



**Client Appointment Books  
Appointment Books**



**The Baldwin Group, Inc.**

7550 Lucerne Drive, Middleburg Heights, OH 44130

Suite 306

support@baldwingroup.com

Cleveland, OH 44130

(440) 891-9100

FAX (440) 891-9458

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## Contents

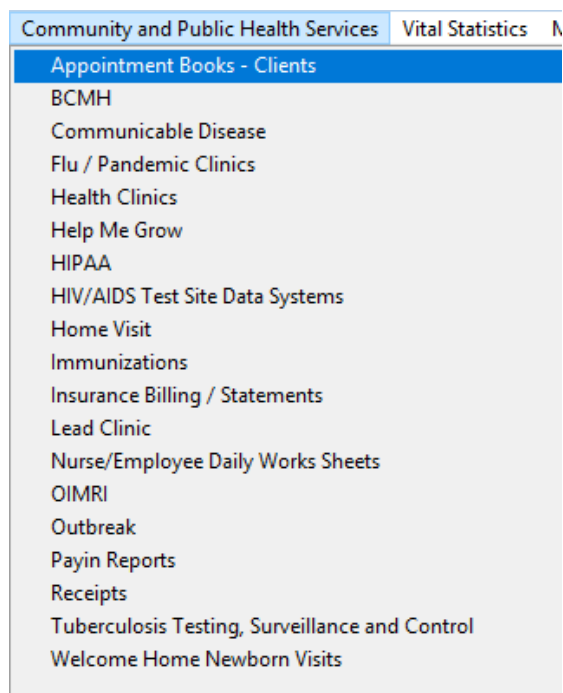
|                                                |    |
|------------------------------------------------|----|
| Chapter 1: Getting Started.....                | 3  |
| Chapter 2: Maintenance .....                   | 4  |
| Appointment Books .....                        | 4  |
| Duplicate Appointment Date .....               | 6  |
| Export Appointment Books to an ASCII File..... | 8  |
| Field Names.....                               | 9  |
| General Profile .....                          | 10 |
| Appointment Books Page.....                    | 10 |
| Letters .....                                  | 12 |
| Printer Setup .....                            | 13 |
| Reindex/Pack Appointment Book Data Files ..... | 14 |
| Rebuild Search Database .....                  | 15 |
| Chapter 3: Using Appointment Books.....        | 16 |
| Create An Appointment Book.....                | 16 |
| Book/Print An Appointment .....                | 19 |
| Search Book for Name .....                     | 22 |
| Print.....                                     | 22 |
| Reports.....                                   | 23 |

## Chapter 1: Getting Started

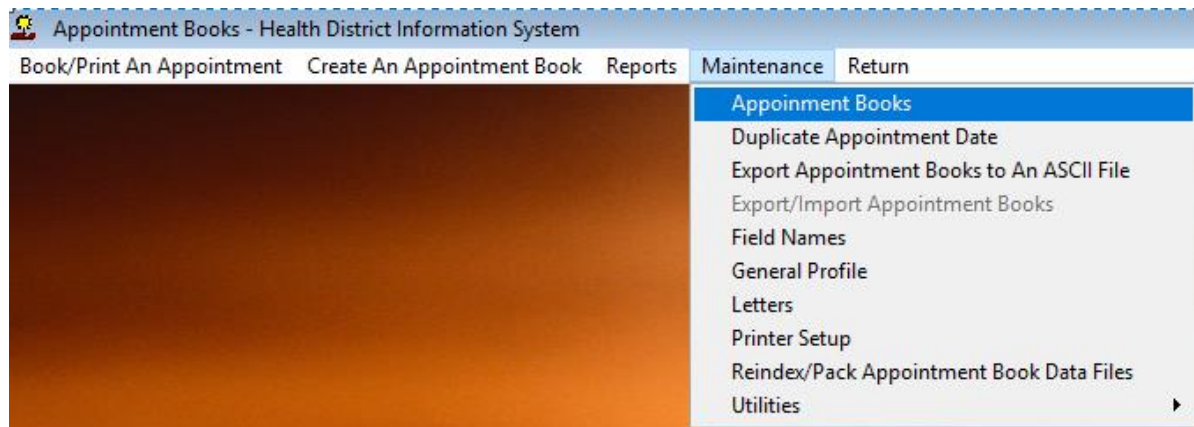
Once **Client Appointment Books** is installed there are some things that need to be set up to make sure the module works correctly.

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                                 |        |

4

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

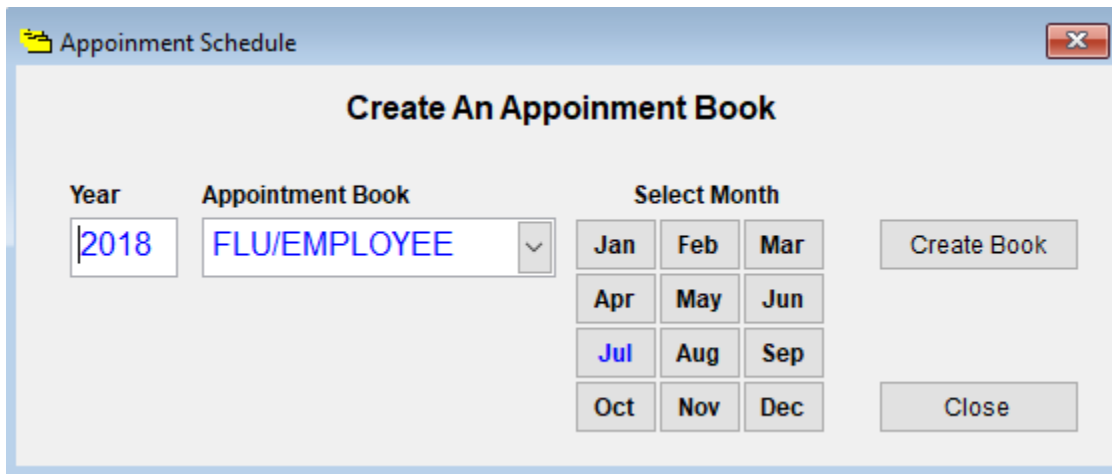
– Deletes the highlighted Appointment Book

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".

| Year | Appointment Book | Select Month |             |
|------|------------------|--------------|-------------|
| 2018 | FLU/EMPLOYEE     | Jan Feb Mar  | Create Book |
|      |                  | Apr May Jun  |             |
|      |                  | Jul Aug Sep  |             |
|      |                  | Oct Nov Dec  | 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**.

Attention

**Appointment Book Created !**

Close

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

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

[illegible]

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

Address1: 7550 Lucerne Drive

Zip: 44130

Address2:

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

## Appointment Books Page

The page for editing settings pertaining to the Appointment Books module is found in the Community & Public Health Services section, as shown on next page.

New settings added to appointment books, effective HDIS ver 6.95.6, pertain to creation of the Immunization Detail record for a client when they are booked for an appointment in the Appointment Books screen. These settings are displayed on the right side of the profile page.

The effect of the settings for these specifications is as follows:

|                      |                                                                                                                                                                                                                                                                                                          |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| No selection         | Only updates existing immunization detail.<br>This is the default specification, behaving same as prior to ver 6.95.6                                                                                                                                                                                    |
| Prompt Creation      | When immunization detail does not exist, prompt user about creating such detail record. Record is created when user selects yes.<br>As this option is superseded by the 'Automatically Create' option, the setting is enabled for selection only when the 'Automatically Create' option is not selected. |
| Automatically Create | When immunization detail does not exist, create the detail record perforce without verification from user.                                                                                                                                                                                               |

The Immunization Detail record is the location where the Date/Time the client is to return for the next vaccination resides. This is displayed on the Health Services tab of the Health Services screen in the lower right corner above the Save/Cancel button. In original Immunizations, it is displayed in upper right corner of the Immunization page, under the buttons to add vaccination and view Forecast details, as shown here:

|                  |            |             |             |          |
|------------------|------------|-------------|-------------|----------|
| Return Date/Time | 07/07/2017 | 10:00 A     | Add Vaccine | Forecast |
| Save             | Cancel     | Return date | Return Time |          |
|                  |            | 06/12/2017  | 02:10 P     |          |

Health Services Screen                      Immunizations Screen

The Return Date/Time detail is referenced in generating Recall / Reminder reports.

## 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

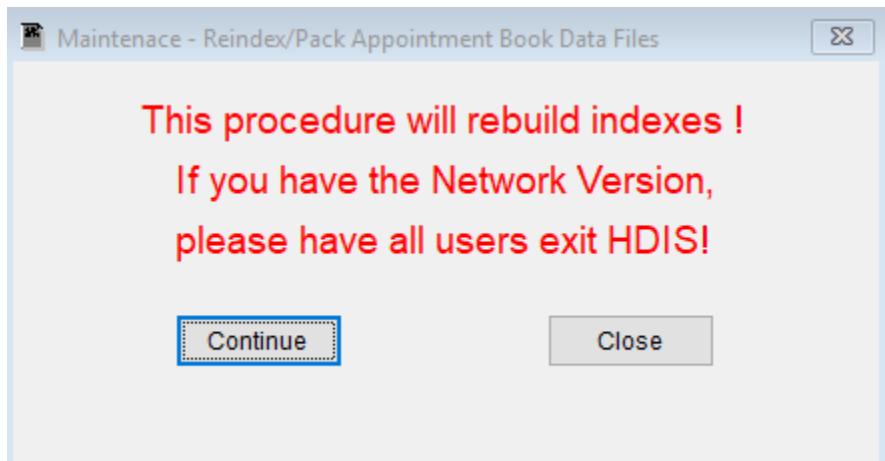
A B C D E F G H I J K L M N O P Q R S T U

appointment letter a  
 \*NAME\*  
 \*Name\*  
 \*name\*  
  
 \*STREET\*  
 \*Street\*  
 \*street\*  
  
 \*PHONE\*

Spell Check Close



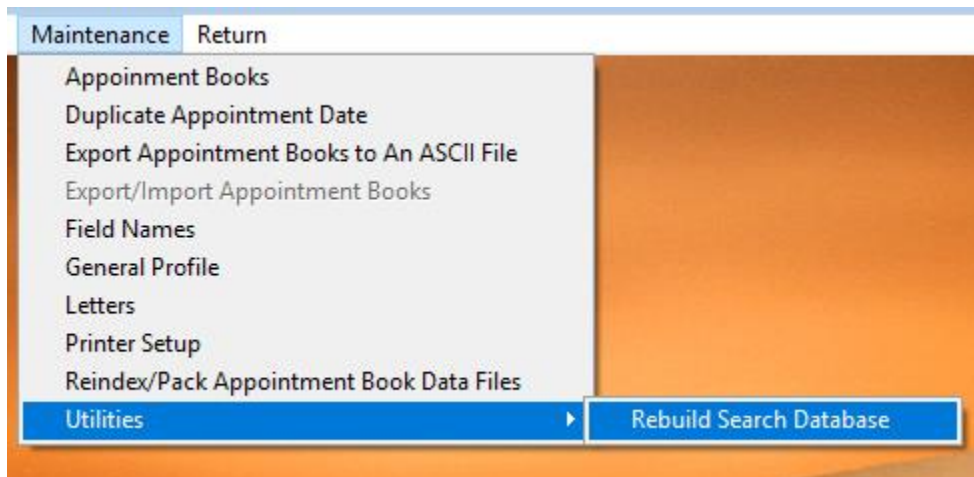
### Reindex/Pack Appointment Book Data Files



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



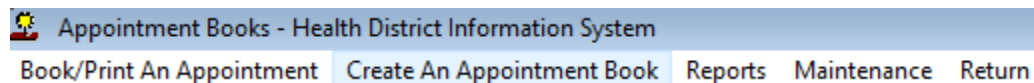
This utility will rebuild search database.

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.

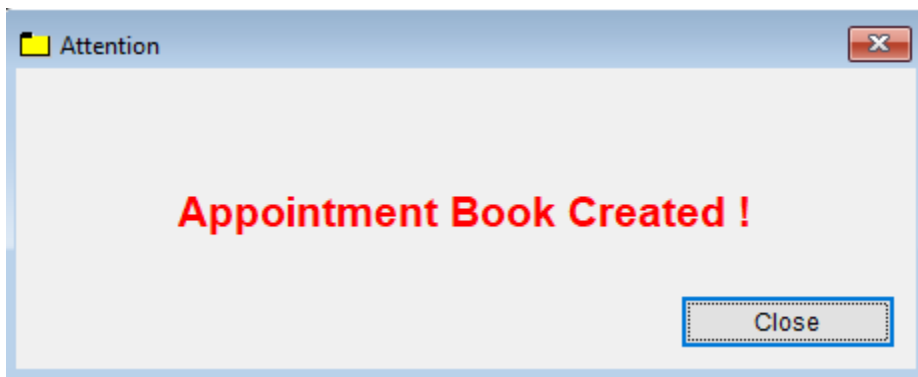
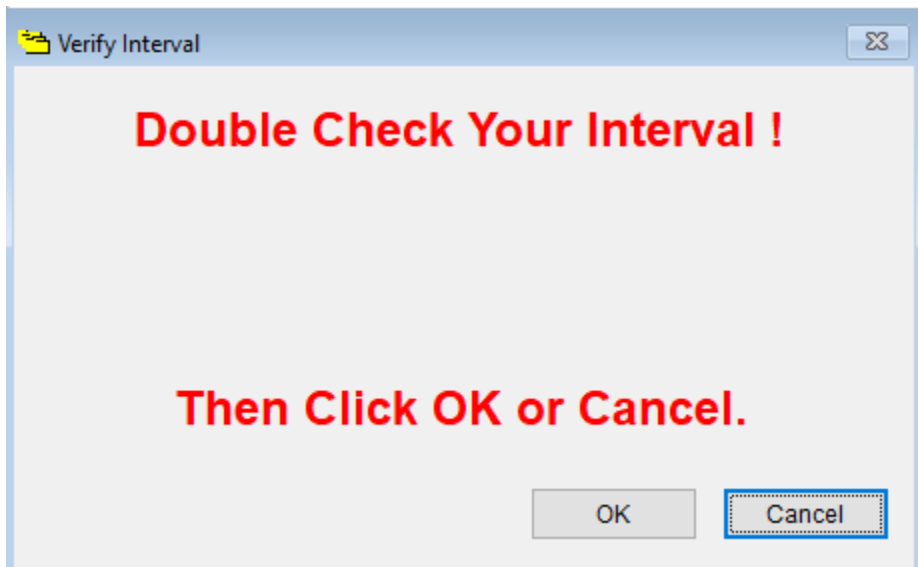
A screenshot of a window titled "Appointment Schedule" with a close button (X) in the top right corner. The window's main content area is titled "Create An Appointment Book". It contains three input fields: "Year" with the value "2018", "Appointment Book" with a dropdown menu showing "FLU/EMPLOYEE", 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**.

| 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:

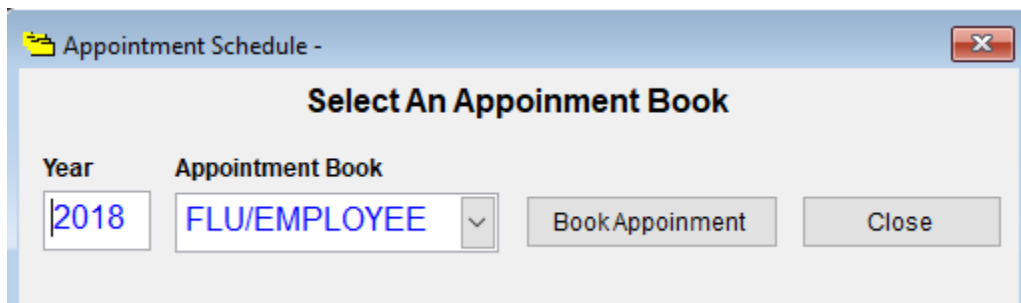


## **Book/Print An Appointment**

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                                                         |
|                      | <b>Buttons</b>                                                   |
| 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.

22

## 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 <b>No Show</b>           |
| 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              |