

APPOINTMENT SCHEDULING – Sevocity Premier

Go to the Calendar or Appointment Scheduler

Direct Link to Calendar:

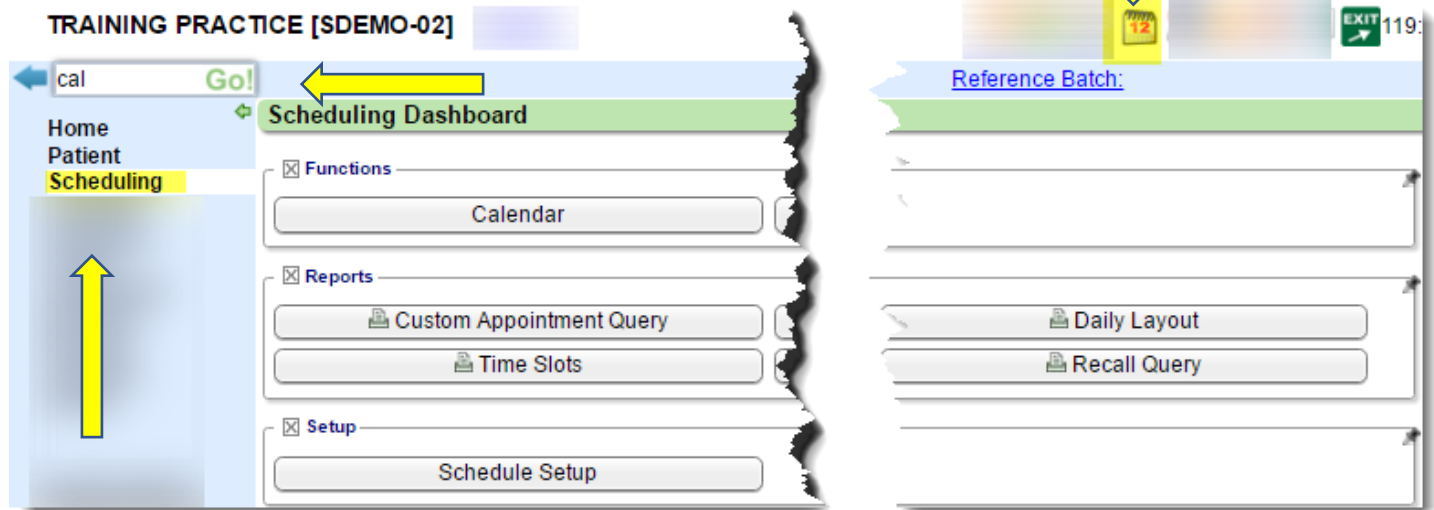
- 'Go'-Cut: CAL

or

- Click upper left Calendar Icon

Link to all Scheduling Function:

- Click Scheduling in the sidebar > Click [Calendar]



TRAINING PRACTICE [SDEMO-02]

cal Go! Scheduling Dashboard

Home Patient Scheduling

Functions

Calendar

Reports

Custom Appointment Query

Time Slots

Setup

Schedule Setup

Reference Batch:

EXIT 119:

Navigate through the Calendar

'Display Profiles'

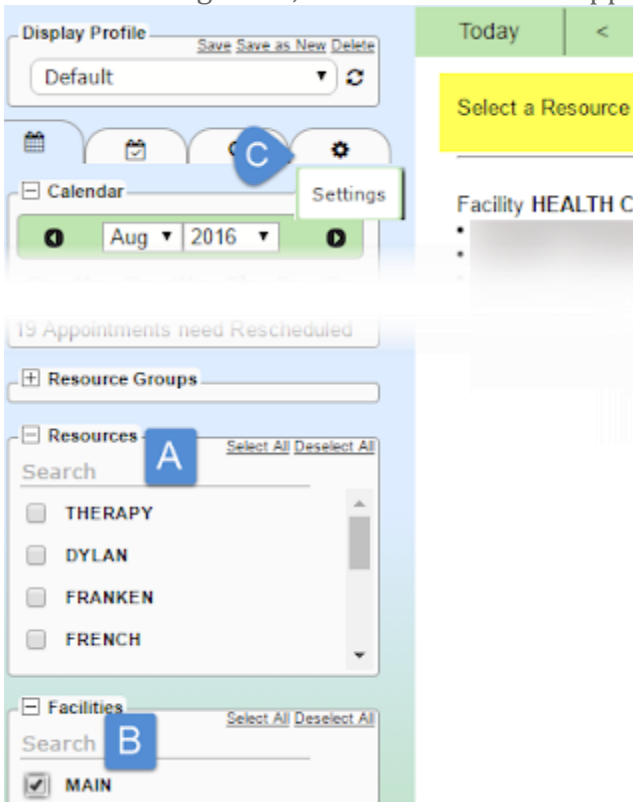
This allows the user to have different views of the calendar saved, using a combination of the first tab (resources/facilities), the last tab, settings and the day/week/month view.

The first time you log in to the Calendar, you may want to save a Default 'Display Profile'. This is the 'view' that will always show when you first log in. You may save as many additional 'Display Profiles' as you like.

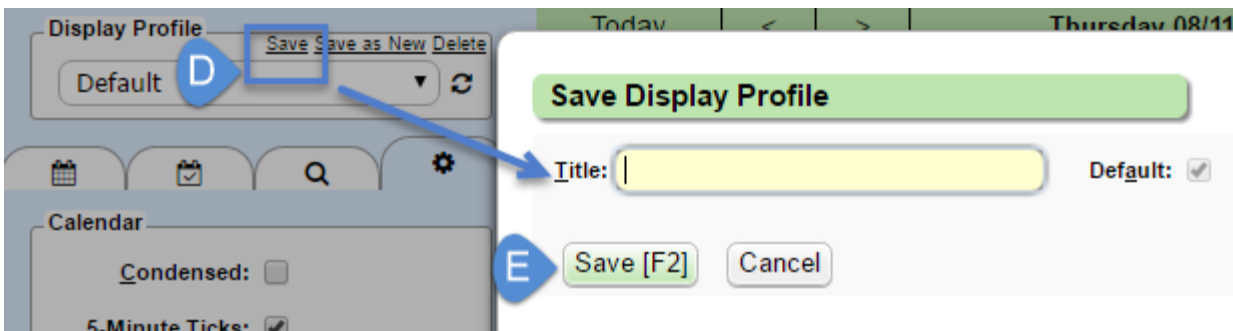
- For guided instructions click 'Customize Calendar' > Calendar Display Settings



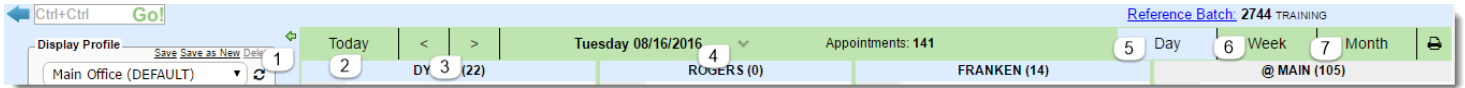
- A. Select Resource(s)
- B. Select Facility (not required)
- C. Click 'Settings' Tab, check in boxes that apply



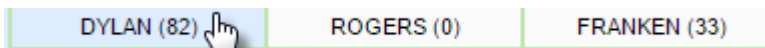
- D. [SAVE]
- E. Create a Title, choose 'Default' and SAVE



Top Navigation



1. Hide the Navigation Panel - Click green arrow
2. Click 'Today' to return to today's date
3. Arrows for Next/Previous: Day,Week,Month
4. Date picker, Click to view Calendar
5. Day, to access the 'Day' view of the Calendar
6. Week > Click on the tab that represents the 'Resource' to be viewed



7. Month > see below

Month View

Color represents availability if Slot Types are defined

- o Green: 0 - 33% booked
- o Yellow: 34 - 66% booked
- o Orange: 67 - 99% booked
- o Red: 100%+ booked

Today		<	>	August 2016			▼
Sun		Mon			Tue		
31		1			2		
		Day		Week		Month	
Resource	Facility	AM	PM	T			
FRANKEN	MAIN OFF	17	5	22			
HAWKINS	MAIN OFF	12	11	23			
CHESNEY	MAIN OFF	19	2	21			
KOSTER	MAIN OFF	10	6	16			
FRENCH	MAIN OFF	11	0	11			
JASTER	MAIN OFF	0	3	3			
Total		69	27	96			
		AM		PM		Total	
		34		18		52	
		Show Details					

Navigation Panel

1. 'Display Profile' -there is a 'Default View' of the Calendar, *additional* views can also be saved. The saved 'Display Profiles' are available in the dropdown.

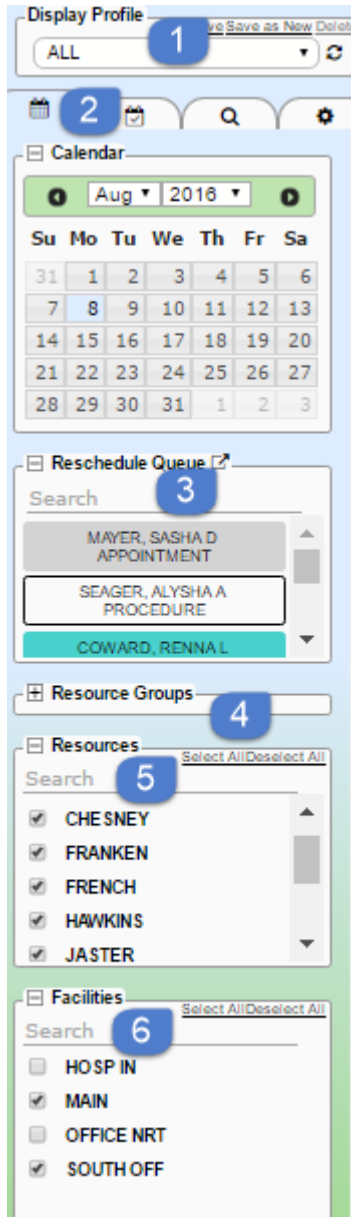
2. Additional Tabs



- a. 'Scheduling'
- b. Today's 'Checked in/out' Patients & Reports
- c. 'Search'
- d. 'Settings'

3. Reschedule Queue – Appointments to be rescheduled. This section only shows if appointments have been added

4. Resource Group- Displays if you have Resource Groups defined. Click to easily view all Resources in the Group



5. Resource

- 'Search' Resources, by typing a portion of the name
- Select All / Deselect All



6. Facilities- Separated from Resources, you do not have to choose a facility here

- 'Search' Facilities
- Select All / Deselect All

Settings tab

1. Condensed – view more of the day
2. '5 Minute Ticks' – a dash for every 5 minutes
3. Formatted Days Only – remove days without Slot Types / Appointments
4. Days in Week View – define # of days in the Week view
5. Layout – control the Facility/Resource display for Daily and Weekly view
6. Providers with different time increments now show side-by-side
7. New easy-to-read slot highlighter
8. Red arrow to indicate the current time
9. New Display Options
 - A. Appointment Type
 - B. Start and end time

C. Appointment Status

Display Profile Save Save as New Delete

Main Office (DEFAULT) ↻

Calendar Settings

Condensed: **1**

5-Minute Ticks: **2**

Formatted Days Only: **3**

Days in Week View: 5 **4**

Layout: Res/Fac **5**

Appointment **9**

Name: Type: **A**

Status: **C** Time: **B**

Reason: Note:

Status

Cancelled: Rescheduled:

Today < > Wednesday 08/10/2016

	DYLAN (28) @ MAIN (28) 5	FRANKEN @ MAIN (
12:40		02:45 6
12:50	7	03:00 8
01:00	ABNER, HILDA M FOLLOWUP	03:15 APPT EPPERSON
01:10	APPT	03:30 APPT MENESE
01:20	APPT	03:45 APPT ABERCROMBIE, YADIRA P THERAPY
01:30	APPT	04:00 APPT
01:40	APPT	04:15 APPT KANGAS
01:50	APPT	
02:00	SMALL, INA F NEW PAT 30 SCHEDULED	
02:10	NP	
02:20	NP	
02:30	NP	
02:40	NP	
02:50	NP	
03:00	NP	



Basic Daily Workflow

Start

- Create a reference batch
 - Book Appointments
 - Use 'Search tab' to answer 'when is patient's next appointment'
 - Use Search Available off this tab to find an appointment or use mini calendar or month view
 - Use Cases to attach correct payer> Save and confirm visit time/day with patient
 - Check-in
 - Click 'Check in'
 - Confirm Insurance/ patient demographics
 - Scan insurance/driver's license
 - Confirm Reason for visit
 - Collect Copay/ on account balance
 - Print receipt
- Check-out
 - Click check out
 - Use 'next appointment' to book the next appointment > Save and confirm visit time/day with patient

End

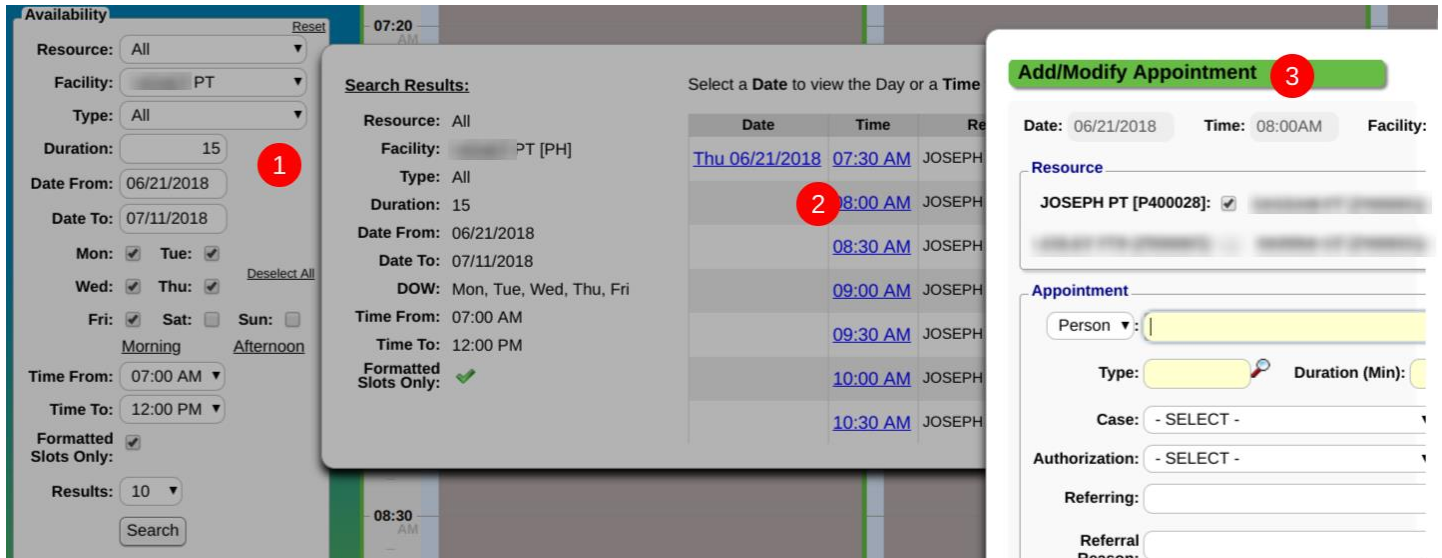
- Front desk to confirm all patients who did not attend their appointment is marked no-show
- Whoever is responsible for reconciliation
 - run the Reference Batch and Receipts Management report for cash drawer balance
 - Be sure the filter type on Receipts Management matches the date you are checking
- Close Reference Batch

How do I search for available appointments?

Use the third tab to 'Search'



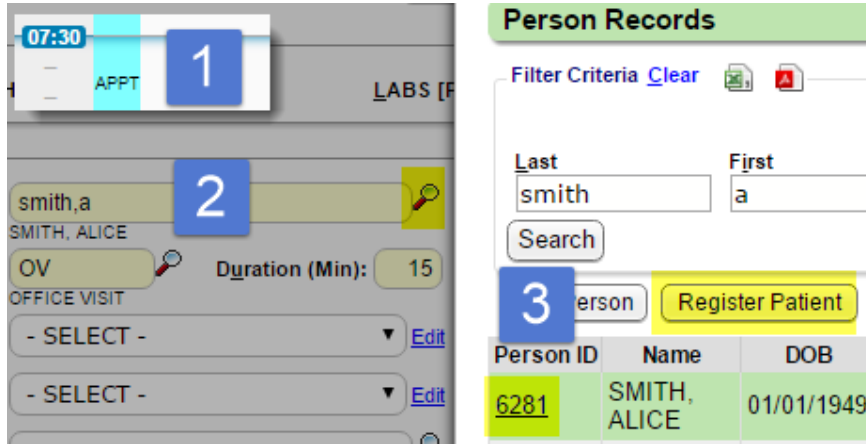
1. In the Availability section, choose filters > Click [Search]
 - Provider, Facility, Date Range, Day of the week, Time of day etc
2. Choose time link
3. Add/Modify Appointment page is in a popup for us to add our appointment > [Save]
 - or use the Date link to filter the calendar view for the date and other filters chosen



The screenshot displays the 'Availability' search interface. On the left, there are filters for Resource, Facility, Type, Duration, Date Range, and Time Range. A red circle '1' highlights the 'Duration' field set to 15. In the center, a 'Search Results' modal is open, showing a table of available slots for 'JOSEPH' on 'Thu 06/21/2018'. A red circle '2' highlights the '8:00 AM' slot. On the right, an 'Add/Modify Appointment' modal is open, with a red circle '3' highlighting the title bar. The 'Add/Modify Appointment' modal includes fields for Date, Time, Facility, Resource (JOSEPH PT [P400028]), Person, Type, Duration, Case, Authorization, Referring, and Referral Reason.

How to Add an Appointment

1. Click the desired Slot for the appointment
2. Look up the patient, in our example smith,a
 - Then use one of these look up methods
 - Tap [Home] key or
 - Tap the [Tab] key or
 - Double Click the mouse in the field or
 - Click on the magnifying glass
3. Click the ID hyperlink that repeats this person or create a new patient by Clicking [Register Patient]



The screenshot displays two panels from the Sevocity EHR system. The left panel shows an appointment entry for 'SMITH, ALICE' with a duration of 15 minutes. The right panel, titled 'Person Records', shows a search for 'SMITH, ALICE' and a table of patient records.

Person ID	Name	DOB
6281	SMITH, ALICE	01/01/1949

4. Choose an Appointment type, the Duration (in Minutes) can be edited
5. [Save] the appointment and proceed to your next task **or** [Save/Manage] to continue working with this appointment

Add/Edit Appointment

Date: 08/16/2016 Time: 07:15AM Facility: OFFICE [O] Block Time Reschedule Queue From Wait List

Resource: **M** SMITH [PJACOB]: LABS [PLABS]: SINGLE [PSINGLE]:

Appointment

Person: 6281
SMITH, ALICE

4 Type: OV Duration (Min): 15

A Case: - SELECT - Edit

Authorization: - SELECT - Edit **B**

Referring: **C**

Referral Reason: **D**

Reason: **E**

F Note:

Recurring: **G**

To Wait List: **H**

5 Save [F2] Save/Manage Cancel

Selected Person

N Name: ALICE SMITH Edit

Address: 3104 Meridian Way N. Apt 10
Palm Beach Garden, FL 33410

DOB/Sex: 01/01/1949 | 67 years 7 M | F

Phone: H: (561) 627-49

Email: **O**

Insurance: [1]-GHI (DEFAULT Expiration)

P Pat Bal: 0.00

Escrow: 40.00

Col Bal: 0.00

Ins Bal: 260.00

Billing Address:
GHI
PO BOX 3000
NEW YORK, NY 10116-3000
(800) 358-5500
Copay: 0.00
Policy/Group: 1258741 /

A. Add an existing Case from or 'Add New' from the dropdown

- o This feature allows the user to affiliate specific Insurance, Accident, Injury and other details with this appointment which creates a default in Charge entry

- B. Defaults to the authorization on the Case chosen
- C. Lookup to the Referring Provider Library
- D. Reason for referral
- E. Brief Reason for the Appointment
- F. Unlimited Notes about the patient or Reason
- G. Check to access recurring appointment options

Edit Recurrence Options








Recurrence Options

Daily Recur every day(s)
 Weekly Every day
 Monthly
 Yearly

of Occurrences: End by

H. Check to access Wait List options

Edit Wait List

Person: 
SMITH, ALICE
 Resource: 
 Facility: 
 Type: 
 Duration (Min):
 Date From:
 Date To:
 Mon: Tue: [Deselect All](#)
 Wed: Thu:
 Fri: Sat: Sun:
[Morning](#) [Afternoon](#)
 Time From: 
 Time To: 
 Formatted Slots Only:


I. Facility for the appointment

J. Link to Block Time

K. Link to add patient from the 'Reschedule Queue'

L. Link to add patient from the 'Wait List'

M. Choose additional 'Resource' for this appointment, such as lab blood draw ...

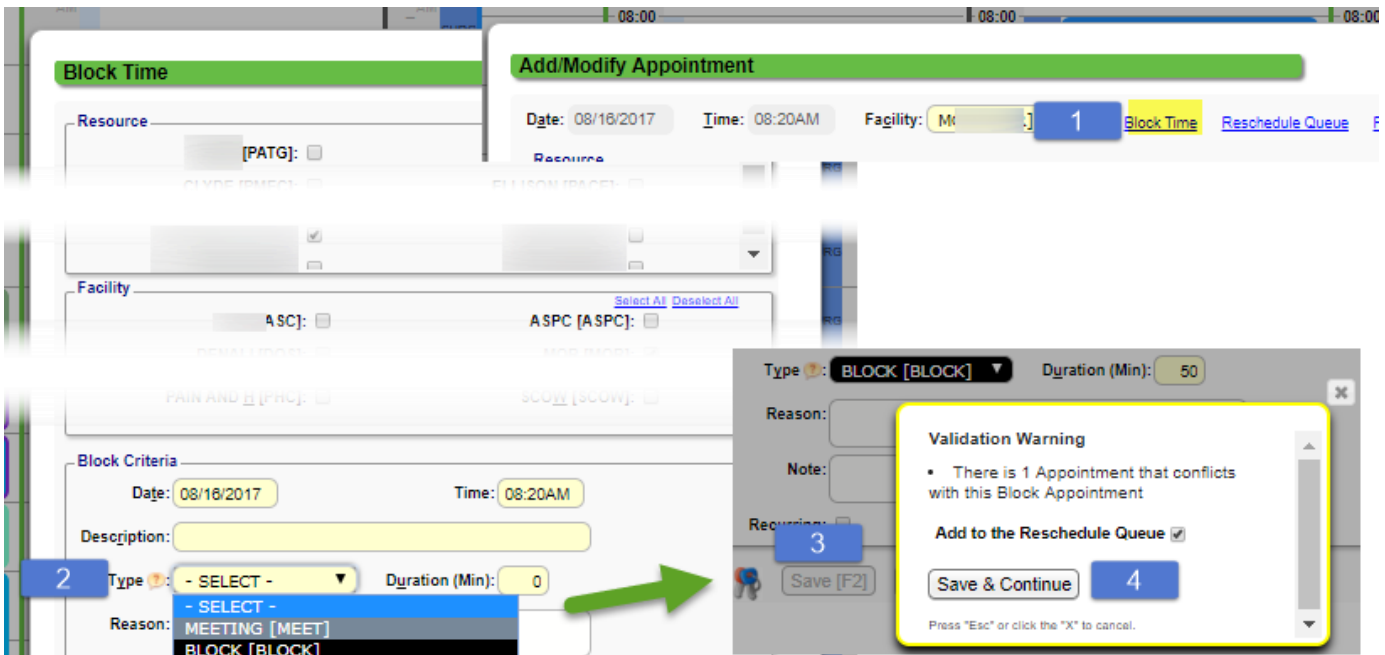
N. Click to 'Edit' patient then 'Refresh' show changes

O. Hover-over for details of Insurance Policy

P. Patient Balance

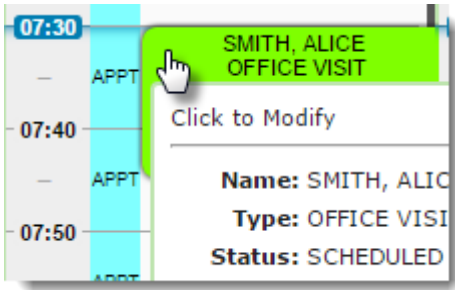
How to use Block appointments

1. After choosing an Appointment Type > click Block Time
2. Add a Description > choose the Block Type in the drop-down > Set the Duration > Add a Reason (optional)
3. SAVE
4. If there are existing appointments, you must choose if you want them to go to the Reschedule Queue (check 'Add to Reschedule Queue') OR leave them (un-check) > Save & Continue



Check In/ Manage an Appointment

Click on the Appointment



In the Popup

1. Click on one of the buttons to Check In, Cancel, Reschedule Or Use the dropdown 'Status'
2. Use hyperlinks to Manage the appointment, Patient details and access other functions
3. Patient Balance section
4. History link- full audit history of this appointment, this information is also available off the 'change log' on the patient dashboard, filtered by appointment
5. Case
6. Authorization
7. Recurring appointments
8. Waitlist
9. Appointment ID - useful for interfaces and change log
10. if there are any custom field they will show here