

Appointments Module



User's Manual

Appointments Module

Health District Information System
HDIS (Windows Ver. 4.0)

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Introduction

This program is designed to assist you in organizing a systematic approach to scheduling appointments for your clinics.

Please review the manual carefully to obtain the maximum benefits. Little or no prior computer experience is necessary to operate this program.

About this Manual

*The **Appointment Books** Program is simple to use. The maximum benefit with the least time spent will be obtained if you start at the first page of this manual and follow the directions exactly as you enter the first appointment in your computer.*

Note: For Technical Support, **helpdesk@hdis.org**

Navigation

Whenever you see one  click the left side of your mouse once.

Tab Or **ENTER** to move to next field

Shift **Tab** or **Up Arrow** to go back one field

Editing Keys

Backspace deletes one character left of cursor

Delete

Insert inserting & overwriting modes

When you see a pull-down field, click the arrow to the right to view all your choices.



Using “**Alt**” key and “**Q**” will exit the HDIS program if there is a problem.

Starting HDIS

Microsoft Windows Users



Start



Programs



Health District Info Systems



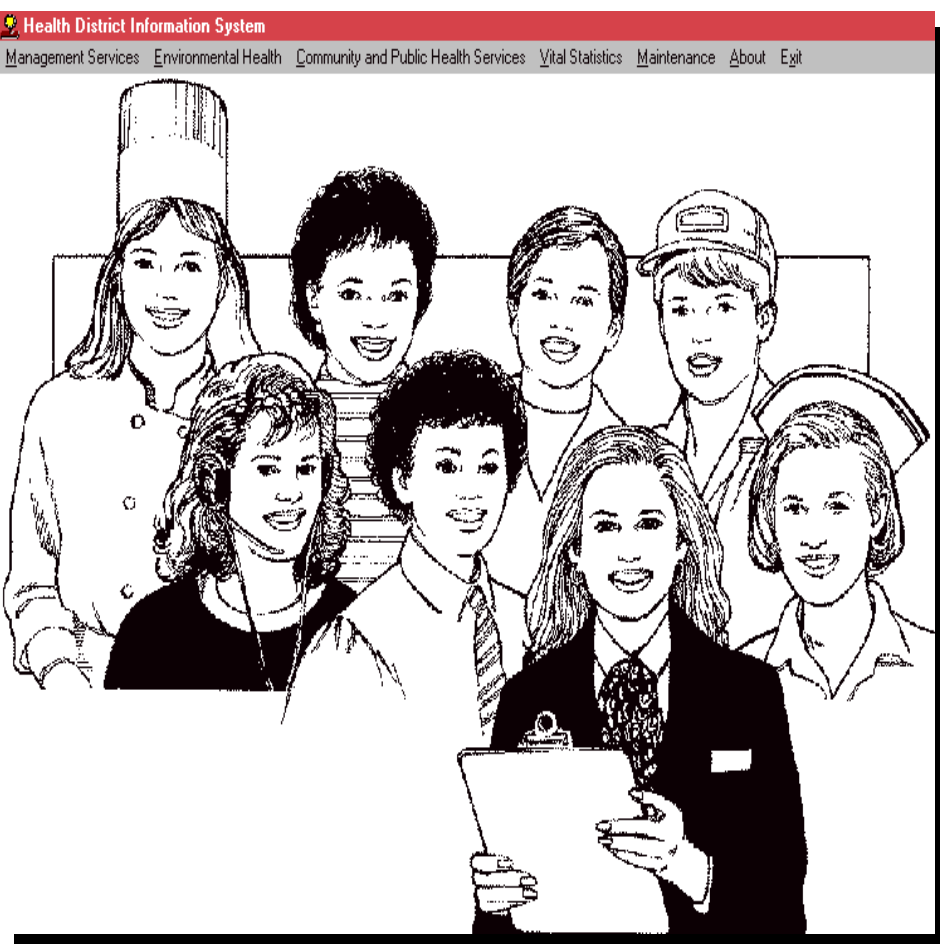
HDIS

HDIS Menu Bar

HDIS (Health District Information System)

has several different modules designed to assist your Health Department in its day-to-day operations.

The **Appointment Books Program** is a great addition to these modules and helps simplify scheduling appointments.



Appointment Books

To access the **Appointment Books Module**



Community and Public Health Services



Appointment Books

Creating an Appointment Book



Maintenance

Appointment Books

Name	Abbreviation	Module
BOOK A	AAAA	
BOOK B	BBBB	
BOOK C	CCCC	

The “Add/Delete/Modify Appointment Books” window allows you to add the different appointment books that you would like to schedule in. To add an appointment book, simply click “Add” and type the name of the book in the “Name” field, give the book an abbreviation (4 characters) and finally choose which module the book will be used for. When you are finished adding your books, click the “Close” button.

FIELD NAME	DESCRIPTION
Name	Name of appointment book
Abbreviation	Abbreviation of appointment book
Module	
	Buttons
Close	Click to close the Add/Delete/Modify Appointment Books window
Add	Click to add an appointment book to the table
Delete	Click to delete the selected appointment book from the table
Print	Click to print the selected appointment book



Create An Appointment Book

The “Appointment Schedule” window will create the appointment books that you just have added in the “Add/Delete/Modify Appointment Books” window. Enter the year and choose what appointment book month you wish to create. Finally, select which month you wish to create the appointment book. The month that you will select will turn **BLUE**.

FIELD NAME	DESCRIPTION
Year	Year of the Appointment Book
Appointment Book	Appointment book that you wish to create
	Buttons
Select Month	Click on the month you wish to create an appointment book for
Create Book	Click to create the selected appointment book
Close	Click to close the Appointment Schedule window



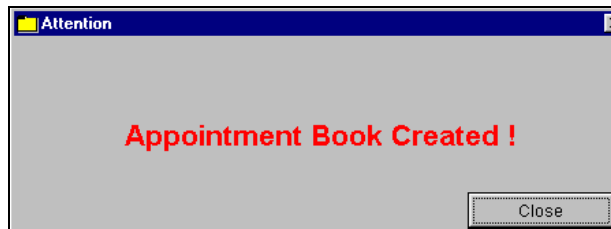
Create Book

The “Create Appointment Times” window allows you to choose the time between scheduled appointments (**Interval**), days that are available for scheduling appointments (**Block Out Days**), and the times that are available for scheduling (**Block Out Times**).

FIELD NAME	DESCRIPTION
Interval	Interval of available appointment times in minutes
	Buttons
Block Out Days	Click on the days where appointments will be able to be scheduled
Block Out Times	Click on the times where appointments will be able to be scheduled, the times with a check in front of them will be blocked out
Create Times	Click to create available appointment times
Close	Click to close the Create Appointment Times window



Create Times



Close

Booking an Appointment



Book/Print an Appointment

This window allows choosing what book that you would like to book appointments in. Simply enter the year and choose the appointment book.

FIELD NAME	DESCRIPTION
Year	Year of the appointment book
Appointment Book	The appointment book you wish to schedule in
	Buttons
Book Appointment	Takes you to the Book Appointment window
Close	Closes the Appointment Schedule window



Book Appointment

Time	AM/PM	Name	DOB	Age	Service	Street
08:00	AM		//			
08:01	AM		//			
08:02	AM		//			
08:03	AM		//			
08:04	AM		//			
08:05	AM		//			
08:06	AM		//			
08:07	AM		//			
08:08	AM		//			

The “**Book Appointment**” is where you will book your appointments. The upper left hand corner displays what appointment book you are in and the year for that appointment book. The month and day that you are scheduling for will appear in **BLUE**. The days that appear in **BLACK** are other days in the specified month that are available for scheduling. The days that appear in **RED** are the block out days that are unavailable for scheduling.

FIELD NAME	DESCRIPTION
Name	Name of the client
Address	Address of client
DOB	Client's date of birth
Age	Age of client
Parent	Name of Client's parent
Phone	Client's phone number
Initials	Optional
Service	Optional
Comment	Optional
	Buttons
NB	Click and it takes you to the next appointment book
PB	Click and it takes you to the previous appointment book
Book Appt.	Click and it books your appointment for the time specified
Delete Appt.*	Right-click and it deletes the selected appointment
Clear Appt.*	Right-click and it clears the selected appointment
Add Appointment	Click and it adds an appointment time
Find in Name Table	Click and you can find a client's name in a table
Clear Name	Click and it clears the client's name
Search Book for Name	Click and it searches the appointment book for the client's name
Print	
Close	Click and it closes the Book Appointment window

Find a Name in the Table



Find in Name Table Button

Last	First	Middle	Suffix	Date of Birth	Sex	SSN
DOE	JOHN			//		
NAPAVER	BRODIE	JOHN		10/04/1980	M	286-80-3626
NAPAVER	LUKE			//		

This window allows you to locate a name that had been previously entered in the HDIS system. However, if the name is not in the table, you are able to add it for later use.

Adding a Name to the Table



Add Name

FIELD NAME	DESCRIPTION
Patient Name and Address	
Last Name	Enter Client's last name
First Name	Enter Client's first name
Middle Name	Enter Client's middle name
Suffix	Enter Client's last name suffix (JR, Sr, I, II, III)
Date of Birth	Enter the Client's date of birth
Age	Enter Client's age as of today (computed by HDIS)
Sex	Enter Client's sex
Mother/Guardian Last	Enter the Client's mother/guardian's last name
Mother/Guardian First	Enter the Client's mother/guardian's first name
Mother/Guardian Middle	Enter the Client's mother/guardian's middle name
Street Number	Enter Client's street number
Street	Enter Client's street name
Street Suffix	Enter Client's street suffix (ROAD, STREET, LANE, ETC)
City	Pull down menu (Note, if this is a new city, you may choose to add it to your pull down menu.)
State	Pull down menu
Zip	Pull down menu (Note, if this is a new zip code, you may choose to add it to your pull down menu.)
Phone	1-999-999-9999
Buttons	
Close	Click to close the "Add Name" window

Book Appointment - BOOK B / 2004

Jan	Feb	Mar	Apr	May	Jun	NB	Name	JOHN M DOE	Find in Name Table	
Jul	Aug	Sep	Oct	Nov	Dec	PB	Address	123 MAIN STREET	Clear Name	
								PARMA, OH 44060	Search Book for Name	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	DOB	01/01/2000	Age	4
		1	2	3	4	5	Parent	DOE, JANE M	Phone	1-440- -
6	7	8	9	10	11	12	Initials		Service	
13	14	15	16	17	18	19	Comment			
20	21	22	23	24	25	26	Book Appt.	Clear Appt*	Print	
27	28	29	30				Delete Appt*	Add Appointment	Close	

Time	AM/PM	Name	DOB	Age	Service	Street
08:10	AM		//			
08:20	AM		//			
08:30	AM		//			
08:40	AM		//			
08:50	AM		//			
09:00	AM		//			
09:10	AM		//			
09:20	AM		//			
09:30	AM		//			

When you are ready to book your appointment and the information on the client is correct, select the time of the appointment you would like to schedule for by simply clicking in the row next to the time you selected. For instance, in this case the appointment for 8:10 am was chosen.



Book Appointment

Book Appointment - BOOK A / 2004

Jan	Feb	Mar	Apr	May	Jun	NB	Name		Find in Name Table	
Jul	Aug	Sep	Oct	Nov	Dec	PB	Address		Clear Name	
									Search Book for Name	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	DOB	//	Age	
		1	2	3	4	5	Parent		Phone	- - -
6	7	8	9	10	11	12	Initials		Service	
13	14	15	16	17	18	19	Comment			
20	21	22	23	24	25	26	Book Appt.	Clear Appt*	Print	
27	28	29	30				Delete Appt*	Add Appointment	Close	

Time	AM/PM	Name	DOB	Age	Service	Street
08:00	AM	DOE, JOHN M	01/01/2000	4		123 MAIN STREET
08:01	AM		//			
08:02	AM		//			
08:03	AM		//			
08:04	AM		//			
08:05	AM		//			
08:06	AM		//			
08:07	AM		//			
08:08	AM		//			

Adding an Appointment



Add Appointment (Double Book)

The screenshot shows a dialog box titled "Add Appointment". It has a blue title bar with a yellow icon on the left and a close button on the right. The main area is light gray and contains four input fields: "Time" with the value "08:01", "AM/PM" with a dropdown menu showing "AM", "# of Appointments to Add" with a spinner box showing "1", and "Minutes Between Appointments" with a spinner box showing "1". At the bottom right, there are two buttons: "Add" and "Close".

The “Add Appointment” button allows you to add additional appointment times in your appointment book. For example, instead of having just one appointment at 8:10 am, you can add a second one at 8:10 am. In essence, you will now have two available appointments at 8:10 am.

FIELD NAME	DESCRIPTION
Time	Time of the appointment you wish to add
AM/PM	Choose AM/PM
# of Appointments to Add	Allows you to choose the number of appointments you wish to add
Minutes Between Appointments	Allows you to choose the number of minutes between appointments
Buttons	
Add	Click to add your appointment(s)
Close	Click to close the Add Appointments window

Search Book For Appointments



Search Book For Name

The screenshot shows a dialog box titled "Search for Appointments". It has a blue title bar with a yellow icon on the left and a close button on the right. The main area is light gray and contains a table with five columns: "Name", "Birth", "Book", "Date", and "Time". The first row of the table contains the following data: "DOE, JOHN M", "01/01/2000", "BOOK A", "06/08/2004", and "08:00 AM". There are four empty rows below the first row. At the bottom right, there is a "Close" button.

This function allows you to search your appointment book for a name that has already been scheduled.

Printing an Appointment Schedule



Print

Form:

- Print Daily
- Print Daily (all times)
- Print Mailing Labels
- Print Immunization Record

Output to:

- Preview
- Print

OK Close

The print window allows you to print three different forms as well as an immunization record for the patient. Simply choose which operation that you would like to print and click **OK**. To preview your print, click the **“Preview”** option.

FIELD NAME	DESCRIPTION
Print Daily	
Print Daily (all times)	
Print Mailing Labels	Click to print mailing labels for your clients
Print Immunization Record	Click to print an immunization record for your client
Preview	Click to preview what you have chosen to print
Print	Click to print your selection
	Buttons
OK	Click OK when you are ready to print or preview your selection
Close	Click to close the Print window

Export Appointment Books

This function allows you to export your appointment books to a laptop if you wish to book appointments at locations outside of the office such as satellite clinics. When you are completed and return to the office, there is a function that allows you to import the appointment book(s) back onto the system.



Maintenance



Export/Import Appointment Books



Export Appointment Books to Diskette or Network

Select	Name of Book	Year
<input checked="" type="checkbox"/>	BOOK A	2004
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Export Appointments to Diskette
 Import Appointments From Diskette

OK Cancel

FIELD NAME	DESCRIPTION
Select	Click on this box if you wish to either export or import appointment books
Name of Book	Name of the appointment book
Year	Year of the appointment book
Export Appointment Books to Diskette	Exports the selected appointment books to a diskette
Import Appointment Books From Diskette	Imports the selected appointment books from a diskette
	Buttons
OK	
Close	Closes the Export/Import Appointment Books window

Import Appointment Books



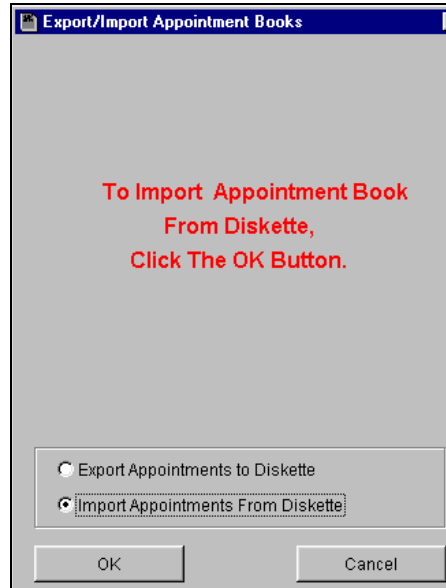
Maintenance



Export/Import Appointment Books



Import Appointment Books From Diskette or Network



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