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Introduction

All staff members on the IMA system have online schedule capability, where they can enter and manage their own appointments or have front desk staff can coordinate the appointments for them. . The daily calendar integrates staff schedules so the front desk staff can easily manage the entire process and view all changes immediately.

Scheduled events often include non-client and non-billable activities, such as meetings, vacation and sick time. Individual or group schedules may be accessed from many perspectives and the schedule for any staff member, for an individual caseload, for a single client, for a group of clients, for a department, or for the whole agency can be maintained using an extensive range of views.

As staff provides services to clients, the status of all appointments can be tracked, completed progress reports and treatment plans can surveyed, available time slots searched, productivity monitored, and communications enhanced.

Prerequisites:

Records for all service providers must be defined and initialized in the IMA Desktop to create their individual calendars, and clients must be registered in the system before they can have scheduled appointments.

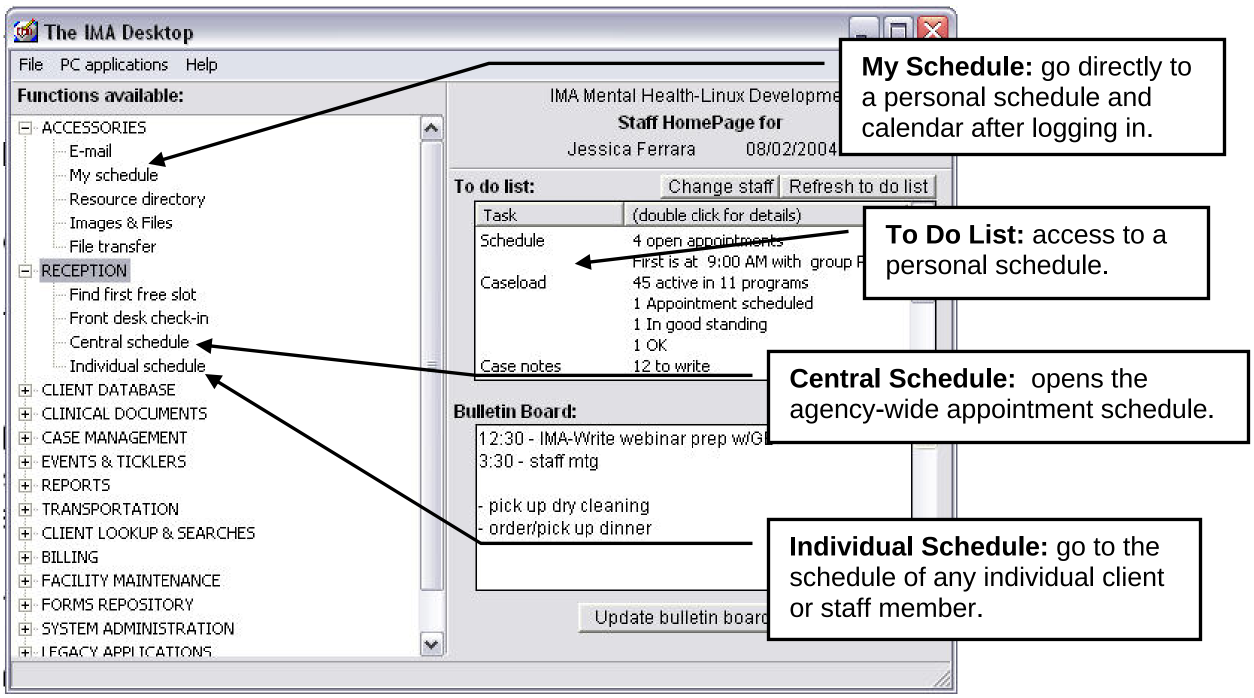
The Agency Profile, which defines the activities that can be scheduled, the fees associated with some of them, and the programs and groups offered.

Security and Privacy, which identifies service providers, creates records for all computer operators and assigns appropriate rights for each to navigate the system.

Registration, allows maintenance of client records.

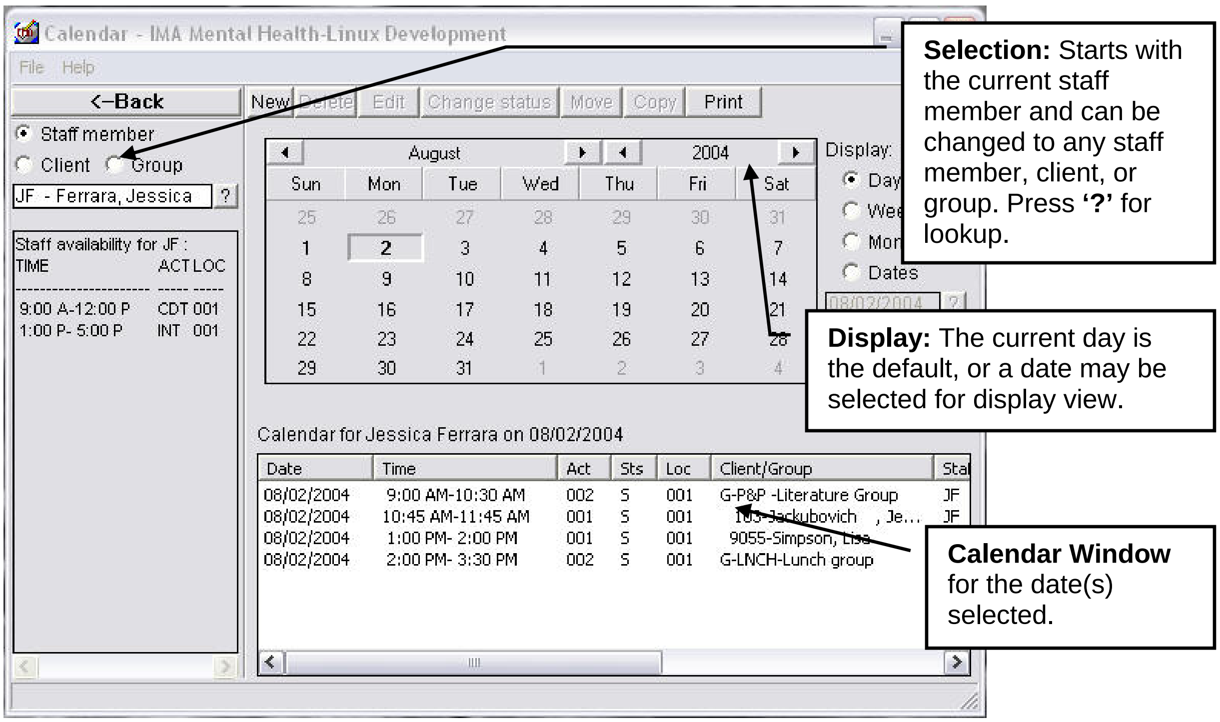
Using the Schedule and Calendar

To make the calendar easier to work with, the IMA Desktop provides more than one avenue of access. The Home Page Portal has pathways to open views of a personal schedule, or the agency-wide schedule:



Depending on the agency-determined set up, the calendar system may start with the schedule of the staff member who has logged in, or with a blank form to let a receptionist select any staff member and manage his or her appointments.

The Calendar
At log in, any staff member may go directly to his or her individual schedule by clicking **'My Schedule.'** The Front Desk staff must first select an individual staff member to open the same calendar.



Changing the View

The default calendar view starts with the selected staff member, and shows all scheduled appointments for the day. To change the view, select a different staff member, client, or group; choose a different day, or use the **'Display'** buttons to select a different view: **Week, Month, Year**, or **Date Range** if desired. A list of all the appointments for the date(s) selected will appear in the Calendar Window.

To open an appointment: highlight it and double-click.

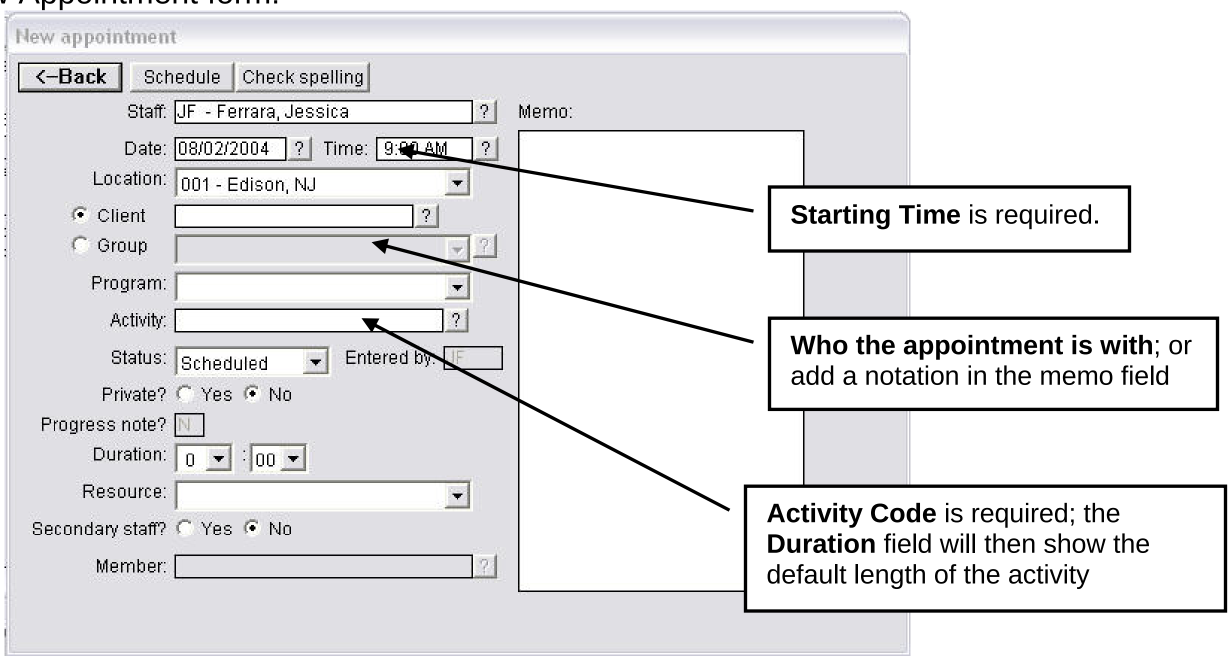
The **Calendar Window** shows the appointments in the current view, and gives details of each, starting with the date and time. Scroll to the right to see all of the fields. The field headings:

Date – the month, day, and year
Time - starting and ending times
Act – activity code
Sts – status code (see discussion below)
Loc – location
Client/Group – client's number and name, or group code and description
Staff – operator code of primary clinician
Progress note – Y=done, N=not done
Entered by – who made last update – operator code
Memo – a note entered in the appointment

Creating a New Appointment

To create a new appointment, click the **'New'** button at the top of the Calendar. Schedule a new appointment for an individual staff member, a group meeting, or an individual client. The default staff member and date will come from the current view on the Calendar screen, but these can be changed when the New Appointment form is opened.

The New Appointment form:



'**Progress note**': **Y**=progress note completed; **N**=not completed.
'**Memo'** is for any optional notes about the appointment.

When the form is complete, the **'Schedule'** button saves the appointment.

Required Fields on the Appointment Screen
Two fields are always required: **Location** and **Activity**.
Location – when the screen opens, this field is automatically filled in; the default is pulled from the staff member's profile.
Activity – this represents what the appointment is for and click the **'?'** to find a code in the Activity Code table. When an activity code is selected, the default length of the activity will show in the **'Duration'** field, this can be changed if necessary. The Activity Code also controls whether it is a billable event.

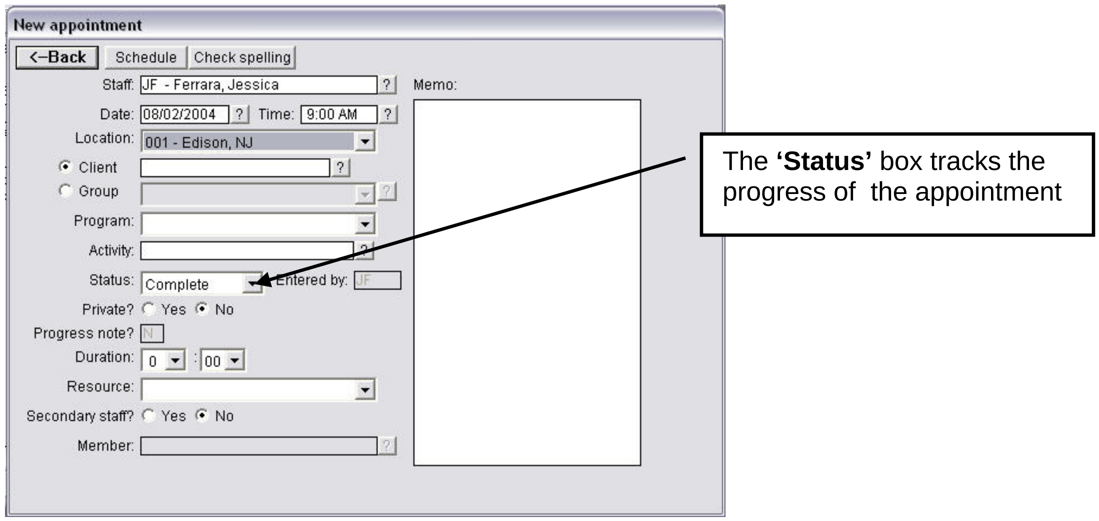
Optional Fields on the Appointment Screen
Some fields are only needed if the event is a client-related appointment:
Client – use the lookup to find their name
Group – predefined groups will appear in the drop-down box, and the **'?'** lookup will display a list of group members (see below for more about groups).
Program – the programs that the selected client is currently enrolled in.
Memo – enter free-form notes describing details about the appointment

There are a number of auxiliary fields:
Private? – controls whether other staff members can view this appointment
Resource – conference rooms, equipment, etc. can have their own schedules.
Secondary staff – select another staff member; the appointment appears in his or her schedule as well.

The Status Field fills in automatically with the current status of the appointment. New appointments will start with **'S'** (scheduled). The status changes automatically based on client check-in and completion of the progress note.

Status Codes:
S – scheduled
I – checked in
U – cancelled
N – no show
C – complete
R – rescheduled

When an appointment is initially made, it is marked as **'S'** (scheduled). When the client arrives, the front desk checks him or her in and the status of the appointment becomes **'I'** (checked in). The status remains **'I'** until a progress note is completed, at which point the status of the appointment is **'C'** (complete). If the scheduled time passes without a check-in, the status can change to **'N'** (no show). A cancellation can change the status to **'U'** (un-scheduled).



Appointment screen showing Appointment Status

Tracking the Appointment's Status

Example #1: visit
- The clinician schedules an appointment
- The client arrives and the front desk notes that the client has *checked in*
- The clinician now has a 'to-do' item to finish: writing the progress note
- The clinician writes a progress note, which flags the appointment as *completed*

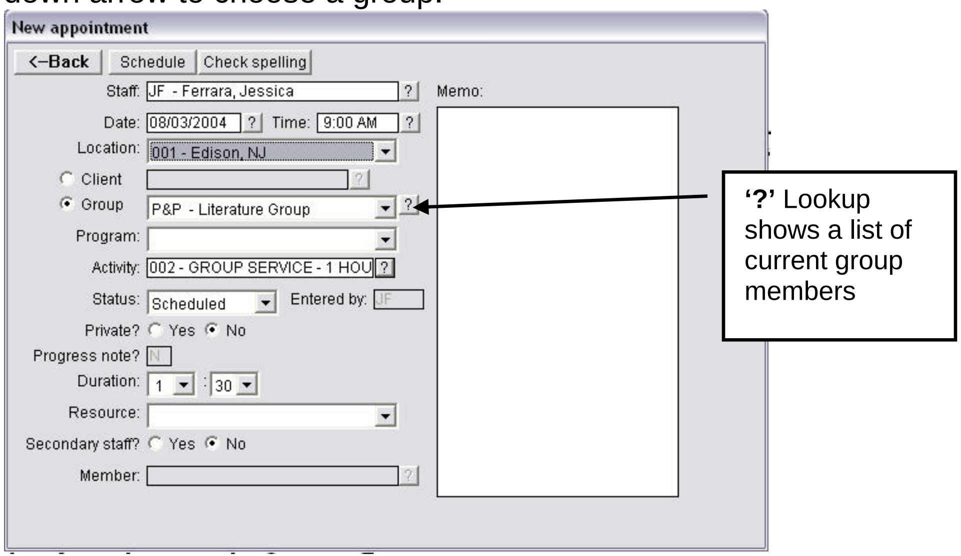
Example #2: reschedule
- The clinician schedules an appointment
- The client calls to change the appointment; the front desk marks '*re-scheduled*'
- The appointment appears in the clinician's schedule at a new day and time

Example #3: cancellation
- The front desk staff schedule the client appointment
- The clinician receives a call from the client; the appointment is *cancelled*
- The appointment no longer appears on the front desk schedule

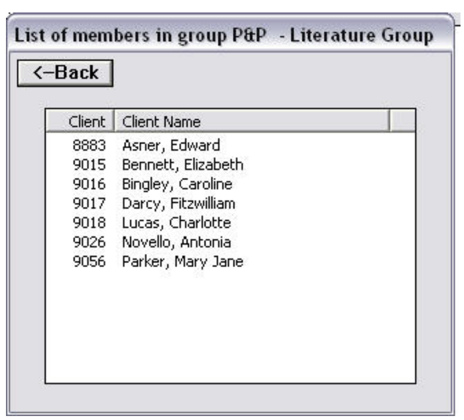
Scheduling Group Meetings

Scheduling appointments for group meetings follows the same procedure as creating individual appointments. A group meeting creates appointments for each of the members of the group.

To create an appointment for a group meeting:
On the 'New appointment' screen, click **'Group'**.
Click the pull-down arrow to choose a group.



To the right of the Group's name, click **'?'** for a quick lookup of current group members:



Managing Appointments

After a new appointment is created, it remains in the calendar at its scheduled time until it is **completed**, **rescheduled**, **cancelled**, **deleted**, or **edited**.

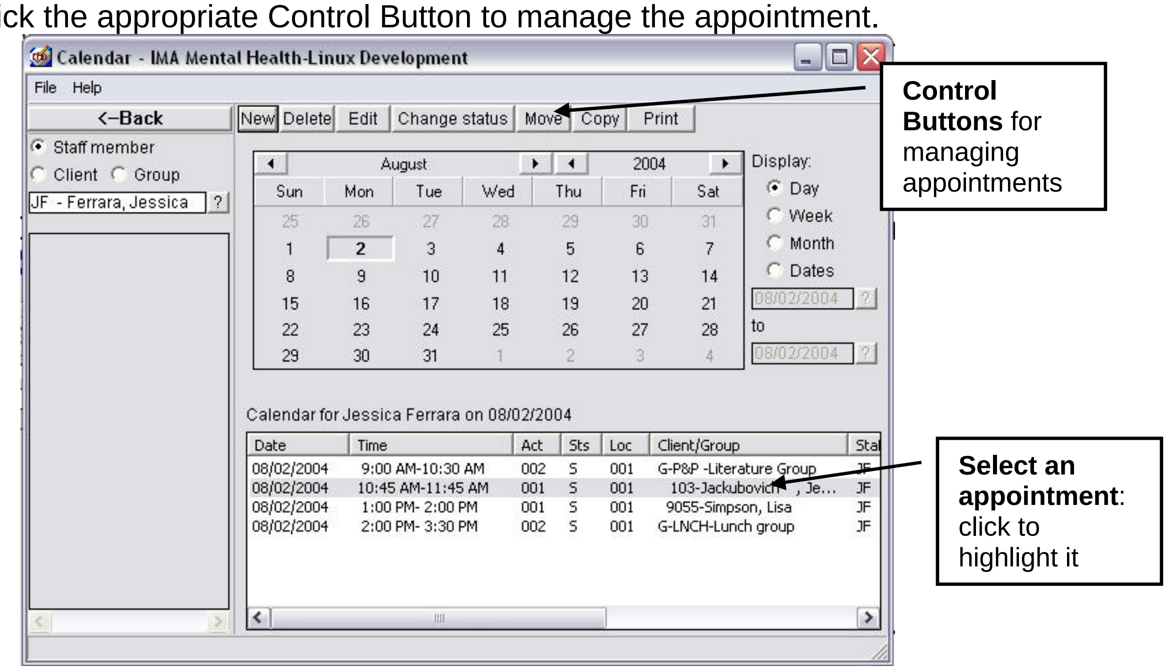
Activating the Calendar Controls
First, open an individual calendar:

> Select an **individual staff member**, **client,** or **group**
> Select a view: **Day** (the default), **Week, Month**, or **specific Dates**.
> Appointments for the selected view appear in the Calendar List Window.

Then, Click on an appointment in the Calendar List Window to select it.

> When the appointment is highlighted, the **Delete, Edit, Change Status, Move,** and **Copy** Control Buttons at the top of the window now apply to the selected appointment (the **New** and **Print** buttons stay active regardless of what is selected).

Next, Click the appropriate Control Button to manage the appointment.

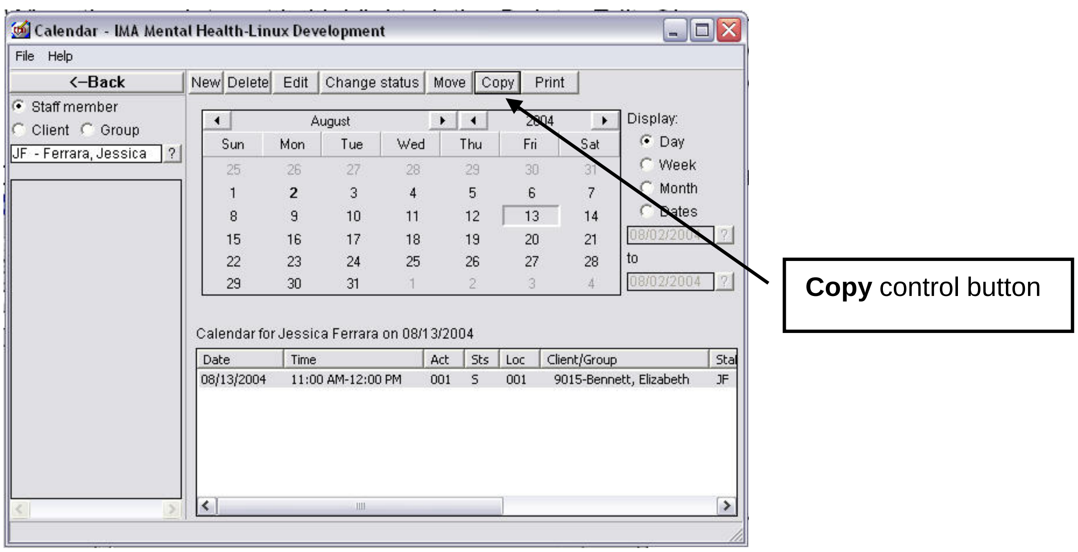


What the Control Buttons do
These buttons apply to the selected appointment:
Delete – erases the selected appointment or appointments (control & click)
Edit – opens the selected appointment to change any details
Change status – modifies status of the selected appointment

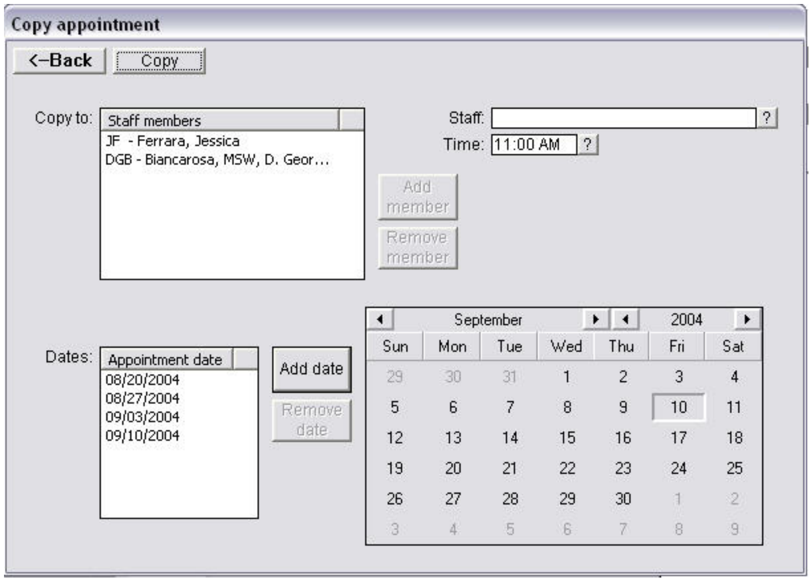
Move – reschedules the selected appointment to a different day and/or time, with same or different staff
Copy – leaves this appointment as is, but duplicates it at a new date and/or time, (useful for recurring visits)

These buttons work regardless of the appointment:
New – opens the new appointment form (default is for the current staff member)
Print – sends to a printer or to a computer file the full schedule for the appointments that are selected. The default is a **single day**, but can be changed to display a **week**, **month**, or **other date range.**

Regular appointments
When an appointment is for a session or group that meets regularly. The **Copy** function may then be used to duplicate the appointment and schedule subsequent meetings.



Highlight an appointment in the lower window, then click the **Copy** control button to create a recurring meeting:



Click '**Add date'** after indicating specific calendar entries**.** The newly scheduled appointments will appear in the Dates window. To delete a meeting date, highlight it and click '**Remove date.**'

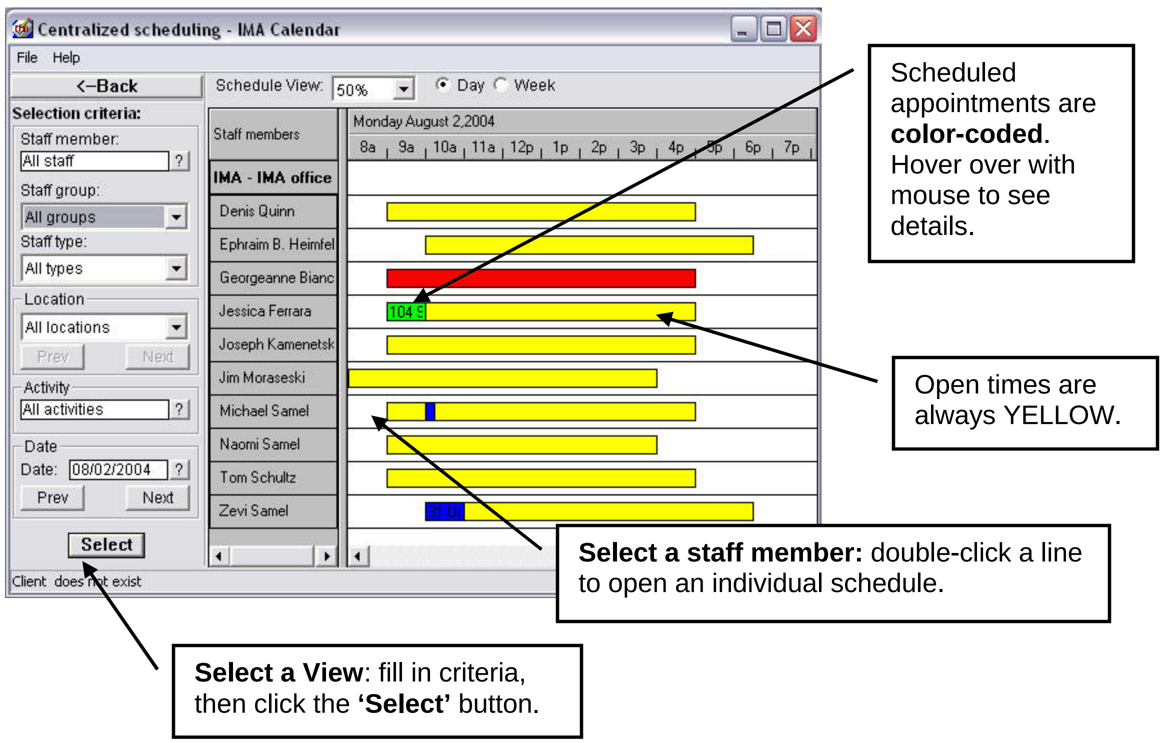
At least one staff member must be scheduled. Click '**Add member**' to copy the appointment to another person's schedule. To remove staff, highlight their name and click '**Remove member**'.

When done, click '**Copy**' to confirm and create the appointments.

Central Schedule

The Central Schedule function is an overview of the entire calendar. There is a clear display of which appointment slots are filled or open, and can be zoomed in on for a closeup, to add or change appointments, and then zoom back out to the global view.

To access this view:
| [-] RECEPTION
| ->Central schedule

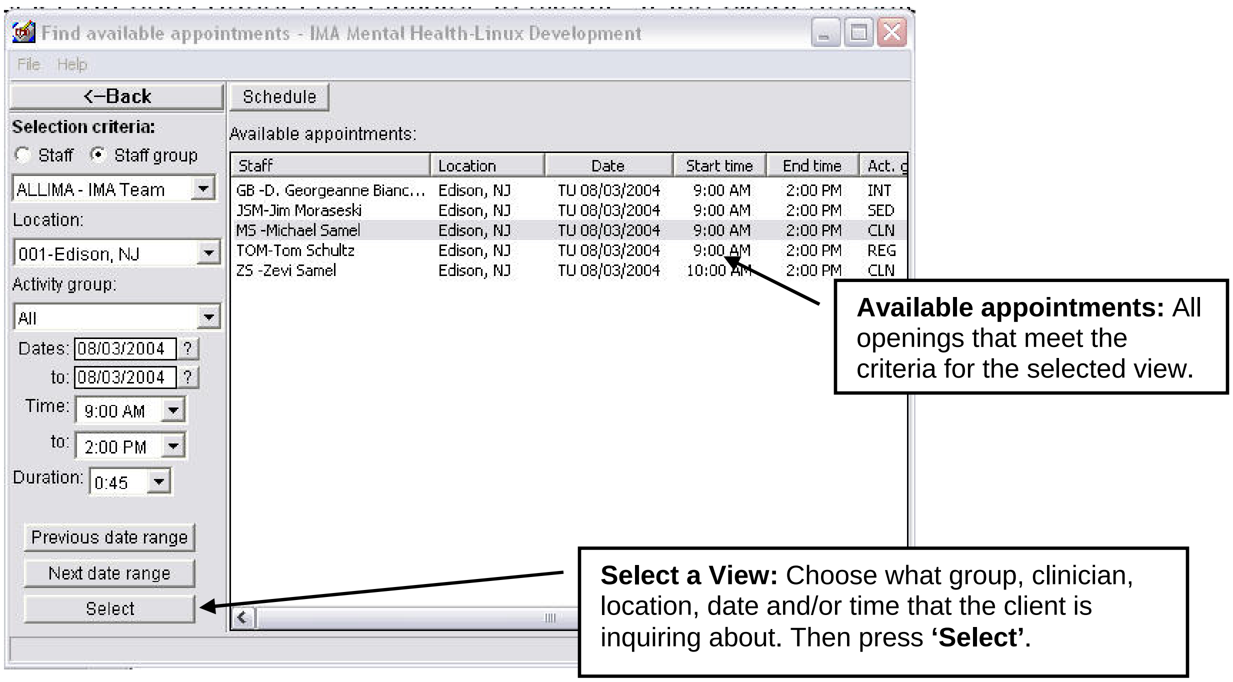


Different color codes can be defined for each kind of scheduled activity when the activity code definitions are managed.

Find first free slot

This function scans the calendar for available appointment times allowing the front desk staff to suggest possibilities to clients. If the client accepts an appointment, the program then opens the **'New Appointment'** screen to book the time.

| [-] RECEPTION
| -> Find first free time slot



If one of the openings is satisfactory, highlight that line and click **'Schedule'**, or double-click it. This opens the individual schedule for the staff member chosen to create a new appointment for the date, time, client, and activity.

Printing Schedules, Rosters, and Reports

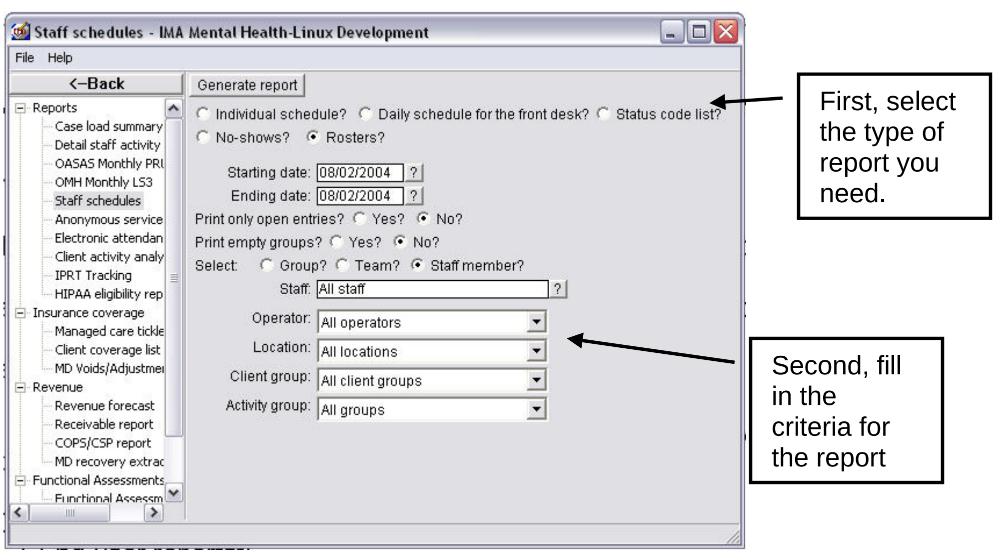
Once the schedule is active, reports can be generated.

- For the front desk, print out the daily schedule for a particular location
- For an individual clinician, list the week's appointments to identify open times
- For client attendance taking, print rosters of groups with signature lines

| [-] REPORTS
| → End-user reports

A screen showing a second Reports cascading menu will appear. Select:

| [-] Reports
| → Staff schedules



Finally, click **'Generate report'** to produce documents that meet criteria.

Administering the Schedule Function

1. Staff Scheduling Targets

Define ‘Staff Targets’ so that a staff member’s time allocation appears on the central schedule. The **‘first free slot’** function can then be used to fill his or her schedule.

To show a staff member’s availability on the central schedule, there are two steps:

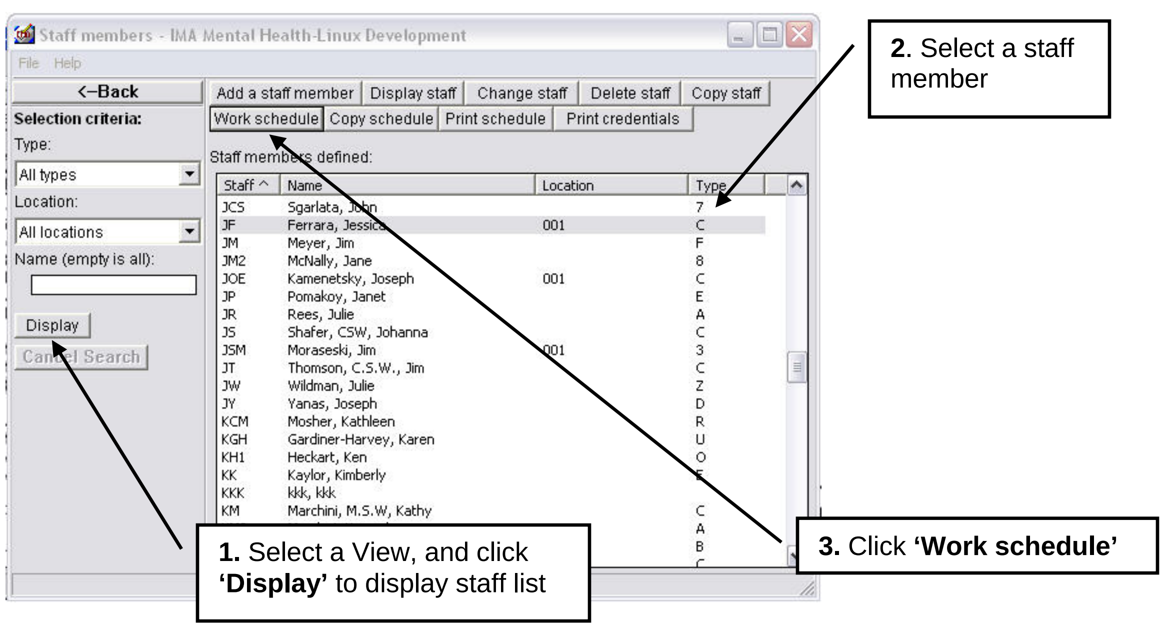
1. In the Activity Code setup, create **‘activity groups’** such as evaluation, intake, emergency service, open time, etc.

2. When a staff person is available for an activity, add a **‘Staff Target’** to the staff member’s record.

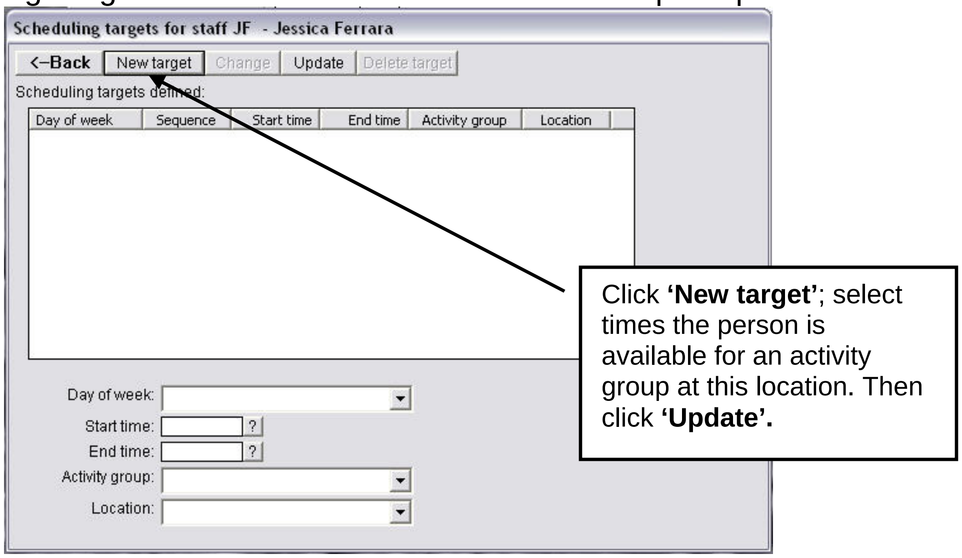
The normal workday may be defined as an activity, and then a staff target added to each staff member that displays when they are expected to be at work.

How to add a Staff Target

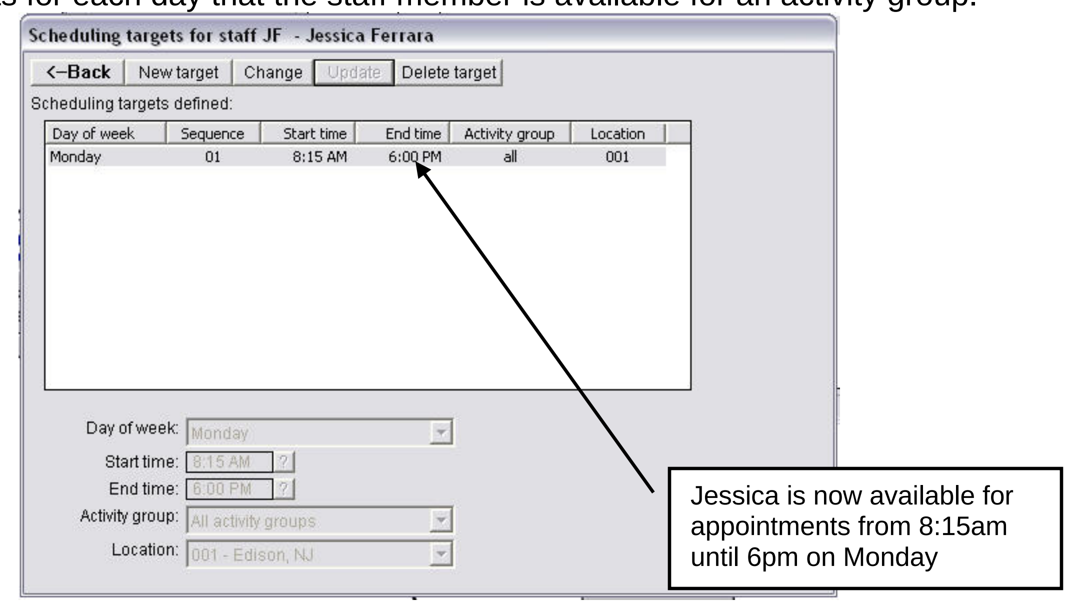
| [-] SYSTEM ADMINISTRATION
| →Staff maintenance



The 'Scheduling Targets' screen for that staff member will open up:



Add targets for each day that the staff member is available for an activity group.



The 'scheduling targets' section of each staff member's record should be filled in with his or her days and scheduled hours of work, which opens up availability for scheduling.

2. Security

A shared calendar system can bring tremendous advantages to agency management. However, it may not be desirable to allow all staff members to have access to all calendars. Security features may be turned on or off as needed.

Divisional Security - with this option client identities are protected and an information barrier between areas of an agency that should not share information is created. If a client is assigned to a division to which the user lacks privileges, they see only '**client**' instead of the person's name.

Access Privileges – the administrator can restrict staff rights by changing the 'permissions' in their operator record.

> **+A4 RO** - gives 'read-only' access to all calendars, disabling the ability to modify any schedules.
> **'+RW'** - grants the rights to modify one's own calendar, but nobody else's.
> **'+RWXXX'** – where 'XXX' is a staff member's operator code, grants rights to manage the calendar of that staff member