

On-line Calendar

The on-line calendar uses a number of different tables, set-up files, and database definitions in the system in its many different functions. The following sections will describe the necessary agency set-up for the calendar programs.

Individual Schedule

The individual schedule requires the following set-up before activities can be scheduled for staff.

Tables in H-2

- **SCHLOC**: Identifies the location that the event is scheduled to occur.

Set up files in H-12 MS

- **WORK.DAY**: Defines the agency's work hours and the time increment to leave between scheduled appointments.

Database definition

- Only operators identified and defined as staff members (**H-7**) will have an individual schedule in which events and appointments can be scheduled.
- Activity codes (**H-8**) need to be defined in order to schedule events.

System level definition

- Either the scheduling location (from **SCHLOC**) or the scheduling operator (**H-3** code) can be designated in the corresponding column on each appointment line by a setting at the system level.
- There is set-up at the system level to check for duplicate appointments for clients across all calendar entries and give a warning message that the specified client has an appointment scheduled, including staff and time.
- The calendar can be set-up at the system level to create an individual appointment entry for clients who check-in at the Front Desk when no

scheduled group entry exists. If Front Desk check-in is also set-up to create the billing record, these individual group appointments will be ignored and will need to be closed through **A-2 SC**.

Load screen

The load screen is an overall view for the master schedule of the entire agency or a specific unit within the agency. Each operator can have a customized default view of the load screen with individualized preset display criteria. These display criteria can be defaulted per user to the view usually selected. These defaults can still be changed by the user during operation if another view is desired.

Tables in H-2

- **SCHLOC** – This lists the available scheduling locations.
- **ACTGRP** – Describes the defined activity groups for groups of activity groups.

Set up files in H-12 MS

- **GROUP.ACT** – Groups the activity groups by code and lists all applicable activity codes for each.
- **STFCAL.INI** – Determines the default view of the extended load screen for each designated operator.

Defining STFCAL.INI

The extended load screen version view is defined for each operator in the file **STFCAL.INI**. The following describes each of the required fields on a given line of this file's code.

1. **Operator** – individual operator code.
2. **Default group type** - The type of code used in the next field, default staff member, either **G** for a group of staff or **S** for an individual staff person.
3. **Default staff member** - The code of the staff member or group. Use ***ALL*** for all.
4. **Default activity type** - The type of code used in the next field, default activity, either **A** for an individual activity code or **G** for an activity group.
5. **Default activity** - The activity code or activity group code for the display.
6. **Location** – The scheduling location of the activities to be shown.
7. **Display type** - **N** for normal and **E** for extended. Extended displays the available slots in addition to those which are scheduled using the staff load information entered in **H-7 AT**.
8. **Start time** - The time when the workday begins.
9. **Display line** - The title bar for the daily load screen.

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IMA Mental Health - Development Area Option:H12-MS
Edit control files

File D:\mh_dev\scd\admin\data\STFCAL.INI
Operator,S,G,Member,activity type,Act code,location,E,W,start time,scale
S
ZS,S,ALL,A,ALL,ALL,E,0900,9a-10-11-12-1P-2-3-4-5-6-7-8-
MS,S,ALL,A,ALL,ALL,E,0900,9a-10-11-12-1P-2-3-4-5-6-7-8-
DSF,G,ALL,G,ALL,ALL,E,0900,9a-10-11-12-1-2-3-4-5-6-7-8-
JSM,S,ALL,A,ALL,ALL,E,0900,9a-10-11-12-1P-2-3-4-5-6-7-8-
GB,G,ALL,G,ALL,ALL,E,0900,9a-10-11-12-1-2-3-4-5-6-7-8-

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120 x 1000 men ext

File STFCAL.INI in H-12 MS.

Database definitions

- Staff groups** – These groups are defined in **D-1 AG**. They are the same as the e-mail distribution groups and can be shared (**Allowed**) or **Private**.
- Staff loads** – Each staff person can be pre-set with a maximum load of activities for each day of the week. This is defined in **H-7 AT**.

First free slot

The system can find the first free slot for a designated activity based on staff characteristics.

Set up files

- D2-RESCON.DAT** sets the defaults for each operator in searching for the first free slot. The choices that can be set up for individual defaults are Staff type, Staff classification, Schedule location, and Staff group. These defaults can be changed during operation if a different view is desired.

Database definitions

- Staff definitions** – A number of fields in the staff database (**H-7**) are used for the search selection criteria. These are Staff type, Classification, Language, Medicaid provider, Medicare provider type, PI provider type, Location, and staff group. These searches will be effective only if the staff information is accurate.

Weighting Option

The weighting option is a powerful administrative tool that can show staff activity and productivity from an agency wide, location, or individual standpoint.

Set-up Files

If this option is desired, IMA must be informed so that this feature can be designated and enabled in the program start up file.

- **GNSTAT.INI** must be defined to generate the associated statistical report at **G-30**.

Database Definitions

- Staff members must have scheduling targets and budget statistics defined in **H-7 AT** and **CS**.
- Activity codes must be assigned a weight in their definition in **H-8**.