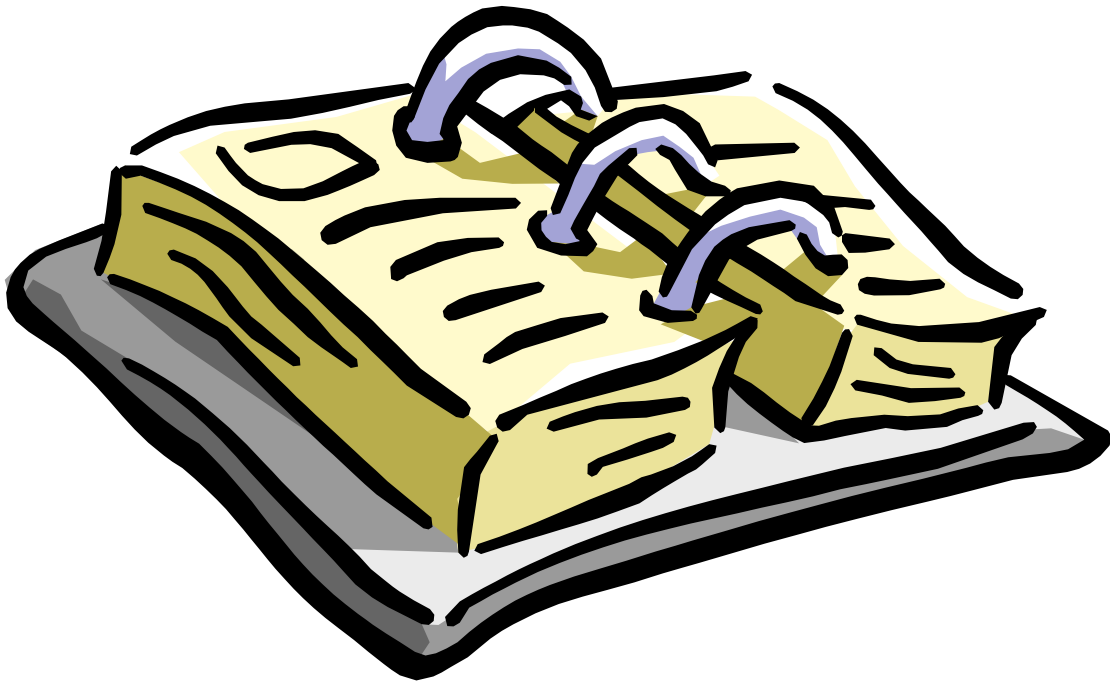


# Complete Billing Systems Appointment Scheduling Module



CBS Appointment System v4.3f

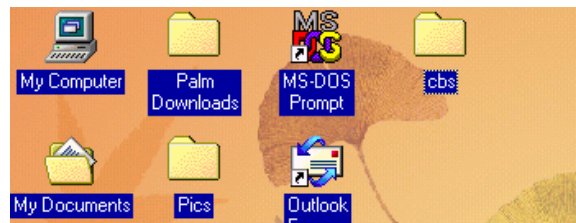
Last Revised: April 5, 2004

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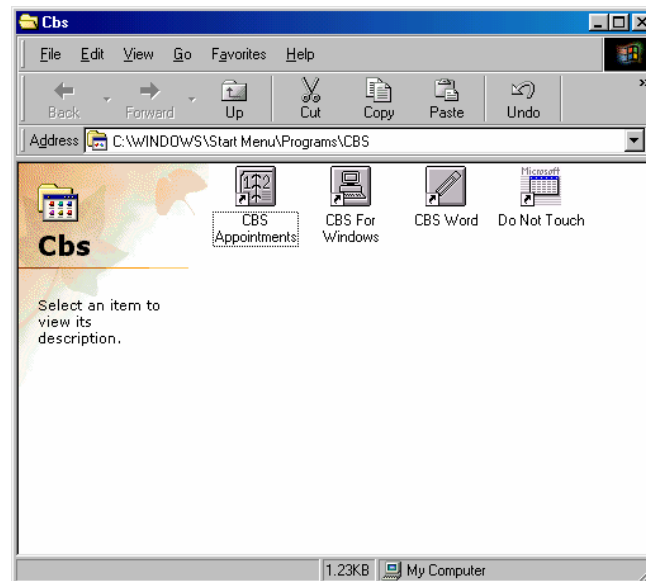
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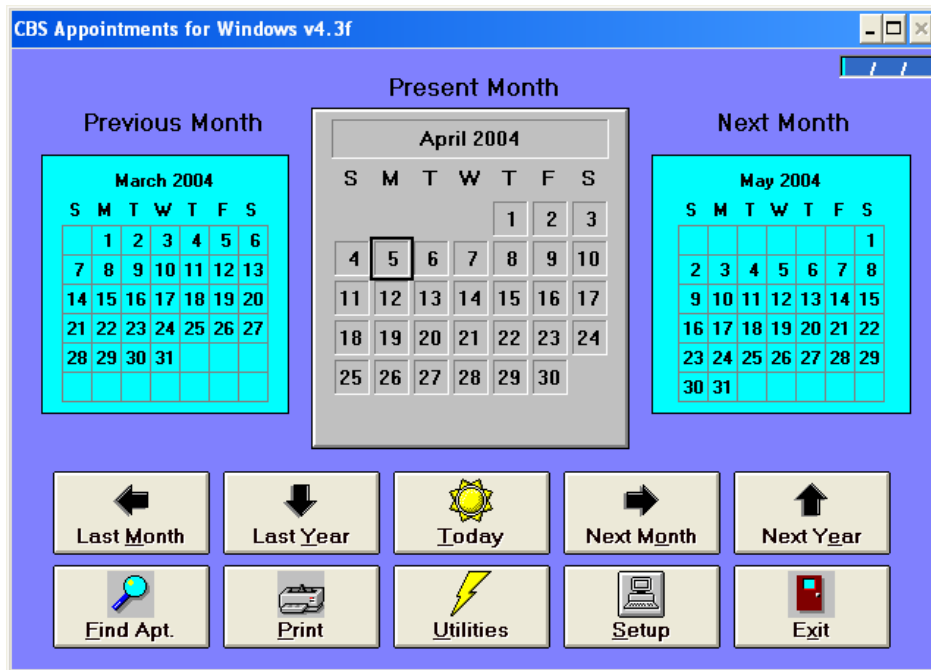
# Starting CBS Appointments



To Start the CBS Appointment Module first locate the CBS folder on your desktop. It will look like a manila folder and will have CBS displayed below. Double click on this folder and it will open to display all CBS programs. Locate the CBS Appointments program and double click on it. This will start the CBS Appointment Module.



# Introducing the Appointment System Main Screen



When you start CBS you will be presented with the main screen display pictured above. You will note that there are a number of navigation controls and special features such as Print, Find Apt, Utilities and Setup.



Once each of these items has been entered click the Set Times button at the bottom of the screen. CBS will make a sample template and display it on the left side of the screen. You may now make any changes you wish to the template. You may wish to remove all the appointments over the noon hour. You can highlight the 12:00 slot and click the DELETE button to remove the noon appointment then proceed to remove the remainder of the appointments over the lunch hour.

If you wish to add two 9:00am slots just click the INSERT button and add another 9:00 time.

You may also click on the individual time slots may also be changed by clicking on the times and typing in whatever time you wish.

The TYPE column can be a very handy and useful feature. Each office may wish to make up it's own appointment types. For example you may use the letter N for new patients and the letter C for complete physical. If you want to book aside the 10:00 time slot for new patients and the 11:00 time slot for complete physicals just click in the TYPE column and place an N at 10:00 and a C at 11:00. From this point forward, every Monday at 10:00 an N will appear in the type column to remind you that this slot is reserved for New patients. You can also have CBS find the next available N or C slot for you – but naturally only if you mark the slot with an N during set-up. A little thought during this set-up phase will help you greatly down the road.

Once you have your schedule looking exactly the way you like it just click the SAVE button. You are now ready to repeat this procedure for the next day of the week. Continue until all days are finished. Once this is done you may select the next doctor in your clinic and repeat the procedure. While this may be a bit tedious, careful set-up will save you hours of work later.

## Changing the Schedule



If you wish to change your schedule at a later date you can easily do so. First you must determine if you wish to make a short term change (such as a doctor who says “for the month of July I want to take Wednesday afternoons off), or a long term change (such as a doctor who says “from now on I want to finish work at 3:00pm on Friday).

For short-term changes you select the Set Days option at the bottom of the screen. Set Days will actually book in the empty appointment slots in your computer and applies to a specified period of days. For this reason, CBS will display a Start Date and End Date box when you have selected Set Days as an option. When you Set Days this will over-ride any templates in effect and should only be used with great caution.

After you have made this selection just fill in the slots as previously described and click on Save. CBS will make the requested changes to the day(s) you have selected HOWEVER existing appointments will NOT be changed. In our example of the doctor who wishes to take Wednesday afternoons off, any previously booked appointments will still be displayed on the screen even if they are in the afternoon. You must manually change these appointments.

## Setting Screen Display Resolution

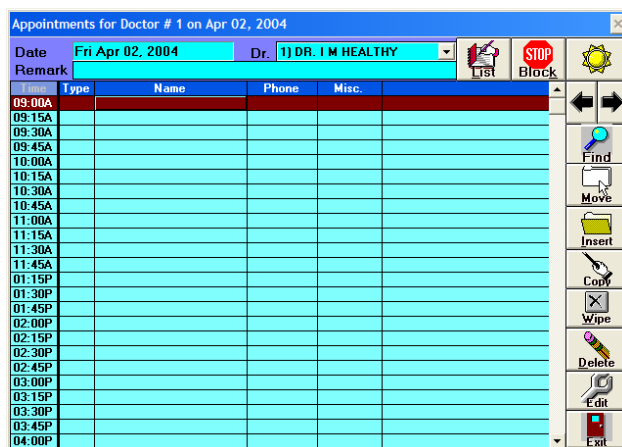


CBS Appointments will automatically detect the maximum resolution of your monitor when the program starts and adjust your display accordingly. If your display resolution is at least 800x600 then CBS will be able to use a higher resolution display. With the extra room, many more features can fit on the screen making for a more useful program.

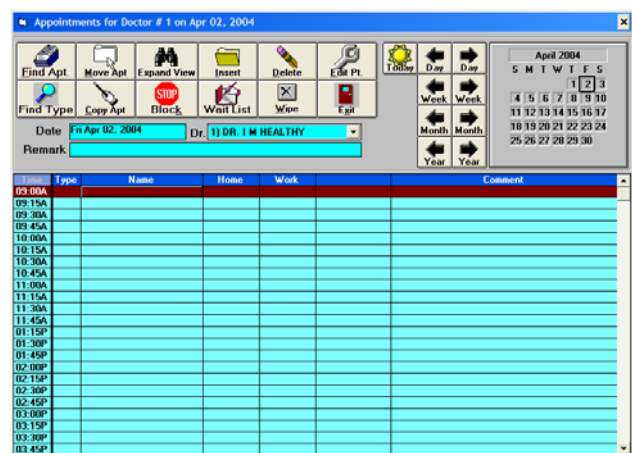
Most video cards and monitors allow the user to adjust the display resolution. We suggest setting your monitor resolution to at least 800x600. Usually this is accomplished by right clicking on your desktop then selecting Properties. Next, click Settings and finally slide the screen resolution slider to the desired setting. Please be aware that older style monitors can be physically damaged or even destroyed by setting the display resolution too high. If you need help adjusting your video card or monitor please consult your computer manual or contact your computer dealer.

Some customers may have become used to the older lower resolution display 640x480. In this mode, there is less room on the screen for CBS to place buttons and features however each screen item is larger and more viewable. Some customers, especially customers with smaller monitors, may prefer the older display however if your monitor is able, we suggest you at least try the new screen.

While CBS senses your display mode and adjusts to the highest mode available you can force the older 640x480 display on a higher resolution monitor if you wish. Just click the Force LowRes Display button. To switch back to the higher 800x600 display just click the Force HiRes Display button. Note that while you can force the high resolution display on a low resolution monitor, the result will be poorly aligned and unusable.



640 x 480 Display Screen (LowRes)



800 x 600 Display Screen (HiRes)

Above you can see both the low resolution and high resolution screens displayed. While each screen retains the basic features of the program, the high resolution screen has room to display some advanced features that are not available on the lower resolution screen.

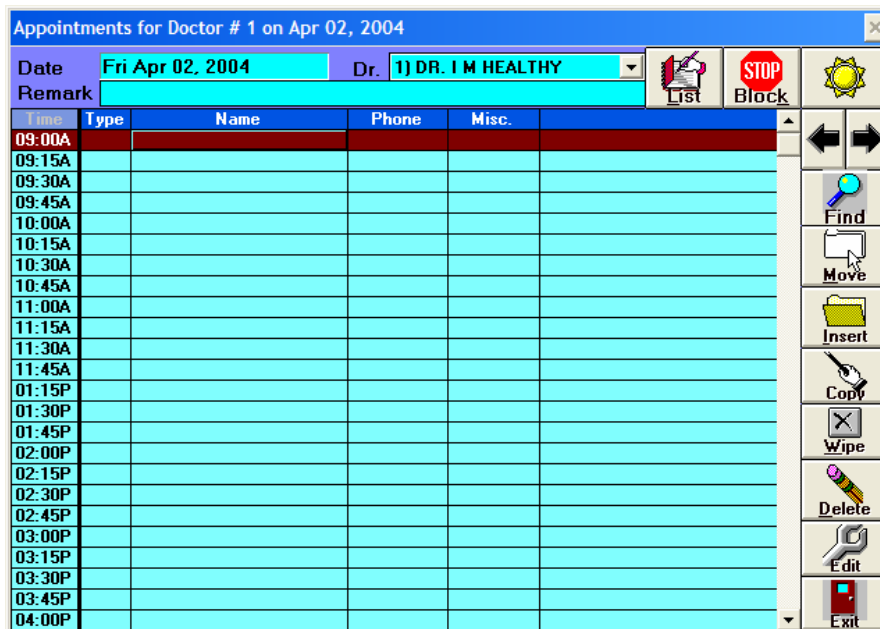
## Selecting A Day

The main screen of the CBS Appointment Module contains a display of three calendars and a number of control buttons below the calendars.



The main function of this main screen is to allow the operator to select the desired day. Use the Last Month button to scroll the calendars one month back. Use the Next Month control to scroll the calendars one month forward. Use the Last Year button to scroll back one year and the Next Year button to scroll ahead one year. Use the Today button to reset the center calendar to the current month and then to highlight the current day.

Once the day you wish to work with is displayed on any of the calendars you can single click on it to display that day. The day selected will be displayed. Below you can see an example of the low resolution display. We will cover each feature of the low resolution display in detail since all these features are also found on the high resolution display. We will then cover the additional features found only on the high resolution display.



Appointments for Doctor # 1 on Apr 02, 2004

Date: Fri Apr 02, 2004 Dr. T) DR. I M HEALTHY

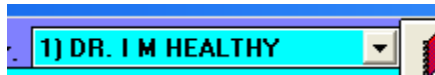
Remark: [Empty]

Buttons: List, Block, Today

Time	Type	Name	Phone	Misc.
09:00A				
09:15A				
09:30A				
09:45A				
10:00A				
10:15A				
10:30A				
10:45A				
11:00A				
11:15A				
11:30A				
11:45A				
01:15P				
01:30P				
01:45P				
02:00P				
02:15P				
02:30P				
02:45P				
03:00P				
03:15P				
03:30P				
03:45P				
04:00P				

Toolbar: Find, Move, Insert, Copy, Wipe, Delete, Edit, Exit

## Selecting a doctor



Naturally you will want to make sure you are working with the right doctor's appointments. To select the doctor just use the Doctor drop down box at the top right hand corner of the screen.

## Booking an Appointment

### Existing Patients

To book an appointment for an existing patient, just type in the last name of the patient or type the last name followed by a comma and then the first name or type the PHN for the patient. Once you have entered the patient's name or PHN press the <ENTER> key and CBS will allow you to select a patient.

### New Patients

To enter a new patient just type the word NEW in the patient name column and press <ENTER>. CBS will display the new patient screen and allow you to fill in the blanks. When you book new patients in the appointment system you do NOT have to fill in all the available slots. You only need to fill in a first name and a last name for the patient. If you wish you may fill in more information, such as a telephone number or the PHN however these fields are not required to book an appointment.

A screenshot of the 'CBS Appointments' form. The form is titled 'CBS Appointments' and has a blue background. It contains several input fields for patient information: Last Name (BARNARD), First Name (LOUISE AUNE), Doctor (1), Birth Date (Dec 01, 1964), Sex (F), PHN (130150746), Address 1 (34 TRUELLE CRES), Address 2 (empty), City (REGINA), Prov (SK), Postal (S4T 6T3), Home Phone (empty), Work Phone (empty), Ref. Doctor (empty), Ref. No. (empty), Misc. (empty), and Last Visit (empty). There is also a 'Patient Chart Notes' field and a 'Prescription' dropdown menu. At the bottom of the form, there are several buttons: Book, Labels, Edit, New, Save, Delete, History, Recall, and Exit.

Once your new or existing patient appears on the patient information screen you can select the BOOK button at the bottom of the screen. CBS will then book the appointment into the selected time slot.

Once an appointment has been booked, the cursor moves to the Comment column. Here you may fill in a comment for the appointment or you may press <ENTER> to move down to the next time slot.

## Control Buttons

The buttons along the right hand side of the appointment day schedule help you with a number of functions.

### Find



The Find button allows you to locate an appointment TYPE.

When you click on the Find button you will see a box asking for the type of appointment you wish to search for. If you have already labeled some of your time slots with code letters such as N for New patients or C for Complete physicals you may enter the code letter now (see Setup).

You may also press <ENTER> and CBS will locate the next available empty appointment slot.



### Quick Day Selectors



There are three controls, which will help you quickly select a day without returning to the main screen. The sun symbol is used to select the current day. The right and left arrow keys will move you ahead and back one day.

### Move an Appointment



The Move button assists you in rebooking or moving an existing appointment. First you must highlight the appointment you wish to move. Next you click the MOVE button. When you do this, CBS will erase the appointment from the screen. Now you must select a new empty appointment slot. The new empty slot may be on a different day or even with a different doctor. Once the new slot is selected click the MOVE button again and CBS will book the previously erased appointment into the newly selected slot.

### Insert Appointment Slot



On occasion you will need to insert a new empty appointment slot. To do this just click the Insert button and enter the time of the appointment. CBS will create an empty slot on the screen.

## Copy Appointment



This function allows you to quickly duplicate a patient's appointment on another day. It would be especially handy when the doctor says "Come back in 2 weeks". To use this feature, first click on the patient. Next click the Copy button. The button heading will change from "Copy" to "Copying". Next select an empty slot on the desired day.

Finally click the "Copying" button. The patient information will be filled into the selected slot and the button heading will change back to "Copy".

## Wipe Out an Appointment Slot



Sometimes you will want to totally remove a time slot from the screen. To do this, first select the appointment slot then click the WIPE button. If there is an appointment booked in this slot, CBS will delete the appointment. CBS will then remove the time slot from the screen.

## Delete An Appointment



To delete an appointment just highlight the appointment you wish to delete then click the Delete button. This function simply deletes the appointment but does not remove the time slot from the screen. Once the appointment is deleted the slot is empty and can be used to hold another appointment for another patient.

## Edit a Patient's Information



The EDIT button allows you to bring up the patient's information and make changes to it. When you first book an appointment for a patient you may only take down the patient's name and telephone number. When the patient comes into the office you can highlight the patient then click the EDIT button and fill in the rest of his information.

## Block



This feature allows the user to mark a series of appointment slots in red so that they are not used.

This feature would be helpful when the doctor has an appointment out of the office and wishes to

block an hour or two so that patients are not booked into those times. To use this feature, first place your mouse pointer over top of the time you wish to start blocking and double click.

When you do this you will see a vertical bar appear to the left of the time. Next, position your mouse over the last time slot you wish to block and again double click. Finally click the BLOCK button and the times selected will highlight in red.

Note that you can still book patients in these spots but the system will give you a warning before you proceed.

Time	Type	Name	Phone	Misc.
09:00A				
09:15A				
09:30A				
09:45A				
10:00A				
10:15A				
10:30A				
10:45A				
11:00A				
11:15A				
11:30A				
11:45A				
01:15P				
01:30P				
01:45P				
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03:00P				
03:15P				
03:30P				
03:45P				
04:00P				

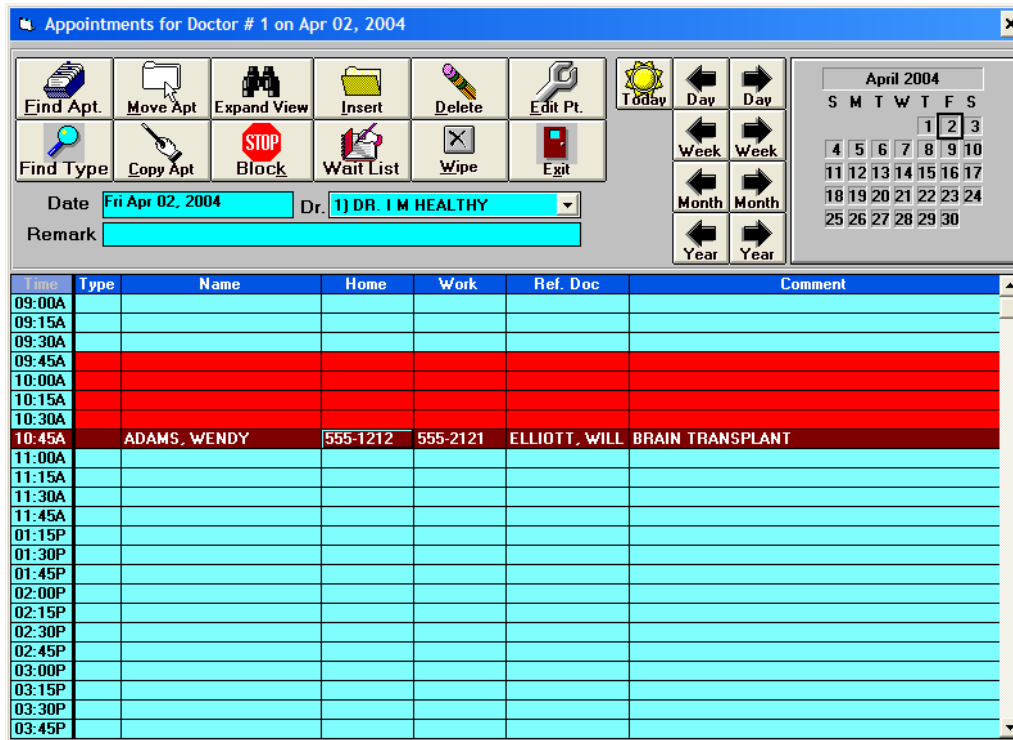
If you do only double click on one time and then click on BLOCK then just that one time slot will be blocked. If you do not click on any times then click the BLOCK button the system will block the entire day (after first confirming that this was your intention).





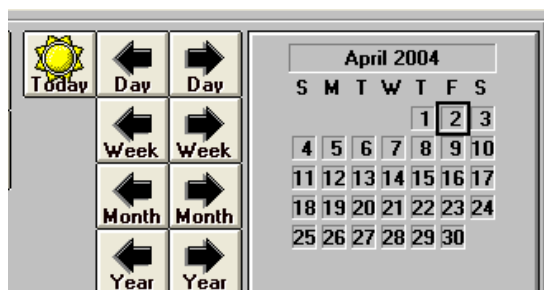
## High Resolution Screen Display Features

As discussed previously, CBS has two display screens. Depending on your selection and your video card/monitor features you will likely be able to use the high resolution display which has a number of handy features not available on the low resolution display discussed previously.



Most of the controls have already been described in the discussion of the low resolution display. There are however a few changes and a few new features.

### Expanded Navigation Controls



Perhaps the most useful feature is the expanded set of quick navigation controls. In the top right hand corner you will find a calendar. You can click on any date displayed on the calendar and the system will instantly switch to that day. There are also a number of buttons which allow you to quickly move ahead or back a day, week, month or year. Using these features reduces the need to constantly switch back to the main screen and makes the program a lot easier to use.

## Expand View



The Expand View feature is another very handy function that is only available on the higher resolution display. Clicking on this button will bring up a larger form which can display four different doctors at once or four days for one doctor.



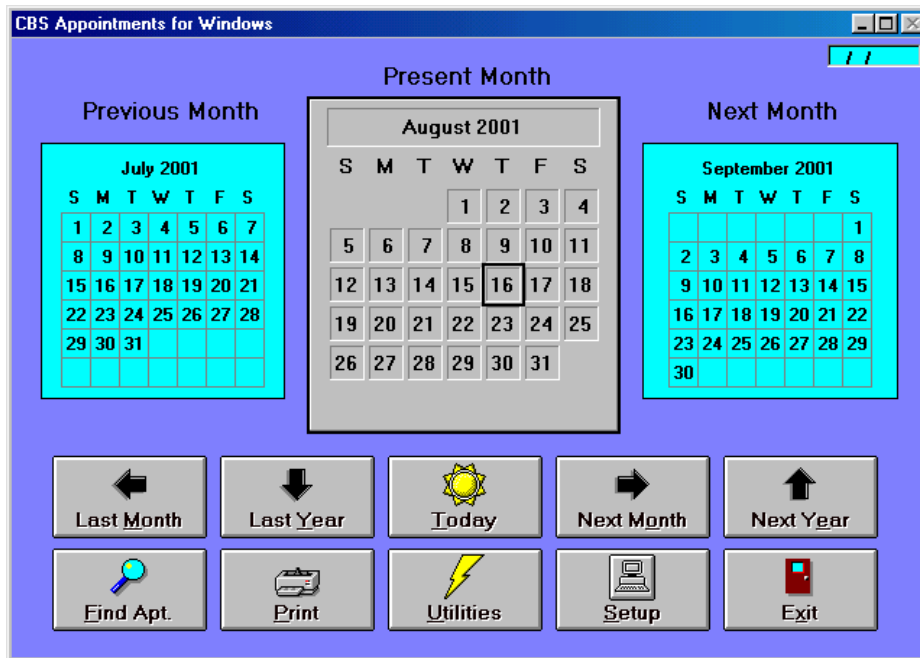
- To view 4 doctors at once, click View 4 Doctors
- To view 4 different days for one doctor click View 4 Days
- Once you have a display on the screen you can adjust the doctors or days you are viewing. Click the right arrow under Select Doctor and the starting doctor will increase by one. For example, if you are viewing 4 doctors, numbers 1 – 4, and you click the right arrow under Select Doctor you will then be displaying doctors 2 – 5. The left arrow reduces the number of the first doctor displayed.
- The Select Day buttons increase or decrease the days being displayed.
- You can click on any displayed day and the system will instantly take you to that day.
- Clicking on Exit will return you to the day you were last viewing.

## Find Apt



This function allows you to search all booked appointments for any individual who has an appointment pending. This feature is also found on the main screen of the program and is described in greater detail in the next section.

## Additional Main Screen Functions

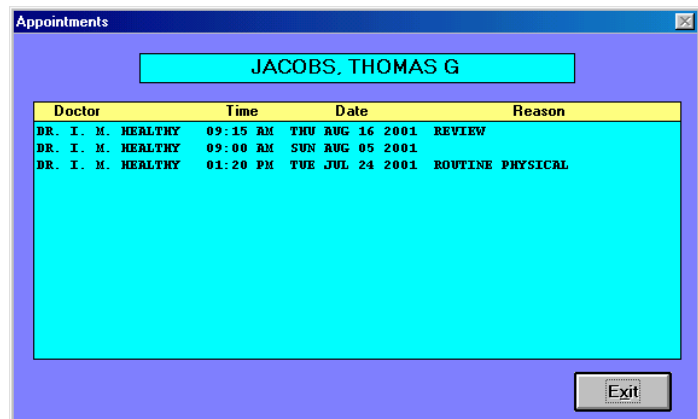


### Find Appointment



The Find Appointment Button is one of the most useful features of the appointment system. It can be used to locate any already booked appointment for any patient. Just click this button, type in the name of the patient and the patient's appointment history will be displayed.

In a busy office, the ability to quickly locate patient appointments can be a real time saver.



## Print Appointments



The Print Appointments function allows you to print out all booked appointments for any selected day or range of days.

The first thing to do when this screen presents is to make sure your options have been properly selected.

Select the doctor you wish to print from the drop down box at the top of the screen.

### Spacing

You may select single spaced reports or double spaced reports

### Empty Slots

You may elect to print the empty appointment slots or not to print them (skip them).

### Times to Print

You may elect to print all appointments, only the morning's appointments or only the afternoon's appointments

### Report Type

Make sure the proper report type has been selected.

- **Billing Report**

The Billing Report is the most common report. It is designed to be printed at the start of the day.

The doctor can then take the report with him, fill in additional information, and return the report to the billing staff for entry into the CBS billing system.

- **Short Report**

This is a short two column report that lists the day's appointments in the most compact format available.

- **Long Report**

This report displays more detail about each patient but takes up more space to print.

- **Custom Report**

CBS has the ability to print virtually any type of report you like. If none of the existing reports meet your needs, contact your CBS representative to inquire about having a custom report designed for your office.

Finally you must enter your Start Date and End Date then click the Print button. Your report will be printed as requested.

A screenshot of the "Print Appointments" dialog box. At the top, there is a "Doctor" dropdown menu showing "1) DR. I. M. HEALTHY". Below this is a "Report Setup" section with several groups of radio buttons: "Spacing" (Single, Double), "Empty Slots" (Skip Empty, Print Empty), "Times to Print" (All Apts., AM Only, PM Only), "Report Type" (Billing Report, Short Report, Long Report, Custom Report), "Printer Type" (Dot Matrix, Laser, Windows), "Output Option" (Printer 1, Printer 2, Printer 3), and "Report Dates" (Start and End dates, both set to "Aug 14, 2001"). At the bottom of the dialog are two buttons: "Print" and "Exit".

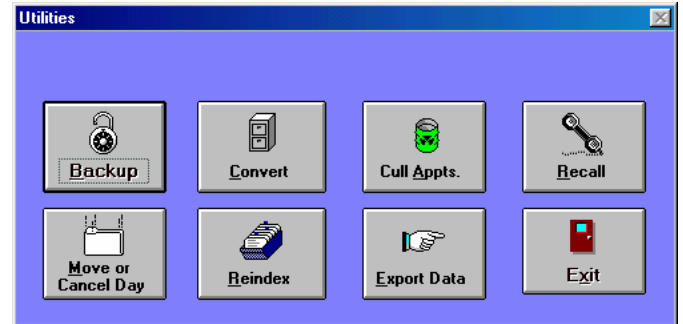
## Utilities



The Utilities function provides a number of useful features.

### Backup

The backup feature is not necessary if you are already using the backup feature in the billing module. If you are using CBS Appointments as a stand-alone program you must use the Backup function to protect your data. Please see the full description of the backup process in the CBS billing module manual.



### Convert

The Convert feature allows CBS for Windows to read CBS For DOS appointments and some other appointment systems. This function should only be used after consultation with your CBS representative.

### Cull Appointments

The Cull Appointments function is used to delete old appointments from the system. Note that when you use this feature the appointment is totally removed and will no longer show up in the patient's appointment history. The Cull Appointments feature may be used to decrease the amount of disk space CBS consumes. When you select this feature CBS will ask you how many days worth of old appointments you wish to keep. If you wanted to keep the past year's worth of old appointment information you would enter 365. Remember that the system is asking for the number of DAYS not years!

After you use this feature you must use the reindex feature to regain hard drive space and shrink the size of the appointment database.

### Recall

This feature is identical to the Recall feature in the billing system and is fully described in that manual. Please refer to the CBS Billing manual for more details.

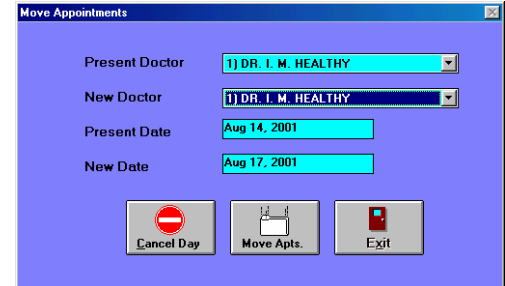
## Move or Cancel Day

This feature allows you to move all appointments from one doctor on one day to another day for the same doctor or to another day for a different doctor. It is a very powerful feature but it is one that must be used with caution.

### Move a Day

First select the doctor you wish to move appointments for. Make sure his name appears in the Present Doctor slot. Next select the doctor you wish to move the appointments to (if you don't want to change the doctor then make sure the "New Doctor" slot contains the same name as the "Present Doctor" slot.

Next select the day you wish to move. Place this date in the Present Date slot. Finally select the date you wish to move the appointments to in the New Date slot.



Once all the information has been selected click the Move Appointments button.

### Cancel a Day

CBS will remove all the empty spaces on a selected day but will NOT delete any existing appointments. To Cancel a Day click the Cancel Day button then enter the date and doctor you wish to cancel for. CBS will delete all empty slots and then inform you how many remaining appointments must be manually rebooked.

## Reindex

The Reindex function will shrink the database and make the CBS Appointment system run faster. It is a good idea to reindex once each month. Please note that ALL other CBS programs on all terminals must close and exit before the Reindex function can run.

## Export Data

The Export Data button will export CBS Appointment data for use in other applications. Please use this feature only after consultation with your CBS representative.

## Exit

The Exit button on the Utilities menu will close the Utilities screen and return to the main CBS Appointment screen.

## Exit



The Exit button on the main CBS Appointment screen closes all CBS databases and terminates the program. Make sure to use the EXIT button every time before you turn off the computer. Failure to exit from the CBS appointment system can cause severe database damage and lost information.