



**Employee 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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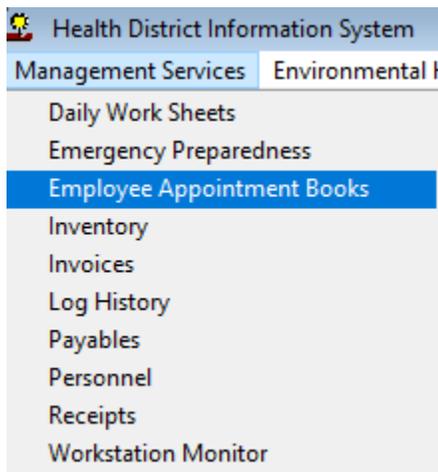
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Chapter 1: Getting Started

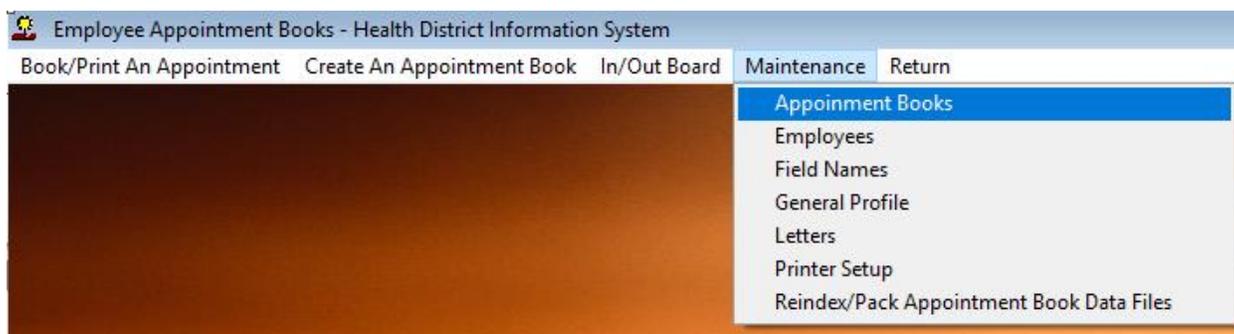
Once **Employee Appointment Books** is installed there are some things that need to be set up to make sure the module works correctly.

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.

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](#).

The screenshot shows a software window titled "Add/Delete/Modify Employee Table". On the left, there is a list box with a scroll bar containing the following names: AMY ANGLES, SHANNON SELLARDS, STEVE SAINT, MARTIN MARTINI, and TONI TEXAS. The name "TONI TEXAS" is currently selected. On the right side of the window, there are five buttons: "Close", "Add", "Delete", and "Print". The "Delete" button is highlighted with a blue border.

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.

The screenshot shows a window titled "General Profile" with several tabs: Demographics, General, Management, Environmental, Community & Public Health Services, and Vital. The "General" tab is active. The form contains the following fields and options:

- Health Department:** BGI HD (Required field)
- City:** Middleburg Heights (Required field)
- Division:** (Empty field)
- State:** OH (Required field)
- Address1:** 7550 Lucerne Drive (Required field)
- Zip:** 44130 (Required field)
- Address2:** (Empty field)
- County:** generic (Required field)
- Phone #s:** 1-440-891-9100 (Required field)
- FAX #:** 1-440-891-9458 (Required field)
- Federal Tax ID:** ADFA
- Commissioner:** Doc Darrell
- Client/Server Location:** M:\HDIS\DATA
- Email:** ADFASD
- Make Checks Payable to:** ADSF
- View Archives:** A grid of checkboxes for years from 2017 to 1998.
- System Settings:** Workstation Monitor Active Update Frequency 60 seconds
- Workstation Settings:** Station ID 51CAA9B-CA36-49CF-8092-FADC821D4648, Station Description Workstation Description, Workstation Monitor Active Update Frequency 60 seconds

At the bottom right, there is a legend: *** - Required Fields**, and two buttons: **Cancel** and **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.

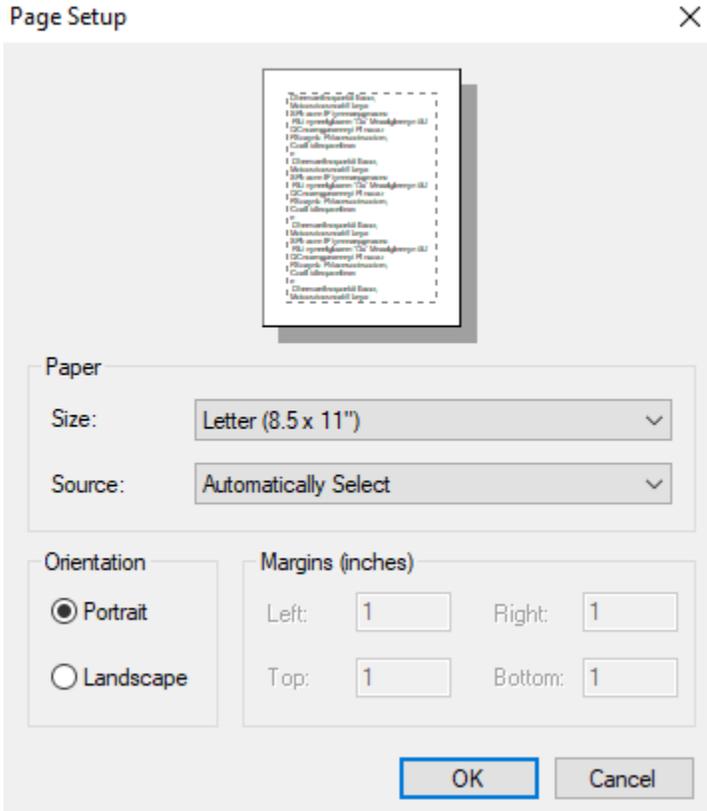
Example: *OWNER* = TOM GORDON

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

Spell Check Close

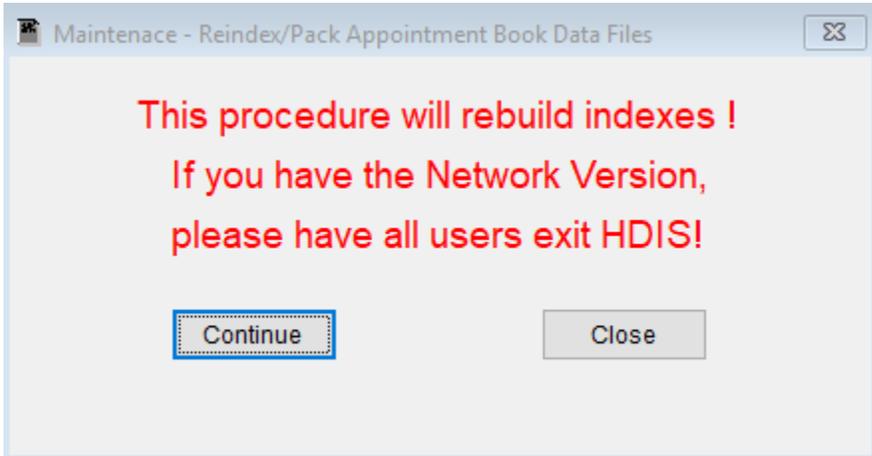
Printer Setup



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



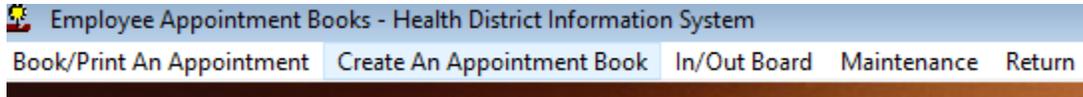
This function is only needed should your data be corrupt due to a power failure.

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.

A screenshot of a pop-up window titled "Appointment Schedule" with a close button in the top right corner. The window contains the following elements:

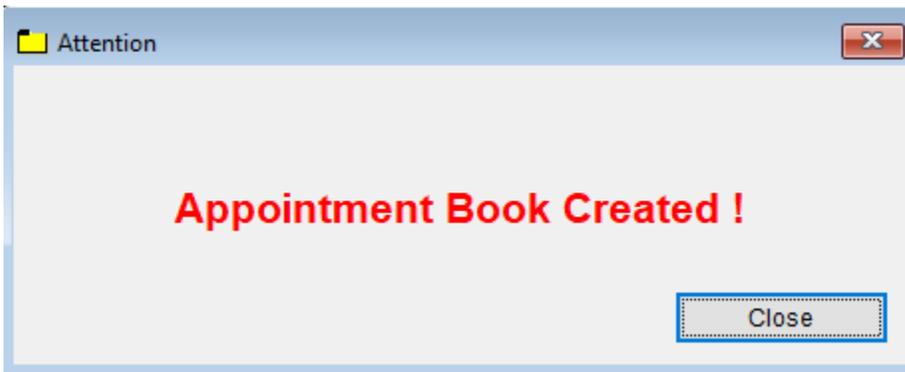
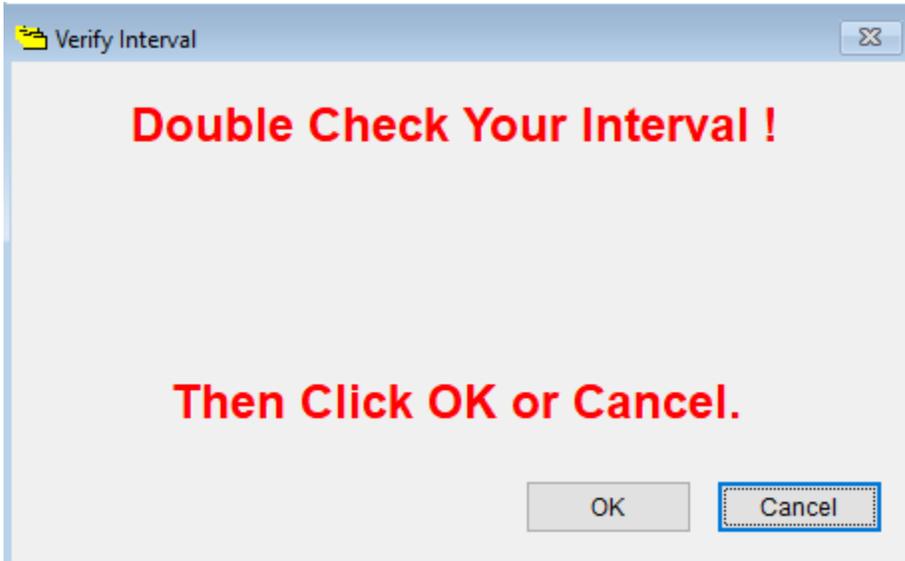
- Create An Appointment Book** (Section Header)
- Year**: A text input field containing "2018".
- Appointment Book**: A dropdown menu with "EH" selected.
- Select Month**: A grid of buttons for each month: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec.
- Create Book**: A button to the right of the month grid.
- Close**: A button at the bottom right of the window.

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:



Click the **Zoom** button:

This is where you can enter more detailed information.

Name	In / Out	Return	AM / PM
PATTY BURGER	<input type="checkbox"/> In <input checked="" type="checkbox"/> Out	12	<input type="checkbox"/> AM <input checked="" type="checkbox"/> PM

Location: 123 HOME

City:

Contact Name:

Contact Phone:

Employee Cell:

Comments:

Close

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. The main content area is titled "Select An Appointment Book". It contains two input fields: "Year" with the value "2018" and "Appointment Book" with a dropdown menu showing "EH". To the right of these fields are two buttons: "BookAppointment" and "Close".

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).