

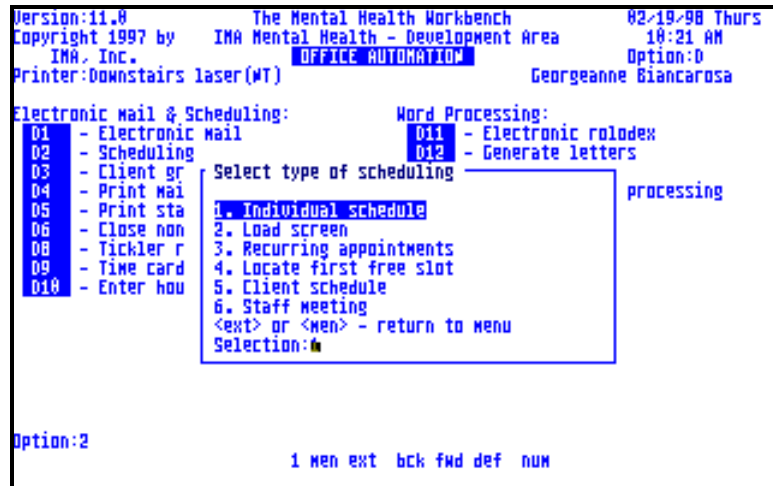
# Scheduling

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## Overview

The IMA Workbench includes a multileveled scheduling system. These schedules are tightly integrated with both the clinical and billing components. Scheduling is accessed from menu entry **D-2, A-4**, or through the **<Pop>** function key. The six options in scheduling are:

1. **Individual schedule** - This is the calendar of an individual staff person. Each staff person has their own calendar to record scheduled events.
2. **Load screen** – An overall picture or the master schedule for the entire agency or a specific location. The user is able to zoom in from the overall monthly view to a single day and then to a specific staff calendar.
3. **Recurring appointment** -This allows for the scheduling of recurring appointments with specific criteria for individual or group sessions.
4. **Locate first free slot** - This option locates the first available slot for an individual staff member or any group of staff members based on a given set of criteria.
5. **Client schedule** - A weekly schedule of all sessions for a specific client or all clients.
6. **Staff meeting** - This option is used to find available time slots for staff groups and list conflicts if a specific time is required.

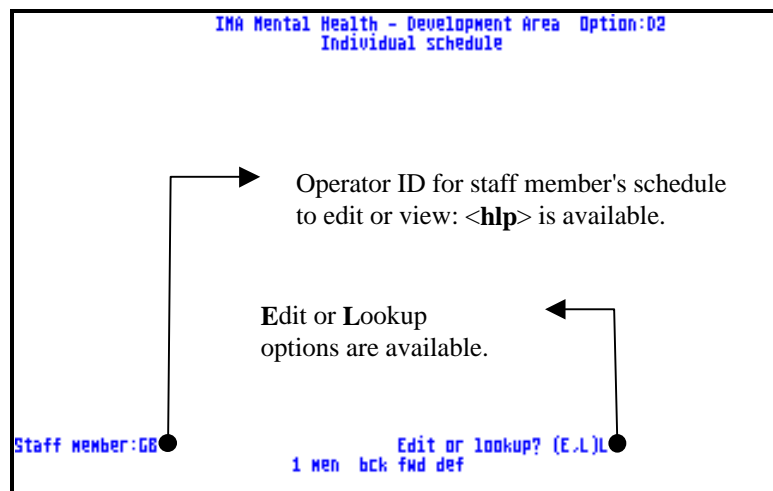


The scheduling menu screen at menu option D-2.

## Individual Schedule

The staff schedule is a powerful agency automation tool that permits all clinical and organizational events to be scheduled and tracked. An agency can schedule appointments with clients or client groups, reserve time for meetings, supervision or other organizational activities, and block time for which only certain activities may be scheduled per individual staff member.

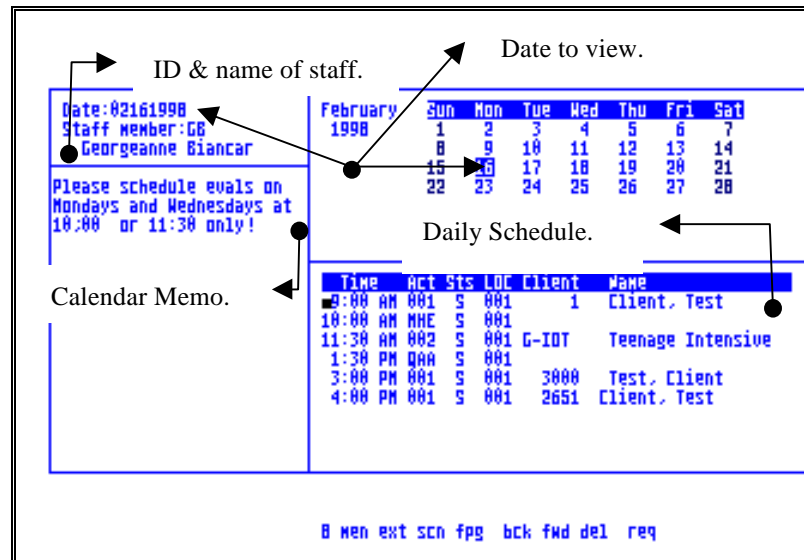
At the '**Staff member:**' prompt, the user identifies the staff member whose calendar should be displayed. The user's own ID is presented and can be accepted by pressing **<enter>** or changed by typing the desired staff code and pressing **<enter>**. **<Hlp>** is also available for a list of staff members and their IDs. Next, **Edit** or **Lookup** is designated by typing the corresponding code and pressing **<enter>**. **Lookup** is the default and must be changed for editing to be allowed. The edit mode permits changes to be made while locking out other users from editing the schedule in use. The lookup mode allows calendar access for viewing only without locking the file to other users.



The initial selection screen for an Individual Schedule in D-2.

In the upper left-hand corner of the calendar screen, the date to view and the name of the staff member are displayed. The rest of the screen consists of three sections.

1. **Calendar** display for any month of any year. When the schedule is first displayed it automatically highlights the current date.
2. **Daily schedule** is displayed for the day that is highlighted in the calendar. It displays one line for each scheduled event. This line contains: time, activity code, status, the location code for where the activity will take place, and the client number and name with whom the event is scheduled.
3. **Memo Field** presents a memo box for a free form memo to be entered. A separate memo box is associated with each scheduled event.



An individual staff schedule.

4. **Departmental Calendar** can be attached to designated staff for staff groups or departments. This calendar will be attached to the memo box for the first appointment of each day and can be used to communicate important departmental events and keep staff informed at a glance of people who may be off site or out. Set-up is accomplished in file **A4-PSEUDO.STF**. At the '**Date:**' field of the designated staff's calendar, this departmental calendar can be viewed and paged using the **<bck>** and **<fwd>** keys.



change it. Typically, it changes to **I** when the client checks in at the front desk and then to **C** when the visit is closed either through **A-2** or by the writing of a progress note. (Closing visits is discussed in the Billing Chapter.) Appointments can also be designated as **No shows**, **Rescheduled** or canceled (**U**) by the front desk or clinician, depending on the reason that the appointment did not take place.

4. **Location** – This field also requires a code be entered for agencies with more than one location. <Hlp> will show a list of the valid location codes from the table **LOCSEN**, defined in **H-12 MS**.
5. **Client** – The client number or group code is entered here if it is known. Pressing <hlp> will get a '**Group or Client help?**' prompt from the system. Typing <G> and the pressing <enter> will access a help window of the agency groups and codes. One can be selected from the window by pressing <enter> when the desired group and code are highlighted using the up and down arrows or the <bck> and <fwd> keys. The group code will fill under '**Client**' and the group name will fill under '**Name**'. Typing <C> and pressing <enter> will prompt the system to ask '**Last Name:**' Type the client's last name in full or part and press <enter>. The client's first name can then be typed at the '**First name:**' prompt or press <enter> to get a <hlp> screen from which to choose the appropriate client. The client number will fill under the '**Client**' column and the client's name will fill under the '**Name**' column.
  - **Accessing the memo field** - When moving from line to line in the daily schedule, the memo box on the left side changes to display the memo associated with each event. To access this memo, press <enter> at the last field on the right of the appointment line.
  - **Return to daily schedule** - Press <Esc> after typing the memo to leave the memo section and return to the daily schedule to enter the next appointment.
  - **Return to calendar** - Press <ext> from the daily schedule section and choose a new date to edit.

Date: 02171998  
Staff member: GB  
Georgeann Biancaro

Test wants to schedule a Med Mgt appt with doc due to side-effects after meeting with thx.

Calendar memo for appointment shown.

February 1998	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	

Date of appointment.

Time	Act	Sts	LOC	Client	Name
9:00 AM	001	S	001	2651	Client, Test

Client number and name.

Location code for scheduling.

Appointment status.

Activity code for appointment.

Appointment time.

B MEN ext scn fpg bck fwd del req

Definitions of fields for the Individual Schedule.

### Client groups

Appointments can also be scheduled with client groups. Client groups are defined in menu option **D-3**. Instead of entering a client number in the 'Client' column, the group code can be typed in preceded by "G-" or <hlp> can be used to choose the desired group code.

### Non-client appointments

An appointment that is not a client contact can also be entered. The 'Activity' field will show the code for the non-client activity/appointment. The 'Client' field will be left blank. A description of that appointment will appear in a Help Slot at the bottom of the calendar or in the 'Client' column. These activity codes are also available at <hlp> for the 'Activity' field.

Date: 02191998  
Staff member: GB  
Georgeann Biancaro

Risk Factors Presentation: risk factors and substance abuse for counselors at YMCA Children At-Risk Camp.

Group appointment scheduled: <hlp> available at 'Activity' and 'Client Name' fields.

February 1998	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	

Time	Act	Sts	LOC	Client	Name
1:30 AM	001	S	001	2651	Client, Test
9:00 AM	002	S	001	G-PH2	Phase II of IV
10:30 AM	002	S	001	G-VCAP	Youth Chem Abuse Pr
12:00 PM	PR	S	002		Risk Factors Presentation:

Non-client activity scheduled: <hlp> available at 'Activity' and fill under 'Client Name' from memo box.

B MEN ext scn fpg bck fwd del req

An Individual Schedule with a group and a non-client activity scheduled.

# Load Screens

The load screen is a monthly picture of all activities scheduled for the organization or any location within it. The load screen information is presented in stages, each stage showing a more detailed view over a smaller time frame than the previous stage.

## Monthly view

The monthly load screen displays a calendar of the month, and next to each day, the number of scheduled activities for that day in brackets ([ ]). The extended version shows the number of visits scheduled for each day in a shaded area next to the date with the number of available visits underneath.

IMA Mental Health - Development Area Option:02  
Load screen

Schedule was last summarized on 02/19/98 @ 3:51 PM  
Staff type:S Staff/group:all Activity type:A Activity/group:all Location:all

January 1998

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 [ 1]	2 [ 3]	3
4	5 [ 6]	6 [ 3]	7 [ 2]	8 [ 2]	9 [ 2]	10
11	12 [ 2]	13 [ 1]	14 [ 3]	15 [ 3]	16 [ 5]	17
18	19 [ 1]	20 [ 3]	21 [ 1]	22	23 [ 2]	24
25	26 [ 1]	27	28 [ 22]	29 [ 11]	30 [ 2]	31

Day to display or <bck> for display changes:  
2 men ext bck num req

Number of visits scheduled for 1/29/98: 11.  
Date: 1/29/98.

First prompt of available options.  
Choosing <bck> will access the second prompt for options.

The Monthly Load Screen.

IMA Mental Health - Development Area Option:02  
Load screen

Schedule was last summarized on 02/19/98 @ 3:51 PM  
Staff type:G Staff-group:all Activity type:G Activity-group:all Location:all

January 1998						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Day to display or <bck> for display changes: 2 men ext bck nmm req

First prompt of available options.  
Choosing <bck> will access second prompt for options.

Actual number of visits scheduled for 1/29/98: 11.  
Possible number of visits to schedule for 1/29/98: 20.  
Date: 1/29/98.

The extended Monthly Load Screen.

In both Monthly Load Screen versions, the user has the option to type and enter the date (**dd**) of the day to display or press **<bck>** to make changes in the display. Choosing and entering the date to display moves to the daily view as described below. Pressing **<bck>** causes another prompt line to appear: **'Month and Year, R to Resummarize or D to change Display parameters'**. For a new month and year to be displayed, type and enter the corresponding numbers (**mmyy**).

Before any decisions are made from the load screen, it will be useful to type **<R>** and press **<enter>** to resummarize the data in the load screen. The initial screen presented will be a reflection of the activity current to when it was last resummarized. Any appointments scheduled since that time will not be counted until that load screen is resummarized.

Additionally, the display criteria can be changed to narrow down or broaden the information presented in the load screen. This is done by typing **<D>** and pressing **<enter>**. The cursor will move to the top of the load screen to the **'Staff type:'** prompt. That field and others may be changed at the following prompts: **'Staff/group:'**, **'Activity type:'**, **'Activity/group:'** and **'Location:'**. This is a particularly powerful tool as the load screen can present scheduling information, at a glance, for any staff or activity type within the agency for any location.

1. **'Staff type:'** is identified as either Singular or Group.
2. **'Staff/Group:'** will accept either a single staff operator ID or group code depending on the selection made in the previous field. Staff groups are defined in menu option **D-1 AG** and are available in **<hlp>** at this field. Individual operator ID codes are also available in **<hlp>**.
3. **'Activity type:'** may be a single Activity code or a Group activity code.
4. **'Activity/Group:'** will accept either a single activity code or group code depending on the selection made in the previous field. Activity groups are defined in table **ACTGRP** in **H-8** and are available at **<hlp>** in this field. The activity codes defined in **H-8** are also available at **<hlp>**.

5. **'Location:'** will provide scheduling information for a particular location or all locations. Scheduling location codes are defined in Table **LOCSEN** in **H-12 MS** and are available at **<hlp>** in this field.

IMA Mental Health - Development Area Option:02  
Load screen

Schedule was last summarized on 02-19-98 @ 3:51 PM  
Staff type:G Staff-org:all Activity typ:G Activity-org:all Location:all

January 1998

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

These display criteria can be changed for view in the load screen.

Month and year, R to resummairze, or D to change display parameters:0  
G men ext bpg fpg hlp fwd req

Options when **<bck>** is pressed at initial prompt.

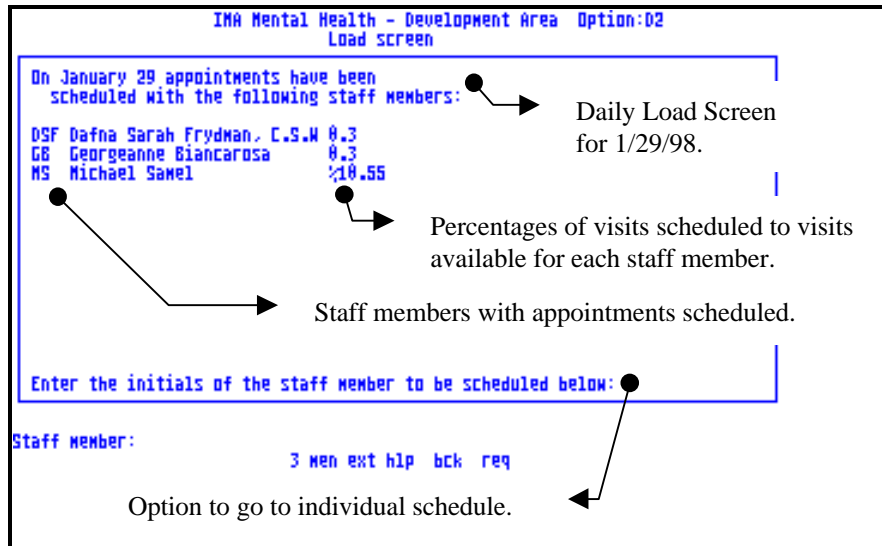
Typing **<D>** and pressing **<enter>** will move the cursor above to change display criteria.

The load screen at the change display prompt with selection criteria the same for both versions.

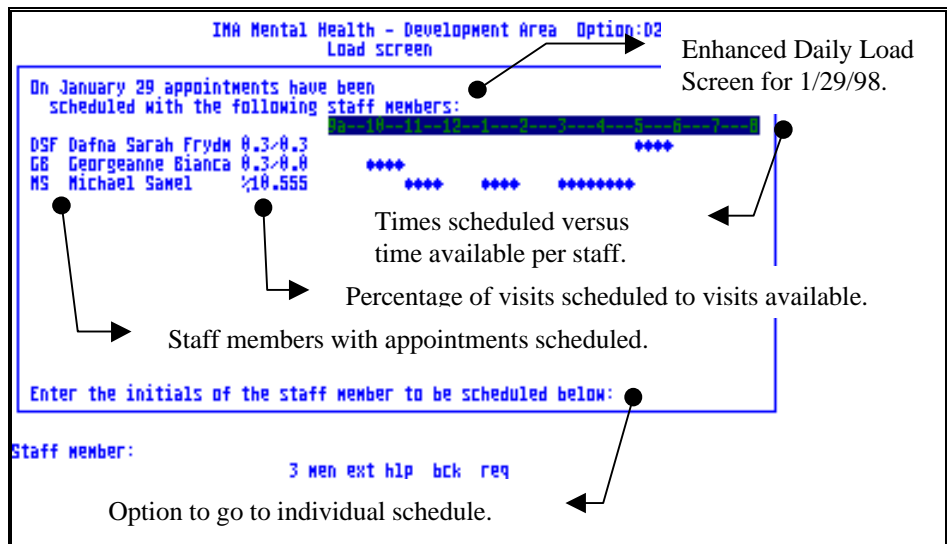
After changing the display criteria, press **<enter>** or use the **<fwd>** key to go back to the **'Day to display...'** prompt. To move to the daily load screen, type the day to be displayed (**dd**) and press **<enter>**.

### Daily view

When a specific day from the monthly view is selected, the system presents a list of staff members who have appointments scheduled with a percentage of available time scheduled for visits. In the extended version, the daily load screen displays a graphical schedule for that day, showing a time for each staff person indicating the time scheduled with shading and the time available as clear.



The Daily Load Screen.



The extended Daily Load Screen.

### Staff schedule

From the daily view, the user can then zoom down to the calendar of a specific staff member and schedule additional events for that person. This would be done as discussed previously in the individual schedule section of this chapter.

### Available Options

Customized choices and defaults for individual operators can be defined in **H-14**. The instructions for this are covered in the system administrator's manual.

# Recurring Appointments

This is an easy-to-use tool for the scheduling of recurring events or appointments for individual staff members or staff member groups. By using this feature, consecutive, recurring events can be scheduled. The system will check for conflicts and enter the event on each staff member's calendar. Scheduled events can be associated with individual clients or groups of clients. The following are required for the screen dialogue of this function:

1. **Are you deleting appointments?** No is the default and can be accepted by pressing <enter>. This will allow the user to schedule recurring appointments. Answering Yes and pressing <enter> allows for the removal of recurring entries that were posted in error. The following procedures are the same for deleting and adding appointments. The only difference is the end result: adding or deleting appointments to or from schedules.
2. **Starting date:** Enter the date of the first appointment (mmdd) or use the up and down arrows or the <bck> and <fwd> keys to move the cursor within the calendar to the desired date. The <bpg> and <fpg> keys change the month displayed.
3. **Number of meetings:** the total number of events being scheduled is entered.
4. **Interval in days:** Enter the number of days between each appointment.
  - a) When choosing an interval of 1 day, a special pop-up window is displayed. This window allows a Yes or No entry for each day of the week. Yes is defaulted for weekdays and No is defaulted for weekend days. These can be accepted by pressing <enter> or changed by typing the corresponding codes and pressing <enter>. When the system computes the dates for the consecutive events being scheduled, it will skip the days that have a No entry.
  - b) When choosing the same date for each month for monthly meetings or appointments, <30> should be entered. The ddth of each month will be scheduled.

IMA Mental Health - Development Area Option:02  
Recurring appointments

February 1998	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28

Starting date: 02201998      Starting date: 2/20/98.

Number of meetings:  
Interval in days:  
Staff I-G:

Time	Act	Sts	LOC	Client	Wave
		5			

Meeting length: :

Are you deleting appointments? (Y,N)N  
1 Men ext fwd dt

A Yes answer allows the user to delete recurring appointments only. No schedules recurring events.

A view of the initial selection criteria for scheduling or deleting recurring appointments.

At this point, the exact dates of the appointments are computed and displayed in a window on the screen. These dates can be edited by answering **Yes** at the '**Change the dates?**' prompt. The <scn> key is used to move through and out of the date window if changes are needed. If these dates are acceptable and correct, answer **No** by typing the corresponding code and pressing <enter>.

IMA Mental Health - Development Area Option:D2  
Recurring appointments

Meeting dates	Wed	Thu	Fri	Sat
02201998FR	4	5	6	7
02271998FR	11	12	13	14
03061998FR	18	19	20	21
03131998FR	25	26	27	28
03201998FR				
03271998FR				
04031998FR				
04101998FR				

Client Name

Change the dates? (Y.N)W

1 men ext bck req

The 'Change the dates?' prompt for selection criteria defined in screen above.

Once the dates are correct and finished, the cursor will return to the selection criteria fields for the following to be determined:

5. **Staff I/G:** Activity scheduled for an individual staff member (**I**) or a group of staff members (**G**). <Hlp> is available for each.
6. **Time Act Sts Loc Client:** Enter the appointment data such as time, activity code, location and client number or name.
7. **Meeting Length:** The default is the time in length defined for the specified activity code in **H-8**, but can be changed at this time.
8. **Memo box:** The cursor will now move to the memo box on the left side, and allow the entry of a memo that will be displayed in each individual's staff calendar along with the scheduled event. Use the <Esc> key to save the memo and/or leave the memo box.
9. **Add, Check, or Edit:** The following is the explanation for these three options:
  - a) Adds the appointment to the staff calendar irrespective of any potential conflicts.
  - b) Checks for conflicts and produces a list or printout of conflicts or displays a help message that no conflicts were found.
  - c) Edit allows the user to go back and change the information about the recurring appointment that was previously entered.

IMA Mental Health - Development Area Option:02  
Recurring appointments

All Phase ones are now phase twoers if listed on check in list. This group will last 8 weeks and meet at this time and day weekly.

February 1998	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	

Starting date: 02201998  
Number of meetings: 8  
Interval in days: 7  
Staff I:G:I Staff:GG

Time	Act	Sts	LOC	Client	Name
9:00 AM	002	S	001	G-PH2	Phase II of IO

Meeting length: 1:30

Add appointment, check conflicts, or edit? (A,C,E)  
1 MEN ext bck req

Memo associated with this recurring appointment.

Appointment line is the same as in an Individual Schedule.

Meeting length determined in H-8 activity code definition: can be accepted as listed or changed by typing over and pressing <enter>.

Add appointment to schedule, Check for conflicts or Edit/change selection criteria.

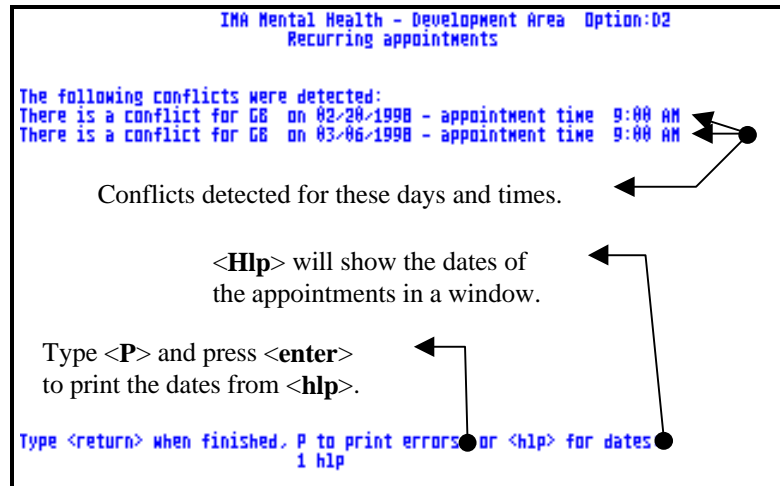
The next selection criteria for adding or deleting recurring appointments.

10. **Conflict screen:** To check for conflicts, type <C> and press <enter>. A conflict screen will be displayed that includes a list of each conflict with the detail of the staff member with whom there is a conflict and the time at which the conflict occurs. Entering <P> will produce a hard copy of the conflict list. Using the <hlp> key will bring up the date window from the recurring appointment to be scheduled. Once the conflict dates are determined, press <enter> to return to the 'Add appointments, Check conflicts or Edit?' prompt.
11. **Editing to avoid conflicts:** At the prompt for Add, Check or Edit, type <E> and press <enter>. The cursor will be at the appointment line and changes can be made to avoid the conflicts on the selected time. The <bck> key can be used to change other selection criteria including staff and date fields. All fields or selected fields can be changed. Upon completion, the cursor returns to the prompt for Add, Check or Edit. Continue this process until no conflicts are detected.

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**Note:** The <pop> key can be used to go to an individual schedule and change the conflicting appointment (s). This should only be used with great discretion.

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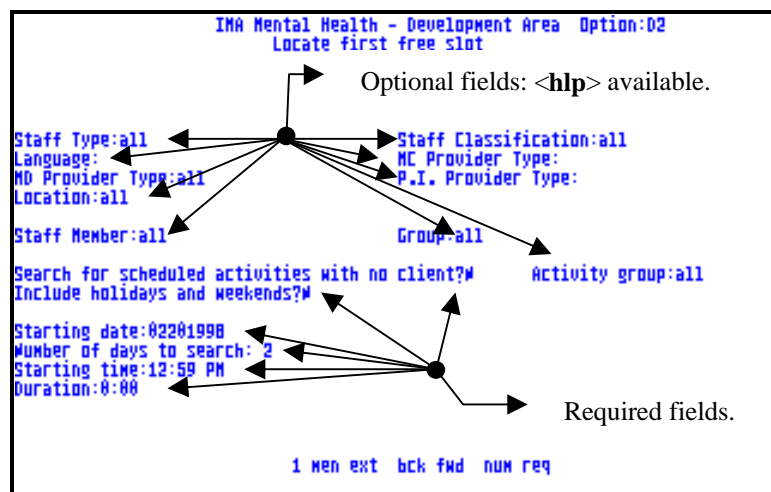
The conflict screen.

- Add appointments:** After resolving conflicts, choice **A** can be entered to add the appointments to the schedule(s). If a conflict exists, the conflict will be ignored and the appointment scheduled if **Add** is chosen at the '**Add appointment, Check conflicts or Edit?**' prompt.

## Locate First Free Slot

This option is used to find an opening for an appointment among specific staff members, a group of staff members or all staff. Additional specific criteria can be used to look for special skills or types of staff, staff activities or locations. This is a powerful tool that can be as specific or general as the user needs.

Within the selection criteria, there are several optional fields that the user can **<fwd>** or **<scn>** through if those specific criteria are not needed. These optional fields include: Staff Type, Staff Classification, Language, MC, MD and PI Insurance Provider Types, Location, Group and Activity Group. **<Hlp>** is also available on those optional fields, as well as the Staff Member field, which is optional when Staff Type is selected. The remaining fields are required.



The selection criteria screen for locating first free slot.

Defaults can be defined for each operator in **H-14** that will pre-fill the staff characteristics and location that is usually used. The instructions for this are located in the System Administrator's section of the manual.

Once the selection criteria has been determined and entered, the system will prompt, '**Ready to start the search?**' Answer **Yes** or **No** and press **<enter>**. If **No** is selected, the cursor will return to the '**Duration:**' field for changes to be made in the search criteria. Use the **<bck>** key to make any necessary changes in the other fields. Remember, it is necessary to press **<enter>** after redefining a field for changes to be retained. When **Yes** is selected, a display of the Staff Member, Date, Time and Number of appointments is listed. The user can then type **<enter>** to go back to the selection criteria screen or type and enter the staff member's IDs to go to their individual schedules to schedule the appointment for each.

IMA Mental Health - Development Area    Option:02  
Locate first free slot

STAFF PERSON	DATE	TIME	NO. APPTS.
ZS Zevi Samel	02-23-1998	11:00 AM	0
	02-24-1998	9:00 AM	0
DSF Dafna Sarah Frydman, C.S.W	02-23-1998	11:00 AM	1
	02-24-1998	9:00 AM	0
DEW Denis P. Quinn	02-23-1998	11:00 AM	0
	02-24-1998	9:00 AM	0
GG Georgeanne Biancarosa	02-23-1998	11:00 AM	1
	02-24-1998	10:00 AM	1

Press <enter> to continue or Staff member: █  
3 men bck

Type staff initials to add to calendars in Individual Schedules or <enter> to redefine search criteria.

The display of the first free slots found for each staff for number of days selected.

## Client Schedule

For any given client or all clients, a display or print out of all scheduled appointments for a week may be obtained. First, the client number must be entered. If it is not known, **<hlp>** can be pressed to get the '**Last name:**' prompt, where the name can be entered. **<Def>** will print or display the weekly schedule for all clients. Next, '**Starting date:**' is entered, then the number for '**Weeks ahead:**' and finally, '**Include weekends?**' is answered **Yes** or **No**.

```

IMA Mental Health - Development Area Option:02
Client schedule

Client: 3000 Starting date:02231998 Weeks ahead:2 Include weekends?M
1 Men ext bck fwd def

```

The selection criteria screen for displaying a client schedule.

The system will then scan the data and present the schedule for the week requested. Within the display of a client schedule, pressing <enter> will automatically display the next week's appointment. Typing <P> and pressing <enter> prints a hard copy of the schedule. Using the <bck> key will allow a new client schedule to be viewed.

```

IMA Mental Health - Development Area Option:02
Client schedule
Client: 3000 Test. Client Starting with 02-23-98

```

MONDAY 02-23	TUESDAY 02-24	WEDNESDAY 02-25	THURSDAY 02-26	FRIDAY 02-27	SATURDAY 02-28	SUNDAY 02-01
10:00 AM to 11:00 Act: 001 Stf: MS		10:00 AM to 11:00 Act: 001 Stf: MS	11:00 AM to 12:30 Act: 002 Stf: MS	Grp: ACAP Grp: 1 12:00 PM to 1:00 Act: 001 Stf: DSG		10:00 AM to 11:00 Act: 001 Stf: MS
Grp: ACAP 11:00 AM to 12:30 Act: 002 Stf: MS				10:00 AM to 11:00 Act: 001 Stf: MS		Grp: ACAP 11:00 AM to 12:30 Act: 002 Stf: MS

```

Type <return> for next week, <bck> to enter client, or P to print:
1 Men ext bck

```

The display of a client schedule.

## Staff Meeting

This option is a tool designed to help locate available time slots for staff meetings or trainings. This can be accomplished by locating the **F**irst free slot or by designating a specific **R**equired time for the meeting.

For each type, the **'Location for scheduling:'**, **'Group:'**, **'Starting date:'**, **'Time required:'** and **'Duration:'** are required. <Hlp> is available for tables of location and group codes. The group members can also be changed temporarily by adding or deleting staff members at the **'Group:'** prompt.

## First Free Slot for Staff Meeting

Using the first free slot method, search criteria is defined for the time slot within a given date range. In this case, open time slots are shown ten at a time. The user can then Schedule the appointment or Change criteria by typing the corresponding code and pressing <enter>. More dates can also be searched by pressing <enter>.

```

IMA Mental Health - Development Area  Option:02
Staff meeting

Location for scheduling:001 Edison, NJ
Find first free slot or enter required time (F,R):F

Group:CUSU
Starting date:02231998
Time required:12:00 PM
Duration:1:30

Ready to start the search? (Y,N)Y
1 Men ext bck req
  
```

Staff meeting search criteria screen for First free slot.

```

IMA Mental Health - Development Area  Option:02
Staff meeting

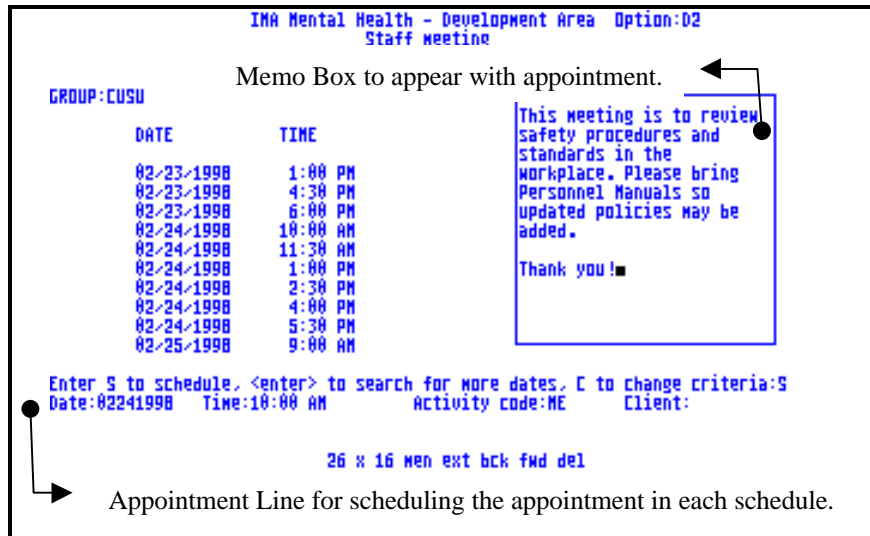
GROUP:CUSU

DATE          TIME
02/23/1998    1:00 PM
02/23/1998    2:30 PM
02/23/1998    4:00 PM
02/23/1998    5:30 PM
02/24/1998    10:00 AM
02/24/1998    11:30 AM
02/24/1998    1:00 PM
02/24/1998    2:30 PM
02/24/1998    4:00 PM
02/24/1998    5:30 PM

Enter S to schedule, <enter> to search for more dates, C to change criteria:
1 Men ext
  
```

Search results for First free slot search.

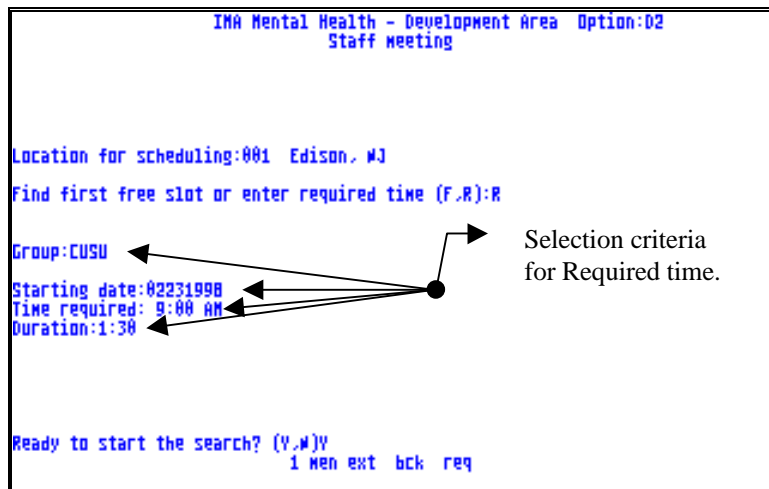
To schedule the appointment for the group, an appointment line appears at the bottom of the screen for the meeting information to be entered into each schedule at once. Date, Time and Activity code are required. A client can be referenced for treatment team meetings and a memo box opens to accept a memo specific to the meeting for all group members. Press <Esc> to save the memo and/or leave the memo box. The system will then alert the user that the group member's schedules have been updated.



*Scheduling a meeting from First free slot.*

### **Required Time for Staff Meeting**

To search for a meeting time when a definite time slot is required, type **<R>** and **<enter>** at the **'Find...time:'** prompt. In this case the user will be informed if the entire group is available, and if not, which of the group members have a conflict.



*The Required time search criteria screen for staff meeting.*

At the view of the conflict screen, pressing **<enter>** will search for more dates. The event can be scheduled despite the conflicts by typing **<S>** and pressing **<enter>**. Typing **<C>** and **<enter>** will return to the selection screen and new criteria can be entered for a new search.

```

IMA Mental Health - Development Area Option:02
Staff Meeting

The following conflicts were detected:
STAFF PERSON      DATE      TIME
ZS Zevi Samel      02/23/1998 9:00 AM
DSF Dafna Sarah Frydman, C.S. 02/23/1998 9:00 AM
DEW Denis P. Quinn 02/23/1998 9:00 AM
GB Georgeanne Biancarosa 02/23/1998 9:00 AM

Enter S to schedule, <enter> to search for more dates, C to change criteria:
1 men ext

```

List of conflicts per staff, date and time.

The conflict screen when everyone in the group cannot meet the Required time.

```

IMA Mental Health - Development Area Option:02
Staff Meeting

Location for scheduling:001 Edison, NJ
Find first free slot or enter required time (F,R):R

Group: CUSU
Starting date:02231998
Time required: 3:30 PM
Duration:1:30

Enter S to schedule, <enter> to search for more dates, C to change criteria:
Group CUSU has 3:30 PM available on 02/23/1998
1 men ext

```

No conflict for Required time.

New search criteria for a required time without conflicts.

To schedule the appointment for the group, an appointment line appears at the bottom of the screen for the meeting information to be entered into each schedule at once. Date, Time and Activity code are required. A client can be referenced for treatment team meetings and a memo box opens to accept a memo specific to the meeting for all group members. Press <Esc> to save the memo and/or leave the memo box. The system will then alert the user that the group member's schedules have been updated.

```

IMA Mental Health - Development Area Option:02
Staff Meeting

Memo Box to appear with appointment.

Location for scheduling:001 Edison, NJ
Find first free slot or enter required time (F,R)

Group:CUSU
Starting date:02231998
Time required: 5:00 PM
Duration:0:30

Please bring your Admin Guides as there are chapters to replace and insert.
Also be prepared to give a brief synopsis on and status update for individual projects.
See you then! MS

Enter S to schedule, <enter> to search for more dates, C to change criteria:S
Date:02231998 Time: 3:30 PM Activity code:ME Client:

26 x 16 Men ext bck fwd del

Appointment Line for scheduling the appointment in each schedule.

```

*Scheduling a meeting from a Required time search.*

## Life Cycle of Scheduled Events

Appointments scheduled on-line with the calendar have a specific life cycle on the system related to their disposition and reference. Client related events are additionally significant to the billing and staff activity databases and non-client related activities are also significant to the staff activity database.

The appointment life cycle begins as a scheduled event. As a calendar entry is made, its initial status is always **S**(cheduled) by default. This status can be changed at the time the event is entered or at later time within the schedule.

The system will automatically update the status of each appointment when new information is entered into the system about the disposition of that appointment. When a client checks-in at the Front Desk for a scheduled appointment, the system changes the status of that appointment from **S**(cheduled) to **Checked In**. Similarly, once that visit is designated as closed through **A-2 SC** or **B-1**, depending on the agency configuration, the system will update the status again to either **C**(ompleted), **N**(o Show), **U**(ser Cancelled) or **R**(escheduled), depending on the specified circumstances. This evolution can be viewed in the calendar at the "Status" column.