Employee Appointment Books
Appointment Books

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Disclaimer

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Chapter 1: Getting Started

Once **Employee 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: **Management Services -> Employee Appointment Books**
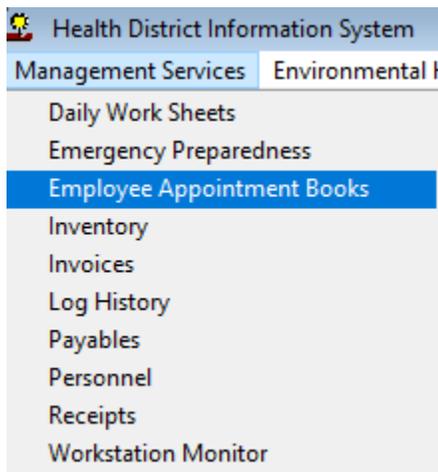
The area of focus will be under the **Maintenance** Tab
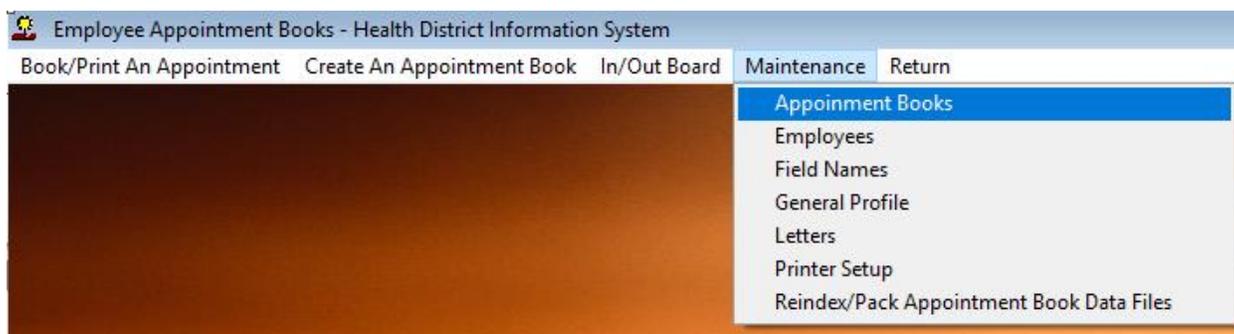
Refer to the **Maintenance Chapter** in this manual for guidelines.

Chapter 2: Maintenance

Appointment Books

Once on the **Maintenance** Tab, click **Appointment Books**:

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

- Fill in the Name field
- Fill in the Abbreviation field

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

Employee Table

Once on the **Maintenance** Tab, click **Employee**:

Enter in the names of the Employees needed for Appointment Books.

Click here for information on the buttons.

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.

Field Name	Data Base Field Name
AM/PM	MSM.AM_PM
CITY/STATE/ZIP	MSM.CSZ
COMMENTS	MSM.COMMENTS
CONTACT	MSM.CONTACT
DAY	MSM.DAY
MILITARY	MSM.MILITARY
MONTH	MSM.MONTH
NAME	MSM.NAME
NO SHOW	MSM.NO_SHOW
PHONE	MSM.PHONE
SERVICE	MSM.SERVICE
STREET	MSM.STREET
TIME	MSM.TIME
YEAR	MSM.YEAR

Close

Print

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.

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
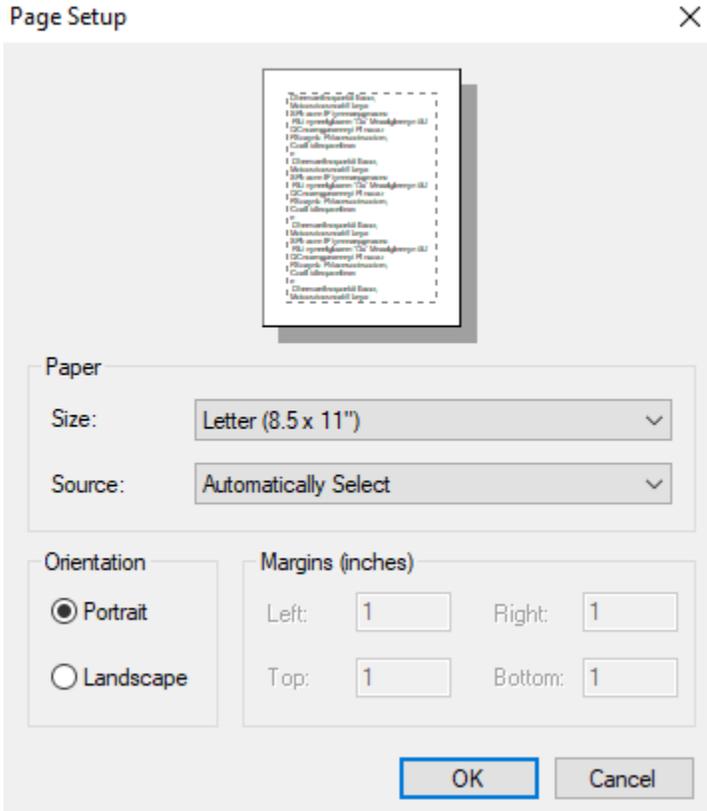
Printer Setup

The print setup allows you to choose from what printer you would like to print.

Pick the printer in the name dropdown and click **OK**

Reindex/Pack Appointment Book Data Files

This procedure will rebuild indexes !
If you have the Network Version,
please have all users exit HDIS!
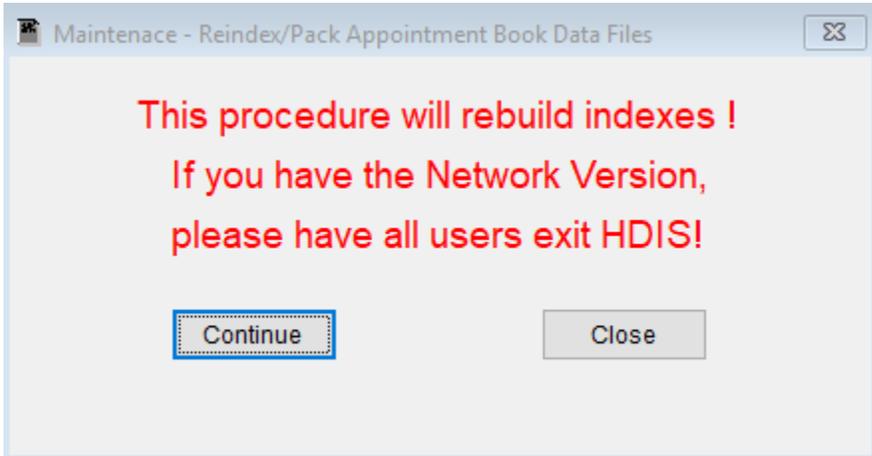
This function is only needed should your data be corrupt due to a power failure.

Please contact BGI if you have any questions or concerns.

Chapter 3: Using Appointment Books

Create An Appointment Book

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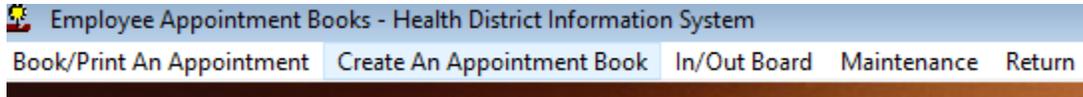
After clicking **Create An Appointment Book** Tab a new window should pop-up.

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:

![HDIS - Health Department Information System - Helping You...Help Others]

In/Out Board

Employees can mark whether they are in or out of the office and specify a return time.

You can enter specific information on your whereabouts by clicking the **Zoom** button.
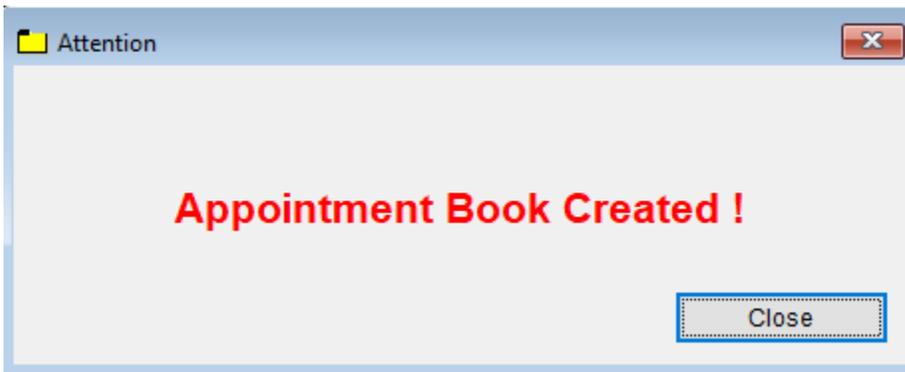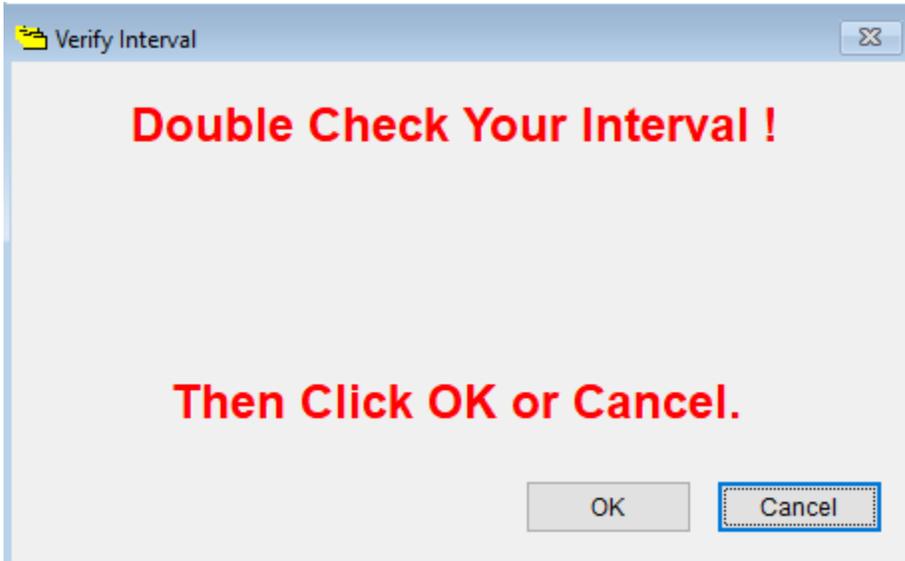
Click the **Zoom** button:

This is where you can enter more detailed information.

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**.

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

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/Button	Description
Name/Location	Enter the name/location of the appointment
Address	Enter the address
Phone	Enter the phone number
Contact	Enter the contact's name
Service	Enter the service
Comment	Enter any comments on the appointment
Book Appt.	Click a time in the Grid, then click to book the appointment
Move Appt.*	Right click to move an appointment from the grid
Clear Appt.*	Right click to clear an appointment

Delete Appt.*	Right click to totally delete an appointment time from the grid
Add Appointment	Click to add an appointment time to the grid
Search Book for Name	Click to search for other appointments with the same name/location
Only Available	Click to view available appointment times only
Print	Click to open the print window
Close	Closes the window

**** The Appointment Books module can be accessed from any HDIS Environmental Module by clicking ALT-A.

All information from the record in that module will be transferred into the appropriate fields in the appointment book (i.e. name/location, address, contact, phone information).