

Last Modified on 05/28/2024 3:00 pm EDT

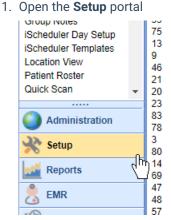
Appointment Types

An Appointment Type is used to determine what service is being performed during a scheduled visit.

The list of appointment types is customized for your practice. This article will explain how to add new appointment types to the application along with the associated features available.

Add a New Appointment Type

To add a new appointment type to the application, follow these steps:



2. Select Appointment Types from the setup list under the Schedule Setup section

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Providers	7	Foll Gro
Referral Source	12	Hea
Time Tracking	22	Hen
User Groups	25	Hen
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Schedule Setup	4	Imm
Appointment Status	73	Indi
Appointment Types	77	Ingu
Blackout Reasons	63	Initia
	pointmen	t Types
Group Notes	55	Inje
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3. Enter the Appointment Type Values in the work area

Duration	minutes
Lead Time	hours MML Lead Time hours
Default Comment	
Default Complaint	
Lock Placeholder	Telemedicine AlertMD Referral Indicator
Exclude Task	Overwrite Intake Co-Pay with Procedure Fee
Popup Text	
Color	Fuchsia 👻
Insurance Profile Ass	ignment
Ins. Profile	~
Superbill Additions	
Procedure #1	
Procedure #2	
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Procedure #1	
Procedure #2	Q.
Procedure #3	Q
Procedure #4	
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Intake	٩.
Batch 270 Eligibility	Service Types
Service Type	✓
Security User Groups	~
User Groups	▼

Save Reference Table (Alt + s)

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Duration	

Appointm

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5 45

The appointment type has now been added to the system. Please note, the appointment type may not show up in the iScheduler yet. It is usually necessary to associate the new appointment type with a resource.

Appointment Type Values

There are several settings and values related to an appointment type that determine how the applications responds when an appointment is added with this type.

Value	Example	How it is used
Name	New Patient Visit	The description of the appointment. This will show up in dropdowns and reports.
Duration (Mins)	30	The default duration of the appointment.
Lead Time (hours)	2	Used to determine how far in advance this type of appointment can be scheduled by users of the application.
MML Lead Time (hours)	24	Used to determine how far in advance this type of appointment can be scheduled by patients in MyMedicalLocker.

Value	Example	How it is used
Default Comment	Be sure to provide new patient packet.	Used to automatically set the Comment field on the appointment edit window.
Default Complaint		Used to automatically set the Chief Complaint field on the appointment edit window.
Lock Placeholder	Checked or not Checked	
Exclude Task	Checked or not checked	If checked, users will not be prompted to complete a Superbill or SOAP Note for this appointment.
Telemedicine	Checked or not checked	If checked, this appointment type will change how the patient appointment is viewed in the patient portal. When selected, these types of appointments will provide details on how to download the AnywhereCare app and what to expect at the time of visit.
Overwrite Intake Co-Pay with Procedure Fee	Checked or not checked	If checked, a user must setup a procedure code in the Superbill Additions section. This is used in the Intelligent Intake process. This option will overwrite the Co-Pay amount with the fee from the selected procedure code. This allows a practice to set a specific payment amount based on the type of visit.
Popup Text	Ensure the patient completes labs prior to appointment.	Used to generate a scheduling alert for the person creating an appointment. Helpful when you want to remind the front desk to take specific actions when scheduling this appointment.
Color	Light Red	 Used to define how appointments show up on both the EMR and iScheduler. The following settings may be used: User Setting: EMR Primary Appointment Color (Background) User Setting: EMR Secondary Appointment Color (Right Side Bar) Company Setting: iScheduler Primary Appointment Color (Background) Company Setting: iScheduler Secondary Appointment Color (Right Side Bar)
Superbill Additions (Provider 1-5)	81003	Used to send specific CPT code to the superbill for this type of appointment.
Intake	New Patient Intake	Used to auto-assign the appropriate Intelligent Intake template when this appointment is scheduled.
Batch 270 Eligibility Service Types	Physician Visit - Sick, Physician Visit - Well	Used when batch eligibility is ran. If the specific options are selected in this list, a Batch Eligibility request will fail if that service type is not active for that patient.
Security - User Groups	Surgery Scheduler	Used to limit which users can add or change these types of appointments. Helpful when you need to control how some sensitive types of appointments are scheduled.

Appointment Statuses

An Appointment Status is used to determine what state an appointment is in relative to to the appointment workflow. Appointment statuses may reflect states such as 'Checked-In', 'Confirmed', or other statues to help

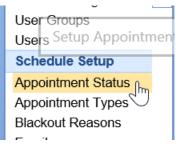
manage the workflow.

The list of appointment statuses is customized for your practice. This article will explain how to add new appointment statuses to the application along with the associated features available.

Add a New Appointment Status

To add a new appointment status to the application, follow these steps:

- 1. Open the Setup portal Group notes 75 iScheduler Day Setup 13 iScheduler Templates 9 Location View 46 Patient Roster 21 Quick Scan 20 23 83 Administration 78 3 Setup 80 14 h Reports 69 47 FMR 48 57
- 2. Select Appointment Status from the setup list under the Schedule Setup section.



3. Enter the Appointment Status Values in the work area on the right.

<u>-</u> -	Setup: Appointment Status						Choice
2, 1,	5						
ID	Description	Color ID	Active Ind		Appointment Sta	tus	
1	Scheduled	Outlook Blue	Y				
2	Confirmed	Outlook Yellow	Y	^	Description	* Scheduled	
3	No-Show	Outlook Red	Y		O al a a ID	* Outlook Blue	~
4	Checked-In	Outlook Green	Y		Color ID		v
5	Checked-Out	Outlook Orange	Y	_	Active Ind	✓	
6	Cancelled	Outlook Maroon	Y				
7	Reminder Sent	Outlook Purple	Y				
8	Arrived	Fuchsia	Y	_			
9	Blackout	Black	Y				
10	Telehealth	Red	Y				
11	Custom	Black	Y	_			

4. Click Save.



Appointment St

Appointment Status Values

There are several settings and values related to an appointment statuses that determine how the applications responds when an appointment is added with this set.

Value	Example	How it is used
Description	Scheduled	The description of the appointment status. This will show up in dropdowns and reports.
Active Ind	Checked	This determines if the status is active in the system or not. If the status is not active, it can not be used in the iScheduler.
Color ID	Light Red	 Used to define how appointments show up on both the EMR and iScheduler. The following settings may be used: User Setting: EMR Primary Appointment Color (Background) User Setting: EMR Secondary Appointment Color (Right Side Bar) Company Setting: iScheduler Primary Appointment Color (Background) Company Setting: iScheduler Secondary Appointment Color (Right Side Bar)

Resources

A resource in the application is an entity that has their own schedule. This may be a provider, a piece of equipment, a room, or anything else that needs their own unique list of appointments assigned.

This guide will explain how to add new resources into the system and how to manage the settings related to that resource.

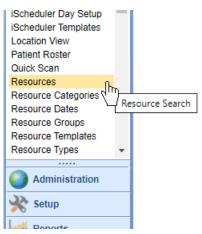
Add a new Resource

To add a new Resource to the application, follow the below steps:

1. Navigate to Setup



2. Select the Resources menu item under the Schedule Setup category



3. Click the New button on the toolbar

Search Results

<<	🔒 🗸 Setup: Resources						
\$	New 🖉 Open 🛛 🖉 User Setup						
(126)	Resource Create a new resource						
e (0)	Category Personnel						
	Name						
	Address 1						
D1)	Address 1						
3)	City						

4. Enter the required fields and adjust other necessary settings as needed.

Reso	ource Setu	р						×
Reso	Resource Information					forma	tion	
Res	ource #				Superbill IC	D9		▼
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æ v	Vork Week				Row 0 o	f 7		Available
	Day	Avail.	Start Time	End Time	Increment	*	Start Time	e am
1	Sunday	No	8:00AM	5:00PM	60			<u></u> .
2	Monday	Yes	8:00AM	5:00PM	60		End Time	am pm
3	Tuesday	Yes	8:00AM	5:00PM	60		Defende Terre la constant	
4	Wednesday	Yes	8:00AM	5:00PM	60		Default Time Increment	•
5	Thursday	Yes	8:00AM	5:00PM	60		Scheduling Patients	
6	Friday	Yes	8:00AM	5:00PM	60			
7	Saturday	No	8:00AM	5:00PM	60	-	Placeholders Only	* N
N	ew Ap	pointment Ty	rpes				<u>O</u> K <u>C</u> ar	ncel <u>A</u> pply

5. Click OK

60	Default Time Increment
60	
60	Scheduling Patients
60	_
60 -	Placeholders Only
	OK Cancel Apply Close window and save changes

The Resource has now been added. Please note, you may not see the Resource when you navigate to the iScheduler. It is often necessary to associate the resource with a user. This can be done using the **User Setup** option.

Resource Setup Values and Options

There are several settings and values related to a resource that determine how the applications responds when an appointment is scheduled with this resource

Resource Information

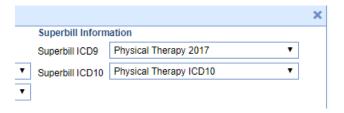
Value	Example	How it is used
Resource #	1234	This is an auto-generated value that unique represents this resource.
Category	Personnel	This is a logical grouping of resources. Resources are organized by this category in several locations throughout the application.
Туре	Providers	This is a second level of logical grouping within the Category.

Resource S	Setup		
Resource Infe	ormation		Sup
Resource #	76	:	Sup
Category	Personnel	۲ :	Sup
Туре	* Providers	•	
Address Info	rmation		

Superbill Information

Value	Example	How it is used
Superbill ICD9	Old Superbill	If a visit is opened prior to the ICD10 conversion date, this superbill will load by default. This is rarely used
		now.

Value	Example	How it is used
Superbill ICD10	New Superbill	If a visit is opened after the ICD10 conversion date, this superbill will load by default.



Contact Information

Value	Example	How it is used
Is Provider?	Checked	If checked, this indicates that this resource is associated with a rendering provider record. Clicking this will enable the Provider dropdown list.
Provider List	Joe Smith, MD	This is a list of rendering providers in the application. Linking a resource to a provider is a critical step in the setup process.
Name	Joe Smith, MD	This is the name of the resource and will appear throughout the system in lists and reports. If this resource is a provider, this will be filled in automatically.
Address 1	123 Test Lane	The street address for this resource. This is rarely used.
Address 2	Suite 3	The suite/apartment number for this resource. This is rarely used.
City	Indianapolis	The city for this resource. This is rarely used.
State	IN	The state for this resource. This is rarely used.
Zip	46237	The zip code for this resource. This is rarely used.
Country	USA	This country code for this resource. This is rarely used.

Address Infor		
Is Provider?	Armstrong, Stephen PT (Lively Bod. 🔻	
Name	* Stephen Armstrong PT	City
Address 1	123 Livelong Ln.	State
Address 2		Country

Indiana	polis	6	
	•	Zip	
USA	٠		

Address Information

Value	Example	How it is used
Primary/Secondary Name	Mary	Contact name for this resource. This is rarely used.
Primary/Secondary Phone	Smith	Contact phone number for this resource. This is rarely used.
Primary/Secondary Email	mary.smith@test.com	Contact email address for this resource. This is rarely used.

					ovana,	0011	
Cont	act Informatio	n					
Prim	ary Name				Secondary Nam	ne	
Prim	ary Phone			Ext	Secondary Pho	ne	Ext
Prim	ary E-mail				Secondary E-m	ail	
Caler	ndar Work We	ek					
🔊 v	Vork Week				Row 0 of 7		Available
	Day	Avail.	Start Time	End Time	Increment 🔺	Start Time	i am
1	Sunday	No	8:00AM	5:00PM	60		pm

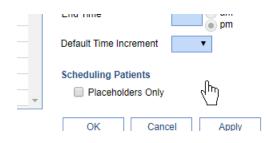
Calendar Work Week

This entire feature is no longer used. Please disregard all settings. The resource schedule can be controlled via the iScheduler Day Setup or iScheduler Templates.

Prim	nary E-mail				Secondary	E-ma
Cale	ndar Work We	ek				
۱	Nork Week				Row 0 o	f 7
	Day	Avail.	Start Time	End Time	Increment	-
1	Sunday	No	8:00AM	5:00PM	60	
2	Monday	Yes	8:00AM	5:00PM	60	
3	Tuesday	Yes	8:00AM	5:00PM	60	
4	Wednesday	Yes	8:00AM	5:00PM	60	
5	Thursday	Yes	8:00AM	5:00PM	60	
6	Friday	Yes	8:00AM	5:00PM	60	
7	Saturday	No	8:00AM	5:00PM	60	-
N	ew App	ointment Ty				

Scheduling Patients

Value	Example	How it is used
Placeholders Only	Checked	If this setting is on, appointments can only be added to pre-configured placeholders for this resource. If this setting is off, appointments can be scheduled for existing placeholders but can also be scheduled in any open time slot on the resource's schedule.



Appointment Types

Value	Example	How it is used
Sel (Selected)	Checked	If checked, this appointment type is available for this resource.
Def (Default)	Not checked	If checked, this appointment type is the default for this resource.
Name	New Patient	This is the name of the appointment type as defined in the Appointment Type Setup table.
Duration	30	The duration of the appointment type as defined in the Appointment Type Setup table.

	Sel	Def	Name	Duration	1
			Latabilation ration root Latin	IJ	
18			Event Monitor	60	
19			Follow up	15	
20			Follow-up Ortho Visit	15	
21			Group Session	60	
22		1	Headaches	30	
23			Hematuria	30	
24			Hemodialysis	60	
25			Hemorrhoids	45	
26	1		Immunization	15	

Resource Templates

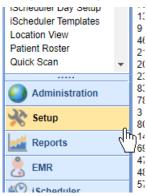
A Resource Template is used to assist in blocking a scheduling when using the iScheduler Day Setup. A unique color is used to identify the scheduling assignment, while a description can be found by hovering over the specific template block.

This guide will explain how to add new resource templates into the system, how to manage the unique colors and descriptions, and how to add the templates to the specific schedule.

Add a new Resource Template

To add a new Resource Template to the application, follow the below steps:

1. Navigate to Setup



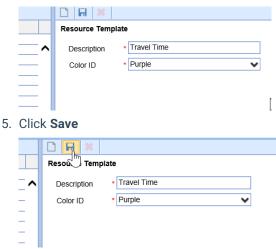
2. Select the Resource Templates menu item under the Schedule Setup category



3. Click the Blank Sheet of Paper button on the toolbar



4. Enter the required fields by creating a Description and choosing a unique Color ID.



The Resource Template has now been added. Please note, you may not see the Resource Template when you navigate to the iScheduler Day Setup. It is often necessary to reset the Setup Portal.

NOTE FROM IMPLEMENTATION: Often, databases are setup with existing Resource Templates than can

modified for the needs of the practice. Keep reading for steps to modify existing Resource Templates.

Modifying an Existing Resource Template

Most databases are built with seven existing Resource Templates that can be modified from with current Template Description and Color ID.

To change an existing Resource Template, follow the below steps:

1. Select an existing Template Resource from the list

2	3			
ID	Template Description	Color ID		
1	Template 1	Gray		
2	Template 2	Silver	^	
3	Template 3	Red		
4	Template 4	Green		
5	Template 5	Blue		
6	Template 6	Maroon		
7	Template 7	Olive		

2. Modify the Description and/or Color ID

	Resource Temp	plate	
^	Description	* Lunch Time	
_	Color ID	* Gray	~
_		Black	
-		White	~
-		Gray	
-		Silver	\sim
		Red	

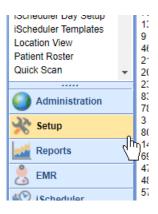
3. Click Save

	Resol Temp	late	
_^	Description	* Lunch Time	
_	Color ID	* Gray	~
_			
_			
_			

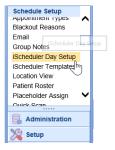
Adding a Resource Template to a Schedule

To add a Resource Template to an existing resource's schedule, follow the below steps:

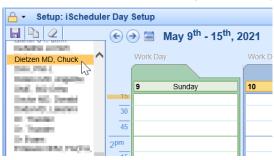
1. Navigate to the Setup



2. Select the iScheduler Day Setup menu item under the Schedule Setup category



3. Select the resource schedule that you wish to apply the Resource Template to



4. Select a time interval on the schedule to turn the block navy blue



5. Right click over the navy blue block, select Add Overlay

	Work Day				Work	Day	
	Dietzen MD	,			Dietzer	n MD,	
	10	Monday			11	Tuesday	
0							
5							
				Add Ap	pointme	nt Placeholder	
5				Add Ov	erlav		
0		L			erlay Bla	ackowi	
5				Delete			
					,		
5				Add Lo			
0				Delete	Location		
5				Clear S	elected I	Rows	
				Copy D	ay		
5			Q	Clear D	ay		
0							

6. Select the Overlay Color or Resource Template that you wish to apply, Click **OK**

Description	Color
East Office	Outlook
janua dia any	Light Greer
Lunch free	Light Gray
North Office	Light Ora
Office	Outlook G.
Enclose E	Outlook
New York Cong.	Olive
in all a	Red
Programs that	Silver
Carl Contract	Outlook B
Comment	
	^
	~
	OK

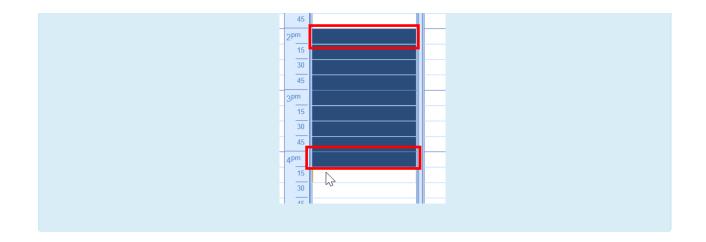
7. Save the schedule

Getup: iScheduler Day Setup						
	🗲 Э 🗮 May					
tzen MD, Chuck	Mork Day					

TIP: To create an extended Resource Template, single click on the first interval of time, turning the block navy blue. Then, hold SHIFT down on your keyboard and click a later time interval.

For example: If a block is from 2:00 - 4:15 PM, select the 2:00 - 2:15 block, hold SHIFT down on the keyboard, then select the 4:00 block.

This will select multiple blocks at once in order to apply an Overlay to a longer period of time.



Blackout Overlays

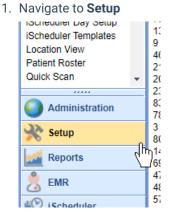
A Blackout Overlay is used to assist in blocking a scheduling when using the iScheduler Day Setup. The Blackout Overlay applies a black overlay over a desired time on the schedule, which prevents a user from scheduling a patient appointment during that time.

This guide will explain how to add a new Blackout Overlay Reason into the system and how to apply the Blackout Overlay to the schedule within the iScheduler Day Setup.

PRO TIP: Check out the Blackout Appointment Status ID company setting for even more control and reporting options.

Add a new Blackout Reason

To add a new Blackout Reason to the application, follow the below steps:



2. Select the Resource Templates menu item under the Schedule Setup category

Schedule Setup
Appointment Status
Appointment Types
Blackout Reasons
Email (^m)
Group Notes
iScheduler Day Setup
iScheduler Templates 🔻
Loootion Minus
🛃 Administration
🌿 Setup

3. Click the Blank Sheet of Paper button on the toolbar



4. Create a Description and make the Reason Active

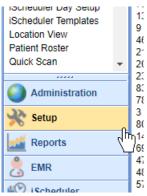
		Blackout Reason
	^	Description * Holiday X
	-	Active 🗸
	-	
5.	Clic	k Save
		Black Reason
	_^	Description * Holiday Active 🖌
	_	

The Blackout Reason has now been added. Please note, you may not see the Blackout Reason when you navigate to the iScheduler Day Setup. It is often necessary to reset the Setup Portal.

Adding a Blackout Overlay to a Schedule

To add a Blackout Overlay to an existing resource's schedule, follow the below steps:

1. Navigate to the Setup



2. Select the iScheduler Day Setup menu item under the Schedule Setup category

Schedule Setup
Appointment rypes
Blackout Reasons
Email
Group Notes
iScheduler Day Setup
iScheduler Templates m
Location View
Patient Roster
Placeholder Assign 🗸
Ouick Scan
Station
🎉 Setup

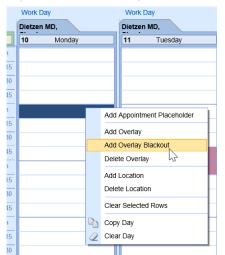
3. Select the resource schedule that you wish to apply the Blackout Overlay to

A v Setup: iScheduler Day Setup						
R b 2	. 🔶 🤆) 🖬	May 9 th - 1	5 th , 2021		
Indexes and the						
Dietzen MD, Chuck		Work D	lay	Work D		
3						
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Dealer NG: Density	15					
0.0000.00000	30					
In Transford						
in Transfer	45					
in France	2pm					
Filmen BALTATE,	21					

4. Select a time interval on the schedule to turn the block navy blue

•	→	Schedule Start 12 am	
	Work Day	Work Day	Work Day
	Dietzen MD,	Dietzen MD,	Dietzen MD,
	9 Sunday	10 Monday	11 Tuesday
30		30	
45		45	Ν
2 ^{pm}		2 ^{pm}	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
15		15	
30		30	
45		45	
3 ^{pm}		3pm	
15		15	

5. Right click over the navy blue block, select Add Overlay Blackout



6. Select the Blackout Reason and add a Comment if desired, Click OK

5	
0	Blackout Comment Tooltip X
5	Reason Comment
	VHoliday LUNCH National Puppy Day, Office Closed
5	Meeting
10	PTO Vacation
15	
5	Apply the blackout information
10	СК
.5	

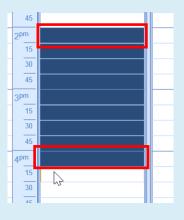
7. Save the schedule

🔒 🔹 Setup: iSche	dule	r Day Setup	
		€ €	May
tzen MD, Chuck	~	Work D	iau

PRO TIP: To create an extended Blackout Overlay, single click on the first interval of time, turning the block navy blue. Then, hold SHIFT down on your keyboard and click a later time interval.

For example: If a block is from 2:00 - 4:15 PM, select the 2:00 - 2:15 block, hold SHIFT down on the keyboard, then select the 4:00 block.

This will select multiple blocks at once in order to apply an Overlay to a longer period of time.



iScheduler Day Setup

The iScheduler Day Setup is used to create structured schedules for individual resources. User access to the iScheduler Day Setup can be configured in the roles.

NOTE FROM IMPLEMENTATION: Most databases are setup to provide only the users with Admin privileges the ability to access and setup the iScheduler Day Setup. Practices who wish for additional users without Admin privileges to have access to the iScheduler Day Setup should configure a **new role** specifically for the iScheduler Day Setup.

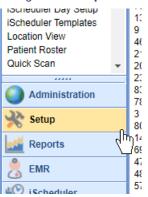
This guide will explain how to configure custom schedules within the system, how to manage the unique locations, and how to build available times for appointments within the iScheduler.

When building a schedule, it is important to note that the schedule is being built on true dates. Meaning that the schedule is being applied directly to an actual date and not just a stored template. Users may wish to copy days to dates in the future in order to efficiently build schedules. Keep reading for how to copy a schedule forward.

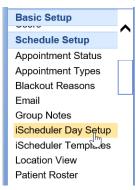
Accessing the iScheduler Day Setup

Begin by navigating to the Setup portal and locating the Schedule Setup section of the navigation pane.





2. Find the Schedule Setup section and select the iScheduler Day Setup

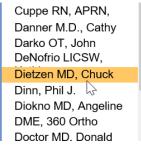


3. Review the list of resources displayed on the left-hand side of the screen

- ← Setup: iScheduler Day Setup						
🔒 🖻 🖉		€.	» 🖬	Augu		
Armstrong PT, Stephen				5		
Artar MD, Ali	^		Work I	Dav		
Belza MD, Robert				,		
Carlys Fake Resource						
Chapman PT, Ann			8	Sunday		
Charles M.D., Stuart			-	carracy		
Charlotte Stites		2pm				
Christie MD, FACC,		Ŭ —				
Cohen M.D., Sandra		15				
COVID		30				
Cuppe RN, APRN,						
Danner M.D., Cathy		45				
Darko OT, John						
DeNofrio LICSW,		4 ^{pm}				
Dietzen MD, Chuck		15				
Dinn, Phil J.		30				
Diokno MD, Angeline		30				
DME, 360 Ortho		45				
Doctor MD, Donald						
Doda MD, Lakshmi		5 ^{pm}				
Dr. Thunder		15				
Dr. Thunder						
Dr.Evans		30				
Ernisson DPM, FACFA,		45				
Evans MD, Jackie						

NOTE : If you do not see the resource that you are looking for, be sure that your user has **access to** that resource.

4. Select the resource that wish to modify



Schedule Start and End Time

Schedules are setup by default to display 24 hours of availability. For the best experience in the iScheduler, we recommend that the practice setup the Schedule Start and End Time to a more focused area of available time.

NOTE FROM IMPLEMENTATION: For best practices, your implementation team recommends identifying a universal start and end time that easily applies to all resources and also allows for a minimum of one hour of "buffer" time.

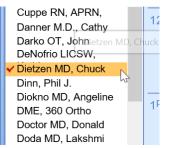
For example:

- If the practice opens at 8:00 AM and most providers begin seeing patients at 8:30 AM, 7:00 AM would be an ideal Schedule Start Time.
- If the latest provider taking their last appointment is finished at 4:00 PM, an ideal Schedule End time would be 5:00 PM.

By unifying the Schedule Start and End Time across all resources, this will create a streamlined view within the iScheduler.

To configure the Schedule Start and End Time for a resource:

1. Ensure that you have your resource selected.



2. Set the appropriate Schedule Start and End Times, located at the top of the screen.

🔒 🔹 Setup: iSche	Getup: iScheduler Day Setup					Choice 🚍			
🖶 🔁 🖉 (↔ ↔ 🗃 August 8 th - 14 th , 2021				Sch	edule Start 7 am	Schedule End 5 pm	~		
✓ Dietzen MD, Chuck Dinn, Phil J.	^	Work Day	Work Day	Work Day		Work Day	Work Day	Work Day	
Diokno MD, Angeline DME, 360 Ortho		Dietzen MD, Chuck	Dietzen MD, Chuck	Dietzen MD, Ch	uck	Dietzen MD, Chuck	Dietzen MD, Chuck	Dietzen MD, Chucl	
Doctor MD, Donald		8 Sunday	9 Monday	10 Tuesday		11 Wednesday	12 Thursday	13 Friday	
Doda MD, Lakshmi		30				30			
. Click Save									

Work Day Start and End Time

The Work Day Start and End Time can be found by selecting the "Work Day" link, located at the top of each day. The Word Day is used to limit the number of true "working hours" that are displayed for a schedule resource.

NOTE FROM IMPLEMENTATION: The Work Day Start and End Time should be set to accurately represent when appointments can be scheduled.

For example: If a provider will take appointments from 9:00 AM to 3:00 PM, their Work Day start will be 9:00 AM and Work Day End will be when their last appointment is over (Ex: 3:30 PM).

1. With your Resource selected, navigate above the day of the week you wish to modify



2. Set the appropriate Work Day Start and End Time

_	41-	- 4									
st	15 th - 21	I ST , 2	2021		Sc	hedu	ile St	art	12 am		
		Wor	Work Day				Work Day				
;k		Diet	Tuesday 08/	17/2021			X	С	huck		
у		16	Workday Start	9 am	*	00	~	ue	sday		
			Workday End	3 pm	~	30 00	X	E			
			 Active 			05	~	Г			
			No Copy Ov	/er		10 15		Г			
				15		20					
				30		25 30					
				45	5	35 40					
				2 ^{pm}	_	45					
				15	_	50 55	\sim				
					_						
3. C		' to	apply obc								
	k Day	10	apply cha	Work I	Dav						
-			47/2024	WORK	-						
et	Tuesda	y ua	/17/2021		X	Cł					
3	Workday	Start	9 am	✔ 00	~	ue					
_	Workday	End	3 pm	✔ 30	~	E					
-	 Active 	э				E					
-	No C	opy (Over	OK (H					
			15	2	m_	Į.					
			15								
1. S	ave th	e so	chedule								
	<mark>⊢ •</mark> s	etup	: iSchedule	r Day S	etu	р					
	H Pa	2		\mathbf{e}) 🗄		Ma	v			

Note: The "Active" indicator determines whether or not this day will display on the iScheduler. The "No Copy Over" indicator determines whether or not the parameters set for this day can be copied over.

May

~

How to use:

tzen MD, Chuck

- 1. Active: For most Saturdays and Sundays, users may wish to deselect the Active indicator so that the weekends do not display on the iScheduler.
- 2. No Copy Over: For days that should not be changed, the No Copy Over will keep the parameters for that single day. For example, Holidays could be set as "Do Not Copy Over" because those days will not change, even if a user wishes to copy a schedule forward over that previously set holiday.

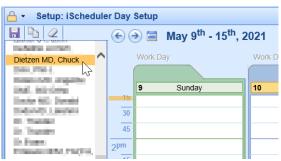
Tuesday 08/1	7/2021			X		
Workday Start	9 am 🗸 🗸		00	~	u	
Workday End	3 pm	~	30	~	ł	
 Active 					ł	
No Copy Over						
hz						

Apply Locations

It is important to appropriately assign locations to a schedule in order to efficiently schedule and navigate within the iScheduler. Locations can be assigned unique colors within the Location Setup.

To apply a location to a schedule:

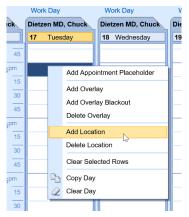
1. Ensure that your resource is selected



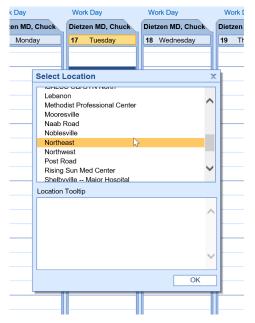
2. Select a time interval on the schedule to turn the block navy blue

•	🌛 🗮 🛛 May 9	th - 15 th , 2		Schedule Start 12 am			
	Work Day		Work Da	Work Day			Day
	Dietzen MD,		Dietzen M	ND,		Dietzer	1 MD,
	9 Sunda	iy	10	Monday		11	Tuesday
30					30		
45					45		N
2 ^{pm}					2 ^{pm}		h3
15					15		
30					30		
45					45		
3 ^{pm}					3 ^{pm}		
15					15		

3. Right click over the navy blue block, select Add Location



4. Select the desired location, Click OK



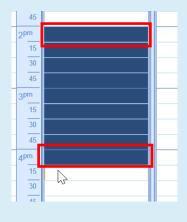
5. Save the schedule

🔒 🔸 Setup: iSche	eduler Day Setup
	👝 📀 🖮 May
tzen MD, Chuck	Mork Day

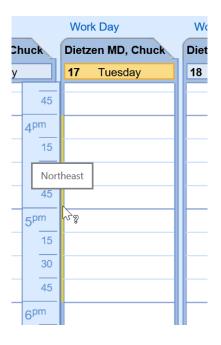
PRO TIP: To apply a location for an extended period of time, single click on the first interval of time, turning the block navy blue. Then, hold SHIFT down on your keyboard and click a later time interval.

For example: If a provider services a single location for several hours, select the 2:00 - 2:15 block, hold SHIFT down on the keyboard, then select the 4:00 block.

This will select multiple blocks at once in order to apply a Location to a longer period of time.



Locations are displayed with a stripe of color on the left-hand side of the day. Users can hover their mouse over the color to display a tooltip description of the location name.

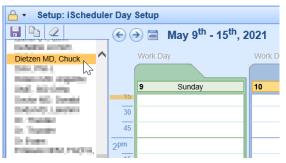


Apply Placeholders

For practices who wish to set specific appointment types throughout the day, the placeholder function will allow a user to determine a unique template within the iScheduler Day Setup.

To apply a placeholder to a schedule:

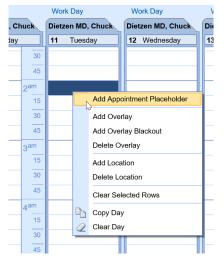
1. Ensure that your resource is selected



2. Select a time interval on the schedule to turn the block navy blue

•			Schedule Start 12 am	
	Work Day	Work Day		Work Day
	Dietzen MD,	Dietzen MD,		Dietzen MD,
	9 Sunday	10 Monday		11 Tuesday
30			30	
45			45	N
2 ^{pm}			2 ^{pm}	
15			15	
30			30	
45			45	
3pm			3 ^{pm}	
15			15	

3. Right click over the navy blue block, select Add Appointment Placeholder



4. Select the desired Service Location and Appointment Type, click OK

),						
_	Add Appointment Placeholde	er				X
	Appointment Location		Appointment Type		Duration	
	*DME -Home (DMERC)		19.2 Test		5	
_	Assisted Living	^	20.1 Test		30	^
2	ChoiceMD Telehealth		Annual Exam		45	
)	Community South		Appendectomy		30	
_	Davita Indy North Dialysis		Case Management		90	
5	Day Service		Catheter Change		15	
	DCD		Cautery		15	
	fake clinic		Cholecystectomy		60	
5	Family First Carmel		Clinical Assessment		60	
,	Family First Physicians		Colposcopy		30	
_	Fishers		Covid testing		30	
5	Franklin		Cryo		15	
-	Franklin Johnson Memorial Hos		Cysto		15	
	Great Plain Vendor		Daily Visit		30	
5	Greenwood High School		Discharge		30	
_	iSalus Healthcare Carmel		DME		30	
)	iSalus Healthcare East		DME Follow up		15	
5	iSalus Healthcare South		DOT Exam		30	
1	iSALUS OB/GYN Downtown		Endometrial Biopsy		30	
	iSALUS OB/GYN North		Established OB		30	
;	Lebanon		Established Patient F	oot Exam	15	
_	Methodist Professional Center	~	Event Monitor	A	60 placeholder i	
)	Mooresville		Follow up	Apply the	placenoider i	nformation
ō	Lead Time Hours				OK	

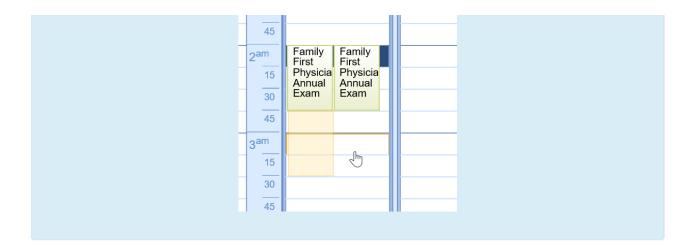
5. Placeholders will be displayed using the duration indicated in the Appointment Type setup

		Work Da	
, Cł	nuck	Dietzen MD, Chuck	Dietzen N
day		11 Tuesday	12 Wed
	30		
	45		
	2 ^{am}	Family First Physicians	
	15	Annual Exam	
	30	-	
	45		
	3 ^{am}		
	15		

PRO TIP: To quickly create a custom workday using placeholders, simply **right click** over the placeholder to easily **Copy** or **Delete** an existing placeholder.

	40	
	2 ^{am}	Family First Physicians Annual Exam
	15	Annual Exam
		Сору
	30	
	45	
L		
	3 ^{am}	

Simply drag and drop the duplicate placeholder to the desired time.

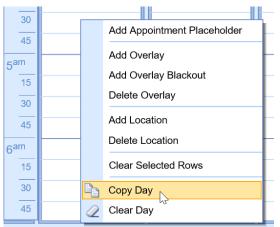


Copying a Schedule

In an effort to efficiently create, manage, and distribute schedules, several copying functions are available for use in the iScheduler Day Setup. Once a schedule has either been built for a single day or an entire week, user will have the opportunity to copy that schedule forward.

Copy a Single Day

1. Simply right click over a single day and select Copy Day



2. Using the calendar, select the desired dates to copy the selected date forward. Then select the desired resource(s) in which you wish to apply the schedule to. Click **OK**

Copy Day from 05/11/20	21	x
To Date(s)	To Resource(s)	
May 2021 Image: Constraint of the state of the st	Christie MD, FACC, Jeffrey Cohen M.D., Sandra COVID Cuppe RN, APRN, Chalice Danner M.D., Cathy Darko OT, John DeNofrio LICSW, Kathleen ✓ Dietzen MD, Chuck Dinn, Phil J. Diokno MD, Angeline DME, 360 Ortho Doctor MD, Donald Doda MD, Lakshmi Dr. Thunder Dr. Thunder	*
Clear Days	Clear Resources	

Copy an Entire Week

1. From the iScheduler Day Setup toolbar, select the copy button

🔒 🗸 Setup: iSched	dule	er Day Setup	
8 🔁 🖉		(←) → 🖬 May 9 th	- 15 th , 2021
✓ Dietzen MD, Chuck	~	Mark Davi	Mark Davi
Dinn, Phil J.		Work Day	Work Day
Diokno MD, Angeline		Dietzen MD, Chuck	Dietzen MD, Chuc

2. Using the list of available weeks, select the desired dates to copy the selected week forward. Then select the desire days of the weeks you wish to copy. Finally, select the desired resource(s) in which you wish to apply the schedule to. Click **OK**



Batch Eligibility Setup

Batch Eligibilit	y Setup					×
Pulling Days Default Provider Coverage						
NPI Location	 Provider NPI Provider Group Provider Group) NPI NPI if it exists, otherwise use Prov	ider	NPI		
Pulling Type Monthly (Perform eligibility if patient has not had eligibility pulled within the current month) Bi-Monthly (Perform eligibility if patient has not had eligibility pulled for the current month, or since the 15th of the month) Always (Perform eligibility for a patient each and every time) Auto-Retry Error Batch Eligibilities						
Appointment Stat	us /	Appointment Type		Appointment Resource		
 Scheduled Confirmed No-Show Checked-In Checked-Out Cancelled Reminder Sen Arrived Blackout Telehealth Custom QA Status Test 22.16 qa test cases Rescheduled 		 16813 Advanced Prostate Cancer Cl Appointment Reminder azb azzb azzz azzz BCG Biopsy Bladder Fulgeration Block Blood Draw Cancer Discussion Cath UA 	•	 Koo Lab Lauren P. Herrmann, MD Legacy Resource Matthew L. Heinlein, PA-C Michael R. Thompson MD Michell Test Paul Goldsmith, MD Sara E. Irving, NP-C Ua Only Ultrasound Urodynamics Wesley D. Smith, MD William H. Newhart, MD William T. Thompson, MD 		•
					🕤 Refresh	🖫 Save

The Batch Eligibility Setup screen consolidates all of the settings for Batch Eligibility into one screen. On this screen you will configure the settings for batch eligibility according to the preferences of your practice. In addition you can override some of these setting by payer in Payer Setup.

Fields

- **Pulling Days:** The number of days in advance to pull eligibility requests. ex. if set to 3, eligibility requests will be made 3 days prior to the appointment date.
- Default Provider: The default provider to send with the eligibility request.
- Coverage: The coverage levels to check for each appointment.
 - Primary Insurance will only run for the primary insurance associated with the patient even if they have multiple insurances.
 - Primary and Secondary Insurance will run for both primary and secondary insurances if they exist.
 - Primary, Secondary, and Tertiary Insurance will run for all 3 level of insurance if they exist.
- NPI Location: The location of the NPI to send with the eligibility requests.
 - Provider NPI will pull the individual provider NPI for the appointment resource associated with the appointment.
 - Provider Group NPI will pull the group provider NPI for the appointment resource associated with the appointment.
 - Provider Group NPI if it exists, otherwise use Provider NPI will pull the group provider NPI if it exists.
 If it does not exist then it will pull the provider individual NPI for the appointment resource associated with the appointment.
- Pulling Type: The frequency of which to pull eligibility requests for a patient.

- Monthly will pull eligibility only if the patient has not already had a request ran that month.
- Bi-Monthly will pull eligibility only if the patient has not already had a request ran in the same half of the month.
- Always will pull eligibility for every patient appointment regardless of their last eligibility check.
- Auto-Retry Error Batch Eligibilities: This will retry eligibility checks that have errored on the next batch eligibility run.
- **Appointment Status:** Multi-Select box that allows you to select every appointment status that you wish to have eligibility ran for.
- **Appointment Type:** Multi-Select box that allows you to select every appointment type that you wish to have eligibility ran for.
- Appointment Resource: Multi-Select box that allows you to select every appointment resource that you wish to have eligibility ran for.