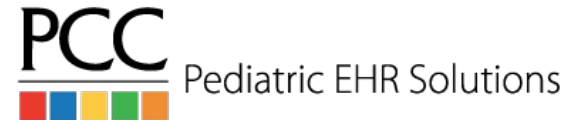


# The Appointment Book: Scheduling Made Easy

With Bryan LeMoine  
June 21st, 2018



# The Original Scheduler - osam

```
Sam, your Appointment Minder

Name(s)

Pick: find, schedule, clear, inquire, or quit

Command:
```

# The Original Scheduler - osam

```
b
      Sam, is now scheduling.

      a           b           c           d           e
      mon        thu        fri        mon        wed
looking for appointment on : 1Aug95   4Aug95   5Aug95   8Aug95   10Aug95
      between:  7:30am   7:30am   7:30am   7:30am   7:30am
Name(s)         and   :  6:00pm   6:00pm   6:00pm   6:00pm   6:00pm

Winnie the Pooh      4:00pm0 11:40am0 10:00am0 10:00am0  9:30am0 b

Pick: next, back, more, less, spread, confirm, quit, or np

Command or time frame:
```

# The Improved "Old" Scheduler - sam

Page Up		F12		Page Down	
<b>SAM Search Criteria</b>					
<input checked="" type="checkbox"/>	Name	Visit Reason	PCP Provider	Mins	L
X	Pebbles Flintstone		W		0
Time Frame: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>					
PATIENT: Pebbles Flintstone		PAT STATUS: \$\$ Problem, Adopti		LAST PHYS: 10/10/13	
DOB: 05/02/2010		CUST STATUS: Billing Problem		NEXT APPT:	
AGE: 4 yrs, 2 mos		GUAR STATUS: Billing Problem			
CUST: Fred Flintstone			GUAR: Fred Flintstone		
1400 Rock Road			1400 Rock Road		
Winooski, VT 05404			Winooski, VT 05404		
H: 802-555-0105	PERS BAL: \$ 0.00	H: 802-555-0105	PERS BAL: \$ 0.00		
W: 802-555-0146	INS BAL: \$ 187.00	W: 802-555-0146	INS BAL: \$ 187.00		
PRI: BCBS Federal \$20 Full WC		CERT: 2877384723	GRP: 29384		
SEC:		CERT:	GRP:		
School: Bedrock Central			SSN: 828-74-6104		
AltLastNam: Rubble			Old PM #: 2755		
MISS: 1 (12/27/13, Pebbles, Sick Call)    CANC: 1 (02/20/08, Pebbles, Sick Call)					
Schedule	Inquire	Find	Next Relation	Demo-graphics	Clear

# The Improved "Old" Scheduler - sam

Page Up		F12		Page Down			
Time Frame: on 07/31/14-07/31/14				SAM Normal View			
Pebbles Flintstone		3:30p	15mins	Sick Call	Casey Office		
Dr. Casey		Dr. Davidson		Dr. Gomez			
Thu Jul 31, 2014		Thu Jul 31, 2014		Thu Jul 31, 2014			
2:45p		2:45p	15	3:00p	15		
15 - Sick Call							
Hayley M. Van Bru							
3:00p	15	3:00p		3:15p	15		
		15 - Sick Call		15 - Sick Call			
		Yusuf "Matt" Nich		Preston Pintarch	Wael Stehr		
3:15p	15	3:15p	15	3:30p			
				15 - Sick Call			
				Lindsey Boyer	Kathryn Sharp		
3:30p	15	3:30p	15	3:45p	15		
3:45p		3:45p		4:00p	15		
15 - Sick Call		15 - Sick Call					
Trevor Batz		Lucas Lutkewitte			4:15p		
4:00p		4:00p		4:15p	15		
15 - Sick Call		15 - Sick Call					
Aaron Sharp		Wael Stehr			4:30p		
4:15p	15	4:15p	15	4:30p	15		
4:45p					15		
Schedule Appt	New Time Frame	Previous Availabl	Next Availabl	Deselect This Day	Select ThisProv	Day View	Detailed View

# The Appointment Book

PCC EHR

Schedule (16) Visit Tasks (99+) E-lab Results (40) Rx Queue (0) Messaging (99+) Signing (99+) Appt Book

Location: Burlington Peds - New North End

Provider: Elizabeth Casey, M.D.

Week of Sunday, 04/22/18

	Sunday 04/22/18	Monday 04/23/18	Tuesday 04/24/18	Wednesday 04/25/18	Thursday 04/26/18	Friday 04/27/18
		Injury	immunizations only			
9:15 am		Elena Swanger School exam				
9:30 am		John Hartman 1 Day Sick	Tyler Banzrof 3yr Well Visit		Renee Weikert Daycare exam	
9:45 am		Joseph Keller 3yr Well Visit		Michael Weaver 6yr - 7yr Well Visit		
10:00 am			Brian Yeager 6yr - 7yr Well Visit	Jacob Weaver 6mo Well Visit	Cara Biggs Consult	Teresa Ream Evaluation
10:15 am		Pebbles Flintstone Asthma Recheck	James Fritchman Recheck		Natalie Albert Medication Followup	
10:30 am		Emma Fay 15mo Well Visit	Kyle Washington 5yr Well Visit	Jason Traino 12yr - 13yr Well Visit		Todd Gack 10yr - 11yr Well Visit
10:45 am		Elizabeth Gray New Sick Call				
11:00 am		April Tran Comprehensive Consult	Bradley Young Chronic 15y			Taryn Brodhead 1mo Well Visit
11:15 am			Cassandra Graybill Immunizations Only			
11:30 am		Kyle Alwine ADHD HS Annual Visit		Ryan Peffley ADHD Elem. Annual Visit		
11:45 am						

Schedule Appointment Add Block

Patient:  Find

Visit Reason:  15 min

Date/Time: 04/24/18 11:30am Tuesday

# What's coming in 8.5?



# Patient Details

**Patient Details** Pebbles Flintstone 10 years 5/22/08 F

**Recent and Upcoming Appointments**

Last Visit: 06/10/18 (2d ago) Dr. Casey  
Dx: none  
Last Physical: 05/30/17 (1y ago)  
Next Physical Due: 06/05/18  
Scheduled Appts.: none

**Appointment History** 1 - 7 of 26

Date	Reason	Provider	Location	Removal Reason
08/19/18 1:22pm Sun	Sick Call	Elizabeth Casey, MD	Winooski Pediatrics	
06/12/18 4:05pm Tue	Sick Call	Elizabeth Casey, MD	Winooski Pediatrics	
06/10/18 2:25pm Sun	Sick Call	Kathleen Gomez, MD	Winooski Pediatrics	
06/10/18 2:25pm Sun	Sick Call	Elizabeth Casey, MD	Winooski Pediatrics	
06/10/18 11:00am Sun	10yr - 11yr Well Visit	Mark Williams, MD	Winooski Pediatrics	
06/10/18 10:00am Sun	10yr - 11yr Well Visit	Mark Williams, MD	Winooski Pediatrics	
06/10/18 10:00am Sun	10yr - 11yr Well Visit	Mark Williams, MD	Winooski Pediatrics	

**Schedule Appointment**

Patient: Pebl  
Visit Reason: Sick  
Date/Time:  
Provider: Beve  
Location: Wino  
Appt Note: not

**Details** Reschedule Remove

Clear Open Chart Patient Details Save Close

27 3 1 News Signed in: pcc at Winooski



# Patient Details

The screenshot shows the PCC EHR interface for a patient named Pebbles Flintstone, 10 years old, born on 5/22/08. The window is titled "Patient Details" and contains several sections:

- Account Balances:** A table showing balances for Fred Flintstone (Account # 1980) across different aging periods.
- Patient Demographics:** Fields for Name, Date of Birth, Sex, and Patient Information (Adoption, Burlington).
- Birth History:** Fields for GA at Birth and Multiple Birth, both undetermined.
- Race, Ethnicity, and Preferred Language:** A section for demographic information.

Navigation buttons include "Clear", "Open Chart", "Patient Details", "Save", "Edit", and "Close". The status bar at the bottom shows "Signed in: pcc at Winooski" and a notification area with counts (27, 3, 1).

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Insurance	84.00	0.00	0.00	0.00	155.00	0.00	239.00
Medicaid	0.00	0.00	0.00	0.00	0.00	0.00	0.00

**Patient Information**  
Patient Flags: Adoption, Burlington  
PCP: Mark Williams, M.D.  
Other ID: 828-74-6104  
School: Bedrock Central  
Note: Rubble  
Old PM ID #: 2755  
Relation to Bill Payer: Child

# Patient Details

The screenshot shows the PCC EHR interface with the 'Patient Details' window open for a patient named Pebbles Flintstone, 10 years old, born 5/22/08. The window is titled 'Patient Details' and contains the following information:

**Patient:** Pebbles Flintstone (Account # 1980)  
**Address:** 1400 Rock Road, Winooski, VT 05404  
**Phone:** Home: 802-555-0105, Work: 802-555-0146, Cell: 802-555-0112, Emg: [blank]  
**Email:** stones@HannaBarbera.com

**Account Flags:** EMG Contact: Wilma, EMG Phone #: 802-991-9911, Alt Last Name: [blank], Mother Employer: 134-334-8932, Father Employer: 567-127-4815, Pharmacy #: [blank]

**Recent Financial History:** Last Service: 05/06/18, Last Bill Sent: 05/25/18, Last Pers. Pmt: 03/16/18, Last Ins. Pmt: 02/25/17, Hold Bill Until: [blank], Budget Amt: [blank]

**Policies:** Insurance: 1. Aetna HDHP, Copay: \$15.00, Certificate: 34DFJH, Group: [blank], Start: 10/14/15, End: [blank], Status: Active

The interface also includes a 'Schedule Appointments' section on the left, a 'Policies' table, and a 'Recent Financial History' section. The bottom of the window shows a status bar with the text 'Signed in: pcc at Winooski'.

# Patient Details - Configuration

Protocol Configuration

Protocol Builder

Component Builder

Protocol Map

Medical Summary Builder

Demographics Builder

Patient Check-In Builder

Patient Details Builder (Appt Book)

Schedule Appointment

Patient: Pebbles F

Visit Reason: Sick Call

Date/Time:

Provider: Beverly C

Location: Winooski

Appt Note: notes

Clear

Close

PCC EHR

27 3 1 News

Signed in: pcc at Winooski

PCC EHR

File Edit Reports Tools

PCC EHR

Protocol Configuration

### Patient Details Builder

Drag and drop components to rearrange.

Component Name	Component Type
Recent and Upcoming Appointments	recent and upcoming appts
Appointment History	appointment history
Account Balances	account balances
Patient Demographics	patient demographics
Account Demographics	account demographics
Policies	policies

Sund 06/10

12:45 pm

1:00 pm

#### Schedule Appointment

**Patient:** Pebbles F  
**Visit Reason:** Sick Call  
**Date/Time:**  
**Provider:** Beverly C  
**Location:** Winooski  
**Appt Note:** notes

Clear

Main Menu

Preview Add Hide Edit

27 3 1 News Signed in: pcc at Winooski

# What's coming after 8.5?



# Post 8.5 Features

- Ability to have multiple scheduling templates
  - For both working hours and visit types
- Ability to specify dates/times when scheduling
- Improved access to the Appointment Book
  - This will allow users to schedule when navigating a patient's chart
  - As a result, schedulers will be interrupted less from their others tasks

# Questions?

If you have any additional enhancements, please see either Jim Smith or Bryan LeMoine  
Don't forget to visit the Wishing Well and share your thoughts with the team!

## Wishing Well Hours:

Wednesday 6/20

1:15-2:30 pm

2:45-4:00 pm

Thursday 6/21

1:15-2:30 pm

2:45-4:00 pm

Friday 6/22

11:00-12:00 pm

1:15-2:30 pm

