HDIS
Health Department Information System
Helping You...Help Others

Client Appointment Books
Appointment Books

BG

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Disclaimer

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information, or locations that appear in this guide are fictitious in nature and do not refer to, or
portray, in name or substance, any actual names, organizations, entities, or institutions. Any
resemblance to any real person (living or dead), organization, entity, or institution is purely
coincidental.

Contents

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**
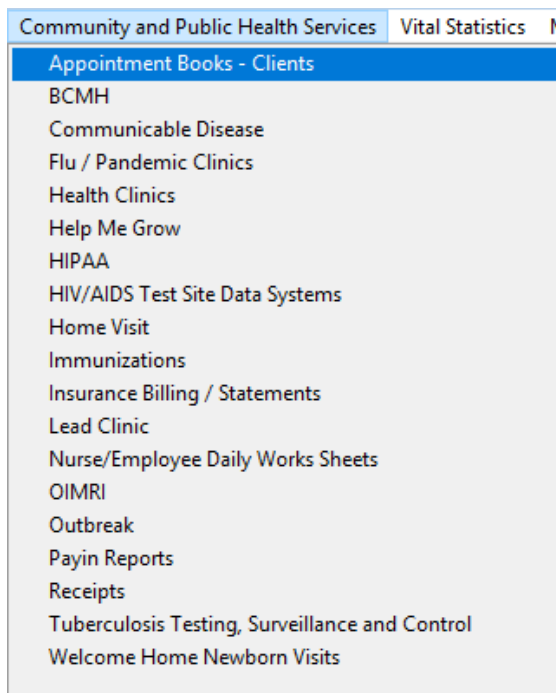
The area of focus will be under the **Maintenance** Tab
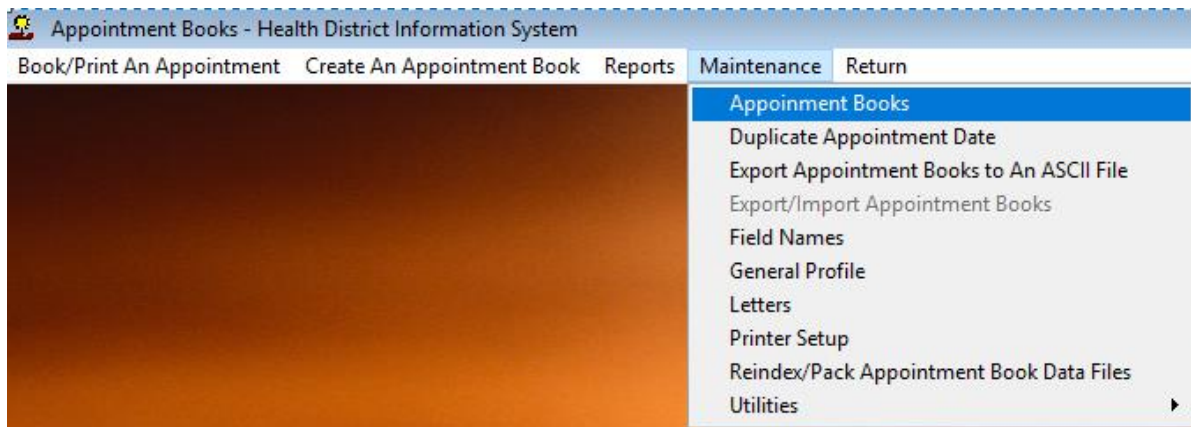
Refer to the **Maintenance Chapter** in this manual for guidelines.

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
- 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**:

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:

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

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

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.

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.

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

Data Base Field Names for Appointment Scheduling Record

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.
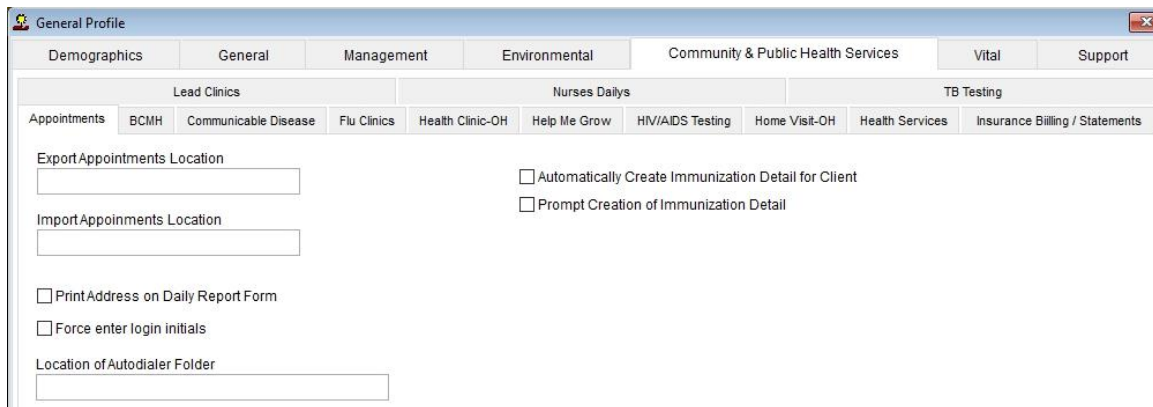

Appointment Books Page

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.
                                     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.
                                     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:

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
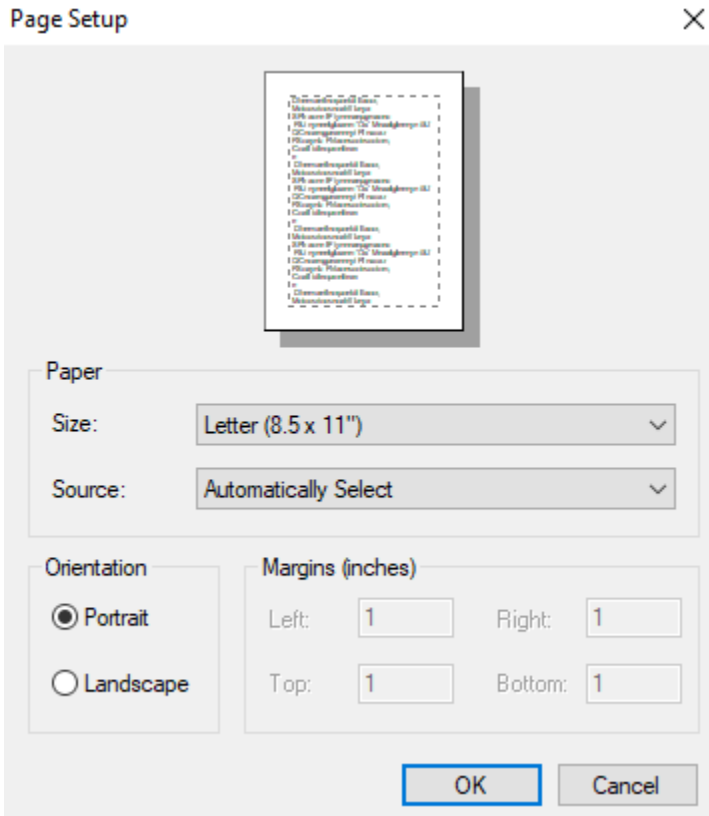
Printer Setup

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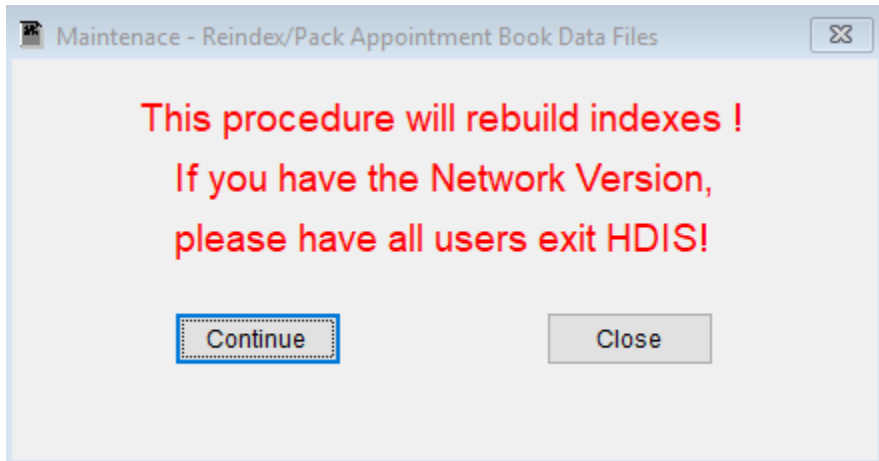
This function is only needed should your data be corrupt due to a power failure.

Please contact BGI if you have any questions or concerns.

Rebuild Search Database
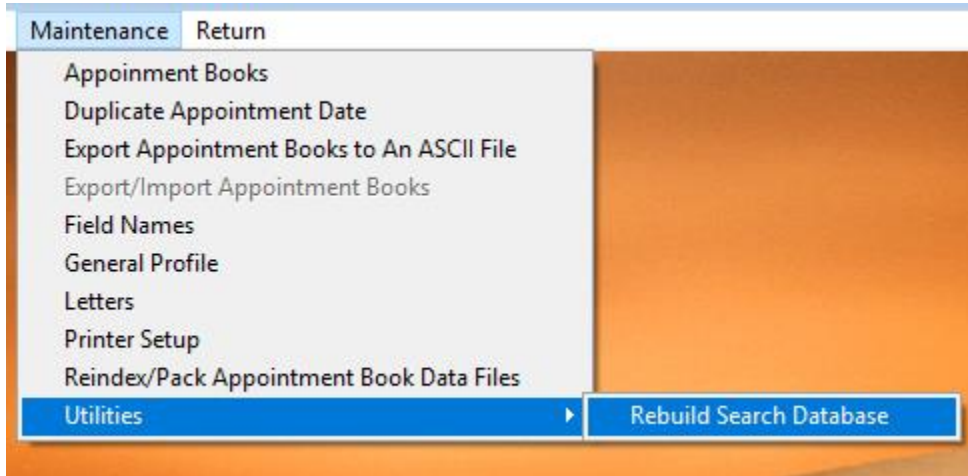
This utility will rebuild search database.

Contact BGI before using this utility.
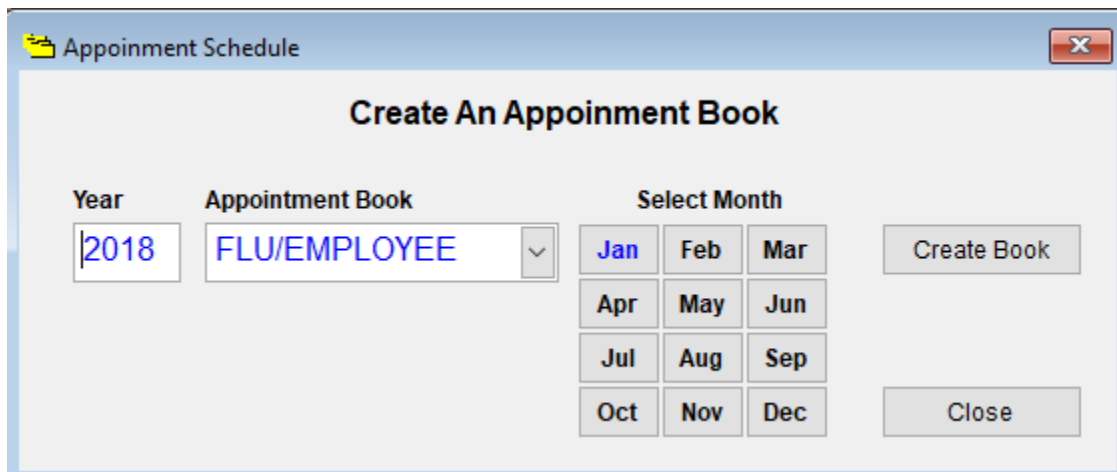
Chapter 3: Using Appointment Books

Create An Appointment Book

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

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

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**.

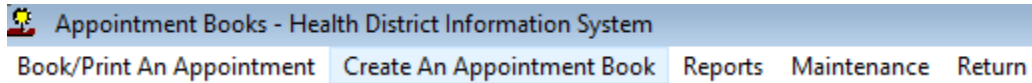| Field/Button	Description
Interval	Interval of appointment times in minutes
Block out Days	Click on the days when appointments are able to be scheduled (x represents no appointment on that day)
Block out Times	Click on the times when appointments are able to be scheduled; times with a checkmark will 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:
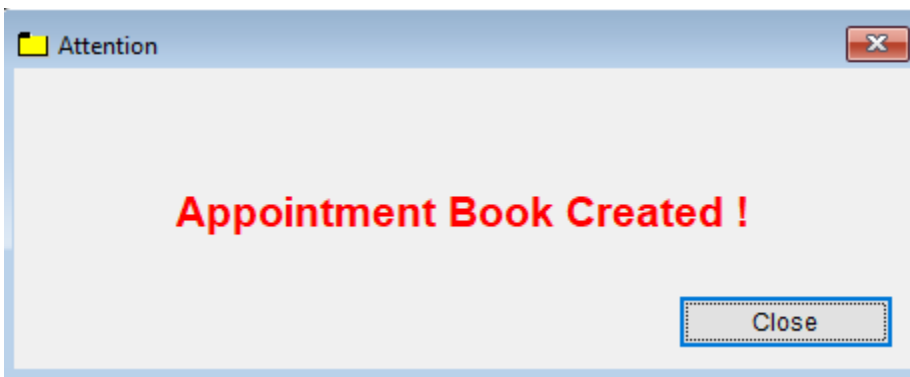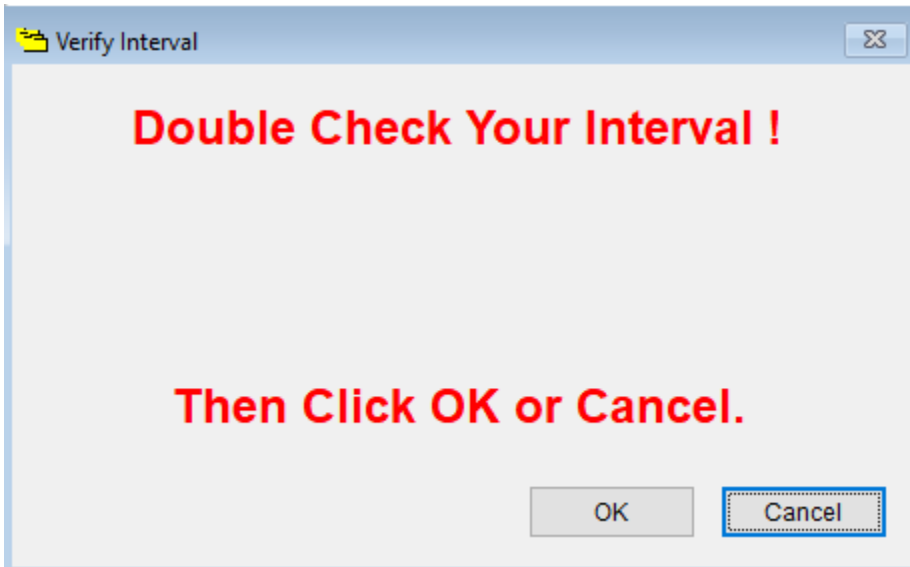
Book/Print An Appointment

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**.

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 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.

Search Book for Name

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

Name	Birth	Book	Date	Time	No Show/Cancel
,	/ /	IMMUNIZATION	02/16/2016	10:50 AM	

Search for Appointments

Close

Print

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

Print

Form:
- ● Print Daily ○ Print Daily (all times) From 08/07/2018 To 08/07/2018
- ○ Print Services
- ○ Print Mailing Labels
- ○ Print Envelopes
- ○ Print Letters
- ○ Print Immunization Records
- ○ Print Demographic Info (Daily)
- ○ Print Routing Slip (Daily)
- ○ Print Routing Slip (Individual)
- ○ Export to Auto-Dialer
- ○ Export to Eligibility Checking (Quadax)
- ○ Export to Eligibility Checking (RealMed)
- ○ VaxCare (Page 1)
- ○ VaxCare (Page 2)

Output to:
- ● Preview
- ○ Print

OK

Close

Reports

Navigate to: **Reports** Tab

This area allows you to print off different types of reports for office use.
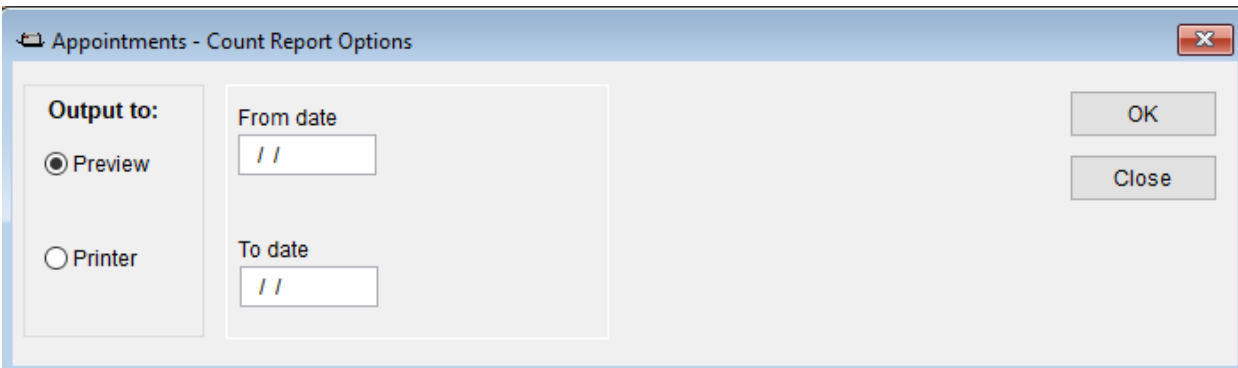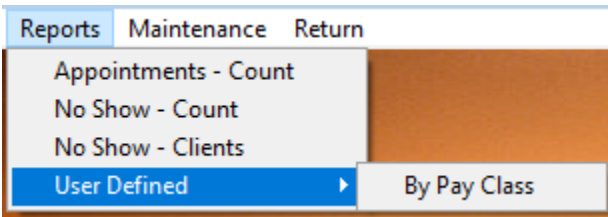
Field Name	Description
Appointments – Count	Prints a report that counts the number of appointments
No Show – Count	Prints a report that counts the number of **No Show**
No Show – Clients	Prints a report that counts the number of No Show based on Clients
User Defined – By Pay Class	Prints a user defined report relating to by pay class