



**Client Appointment Books
Appointment Books**



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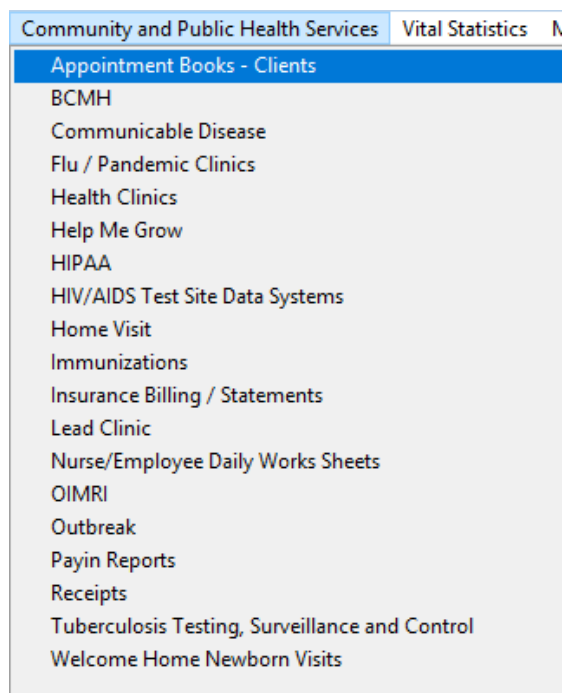
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Chapter 1: Getting Started

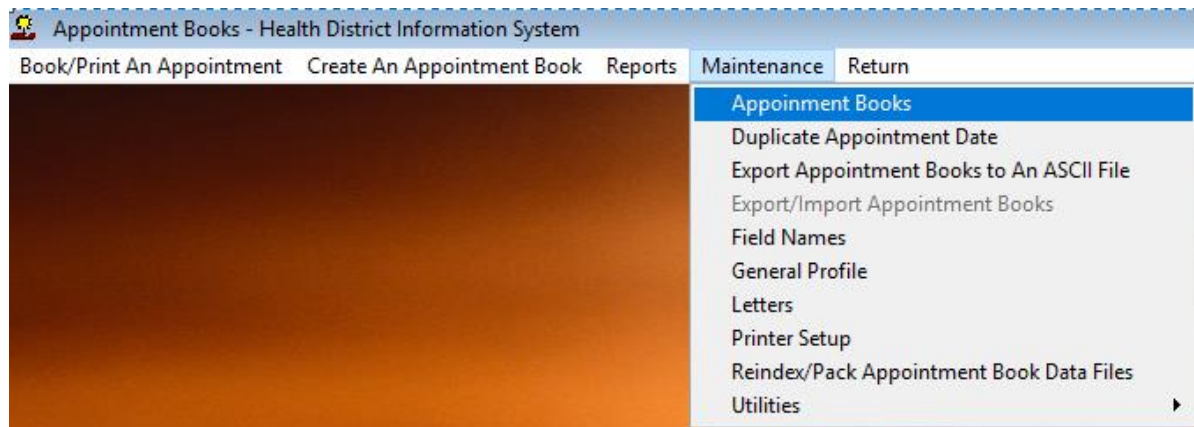
Once **Client Appointment Books** is installed there are some things that need to be set up to make sure the module works correctly.

Making sure the module is set up properly at the beginning helps ensure a smooth transition for getting used to the new section.

Navigate to: **Community and Public Health Services -> Appointment Books - Clients**



The area of focus will be under the **Maintenance** Tab



Refer to the [Maintenance Chapter](#) in this manual for guidelines.

Appointment Books

Maintenance	Return
Appointment Books	
Duplicate Appointment Date	
Export Appointment Books to An ASCII File	
Export/Import Appointment Books	
Field Names	
General Profile	
Letters	
Printer Setup	
Reindex/Pack Appointment Book Data Files	
Utilities	

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This box is where you **Add/Delete/Modify** the Appointment Books:

- Fill in the Name field
- Fill in the Abbreviation field
- Select the Module

Buttons:

Close

– Close this box

Add

– Add a new Name and Initials

Delete

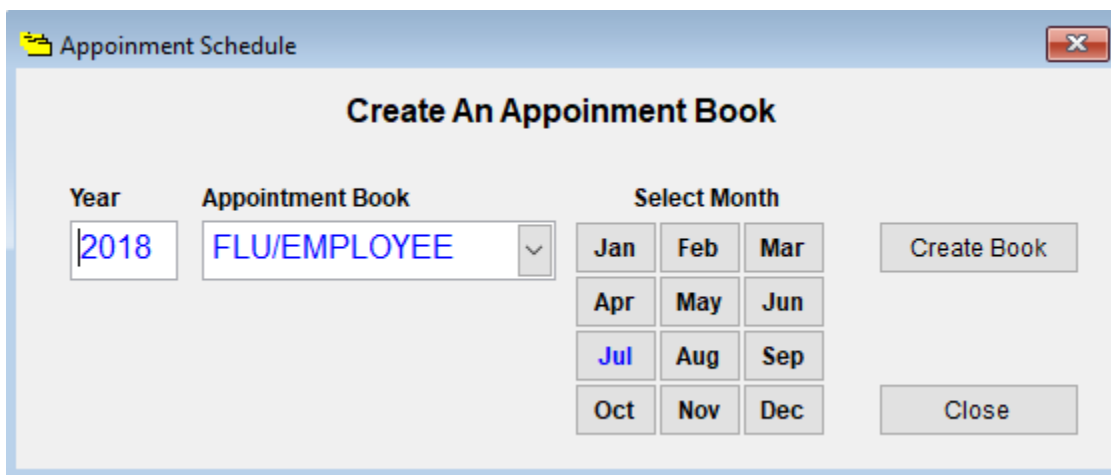
– Deletes the highlighted Appointment Book

Print

– Prints a list of the Appointment Books

Duplicate Appointment Date

Once on the **Maintenance** Tab, click **Duplicate Appointment Date**:



The screenshot shows a window titled "Appointment Schedule" with a close button in the top right corner. Inside the window, the title "Create An Appointment Book" is centered. Below the title, there are three main sections: "Year", "Appointment Book", and "Select Month". The "Year" section has a text box containing "2018". The "Appointment Book" section has a dropdown menu with "FLU/EMPLOYEE" selected. The "Select Month" section has a grid of buttons for the months: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, and Dec. To the right of the month grid are two buttons: "Create Book" and "Close".

Select the **Year**, **Appointment Book**, Select **Month**, and click **Create Book** to Duplicate Appointment Date.

After clicking **Create Book** a new window will pop up:

July, 2018

Date To Copy
//

Copy Times To These Days

Sun	Mon	Tue	Wed	Thu	Fri	Sat
X	X	X	X	X	X	X
X	X	X	X	X	X	X
X	X	X	X	X	X	X
X	X	X	X	X	X	X
X	X	X				

Copy Times Close

Enter the **Date To Copy** and select the **Days** you want to copy.

After selecting your date and fields, click **Copy Times**.

Appointment Book Created !

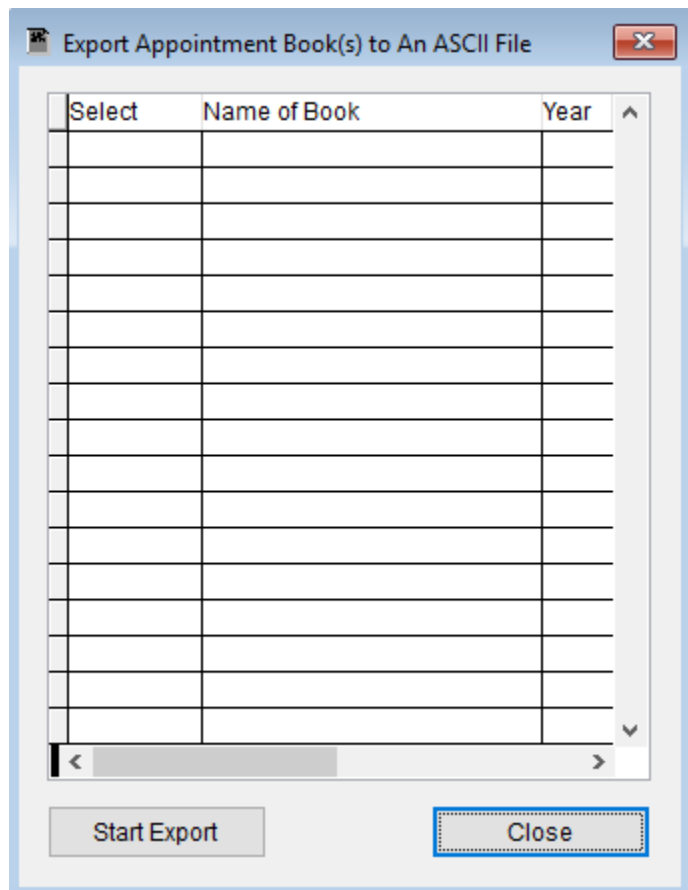
Close

Export Appointment Books to an ASCII File

Navigate to: **Maintenance -> Export Appointment Books to an ASCII File**

After clicking the link, this process will allow you to export appointment books to an ASCII file.

Click the **Start Export** button to begin exporting.



Export Appointment Book(s) to An ASCII File

Select	Name of Book	Year
<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"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Start Export Close

Contact **BGI** if help is further needed.

Field Names

Once on the **Maintenance** Tab, click **Field Names**:

This is the list of Field Names used inside the Appointment Books module

You can use these Field Names inside the Letters section to fill in information relating to the letter.

Data Base Field Names for Appointment Scheduling Record		
Field Name	Data Base Field Name	
AM / PM	ASM.AM_PM	
AGE	ASM.AGE	
CARD	ASM.CARD_Y	
CARD	ASM.CARD_NA	
CITY,STATE,ZIP	ASM.CSZ	
COMMENT	ASM.COMMENT	
CONTANCT	ASM.CONTRACT	
DATE OF BIRTH	ASM.BIRTH	
DATEBASE	ASM.DATABASE	
DAY	ASM.DAY	
FEMALE	ASM.FEMALE	
FULL	ASM.FULL	
ID #	ASM.ID	
INFORMATION	ASM.INFOR_Y	
INFORMATION	ASM.INFOR_NA	
INITIALS	ASM.INITIALS	
MALE	ASM.MALE	
MEDICAID	ASM.MEDICAID	
MILITARY TIME	ASM.MILITARY	
MINIMUM	ASM.MIN	
MONTH	ASM.MONTH	
NAME	ASM.NAME	
NEW	ASM.NEW	
NO PAY	ASM.NO_PAY	
NO SHOW	ASM.NO_SHOW	
PARENT	ASM.PARENT	
PARTIAL PAY	ASM.PARTIAL	
PAY	ASM.PAY_Y	
PAY	ASM.PAY_NA	
PHONE	ASM.PHONE	
PREGNANT	ASM.PREG_Y	
PREGNANT	ASM.PREG_NA	
PROOF	ASM.PROOF_Y	

General Profile

Once on the **Maintenance** Tab, click **General Profile**:

This opens up the **General Profile** where you can make changes across modules.

The **General Profile** also allows you to fill out the basic information regarding your health department.

General Profile

Demographics | **General** | Management | Environmental | Community & Public Health Services | Vital

* Health Department: BGI HD

City: Middleburg Heights

State: OH

Zip: 44130

County: generic

* Phone #s: 1-440-891-9100

* FAX #: 1-440-891-9458

Federal Tax ID: ADFA

Commissioner: Doc Darrell

Client/Server Location: M:\HDIS\DATA

Email: ADFASD

Make Checks Payable to: ADSF

View Archives: ☐ 2017 ☐ 2016 ☐ 2015 ☐ 2014 ☐ 2013 ☐ 2012 ☐ 2011 ☐ 2010 ☐ 2009 ☐ 2008 ☐ 2007 ☐ 2006 ☐ 2005 ☐ 2004 ☐ 2003 ☐ 2002 ☐ 2001 ☐ 2000 ☐ 1999 ☐ 1998

System Settings: Workstation Monitor Active ☐ Update Frequency: 60 seconds

Workstation Settings: Station ID: 51CAAE9B-CA36-49CF-8092-FADC821D4648

Station Description: Workstation Description

Workstation Monitor Active ☐ Update Frequency: 60 seconds

* - Required Fields

Cancel Close

Letters

The HDIS system provides you the flexibility to write standard letters that can be sent to clients.

These letters will pull data through use of the asterisk *symbol.

The * is placed on each end of the field name that you want to pull into the letter.

Use **capital letters** to describe the field name.

Example: *OWNER* = TOM GORDON

Enter/Modify Appointment Scheduling Letters

A B C D E F G H I J K L M N O P Q R S T U

appointment letter a
 NAME
 Name
 name

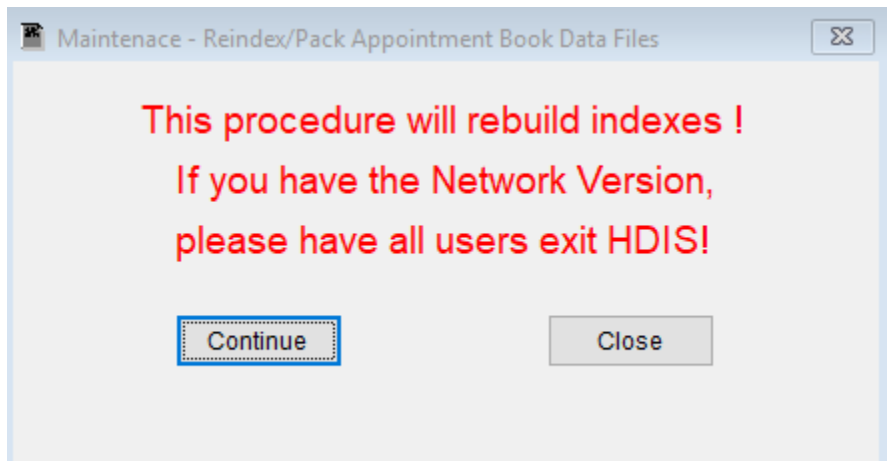
 STREET
 Street
 street

 PHONE

Spell Check Close

X

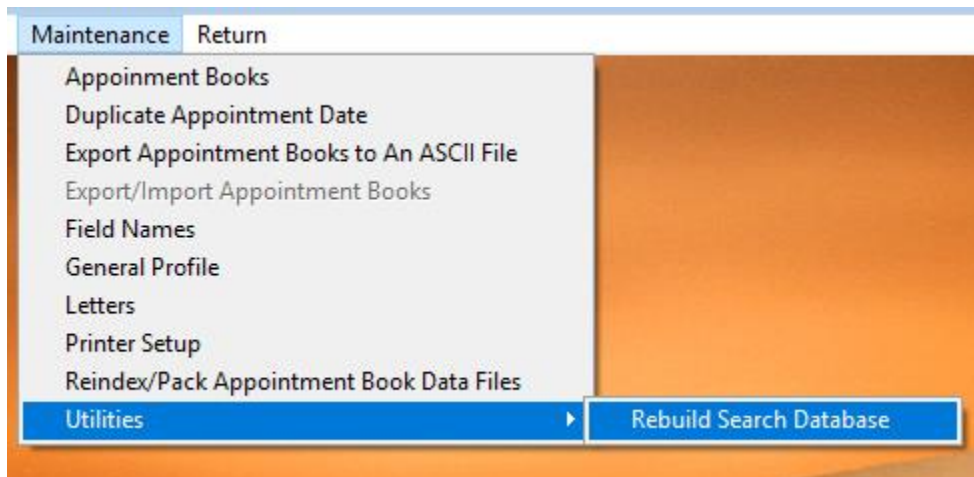
Reindex/Pack Appointment Book Data Files



This function is only needed should your data be corrupt due to a power failure.

Please contact BGI if you have any questions or concerns.

Rebuild Search Database



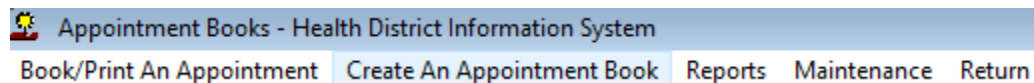
This utility will rebuild search database.

Contact BGI before using this utility.

Chapter 3: Using Appointment Books

Create An Appointment Book

Navigate to: **Create An Appointment Book** Tab



After clicking **Create An Appointment Book** Tab a new window should pop-up.

A screenshot of a window titled "Appointment Schedule" with a close button in the top right corner. The window's main content area is titled "Create An Appointment Book". It contains three input fields: "Year" with the value "2018", "Appointment Book" with a dropdown menu showing "FLU/EMPLOYEE", and "Select Month" with a grid of buttons for each month from Jan to Dec. To the right of the month grid are two buttons: "Create Book" and "Close".

This screen is where you will run through the tasks to create a new Appointment Book.

After selecting the **Year**, **Appointment Book**, and **Select Month**, click **Create Book**.

Create An Appointment Book for FLU/EMPLOYEE

October, 2018

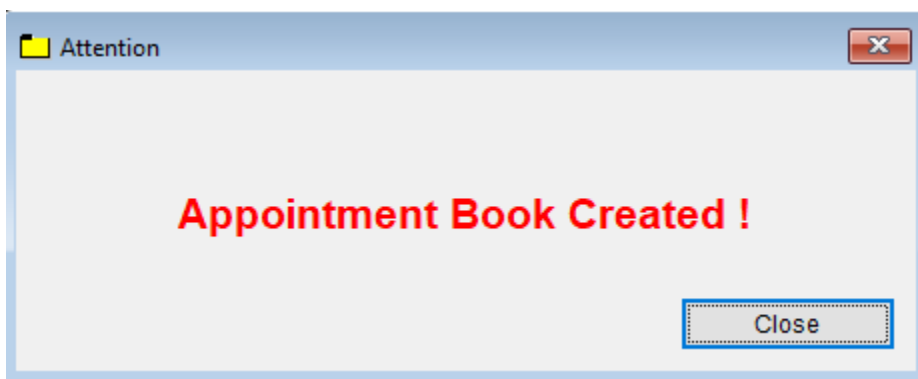
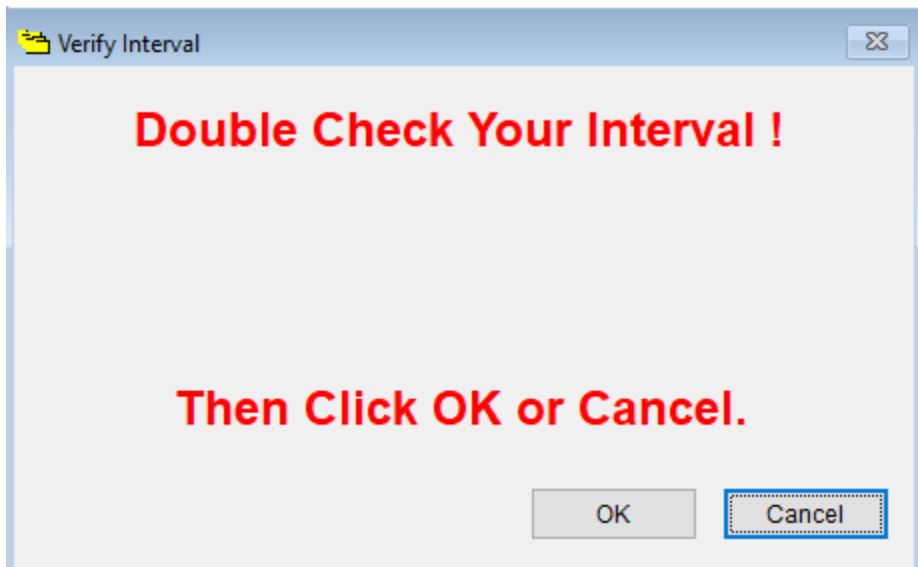
Choose Interval	Block Out Days							Block Out Times	
Interval	Sun	Mon	Tue	Wed	Thu	Fri	Sat	A.M.	P.M.
15		X	X	X	X	X	X	<input checked="" type="checkbox"/> 12:00	<input checked="" type="checkbox"/> 12:30
								<input checked="" type="checkbox"/> 01:00	<input checked="" type="checkbox"/> 01:30
	X	X	X	X	X	X	X	<input checked="" type="checkbox"/> 02:00	<input checked="" type="checkbox"/> 02:30
	X	X	X	X	X	X	X	<input checked="" type="checkbox"/> 03:00	<input checked="" type="checkbox"/> 03:30
	X	X	X	X	X	X	X	<input checked="" type="checkbox"/> 04:00	<input checked="" type="checkbox"/> 04:30
	X	X	X	X	X	X	X	<input checked="" type="checkbox"/> 05:00	<input checked="" type="checkbox"/> 05:30
	X	X	X	X	X	X	X	<input checked="" type="checkbox"/> 06:00	<input checked="" type="checkbox"/> 06:30
	X	X	X	X	X	X	X	<input checked="" type="checkbox"/> 07:00	<input checked="" type="checkbox"/> 07:30
								<input type="checkbox"/> 08:00	<input type="checkbox"/> 08:30
								<input type="checkbox"/> 09:00	<input type="checkbox"/> 09:30
								<input type="checkbox"/> 10:00	<input type="checkbox"/> 10:30
								<input type="checkbox"/> 11:00	<input type="checkbox"/> 11:30

1 Change to Double, Triple or Quadruple Book Appointments

Create Times Close

Field/Button	Description
Interval	Interval of appointment times in minutes
Block out Days	Click on the days when appointments are able to be scheduled (x represents no appointment on that day)
Block out Times	Click on the times when appointments are able to be scheduled; times with a checkmark will be blocked out
Create Times	Click to create available appointment times
Close	Closes the window

After creating a new Appointment Book two windows will pop up:

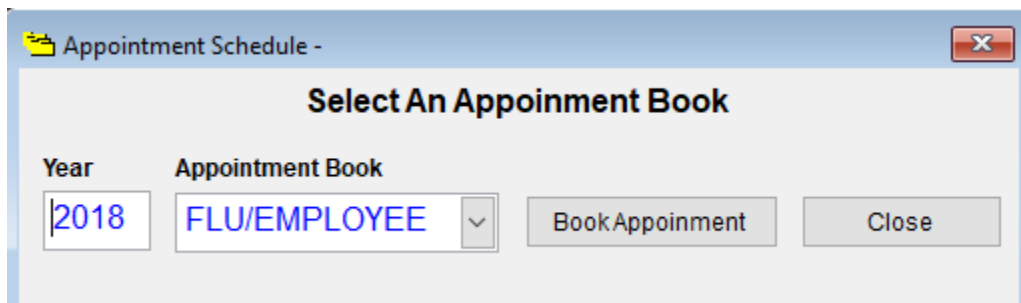


Book/Print An Appointment

Click the **Book/Print An Appointment** Tab:

This window allows you to select the book you would like to book appointments.

Enter the **Year**, Choose an **Appointment Book**, and click **Book Appointment**.



The screenshot shows a window titled "Appointment Schedule -" with a close button in the top right corner. Inside the window, the title "Select An Appointment Book" is centered. Below the title, there are two input fields: "Year" and "Appointment Book". The "Year" field contains the text "2018". The "Appointment Book" field is a dropdown menu with "FLU/EMPLOYEE" selected. To the right of these fields are two buttons: "Book Appointment" and "Close".

After clicking **Book Appointment** a new window will pop up:

Book Appointment - FLU/EMPLOYEE / 2018 / 32-0

Jan Feb Mar Apr May Jun
Jul Aug Sep Oct Nov Dec

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 29 30 31

Name Find in Name Table
Address Clear Name*
 Search Book for Name
DOB Age
Parent Phone
Initials Services Service
Comment
Book Appt. Clear Appt* Mark Appt. as Cancelled * Move Appt* Print
Delete Appt* Add Appt. Mark Appt. as No Show * Only Available Close

Time	AM/PM	Name	DOB	Age	Service	Street	City, State, Zip
08:00	AM		//				
08:15	AM		//				
08:30	AM		//				
08:45	AM		//				
09:00	AM		//				
09:15	AM		//				
09:30	AM		//				
09:45	AM		//				
10:00	AM		//				
10:15	AM		//				
10:30	AM		//				
10:45	AM		//				
11:00	AM		//				
11:15	AM		//				
11:30	AM		//				
11:45	AM		//				
12:00	PM		//				

The **Book Appointment** window is where you will book your appointments.

The upper left hand corner displays whose appointment book you are in and the year for that appointment book.

The month and day that you are scheduling 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

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.

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.

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

Print

This window allows you to print different types of forms, as well as having **VaxCare** and **Export** functions.

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Reports

Navigate to: **Reports** Tab

This area allows you to print off different types of reports for office use.

Field Name	Description
Appointments – Count	Prints a report that counts the number of appointments
No Show – Count	Prints a report that counts the number of No Show
No Show – Clients	Prints a report that counts the number of No Show based on Clients
User Defined – By Pay Class	Prints a user defined report relating to by pay class