# Initial Training Workbook

## SoftDent Scheduler

**Your Guide to a Successful Transition**

NG941-06

# SoftDent Scheduler

# Initial Training Workbook

# Notice



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Lesson 1

# Getting Started

The Scheduler is designed to bring you the functionality you need to manage your appointments. Information and options are displayed in a progressive manner, which means one level of information flows into the next level.

Using the Scheduler, you can perform the following appointment-related functions:

- Scheduling
- Editing details
- Confirming
- Cancelling
- Rescheduling

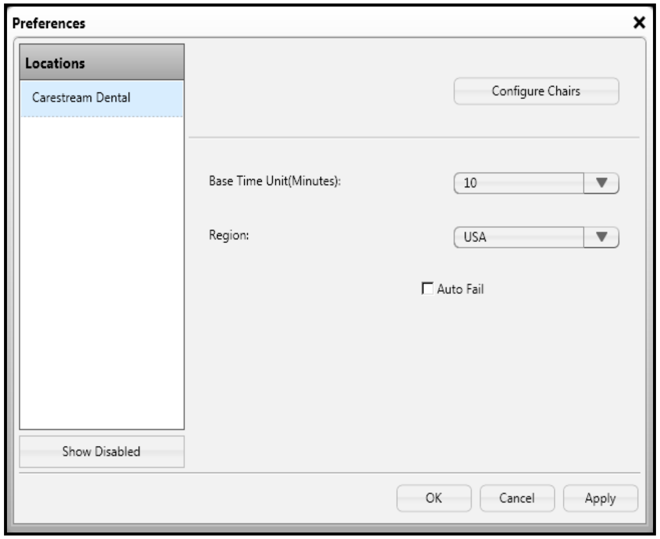
See the Scheduler online help for more information.

## Setting Up the Columns

The Scheduler's primary interface is the Day View, which contains columns that represent a provider or specific chair or operatory within an office or location.

To set up columns:

1 In the Scheduler, select **Settings > Office Settings**. The **Preferences** window is displayed.

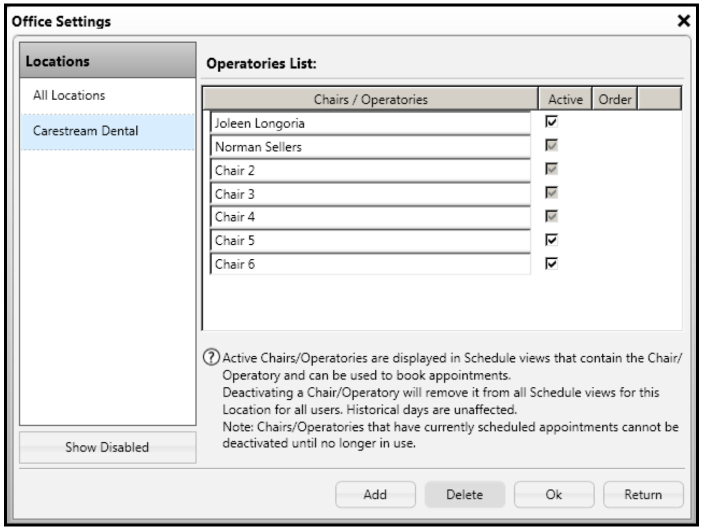



2 In the **Locations** list, select the office you are setting up.

3 Select a base time unit and region for the location.

4 If you want appointment failures to be recorded, select **Auto Fail**.

5 Click **Configure Chairs.** The **Operatories List** is displayed.




6 To create a chair or column, click **Add** and type a name.

7 In the **Active** fields, select the chair or column you want to display in the Day View.

**Note**

If you deactivate a chair, you remove it from all views in the Scheduler.

8 To change the order, hold the cursor under the **Order** button until arrows are displayed. Click an up or down arrow.

9 Click **OK.**

## Setting Up the Schedule

On the **Schedule Planning** tab, set these options for your office:

**Note**

A legend at the bottom of the screen explains the colors used for particular days.

- **Default Office Hours**
- **Holidays**
- **Daily Templates**
- **Provider's Default Hours**

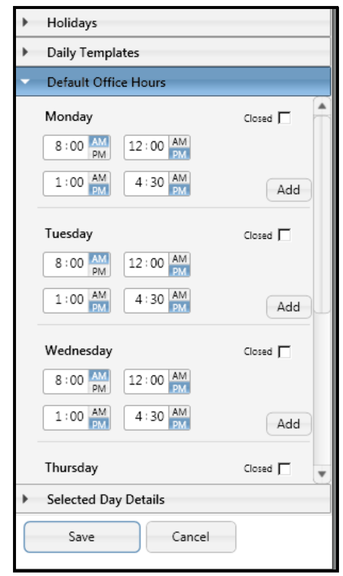
## Defining Office Hours

To define or change the default office hours:

1 Select **Settings > Schedule Planning.** The **Schedule Planning** tab is displayed.

2 In the **Calendar view for** field, select the office location.

3 Click **Default Office Hours** and **Edit.** The **Default Office Hours** panel is displayed.




4 Enter or change the hours for each day of the week. Select **Closed** for the days that the office is closed.

5 Click **Save.**

### Viewing and Changing Hours

To view the office hour settings for a particular day, click **Selected Day Details** and select a day on the schedule.

To change the settings:

- **Edit day**–Edit the hours.
- **Go to**–Jump directly to the day in the Day View.
- **Close the day**–Show the office as closed for the day.
- **Remove the template**–Remove the daily template from the day.

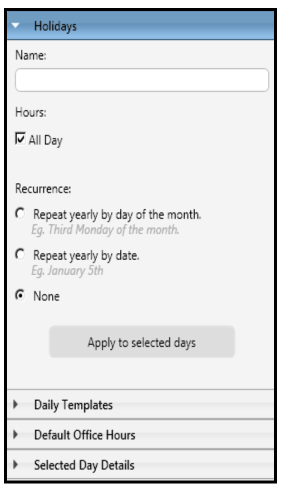
## Defining Office Holidays

To define holidays for an office:

1 Select **Settings > Schedule Planning**. The **Schedule Planning** tab is displayed.

2 In the **Calendar view for** field, select the office location.

3 Click **Holidays**. The **Holidays** panel is displayed.




4 In the **Name** field, type the name of the holiday.

5 In the **Hours** field, select **All Day.**

**OR**

Deselect **All Day** and designate the hours the office opens and closes.

6 To use the same template every year, select one:

- **Repeat yearly by day of the month**
- **Repeat yearly by date**

7 Select the day in the calendar and click **Apply to selected days**.

## Creating Daily Templates

You can create multiple templates that are different from the default office hours.

You can also use daily templates to apply ideal day settings that block out times and columns for specific types of appointments or for non-working time. See “Using Ideal Day Scheduling” for more information.

Daily templates specify time ranges only and must be applied to selected days on the calendar.

To create a daily template:

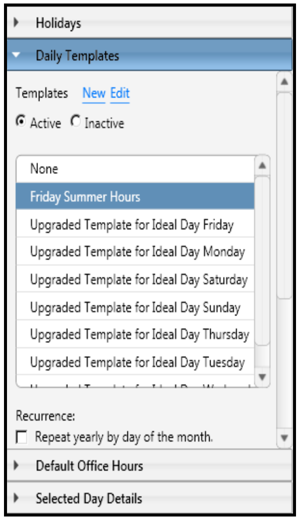
1 Select **Settings > Schedule Planning**. The **Schedule Planning** tab is displayed.

2 In the **Calendar view for** field, select the office location.

**Tip**

A black triangle in the corner of a day indicates appointments are scheduled; a red exclamation point indicates a scheduling conflict.

3 Click **Daily Templates.** The **Daily Templates** panel is displayed.




4 To create a new template, click **New**, name the template, define the hours, and click **Save**.

5 To edit an existing template, select the template, click **Edit**, make the changes, and click **Save**.

### Creating Non-Working Time Slots

You can designate blocks of time as non-working time. To create a non-working time slot:

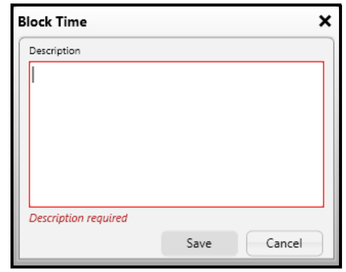
1 Select a template.

2 Click **Edit.**

3 Click **Non-working Time.**

4 Click **Create non-working time.**

5 Click and drag in the time slots you want to block. The **Block Time** window is displayed.




6 Type a description.

7 Click **Save.**

## Using Ideal Day Scheduling

Use the Ideal Day feature to set up blocks of time for specific types of appointments. By creating scheduling classes, you can use colors to display the best times to schedule specific types of work, depending on the availability and preferences of the providers in your practice.

When you try to schedule an appointment in a block of time allocated for a different appointment type, a message is displayed reminding you of the conflict.

To implement Ideal Day scheduling:

- Set up scheduling classes
- Apply the classes to the schedule

## Setting Up Scheduling Classes

To set up Ideal Day scheduling classes:

1 Select **Settings > Schedule Planning.**

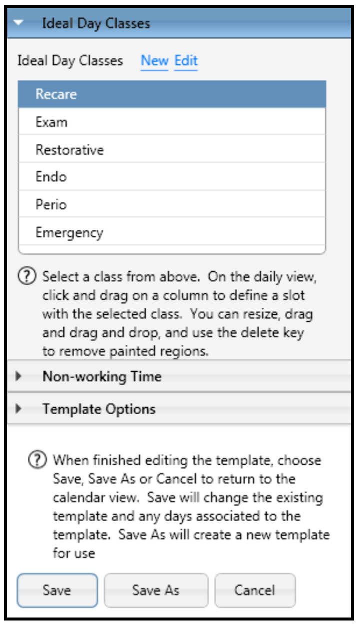
2 Click **Daily Templates** and:

- Click **New.**

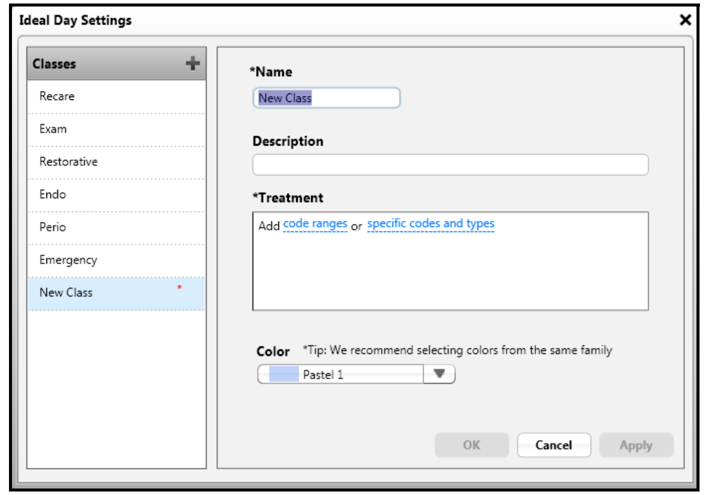
**OR**

- Select a template and click **Edit.**

3 Click **Ideal Day Classes.** The **Ideal Day Classes** panel is displayed.




4 To create a class, click **New.** The **Ideal Day Settings** window is displayed.




5 Enter a name and description.

6 In the **Treatment** section, click to add code ranges or specific codes and types.

7 In the **Color** section, use the arrow to select the color for the class.

8 Click **OK.**

To edit an Ideal Day class:

1 In the **Ideal Day Classes** panel, select a class.

2 Click **Edit.**

3 Make the changes.

4 Click **OK.**

## Applying Ideal Day Classes

To apply Ideal Day scheduling classes to a day profile, or to paint the day:

1 In the **Ideal Day Classes** panel, select the class.

2 Click and drag the class on a time slot in a column. The class is displayed in the appropriate color.

3 To move or resize the class, select it and drag it again.

**Note**

To delete a class, select it and press Delete.

# Defining Provider Hours

Use the **Scheduler Planning** tab to set up working hours and to assign chairs for each provider.

When you define working hours for a provider, you save the schedule as a template. You can select from multiple templates when you want to change a provider's regular schedule.

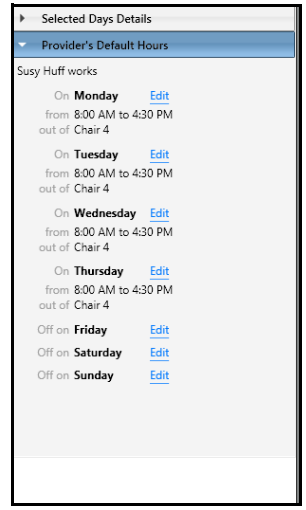
To define the working hours for a provider:

1 Select **Settings > Schedule Planning**. The **Schedule Planning** tab is displayed.

2 In the **Calendar view for** field, select the provider. The **Provider** panel is displayed.

**Note**

Providers can be assigned to more than one chair on any day.




3 Click **Edit** next to the day you want to add or change.

4 Set the hours and select the chair number. If the provider wants non-working time during the day, such as a lunch hour, end the first working time block and then click **Add** to begin another time block.

5 Click **Save.**

## Viewing and Changing Hours

To view the office hour settings for a particular provider, click **Selected Day Details** and select a day on the schedule.

To change the settings:

- **Go to**–Jump directly to the day in the Day View.
- **I'm off!**–Designate the day as a day off.
- **Edit**–Modify the hour and chair settings for the day.
- **Reset**–Use the default settings for the day.

# Defining Production Goals

You can define monthly financial targets for a given location and for individual producers. You can track progress toward these goals and consider them when scheduling appointments.

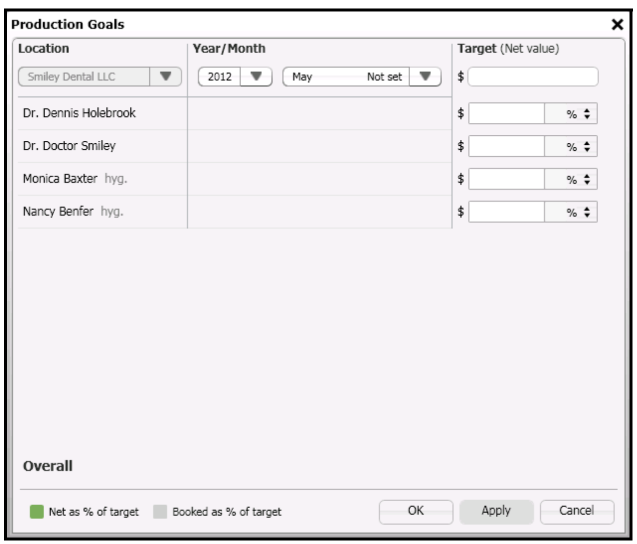
To assist in scheduling decisions, the percentage of a target is displayed for the producers in the Calendar and the Day View.

Goals are tracked by booked production in gray bars and net production in green bars. The Scheduler pulls data for the graph from the procedures scheduled for each producer and from the production amounts posted in the software.

On the **Schedule Planning** tab, you can click the **Production Activity Overlay** to view the progress that is being made by your office and your providers towards their goals.

To define production goals:

1 Select **Settings > Production Goals**. The **Production Goals** window is displayed.



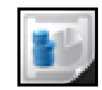

2 Select the location for which you are setting goals.

3 Select the target year and month for which you are defining, editing, or viewing goals.

4 Enter a target net value dollar amount for the month.

5 Assign a target for each producer. If you enter an amount, the percentage of the target is calculated for you. If you enter a percentage, the target dollar amount for the provider is displayed.

6 Click **OK**.



**Production Activity Overlay**

## Skill Sharpeners

### Exercise 1—Set Up a Provider Column

A new doctor has joined your staff and has been entered in the practice management software. You want to add a column for him in the Scheduler. To set up a provider column:

1 Select **Settings > Office Settings**. The **Preferences** window is displayed.

2 In the **Locations** list, select your office.

3 In the **Base Time Unit (Minutes)** field, select **15**.

4 In the **Region** field, select **USA**.

5 Click **Configure Chairs**. The **Operatories List** is displayed.

6 Click **Add** and name the chair with the new doctor's name.

7 Click **OK**.

### Exercise 2—Define Office and Provider Hours

You want to define the hours for one doctor and two hygienists, but before you can define provider hours, you must define the office hours for the location in which they work.

To define office and provider hours:

1 Select **Settings > Schedule Planning**. The **Schedule Planning** tab is displayed.

2 In the **Calendar view for** field, select the office location.

3 Click **Default Office Hours** and **Edit**. The **Default Office Hours** panel is displayed.

4 Click **Add**, if necessary, and set the following hours:

- **8:00 AM** as the beginning time for each day
- **12:00 PM** as the beginning of the lunch break
- **1:00 PM** as the end of the lunch break
- **6:00 PM** as the closing time for **Monday** through **Thursday**
- **5:00 PM** as the closing time for **Friday**
- **Saturday** and **Sunday** to **Closed**.

5 Click **Save**.

6 In the **Calendar view for** field, select a doctor's name. The **Provider's Default Hours** panel is displayed.

7 Click **Edit** and change the hours and chair for the provider.

If the provider is scheduled to be off on a day, click **Edit** and select the day; then change the hours and chair.

8 Click **Save**.

9 Repeat these steps to define the working hours for two hygienists.

### Exercise 3—Set Up an Ideal Day

You decide to set up blocks of time each day for fillings. To use the Ideal Day feature, you must set up a scheduling class and then apply the class.

To set up a scheduling class:

1 Select **Settings > Schedule Planning**.

2 Click **Daily Templates** and click **New**.

3 Click **Ideal Day Classes.** The **Ideal Day Classes** panel is displayed.

4 Click **New.** The **Ideal Day Settings** window is displayed.

5 In the **Name** field, type **Radiographs.**

6 In the **Description** field, type **All types of radiographs.**

7 In the **Treatment** section, click **specific codes and types** and type **00200.00** in the field.

8 In the **Color** section, click the arrow and select the **Pastel 9.**

9 Click **OK.**

To apply the class to the schedule:

1 In the **Ideal Day Classes** panel, select a class.

2 Click and drag in a time slot on a column.

Lesson 2

# Navigating the Scheduler

To move around in the software, use click-and-drag. To select an item or option, click the mouse. To display the next logical option or choice, click and hold the mouse over some features. To select multiple items, press Shift and click the mouse.

## Using the Search Field

The **Search** field is located in the upper-right section of the **Scheduler** window and the appointment card.

To use the **Search** field, type at least three characters in the field. Search results include a patient's name, nickname, address, phone number, birth date, and e-mail address.

To display more information and choices for a patient, click one of the following items in the search results:

- **Go to Patient**
- **Next scheduled appointment**
- **Show History**
- **Book Recare**
- **Auto Scheduler**

## Displaying Dates

To display dates, you can change views, scroll forward or backward, and use the real time bar or calendar.

### Day View

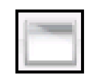

The current date is displayed by default. This is called the Day View. Use the arrows next to the date to scroll forward or backward one day.

You can view a single day or an entire week, and you can select multiple days to view at once.

**Day View**

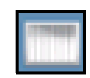
#### Full Day View

Use the **Full Day View** icon to toggle your Day View from a portion of the day's schedule with details on the appointment tiles to a full day's schedule without details on the appointment tiles.


**Full Day View**

### Weekly View

Use the **Weekly View** icon to display the entire work week for a displayed date. Select the icon again to return to today's date.


**Weekly View**

## Real Time Bar


The real time bar lets you know where you are in relation to your next appointment.

## Calendar

**Calendar**

To display the calendar with the current month and the following two months, click the **Calendar** icon by the date. On the calendar, you can:

- Double-click a single date to go to that date in the appointment book.
- Shift + click two dates to select a range of dates in the appointment book.
- Ctrl + click individual dates to select multiple dates in the appointment book.

## Navigation Buttons

Click the **Today** button to return to the current date.

Use the following buttons to move forward in time:

- **+1 Week**
- **+2 Weeks**
- **+1 Month**
- **+3 Months**
- **+4 Months**
- **+6 Months**

# Scheduler View Items

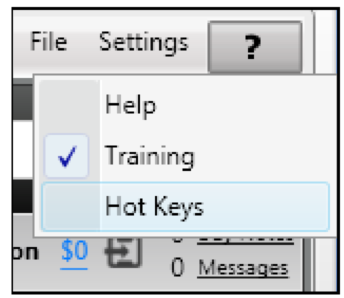
The following list explains the Scheduler symbols and colors:

- Circle around a day–Current day
- Slashes–Past days that are view-only
- Blue and pink–Days the office staff is working
- Dark blue–Day that uses a template
- Pink–A unique day that is not on a shared plan
- Light gray–Days the office is closed

# Using Keyboard Shortcuts

You can use the keyboard shortcuts, or hot keys, to navigate the Scheduler software. To display a list of hot keys:

1 Click the **Help** (?) button and select **Hot Keys**.

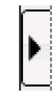



2 Click **Main View** or **Appointment Card** to expand or close the list of keyboard shortcuts.

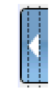
## Links to Features in the Practice Management Software

An **Options** panel on the left side of the **Scheduler** window provides links to the practice management software and other modules and features.

To access the features, click the **Open Panel** arrow.
To close the panel, click the **Close Panel** arrow.



**Open Panel**



**Close Panel**

## Skill Sharpener

### Exercise 1—Practice Moving Around in the Scheduler

Experiment with each of these procedures:

- Click the right arrow next to the current date.
- Double-click an appointment tile. Click the **X** to close the appointment card.
- Click the **Calendar** icon and hold the Ctrl key as you select multiple dates. Double-click a date to view details.
- Type the first three letters of a patient's last name in the **Search** field. Select the patient and click **Show History**.
- Click the **Day View** icon and then the **Weekly View** icon.
- Press Alt + P to view the Pending List.
- Click the **Location** tab to return to the schedule.
- Scroll to the bottom of the window and click **+1 Month** to view time slots one month from the current date.
- Click **Today** to return to the current date.

Lesson 3

# Customizing Views and Setting Up Treatment Categories

You can adjust the **Scheduler** window to display what you need to see. You can:

- Create as many columns or tabs as you need to organize your workflow.
- Use the overlay icons to display what you need to see on the appointment tiles.
- Set up Ideal Day scheduling and treatment categories to further customize how appointments are scheduled and displayed on the Day View.
- Turn the privacy setting on or off.

## Using the Overlays

Overlays focus the view on specific information and enable you to perform a task or access information quickly.

For example, when you click the **Confirmation Overlay** icon, the day's appointments that need to be confirmed are displayed brightly, while confirmed appointments are shaded.

The following overlays are available in the **Scheduler** window:

- **Confirmation**–Highlights appointments that need to be confirmed by shading those already confirmed.
- **Production Goals**–Displays indicators of a provider's or location's progress toward production goal targets.
- **Admin**–Displays information on the tile, such as the patient's age and scheduled procedures for the appointment.
- **Clinician**–Displays clinical information on the tile, such as medical alerts and scheduled procedures for the appointment.
- **Default**–Displays your personalized view of the **Scheduler** window.
- **Provider Working Time**–Displays the providers working in each chair each day.

**Admin Overlay**

**Clinician Overlay**

**Default Overlay**

**Provider Working Time**

## Configuring the Overlays

You can customize the appearance of appointment tiles in the **Default**, **Admin,** and **Clinician** overlays. The configuration of the **Default** overlay is user-specific and can be customized at every workstation. The configuration of the **Admin** and **Clinician** overlays is global for the office, and you must have permission to change the settings.

To configure the **Default**, **Admin,** and **Clinician** overlays:

1 Click **Settings > Configure Overlay.**

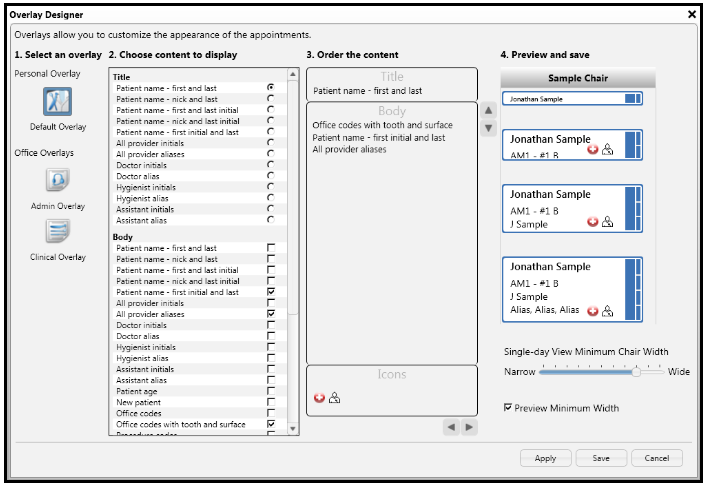
**Note**

When an overlay is active, a blue border is displayed around the icon on the toolbar.

**Confirmation Overlay**

**Production Goals Overlay**

The **Overlay Designer** window is displayed.




2 Select **Default Overlay**, **Admin Overlay,** or **Clinical Overlay**.

3 Select the content you want to display on the appointment tiles.

4 Click the up and down arrows to select the order in which the content is displayed.

5 Select the icons you want to display on the appointment tiles.

6 Click the left and right arrows to change the order in which the icons are displayed.

7 Change the display width of the chairs, if necessary.

8 Preview the configuration, and click **Apply** or **Save**.

**Important**

The location tab is always displayed first, and a global custom view cannot be selected as the main tab for the Day View.

**Note**

You can use the arrow to disable or rename a view. Use the **Show Disabled** option to display disabled views.

# Creating Custom Views

You can customize the **Scheduler** window to display scheduling resources in a combination that suits your needs.

Each custom view is user-specific, but one person can have multiple personal views. After you name a view, you can save, close, and access it any time until you delete it.

To create a personal view:

1 In any view, click and hold a column heading.

2 Drag the cursor to the tab area at the top until the outline of a new tab is displayed.

3 Release the mouse. The tab is displayed with the name **New View.**

4 Double-click the name until a rename field is enabled.

5 Rename the tab, and then click off the tab.

## Creating Global Custom Views

You can create global views that can be used by more than one user in your office.

To create global custom views:

1 Select **Settings > Global Custom Views.** The **Global Custom Views** window is displayed.

2 Next to **Schedule Views**, click the plus sign.

3 Type a name for the new view and press Enter. The new view is highlighted.

4 Under **Chairs/Operatories**, use the arrow to select a chair you want to display in the new view. To select additional chairs, click **Add**.

5 Click **Apply** or **Save**.

6 To display the custom view:

- On the Day View, click the triangle on the **Location** tab. A list displays locations and global custom views.
- Select a view.

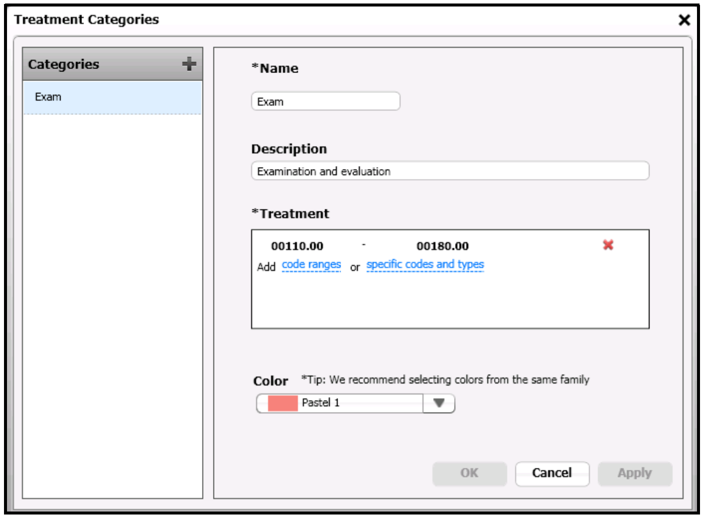
## Setting Up Treatment Categories

Use treatment categories to group procedure codes into categories and display appointment tiles in a specific color for each category. You can then determine the type of appointment by glancing at the Day View, without having to open the appointment card.

The category color is displayed as a solid bar on the right side of the tile for a scheduled appointment. If more than one category is used for an appointment, the category for the included procedure with the longest default time period is displayed.

To set up treatment categories:

1 Select **Settings > Treatment Categories**. The **Treatment Categories** window is displayed.




2 In the **Categories** section, click **+**.

3 Enter a name and description for the new category.

4 In the **Treatment** section, click to add code ranges or specific codes and types. Each code or range becomes an item in the list. Continue adding until the category includes all the appropriate codes.

5 In the **Color** section, select the color for the category.

6 Click **OK**. The category is added to the list.

**Note**

A procedure code can be associated with only one category.

**Note**

If you add a code or range in error, click the red **x** to delete it.

## Using the Privacy Display

To help you protect your patients' privacy and comply with HIPAA standards, you can choose to display a patient's first name and last initial on an appointment tile. The privacy setting is used also on the flyout and the appointment card.

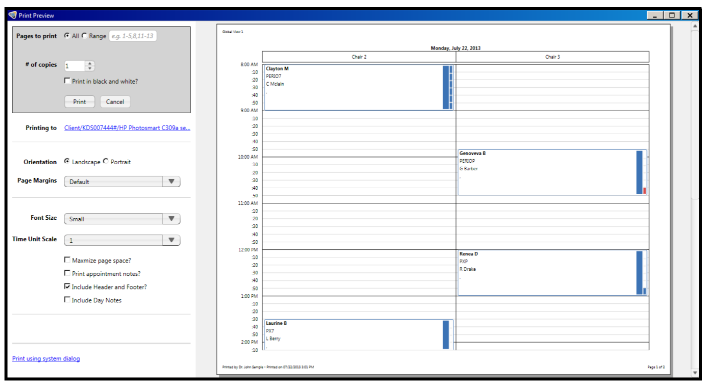
The active privacy setting is displayed on the **Settings** menu: **Privacy On** or **Privacy Off**. Click the option to change it.

## Printing the Schedule

**Print Scheduler**

To print the Day View:

1 Click the **Print Scheduler** icon, or select **File > Print**. The **Print Preview** window is displayed.



2 Set these options:

- **Pages to print**
- **# of copies**
- **Print in black and white?**
- **Printing to**
- **Orientation**
- **Page Margins**
- **Font Size**
- **Time Unit Scale**

3 Select from these options:

- **Maximize page space?**
- **Print appointment notes?**
- **Include Header and Footer?**
- **Include Day Notes**

4 Click **Print.**

## Printing Routing Slips

Offices typically print routing slips the night before or the day of an office visit. To print a routing slip, select an appointment in the Scheduler and then select the **Routing Slip** option in the practice management software.

For information about printing a routing slip automatically for each patient that is scheduled for an appointment on the current day, see the online help.

# Skill Sharpeners

### Exercise 1—Create a Personal View

You want to create views for staff members at your office. To create personal views:

1. Click the **Office Location** tab and the **Day View** icon.
2. Select the column heading of a doctor and drag the heading to the tab area. Release the mouse.
3. Double-click **New Name** until a rename field is enabled.
4. Type the doctor's name, and then click off the tab.
5. Repeat these steps for other staff members.

### Exercise 2—Set Up a Treatment Category

To see the treatments scheduled for patients, you decide to set up a category for the most common treatments. To set up the categories:

1. Select **Settings > Treatment Categories**. The **Treatment Categories** window is displayed.
2. Click the plus sign in the **Categories** section. Entry fields for a new category are displayed.
3. In the **Name** field, type **Exam.**
4. In the **Description** field, type **Examination and evaluation**.
5. In the **Treatment** section, click code ranges and type **00110.00** in the first field and **00180.00** in the second field.
6. In the **Color** field, click the arrow and select **Pastel 3** for the category.
7. Click **OK.**

Lesson 4

# Managing Appointments

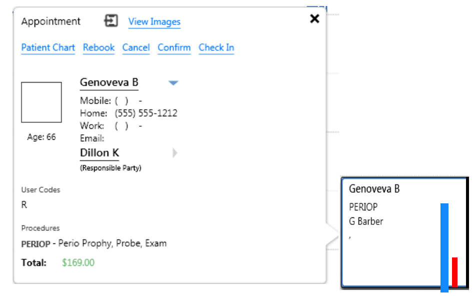
The Scheduler enables you to perform appointment-related tasks from where you are working in the software.

To begin making an appointment:

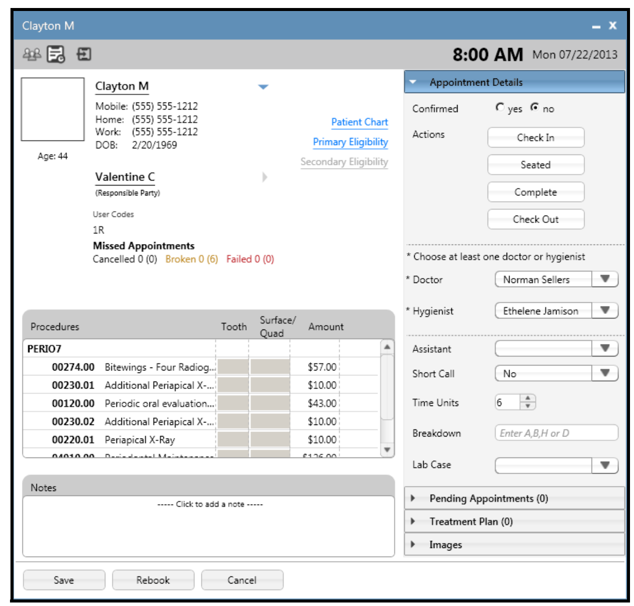
- Click the **New Appointment** button on the main toolbar. A new blank appointment card is displayed.
- Use the **Search** field to select a patient, and then click-and-drag the patient to the Day View. The patient tile hovers there while you select a time. Click the plus sign on the time slot, and the appointment card is displayed with the patient's information.
- Use your cursor to select a time slot in the Day View; click the plus sign to open a new blank appointment card; and select the patient from the appointment card's **Search** field.
- Select a patient from the Pending List or the Short Call List and click **Rebook.** The appointment appears in reschedule mode hovering over the Day View.

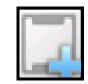
Appointments are displayed in the Day View as tiles.

Click once on a tile to display a flyout–a small panel with more information and options.




Click twice on a tile to open an appointment card.



**New Appointment**

The color and amount of information displayed on the tiles depends on the privacy setting, the number and width of the columns, how many appointments are booked in the same time slot for a column, the status of the patient, and the overlay, if any, you have selected for viewing.

Appointment tiles can also display mini icons to alert you to the following information:

**New Appointment**

- New patient
- Medical alert
- Note attached
- Lab case pending
- Confirmed
- Group appointment

The colored blocks on the right edge of the tile represent time units for the appointment as they relate to provider time. Use the following guidelines:

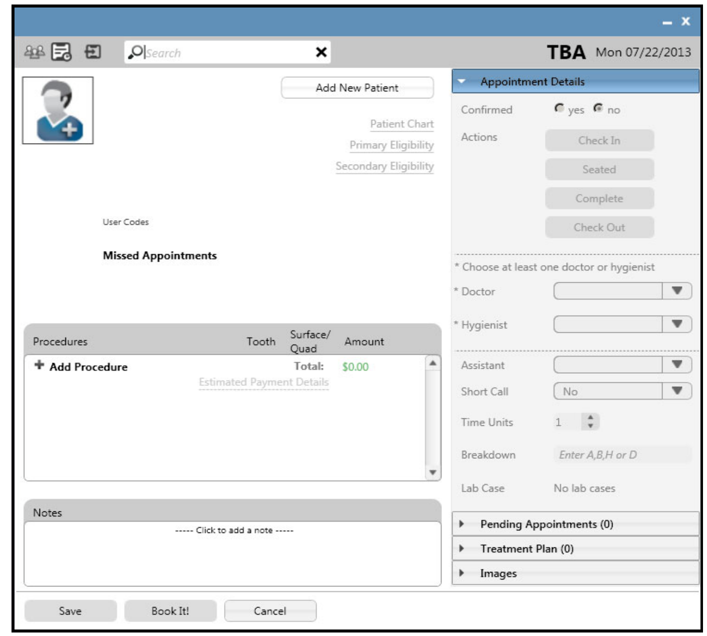
- White–Unbooked
- Color–Booked
- Red–Overbooked

## Adding a New Patient

If you are scheduling an appointment for a patient who is not in the system, you can add the new patient's basic information in the **Scheduler** window and then schedule the appointment. The patient's basic information is saved, and the detailed information, such as insurance, medical history, and so forth, can be entered in the appropriate locations in the practice management software.

To add a new patient in the Scheduler:

1 Click the **New Appointment** button. A blank appointment card is displayed.




2 Use the **Patient Search** field to confirm that the patient record does not already exist.

3 Click **Add New Patient**.

The **New Patient Information** window is displayed.


4 Enter the patient's name and date of birth. The name is automatically entered into the **Responsible Party** field.

5 If the patient is the responsible party, leave the **Create new** option selected. If the responsible party for the patient already exists, select **Add to existing**, and use the **Search** field to select the person.

6 Enter the patient's contact information. If one number is designated as the preferred method of contact, it is highlighted in the following places:

- Flyout panel
- Search results
- Confirmation, Pending, and Short Call Lists
- Appointment card

7 Click **Save**.

## Scheduling Doctor and Assistant Time

The Scheduler uses a time summary indicator to display how blocks of a provider's time are allocated to a specific appointment. Because a provider can be assigned to more than one appointment at a time, the indicator shows where the provider's time is available, booked, or over-booked.

Blocks filled with the tile’s main color indicate the doctor’s time is committed. Red blocks indicate the doctor’s time is overbooked. When the blocks to the right of the solid bar are empty, the doctor’s time is uncommitted.

When scheduling an appointment, you can display the time summary indicator by dragging an appointment tile over the column in hover mode. If that provider has been assigned to the appointment, the time units are indicated with colored blocks.

The breakdown of clinical resources for an appointment is defined in the **Breakdown** field in the **Appointment Details** section of the appointment card.

### Viewing Production Goals

When the Production Goal overlay is turned on, you can hover on the title in a provider's column to see a summary of the provider's net production toward assigned production goals. This feature is useful when deciding which provider to book for a particular time slot.

**Note**

If e-mail is the preferred type of contact, it is displayed on the flyout, but not the appointment tile.

## Using the Appointment Card

**Note**

When you perform many functions, notes are created automatically in the **Notes** section. You can also enter notes manually.

Use the appointment card to add, edit, or view the details of a patient's appointment, including procedures and estimated payment details. You can also use the appointment card to check a patient in and out.

At the bottom of the card, you can access the appointment log, save changes, and rebook or cancel an appointment.

To use the appointment card:

1 In the **Patient Information** section, you can view this information:

- Name
- Age
- Image
- Contact information
- Responsible party
- Medical alerts
- Missed appointment information

2 In the **Procedures** section:

**Note**

When procedure codes are associated with office codes, the office codes are displayed.

- Click **+ Add Procedure** to select procedures from the list. Begin typing a number in the field to access the list.
- Use the **Tooth** and **Surface** columns to enter the location of the procedure, when applicable.
- Click **Estimated Payment Details** to display the estimated amounts that insurance and the patient must pay.
- To delete a procedure, select it and click the red **X**.

3 In the **Appointment Details** section, use these options:

- **Confirmed**–Select **Yes** to confirm; **No** if not confirmed.
- **Check In**–Select when the patient arrives in the waiting room.
- **Seated**–Select when the patient has been seated in the chair.
- **Complete**–Select when the patient's treatment is completed.
- **Check Out**–Select to access the patient's ledger, accept payment, and check the patient out.
- **Cancel**–Select to cancel changes and close the card.
- **Doctor**–View or change the patient's doctor.
- **Hygienist**–View or change the patient's hygienist.
- **Assistant**–View or change the doctor's assistant.
- **Short Call**–Select **No**, if the patient is not interested; select **Anytime**, **Morning**, or **Afternoon**, if the patient can reschedule the appointment on short notice.
- **Time Units**–Enter or change the number of time units allotted for the appointment.
- **Breakdown**–Enter or change these producers required for the appointment:
  - **D**–Doctor
  - **H**–Hygienist
  - **A**–Assistant
  - **B**–Both
- **Lab Case**–Select **None**, **Pending**, or **Received**.

4 Use the **Pending Appointments** section to view a list of the patient's cancelled, broken, or failed appointments. Appointments that were created and saved, but not scheduled, are also displayed.

5 Use the **Treatment Plan** section to display the patient's treatment plan and a list of procedures. Click a procedure from the list to add it to the appointment.

6 Use the **Images** section to display a side panel of images.

## Confirming Appointments

Depending on where you are in the software, you can confirm an appointment in these ways:

- Day view–When you click an appointment, the appointment flyout is displayed. Click **Confirm**. You can click the **Confirmation** overlay to highlight unconfirmed appointments.

- Confirmation List–When you generate a Confirmation List, place your cursor over the appointment you want to confirm. The **Rebook**, **Cancel**, and **Confirm** buttons become active. Click **Confirm**.

- Patient search–When you use the **Search** field to find a patient, the patient's scheduled appointments are listed in the flyout. Click the triangle to expand the options, and then click **Confirm**.

- Appointment card–The **Confirmed** status is displayed under **Appointment Details**. Click **Yes**.

## Cancelling Appointments

When you click **Cancel** for an appointment, you are prompted to enter a cancel type and a reason for the cancellation. These types of cancellations are available:

- **Cancel**
- **Break**
- **Fail**
- **Delete**

A cancelled appointment becomes a pending appointment and can be accessed from the patient search results and rescheduled without having to recreate the details.

The cancellation details are automatically added to the **Notes** section of the appointment card and to the Appointment Audit Log.

You can cancel an appointment from these locations:

- Day view–When you click an appointment, the appointment flyout is displayed. Click **Cancel**. The panel expands for you to select a cancel type and enter a reason. Click **Cancel Appointment**.

- Patient search–When you use the **Search** field, the patient's scheduled appointments are listed in the flyout. Click the triangle to expand the options, and then click **Cancel**. The panel expands for you to select a cancel type and enter a reason. Click **Cancel Appointment**.

**Note**

Select **Delete** if you make an appointment in error and you do not want it to be tracked in the Pending List or as part of the patient's appointment history.

**Note**

When you confirm an appointment, a note is created automatically in the appointment record.

**Note**

To close the appointment card without saving edits, click **Cancel**.

## Rescheduling Appointments

When you begin to reschedule an existing appointment or schedule an unbooked appointment, the appointment tile turns pink and hovers above the Day View. When you find the date and time you want, click-and-drag the tile to the new time slot.

To reschedule an appointment, you can click **Rebook** on the appointment tile, card, or flyout, or in the Confirmation, Pending, or Short Call Lists. You can also reschedule directly from the Day View.

To reschedule an appointment from the Day View:

1 Click and hold your mouse over the appointment tile. The appointment tile turns pink and hovers in reschedule mode.

2 Use the calendar to select another date. The date is displayed with the appointment tile still hovering.

3 Drag the appointment to the time you want and release your mouse.

**Note**

If you have checked a patient in by mistake, open the appointment card and click **Undo** next to the **Check In** button.

**Note**

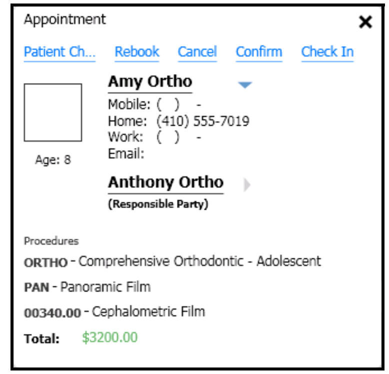
When you check the patient out from an open appointment card, the charges are posted automatically, and you do not have to click **Post**.

## Checking a Patient In and Out

You can check a patient in, seat the patient, mark the appointment as completed, and check the patient out from the appointment card and from the appointment tile in the Day View.

To check a patient in and out from the Day View:

1 Click the appointment tile and select **Check In** from the panel. The tile fills with the category color.




2 When you seat the patient, click the appointment tile and select **Seated.** A border surrounds the colored tile.

3 When the procedures for the appointment are complete, click the appointment tile and select **Completed.** The tile becomes a pale color.

4 To check the patient out, click the appointment tile and select **Check Out**. The patient's ledger is displayed.

5 Click **Post**, and the appointment tile is grayed out.

## Managing Patient Recare

The Scheduler tracks dates and provides links to help you manage patient recare appointments. A recare due date is automatically set for six months from a patient's last recare appointment. When a patient's recare status is **Due**, **Overdue**, or **Scheduled**, the status is displayed in patient search results.

When the status is **Due** or **Overdue**, click **Book recare** to schedule an appointment.

When the status is **Scheduled**, the appointment is included with the list of scheduled appointments.

**Note**

When you attempt to schedule a recare appointment before the due date, a message is displayed. This feature helps prevent denial of insurance claims.

## Using the Auto Scheduler

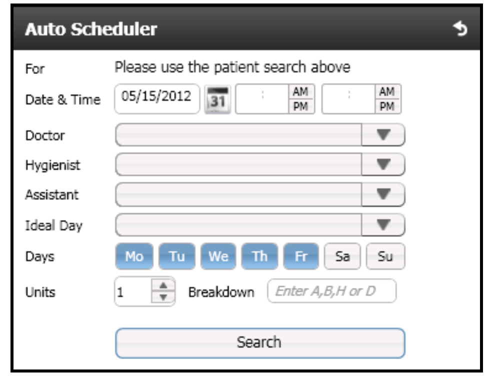
The Auto Scheduler enables you to search for open spaces in the schedule based on specific criteria. You can access this function from the icon below the **Search** field, from the patient search results, or from the appointment card.

When you access the Auto Scheduler from an existing appointment, the criteria from the appointment are used for the search.

When you specify a patient, any criteria entered for the patient, such as provider preference or mornings only, is filtered into the search.

To use the Auto Scheduler:

1 Click the **Auto Scheduler** button. The **Auto Scheduler** window is displayed, showing the patient's name, or you are prompted to use the **Search** field to select a patient.




2 Use the **Date** and **Time** fields to select a date or time range to search.

3 If the patient has a preferred doctor, hygienist, or assistant, select them in the appropriate fields. If the patient has no preference, leave the fields blank.

**Note**

Patient preferences can be changed to expand the search.

4 If your practice uses **Ideal Day** scheduling, use this field to select the appropriate scheduling class for the appointment.

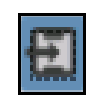
5 To search for specific days, deselect the other days.

6 Enter the number of time units for the appointment and the appointment breakdown.

7 Click **Search**. A list of time slots matching the criteria is displayed.

8 To preview an appointment in the Day View, click it once. To open an appointment card, click it twice.

9 Schedule the appointment.



**Auto Scheduler**

## Creating Notes and Messages

You can create the following notes to share with users on other workstations about the day's schedule, specific appointments and patients, or other information:

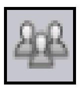
**Note**

You can display a note in multiple locations.

- Notes–Specific to the dates for which they are entered.
- Messages–Attached to a patient's record in another part of the software, such as the chart or ledger.

**Note**

Appointments that are part of a group display the **Group Booking** icon on the appointment tiles.

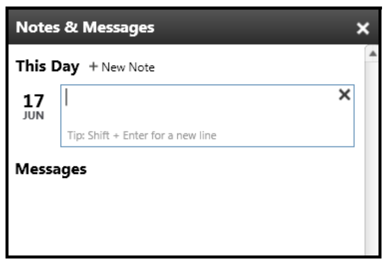


**Group Booking**

To create a note:

1 Click **Day Notes**. The **Notes & Messages** panel is displayed.

2 Click **+ New Note**. A text box is displayed for the current date.




3 Enter the note text and press Enter. The note is displayed in the panel with the date, time, and author of the note.

## Scheduling Family or Group Appointments

The Scheduler enables you to put family members into groups for the purpose of scheduling appointments for multiple patients at the same time.

You can create a group by clicking the **Add to Group** link in the patient search results. When you create an appointment for one member of the group, appointment tiles are created in hover mode for the other members. This keeps the appointments together so you can find a date and time to schedule all of them.

To create appointments for a group:

1 In a new appointment card, use the **Search** field to find a patient.

2 Click **Add to Group**. The **Group Booking** panel is displayed.

3 Use the search field to locate other patients for the group, and click **Add to Group**. The **Group Booking** panel displays the patients in the group, and names the group for the last name of the first patient.

4 Move your cursor over the names in the list to activate the options.

5 Click the arrow next to the patient you want to designate as the group contact, and select **Group Contact**. The group contact icon is displayed by the patient's name.

6 Do not close the appointment card.

To book appointments for members of the group:

1. With the first group member's appointment card open, add procedures and appointment details.
2. Click **Book It!** An appointment tile is created for each member of the group, suspended in hover mode, enabling you to search for a date with time slots available to schedule them at the same time.
3. After you book the appointments, double-click them to open the appointment cards that require more detail.

## Skill Sharpeners

### Exercise 1—Schedule an Appointment for a New Patient

A new patient calls your office and asks to make an appointment for a cleaning. You check to make sure the patient is not in the system, then add the patient, and schedule the appointment.

To add the new patient:

1. Click the **New Appointment** button. A blank appointment card is displayed.
2. Enter the patient's name and date of birth. The name is automatically entered into the **Responsible Party** field.
3. If the patient is the responsible party, leave the **Create new** option selected. If the responsible party for the patient already exists, select **Add to existing**, and use the **Search** field to select the person.
4. Enter the patient's contact information.
5. Click **Save**.

To schedule the appointment:

1. In the **Procedure** field, click **+** and type **cleaning**. Select the procedure.
2. In the **Doctor** and **Hygienist** fields, select the staff members.
3. In the **Notes** field, type any notes.
4. Click **Book It!**
5. Click the **Weekly View** icon and use the arrow keys to find an available hygienist time slot.
6. Click-and-drag the floating appointment to the time slot.
7. Close the appointment card.

### Exercise 2—Confirm an Appointment

To confirm the appointment you made earlier:

1. In the **Search** field, type three letters of the patient's last name.
2. Open the patient's appointment card. In the **Appointment Details** section, the confirmation status is displayed.
3. Click **Yes**.

### Exercise 3—Reschedule an Appointment

A patient calls the office and tells you that he must reschedule an appointment. To reschedule:

1. In the Day View, find the patient's appointment.
2. Click and hold your mouse over the appointment tile. The appointment tile turns pink and hovers in reschedule mode.
3. Use the calendar to select another date. The date is displayed with the appointment tile still hovering.
4. Drag the appointment to the time you want and release the mouse.

### Exercise 4—Check a Patient In and Out

A patient arrives at the office. Check him in, track his progress, and check him out.

To check the patient in and out:

1. In the Day View, find the patient's appointment and click the tile.
2. Select **Check In**.
3. When you seat the patient, click the appointment tile and select **Seated**.

4 When the procedures for the appointment are complete, click the appointment tile and select **Completed**.

5 To check the patient out, click the appointment tile and select **Check Out**. The patient's ledger is displayed.

6 Click **Post.**

Lesson 5

# Generating Lists

You can generate these lists from the **Tasks** tab:

- Confirmation
- Pending
- Short Call

## Generating Confirmation Lists

The Confirmation List is a list of patients with scheduled appointments that have not been confirmed, beginning with the appointment closest to the current date and time. From the list, you can click an appointment to view details and contact information or to add a note. You can also select one of the **Left Message** options to show information about a message if you did not reach a patient.

When you select an appointment from the list, the **Rebook**, **Cancel**, and **Confirm** buttons become active. If you select one of these options, an entry in the **Note** field is created.

To generate a Confirmation List:

1 Click the **Tasks** tab.

2 Click the **Confirmation List** icon. A list of unconfirmed appointments is displayed.

3 Use the **Filter** options to refine the list:

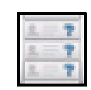
- **Location**–Use the arrow to select an office location.
- **Provider**–Use the arrow to select a provider.
- **Production Value**–Move the slider to select a production value to include.
- **Duration**–Move the slider to select an appointment duration length to include.
- **Days From Today**–Move the slider to select the number of days from today for appointments to include.

## Generating Pending Lists

The Pending List is a list of patients with appointments that were cancelled, broken, missed, or defined but not yet scheduled. From the list, you can click an appointment to view details and contact information or to add a note. To reschedule an appointment, click **Rebook**.

To generate a Pending List:

1 Click the **Tasks** tab.



**Pending List**

2 Click the **Pending List** icon. A list of patients with appointments with a status of **Cancelled**, **Broken**, **Failed**, or **Unbooked** is displayed.

All four types are included by default. To exclude a type of missed appointment, deselect it from the **Include** section.

**Confirmation List**

3 Use the **Filter** options to refine the list:

- **Location**–Use the arrow to select an office location.
- **Provider**–Use the arrow to select a provider.

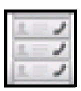
- **Include**–Select whether to include appointments that were cancelled, broken, failed, or unbooked.
- **On Pending List**–Move the slider to the right to include all appointments on the Pending List.
- **Order By (Oldest First)**–Select **Days Pending** or **Scheduled Date**.
- **Production Value**–Move the slider to select a production value to include.
- **Duration**–Move the slider to select an appointment duration length to include.

## Generating Short Call Lists

The Short Call List is a list of patients with scheduled appointments who might be available to fill an earlier time slot. From the list, you can click an appointment to view details and contact information or to add a note. To reschedule an appointment, click **Rebook.**

To generate a Short Call List:

1. Click the **Tasks** tab.



**Short Call List**

2. Click the **Short Call List** icon. A list of patients with non-cancelled appointments whose short call status is not set to **No** is displayed.
3. Use the **Filter** options to refine the list:
   - **Availability**–Select **Anytime**, **Morning**, or **Afternoon**.
   - **Location**–Use the arrow to select an office location.
   - **Provider**–Use the arrow to select a provider.
   - **Production Value**–Move the slider to select a production value to include.
   - **Duration**–Move the slider to select an appointment duration length to include.
   - **Days from Today**–Move the slider to select the number of days to include from the current date.
   - **Lab case received**–Select this option to include appointments for which lab cases have been received.

## Skill Sharpeners

### Exercise 1—Generate a Pending List

You want to see how many appointments have been cancelled in the last year. To generate the list:

1. Click the **Task** tab and the **Pending List** icon.
2. In the **Location** field, select your location.
3. In the **Provider** field, select **All.**
4. In the **Include** field, select only the **Cancelled** option.
5. In the **Production Value** field, move the slider to the left to include all appointments.
6. In the **Duration** field, move the slider to the right to include all appointments.
7. In the **Days Before Today** field, move the slider to the middle. The list is displayed.

### Exercise 2—Generate a Confirmation List

You want to see how many appointments have been confirmed for all providers for the next ten days. To generate the list:

1. Click the **Task** tab and the **Confirmation List** icon.
2. In the **Location** field, select your location.
3. In the **Provider** field, select **All.**
4. In the **Production Value** field, move the slider to the left to include all appointments.
5. In the **Duration** field, move the slider to the right to include all appointments.
6. In the **Days From Today** field, move the slider to **10.** The list is displayed.

### Exercise 3—Generate a Short Call List

A patient cancels a 3:00 appointment two weeks from today, and you want to fill the time slot. To see how many patients are available for an afternoon appointment in the next two weeks, generate a short call list. To generate the list:

1. Click the **Task** tab and the **Short Call List** icon.
2. In the **Availability** field, select **Afternoon**.
3. In the **Location** field, select your location.
4. In the **Provider** field, select the name of the provider who was originally scheduled.
5. In the **Production Value** field, move the slider to the left to include all appointments.
6. In the **Duration** field, move the slider to the right to indicate the amount of time available for the appointment.
7. In the **Days from Today** field, move the slider to **10.** The list is displayed.

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## V



## W

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