T}$ for Time was selected, enter the time of day required for this appointment (i.e., 11:30). Then say if it is in the PM? Enter $\boxed{Y}$ or $\boxed{N}$ if it is in the AM.

Press $\boxed{M}$ to request a morning appointment.

Press $\boxed{A}$ to request an afternoon appointment.

Press $\boxed{E}$ to request an evening appointment.

The next prompt requests the length of the appointment.

```
NUMBER OF MINUTES?   >
         or Press  ENTER for 15
```

The default is displayed. Press $\boxed{\text{ENTER}}$ to insert the default or type another length and press $\boxed{\text{ENTER}}$.

The system will begin on the current day (where the cursor was on the calendar when the Next Available function was selected) and will display the first match. The match suggests that the time requested does not interfere with the scheduling parameters set for the calendar and that an appointment does not already exist for that time.

A list of the available appointments is displayed next that meets your time of day criteria.
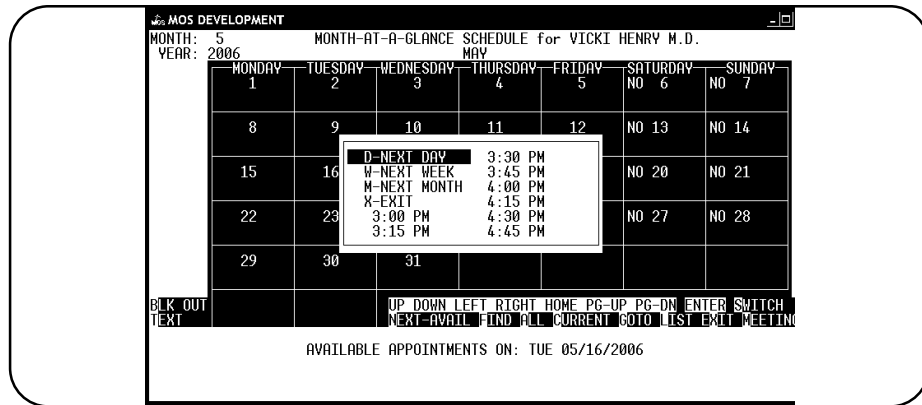
Figure 19-14: Available Appointment List

From this list select one of the following to try another day quickly:

Press ⬚D⬚ to move to the next days available appointments.

Press ⬚W⬚ to move one week in the future and list the available appointments.

Press ⬚M⬚ to move to the next month and list the available appointments.

Press ⬚X⬚ to end the selection without continuing.

These times are available on the day shown at the bottom of the screen and generally occur on the current calendar day (where your cursor was when this function is selected). If the correct time and day are listed, highlight the time needed and press ⬚ENTER⬚ .
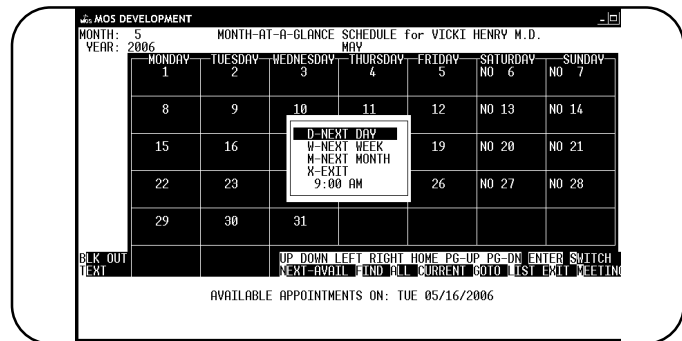
If no times are available on a specific day, the day and time will appear on the bottom of the screen. No times will appear on the screen. The following prompt appears:
Finish making the appointment from this point in the normal way.

Figure 19-15: Appointments Available

Press ⬚F1⬚ to look at a previous date. Press ⬚F2⬚ to look at a future date's daily calendar. Either of these functions will pop up a window with the following selections:
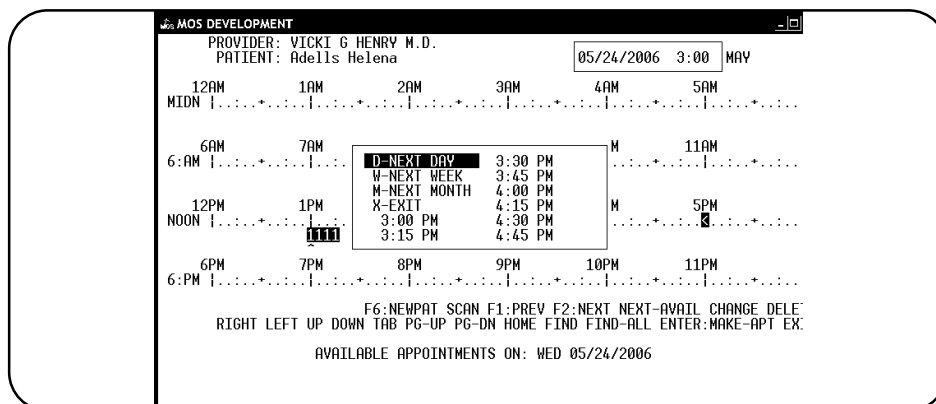
Figure 19-16 : Previous Daily Calendar Move

Highlight the correct change; Day, Week, or Month, and press ⎡ENTER⎤ . If the DAY option is selected, the cursor will move one day in the direction selected. If WEEK was selected, the cursor will move one week in the direction selected. If the MONTH option was selected, the cursor will move one month in the direction selected.

Next Avail   By entering ⎡N⎤ , the system will begin at the current cursor position and search for the next available appointment time based on the number of minutes required for the appointment.

Press ⎡N⎤ to begin the search for the next available time. Type the number of minutes required for the appointment and press ⎡ENTER⎤ , or press ⎡ENTER⎤ to accept the default listed at the bottom of the screen.

If appointments are available, a list of appointment times will be displayed in the center of the screen. If no appointment times are displayed on the screen, no times are available for the day listed on the bottom of the screen.

If the day displayed is not satisfactory, choose Next Day, Next Week, or Next Month by highlighting your choice and pressing ⎡ENTER⎤ . Once a suitable option is displayed, highlight the time and press Enter. The appointment screen will be displayed and the appointment can then be created.

Change   To change an existing appointment, place the cursor on the appointment (make sure the appointment details appears on the bottom left corner of the screen) and press ⎡C⎤ . If more than one appointment is assigned to that time, your cursor will be found under the time with the prompt:

```
              #
```

This prompt is requesting the number of the appointment to be changed. Enter a number, and then correct the information for the appointment as each question appears.

The delete function explained below will allow an appointment to be deleted and then pasted to another day/time. This is a great way to change the time/date of an appointment.

Delete   To delete an appointment, place the cursor on the appointment (make sure the appointment details appears on the bottom left corner of the screen) and press ⎡D⎤ . The appointment will automatically be removed from the daily calendar. The appointment just deleted is stored temporarily in a buffer. A new prompt "**P**aste" is added to the selections at the bottom of the screen. If a new time/day is

selected then from the daily calendar press $\boxed{\text{P}}$ and the appointment will be moved to the new time. Any appointment deleted will be stored for later review. This will help make it easier to assure that all appointments are accounted for by claims that have been entered for the day. A double check on the days work.

Find   This search option will allow previously created appointments to be found. For example, you can search for an appointment involving Tom Smith. The search begins at the current cursor position and is based on the data entered in the "appointment with" field when the appointment was created. This search will find (beginning at the cursor position) the NEXT appointment that matches the entered criteria.

Press $\boxed{\text{F}}$ to access find. Enter the name to be found. Enter the last name, all or partial, and the system searches the current calendar (the current calendar) from the current cursor position. If the name is found, a display will list all the appointments that are on file for the name given. Highlight any one that should be reviewed and press $\boxed{\text{ENTER}}$ to find that appointment. If the name has not been found, a prompt will show "NO APPOINTMENTS FOUND".

All   Will find all appointments matching the entered name or partial name, past or future.

Press $\boxed{\text{A}}$ to use all. Remember a list of all matching appointments will be displayed. Enter the name and press $\boxed{\text{ENTER}}$. After the name is entered, the system will search the appointments past and future. If the name is found, a list of matching appointments will be displayed.

Exit   Press $\boxed{\text{X}}$ to exit from this daily calendar and return to the Month-At-A-Glance calendar.

Recall a Patient

This prompt will allow patient recalls to be created, modified and deleted. Letters can be sent to patients based on this information to remind them of procedures that should be done periodically, usually for preventive tests and follow-up checks. For example, a woman with a history of breast cancer would be marked for recall once a year for a mammogram. Another example might be for a cancer patient to be recalled in three months for a checkup. Medication checks or annual physicals could be listed for recall to provide a reminder for wellness procedures and follow up procedures for chronic illnesses.
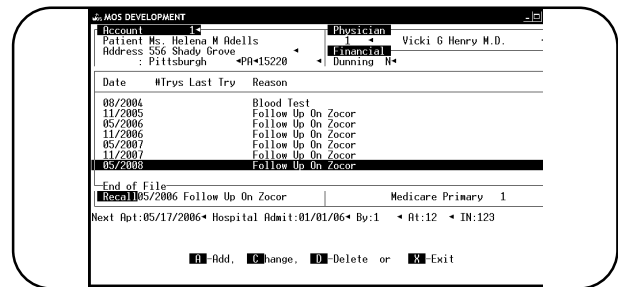

Figure 19-17 : List Recalls for a Patient

Press [A] - Appointments, then select [R] to add or display recalls for the current patient. The list in Figure 19.1 will be displayed. The complete list of recalls for this patient is displayed on this screen.

Add

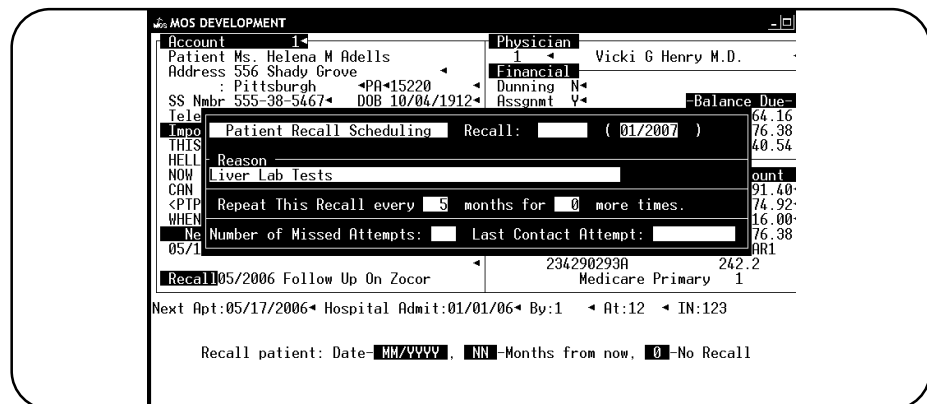Press [A] to add a recall. The following screen is displayed:

Figure 19-18 : Add a Recall

Fill in the information required.

Recall

Enter the month a slash and the year (01/95) for the recall month. If just a number is entered, it will be used as a number of months and will calculate a month/year automatically.

Reason

Enter the reason for the recall. It is important that groups of recalls be identified similarly to allow them to be selected easily.

Repeat This recall every:

NN Months. The default entered is always 3. Enter the frequency of the recall. Leave blank for only one recall.

For:

NN more times. The default entered is 0. That will not add any more than the one you are currently adding. Enter number of recalls that should be added not including this one at the frequency given just before.

Number of Missed

Attempts: Enter the number of missed notices. Each time this recall is listed on the missed recall report, this number is automatically incremented. You can manually change it if you rely on the screen data here to contact recalls.

Last Contact
Attempt: This is the last date that a recall letter was sent. You can manually edit this also, if you do this function from the screen.

Press [ESC] to save the recall. If you are adding additional recalls, a prompt will verify that at this time.   If you indicated a non-zero frequency and non-zero times, additional recalls will be added also. For example, if you are entering a recall for 1/98 and indicate Repeat every 3 months for 4 more times, then the recalls entered would be for 1/98, 4/98, 7/98, 10/98, 1/99, for a total of 5 recalls.

```
Add next recall for MM/YYYY OK? (Y/N/ [DEL]  to cancel) >
```

Press [Y] to add the recall indicated. If you indicate [N] , the questions will continue to try to make the correct number of recalls, it will skip the any month you answered No for and add one more to the end. Press [DEL] to cancel without adding any more recalls from this point.

If the recall date is blank, the recall is not recorded.

Change   Highlight a recall that should be changed and press [C] to select change. The recall screen is displayed with the previous date displayed in parentheses. If the date is left blank, the previous date is automatically assigned again and changing the reason will only be necessary.

Press [ESC] to save the recall. If the recall date is blank, the recall is not recorded.

Delete   Highlight the recall entry to be eliminated and press [D] . The prompt:

```
DELETE Recall for 01/95: >
```

will be displayed, where the correct date is used instead of 01/95. Press [Y] to continue to delete the recall data. Press [N] or [ENTER] to cancel your request to delete.

Exit   Press [X] to exit the recall functions and return to the Patient Sliding Menu.

Notes: