

The IMA Desktop Implementation Guide

Appointment Schedule and Calendar

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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.

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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.

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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:

The screenshot shows the IMA Desktop application window. On the left is a navigation pane with a tree view under 'Functions available:'. The main area displays a 'Staff HomePage for Jessica Ferrara' with a 'To do list' table and a 'Bulletin Board' section. Five callout boxes with arrows point to specific elements: 'My Schedule' points to 'My schedule' in the navigation pane; 'To Do List' points to the 'Schedule' row in the 'To do list' table; 'Central Schedule' points to 'Central schedule' in the navigation pane; 'Individual Schedule' points to 'Individual schedule' in the navigation pane; and another 'Individual Schedule' callout points to the 'Schedule' row in the 'To do list' table.

Task	(double click for details)
Schedule	4 open appointments First is at 9:00 AM with group P
Caseload	45 active in 11 programs 1 Appointment scheduled 1 In good standing 1 OK
Case notes	12 to write

My Schedule: go directly to a personal schedule and calendar after logging in.

To Do List: access to a personal schedule.

Central Schedule: opens the agency-wide appointment schedule.

Individual Schedule: go to the schedule of any individual client or staff member.

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.

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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.

Selection: Starts with the current staff member and can be changed to any staff member, client, or group. Press '?' for lookup.

Display: The current day is the default, or a date may be selected for display view.

Calendar Window for the date(s) selected.

Date	Time	Act	Sts	Loc	Client/Group	Sta
08/02/2004	9:00 AM-10:30 AM	002	5	001	G-P&P -Literature Group	JF
08/02/2004	10:45 AM-11:45 AM	001	5	001	105-Jackubovich , Je...	JF
08/02/2004	1:00 PM- 2:00 PM	001	5	001	9055-Simpson, Lisa	
08/02/2004	2:00 PM- 3:30 PM	002	5	001	G-LNCH-Lunch group	

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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

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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:

The screenshot shows the 'New appointment' form with the following fields and callouts:

- Starting Time is required.** (Callout pointing to the Time field)
- Who the appointment is with; or add a notation in the memo field** (Callout pointing to the Client/Group selection and Memo field)
- Activity Code is required; the Duration field will then show the default length of the activity** (Callout pointing to the Activity and Duration fields)

Form fields include: Staff (JF - Ferrara, Jessica), Date (08/02/2004), Time (9:00 AM), Location (001 - Edison, NJ), Client/Group selection, Program, Activity, Status (Scheduled), Entered by (JF), Private? (Yes/No), Progress note? (N), Duration (0:00), Resource, Secondary staff? (Yes/No), and Member.

'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.

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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).

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The screenshot shows a 'New appointment' window with the following fields and values:

- Staff: JF - Ferrara, Jessica
- Date: 08/02/2004
- Time: 9:00 AM
- Location: 001 - Edison, NJ
- Client/Group: Client (selected)
- Program: [Empty]
- Activity: [Empty]
- Status: Complete
- Entered by: JF
- Private?: No
- Progress note?: [Empty]
- Duration: 0:00
- Resource: [Empty]
- Secondary staff?: No
- Member: [Empty]

A callout box points to the 'Status' dropdown menu with the text: 'The 'Status' box tracks the progress of the appointment'.

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

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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.

The screenshot shows the 'New appointment' window. The 'Group' dropdown menu is selected, and a callout box points to the '?' icon next to the dropdown arrow. The callout box contains the text: '? Lookup shows a list of current group members'.

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

The screenshot shows the 'List of members in group P&P - Literature Group' window. It contains a table with the following data:

Client	Client Name
8883	Asner, Edward
9015	Bennett, Elizabeth
9016	Bingley, Caroline
9017	Darcy, Fitzwilliam
9018	Lucas, Charlotte
9026	Novello, Antonia
9056	Parker, Mary Jane

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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.

The screenshot shows the 'Calendar - IMA Mental Health-Linux Development' window. At the top, there is a menu bar with 'File' and 'Help'. Below it is a toolbar with buttons: '<-Back', 'New', 'Delete', 'Edit', 'Change status', 'Move', 'Copy', and 'Print'. The 'Move' button is highlighted with a callout box that says 'Control Buttons for managing appointments'. The main area is divided into two sections. The top section is a calendar grid for August 2004, with the date '2' highlighted. The bottom section is a table titled 'Calendar for Jessica Ferrara on 08/02/2004'. The table has columns: Date, Time, Act, Sts, Loc, Client/Group, and Sta. The first row is selected, and a callout box points to it with the text 'Select an appointment: click to highlight it'.

Date	Time	Act	Sts	Loc	Client/Group	Sta
08/02/2004	9:00 AM-10:30 AM	002	S	001	G-P&P - Literature Group	JF
08/02/2004	10:45 AM-11:45 AM	001	S	001	103-Jackbovich, Je...	JF
08/02/2004	1:00 PM- 2:00 PM	001	S	001	9055-Simpson, Lisa	JF
08/02/2004	2:00 PM- 3:30 PM	002	S	001	G-LNCH-Lunch group	JF

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

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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)

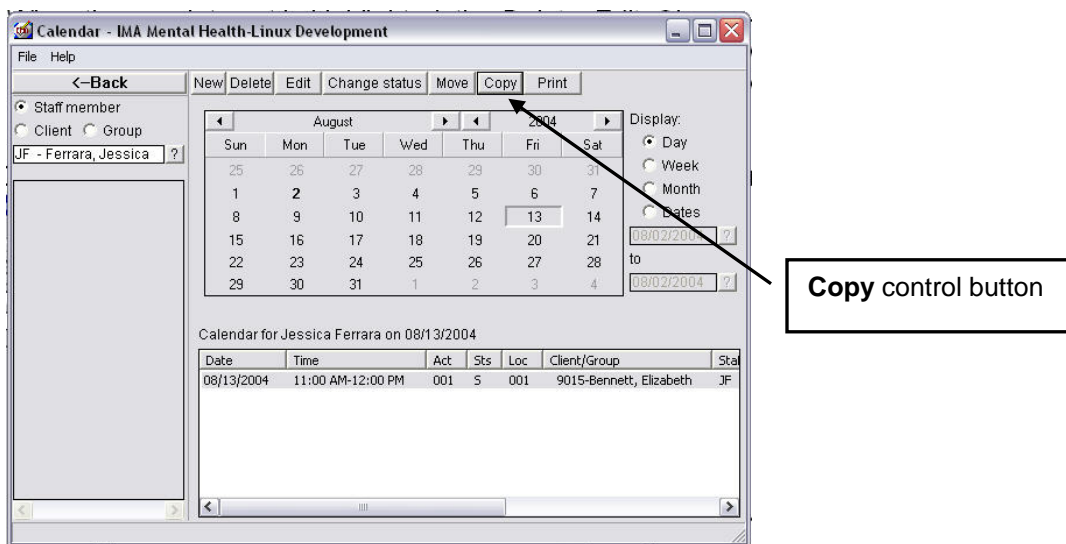
These buttons work regardless of the appointment:

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:

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Copy appointment

<-Back Copy

Copy to: Staff members
JF - Ferrara, Jessica
DGB - Biancarosa, MSW, D. Geor...

Staff: [?]
Time: 11:00 AM [?]

Add member
Remove member

Dates: Appointment date
08/20/2004
08/27/2004
09/03/2004
09/10/2004

Add date
Remove date

September							2004
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
29	30	31	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	1	2	
3	4	5	6	7	8	9	

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.

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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

Centralized scheduling - IMA Calendar

File Help

<-Back Schedule View: 50% Day Week

Selection criteria:

Staff member: All staff ?

Staff group: All groups

Staff type: All types

Location: All locations

Activity: All activities ?

Date: 08/02/2004 ?

Select

Client does not exist

Monday August 2, 2004

8a 9a 10a 11a 12p 1p 2p 3p 4p 5p 6p 7p

IMA - IMA office

Denis Quinn

Ephraim B. Heimfel

Georgeanne Bianco

Jessica Ferrara

Joseph Kamenetsk

Jim Moraseski

Michael Samel

Naomi Samel

Tom Schultz

Zevi Samel

Scheduled appointments are **color-coded**. Hover over with mouse to see details.

Open times are always **YELLOW**.

Select a **staff member**: double-click a line to open an individual schedule.

Select a **View**: fill in criteria, then click the '**Select**' button.

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

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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

The screenshot shows a window titled "Find available appointments - IMA Mental Health-Linux Development". On the left, under "Selection criteria", there are dropdown menus for "Staff" (set to "ALLIMA - IMA Team"), "Location" (set to "001-Edison, NJ"), and "Activity group" (set to "All"). There are also input fields for "Dates" (08/03/2004 to 08/03/2004), "Time" (9:00 AM to 2:00 PM), and "Duration" (0:45). Buttons for "Previous date range", "Next date range", and "Select" are at the bottom left. On the right, under "Available appointments:", there is a table with columns: Staff, Location, Date, Start time, End time, and Act. d.

Staff	Location	Date	Start time	End time	Act. d
GB -D. Georgeanne Bianc...	Edison, NJ	TU 08/03/2004	9:00 AM	2:00 PM	INT
JSM-Jim Moraseski	Edison, NJ	TU 08/03/2004	9:00 AM	2:00 PM	SED
MS -Michael Samel	Edison, NJ	TU 08/03/2004	9:00 AM	2:00 PM	CLN
TOM-Tom Schultz	Edison, NJ	TU 08/03/2004	9:00 AM	2:00 PM	REG
ZS -Zevi Samel	Edison, NJ	TU 08/03/2004	10:00 AM	2:00 PM	CLN

Two callout boxes are present: one pointing to the "Select" button with the text "Select a View: Choose what group, clinician, location, date and/or time that the client is inquiring about. Then press 'Select'." and another pointing to the table with the text "Available appointments: All openings that meet the criteria for the selected view."

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.

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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

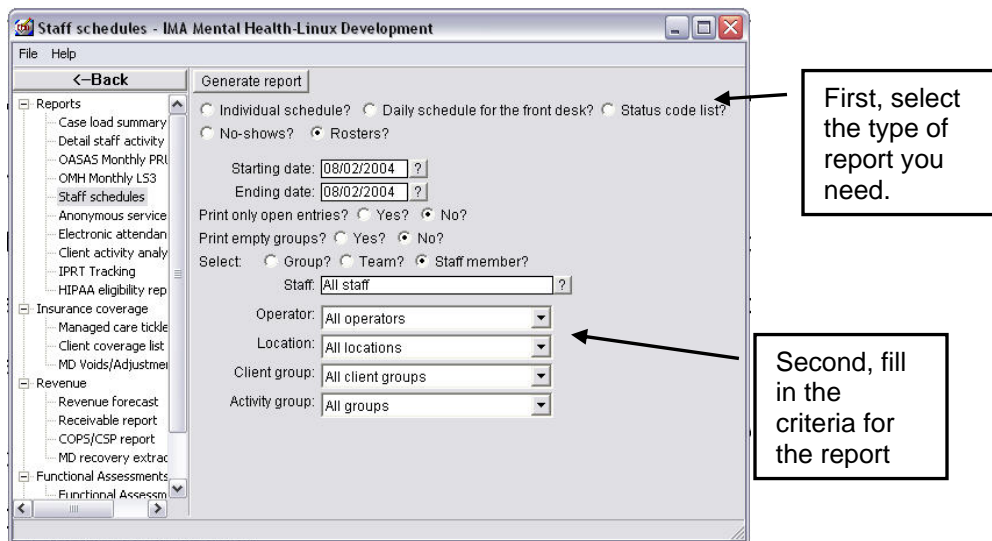
| [-] REPORTS

| → 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.

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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.

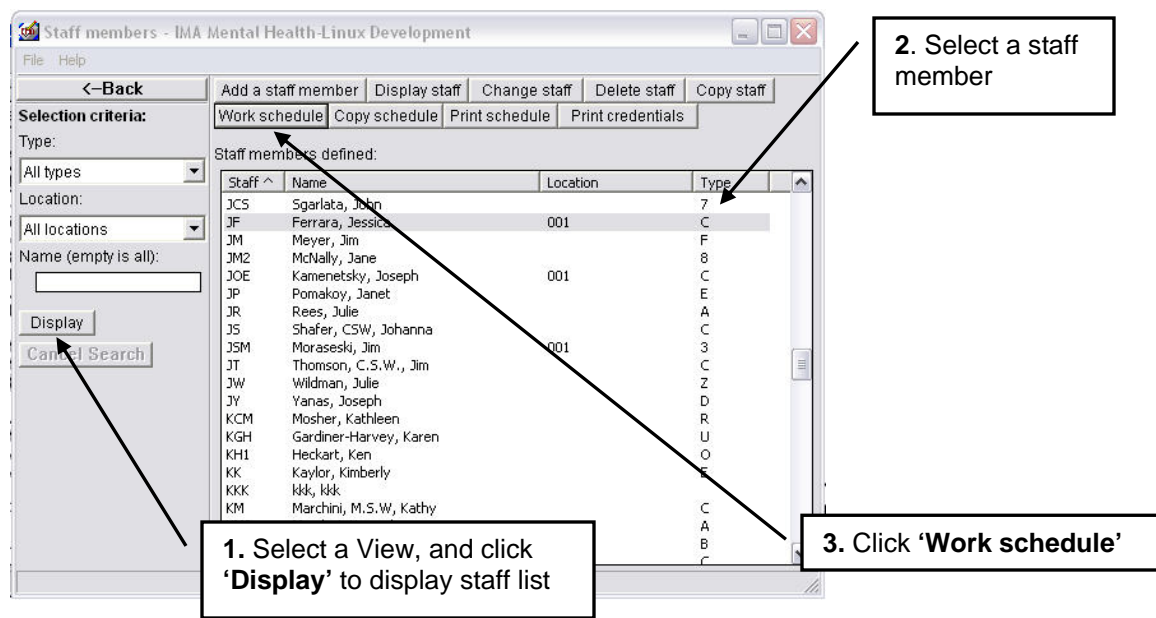
To show a staff member's availability on the central schedule, there are two steps:

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



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

Scheduling targets for staff JF - Jessica Ferrara

<-Back New target Change Update Delete target

Scheduling targets defined:

Day of week	Sequence	Start time	End time	Activity group	Location
-------------	----------	------------	----------	----------------	----------

Day of week:

Start time: ?

End time: ?

Activity group:

Location:

Click 'New target'; select times the person is available for an activity group at this location. Then click 'Update'.

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

Scheduling targets for staff JF - Jessica Ferrara

<-Back New target Change Update Delete target

Scheduling targets defined:

Day of week	Sequence	Start time	End time	Activity group	Location
Monday	01	8:15 AM	6:00 PM	all	001

Day of week:

Start time: ?

End time: ?

Activity group:

Location:

Jessica is now available for appointments from 8:15am until 6pm on Monday

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.

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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