**Department of Health Care Services**
**Children's Medical Services Network**

# CMS Appointment Scheduling

## User Manual
## (Step-by-Step)
**Revised: June 23, 2009**

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# 1 OVERVIEW

Children's Medical Services Network (CMS Net) Appointment Scheduling module is used for scheduling, tracking and storing appointments.

Listed are features and functionalities of the Appointment Scheduling module:

- Ability to search and view appointments by scheduled time.
- Ability to search and view appointments by clients and users.
- Ability to search and view appointments by month, week, day or hours.
- Be able to view user availability in incremental periods (Every 15, 30 minutes or an hour).
- Flexibility to modify existing current and future appointment dates and times.
- Ability to schedule multiple appointments for a single user.
- Ability to schedule single and multiple appointment(s) for a client.
- Allow single user to schedule multiple appointments for multiple users.
- Ability to schedule variable lengths of time for appointments.
- Ability to enter comments and store to case note.
- Ability to cancel current and future appointments.
- Ability to view user availability prior to scheduling appointments – Open time slots
- Display client's language.
- Ability to select 1$^{st}$ available appointment with the option to select next or future appointment date.
- Display patient header on the Add New Appointment screen.
- Ability to generate an automatic case note.
- Allow a user's supervisor to view existing appointments and create new appointments for the user.
- Ability to indicate cancellation or failed appointment reasons.
- Ability to sort by appointment date and time.
- Ability to enter free text or comments within the appointment.
- Ability to generate an appointment letter.

# 2 ACCESSING CMSNET SHEDULING APPOINTMENTS

## 2.1 *Using homepage quick search or CCS modules menu*

The Appointment Scheduling module can be accessed by hovering the mouse pointer over the ‘CCS Modules’ option to display the menu drop-down list. Click on the ‘Appt Scheduling’ option as shown in Figure 2-1 or on the Home page, expand the ‘Appt Scheduling’ option and click on the available quick search hyperlinks.

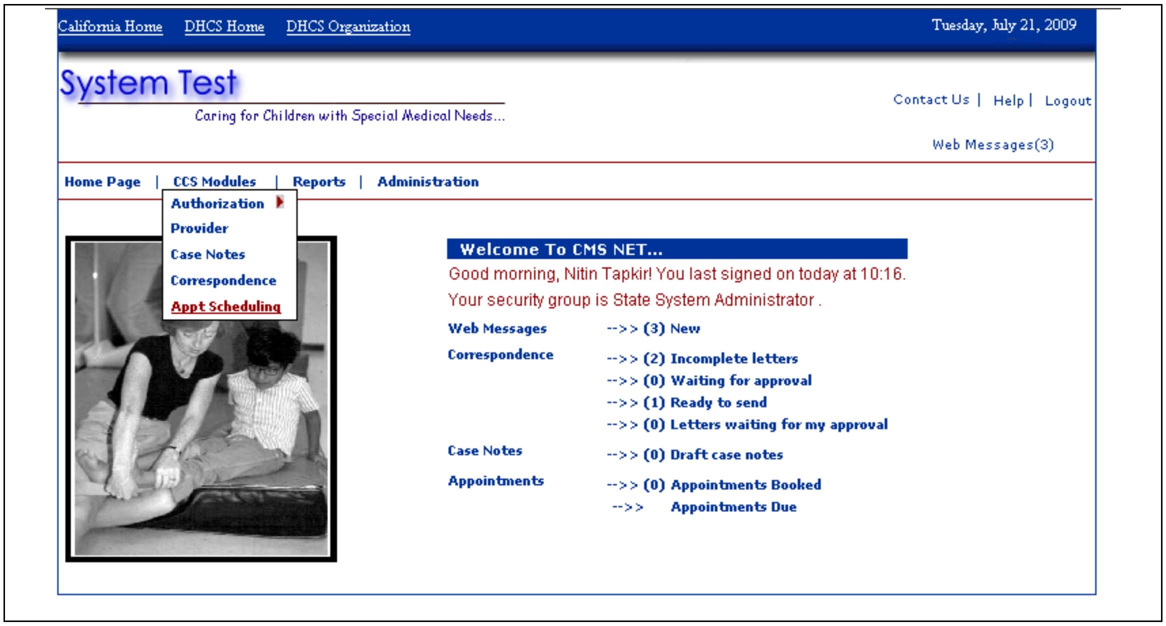



**Figure 2-1, Access the Appointment Scheduling module**

The Booked Appointments tracks all appointments scheduled for the user.

## 2.2 *Appointments Due Quick Link*

The Appointments Due quick link lists the user’s county clients with program eligibility end date(s) expiring in the next 60 days. The list is in alphabetical order by client’s CCS#, CIN#, client name, tickler date *(program end date)* and a “X” as a delete option. The tickler date is a hyperlink to the Add/Edit Appointment Scheduling screen and a user may delete a client from the tickler list if an appointment is not required by clicking on the “X”. The appointments that are cancelled or failed (not yet completed) will be added onto the tickler again with a Tickler status “Reschedule”.

## 2.3 *Appointments Booked Quick Link*

When clicking on the Appointments Booked quick link the search results screen will display user’s booked appointments.

# 3 SETTING USER AVAILABILITY AND UNAVAILABILITY

Figure 3-1 displays the User Unavailability and Availability menu options. These options allow users to indicate working and away hours. The user availability will default to the system hours with the ability to change. A County System Admin or System Administrator may modify the hours at any time.


**Figure 3-1, User Availability/Unavailability menu option**

## *3.1 Set User Availability*

Figure 3-2 displays the User Availability screen used to set default availability and to modify existing default dates, duration and times available to schedule appointments.

A county system administrator will set the availability for county user in user security screen by checking the box with the label: Set Default Availability. This will set the availability for the user from 8 a.m. to 12 p.m. and 1 p.m. to 5 p.m. until the year 2019. This availability can be later edited by the administrator by navigating to the Availability menu. This feature is used when setting up a **new** county user.

**Step 1.** Select Administration from the menu.
**Step 2.** Select User Management option from the menu.
**Step 3.** Select User Security from the menu.
**Step 4.** Select the user from the Search screen
**Step 5.** Click on Set Default Availability box and click the Save button.

*Note: The Set Default Availability box does not stay checked but when you go to the Availability screen you will see that a default period of time is set with the ability to modify.*

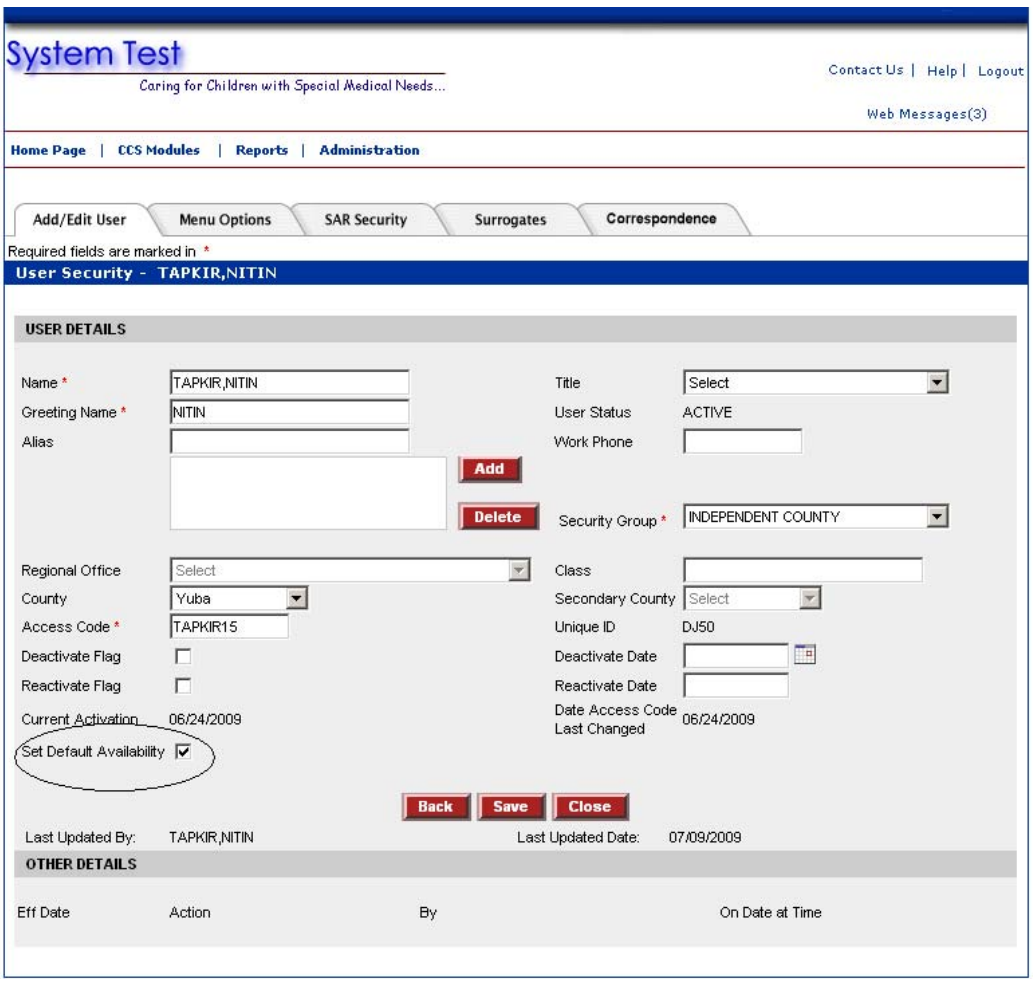



**Figure 3-2, Set default User Availability**

**Step 1.** Select Administration from the menu.
**Step 2.** Select User Availability option from the menu.
**Step 3.** Select User from the Search User screen
**Step 4.** Enter the start date, end date, start time, end time and duration
**Step 5.** Click the Save button.

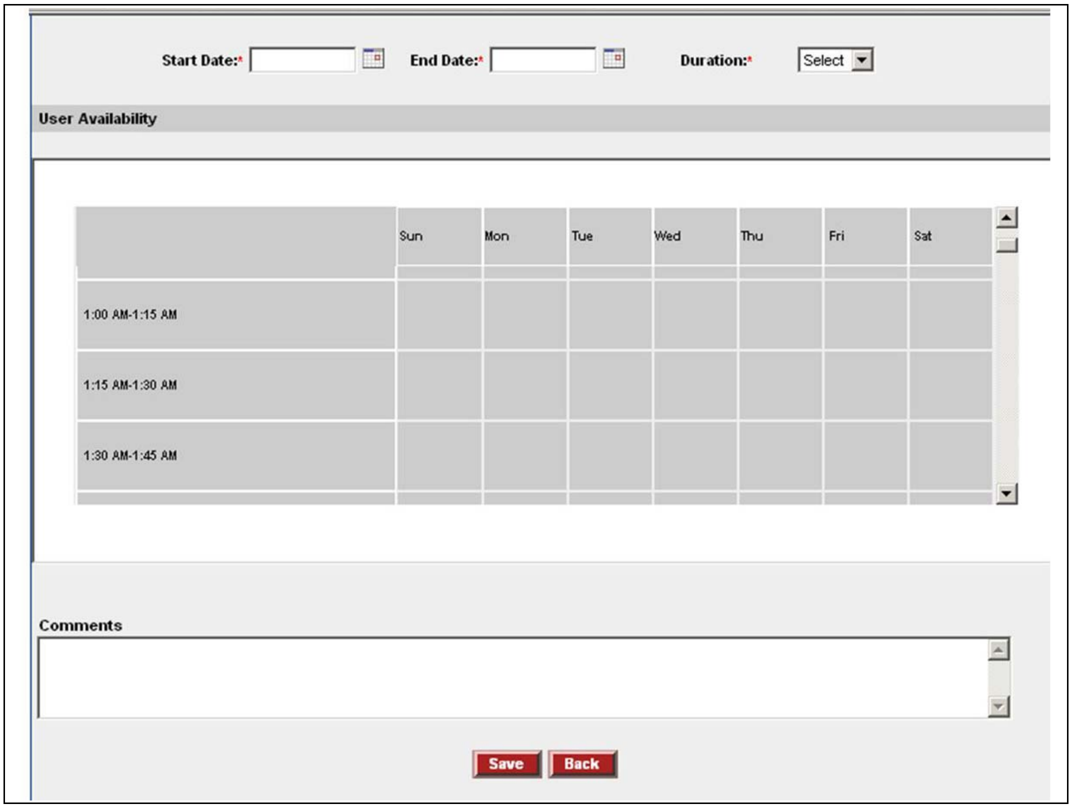



**Figure 3-2 Modify User Availability**

### *3.2 Set User Unavailability*

Figure 3-3 displays the User Unavailability screen used to indicate the dates, times and recurrence of unavailability.

**Step 6.** Select User from the Search User screen
**Step 7.** Enter the start date, end date, start time, end time and unavailability reason.
**Step 8.** Select recurrence pattern.
*Note: a maximum limit exists on each recurrence. When entering a date if the recurrence pattern which exceeds the limit an error will display at the top of the screen.*

| | |
|---|---|
| Daily | 100 |
| Weekly | 52 |
| Monthly | 12 |
| Yearly | 10 |

**Step 9.** Click on the save button at the bottom of the screen.

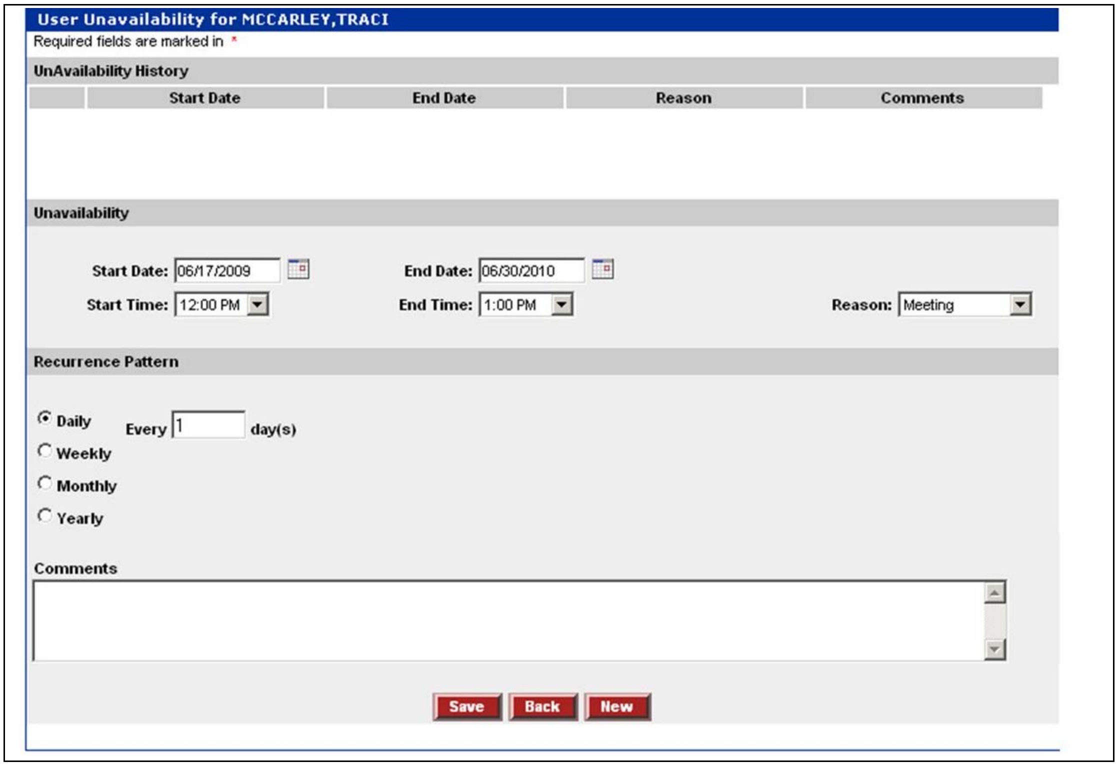



**Figure 3-3, User Unavailability**

# 4 SEARCHING FOR AN APPOINTMENT

Figure 4-1 displays the default Appointment Scheduling main screen where appointments can be searched by entering specific search criteria. The date range defaults to a month time period from today but may be edited. The county defaults to the current user's legal county. The patient search fields are used to search for appointments by patient.

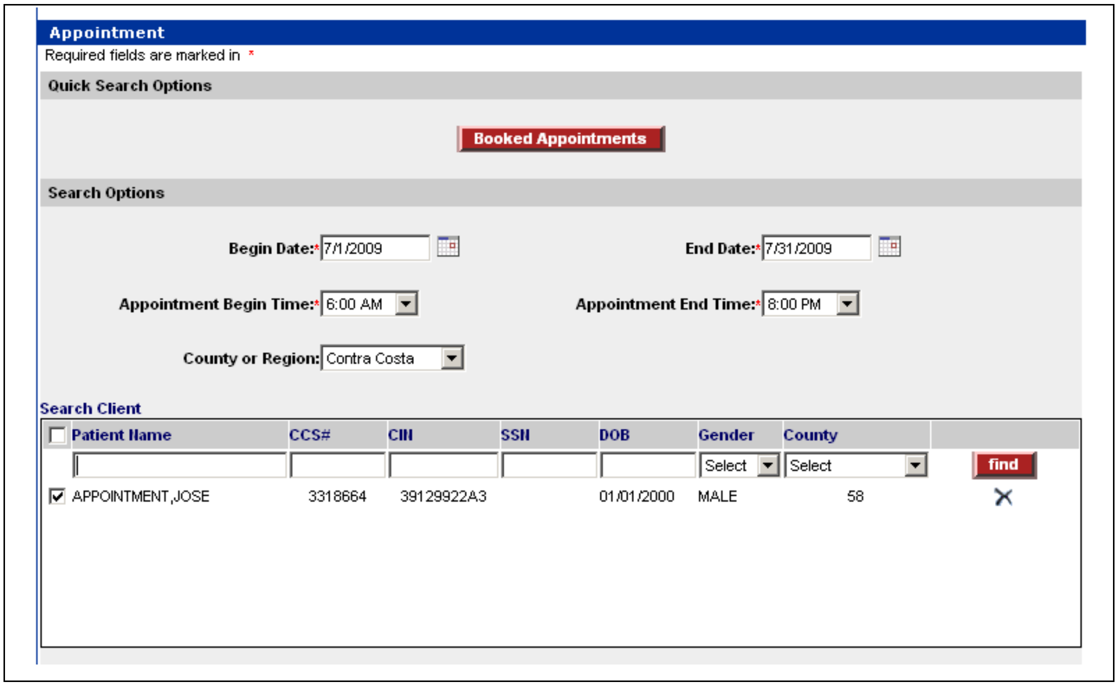



**Figure 4-1, Main Scheduling Search screen**

## 4.1 *Search Results by Patient*

Figure 4.2 displays a patient's name search fields and the find button.

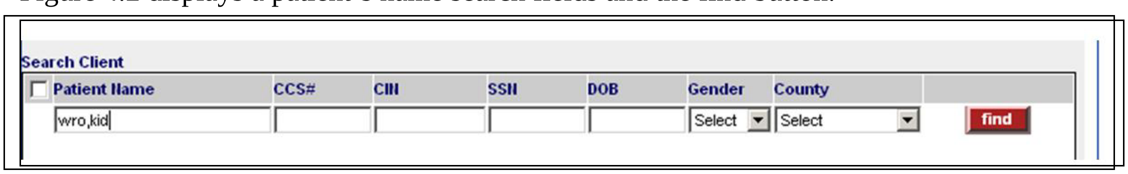



**Figure 4-2, Patient Search by Name**

Figure 4.3 displays the patient's name from the search results pop up screen and the Continue button to finish selection.

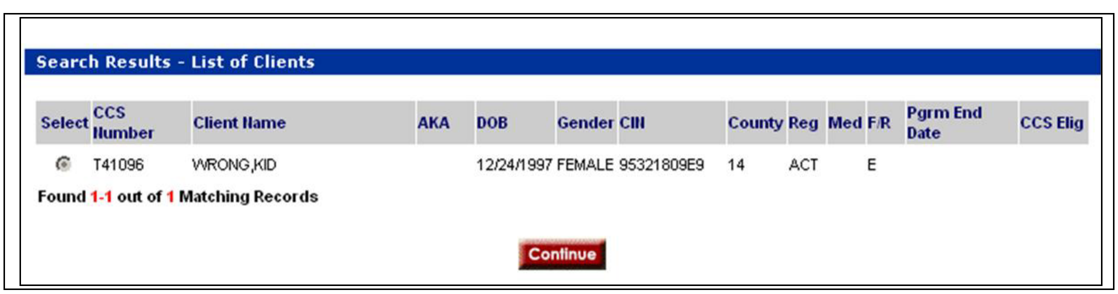


**Figure 4-3, Display from the Search Results screen**

Figure 4.4 displays patient's name displays from the search results selection.

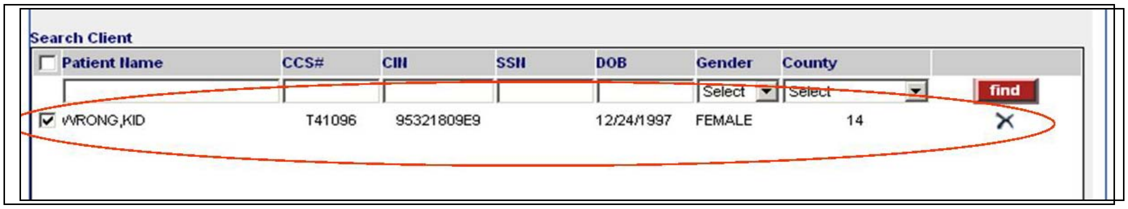



**Figure 4-4, Client's Search results**

Figure 4.5 displays the buttons to take the next step in the appointment process.

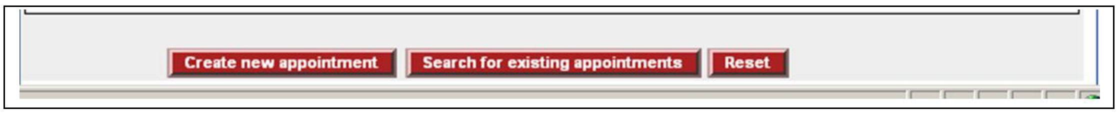



**Figure 4-5, Add new appointment or search for existing appointment.**

### *4.1.1 Search by date and county*

**Step 1.** Enter a date from the calendar.
*Note: Keep in mind, the CMS Web system has a 200 record results limit.*
**Step 2.** Select the county.*(User's county should default)*
**Step 3.** Click the 'Search for existing appoint' button

The system displays all the appointments set by a specified date for the selected county.

### *4.2 Advance Search Options*

Figure 4-2 displays the advanced search options to search by user or appointment status in the search criteria.

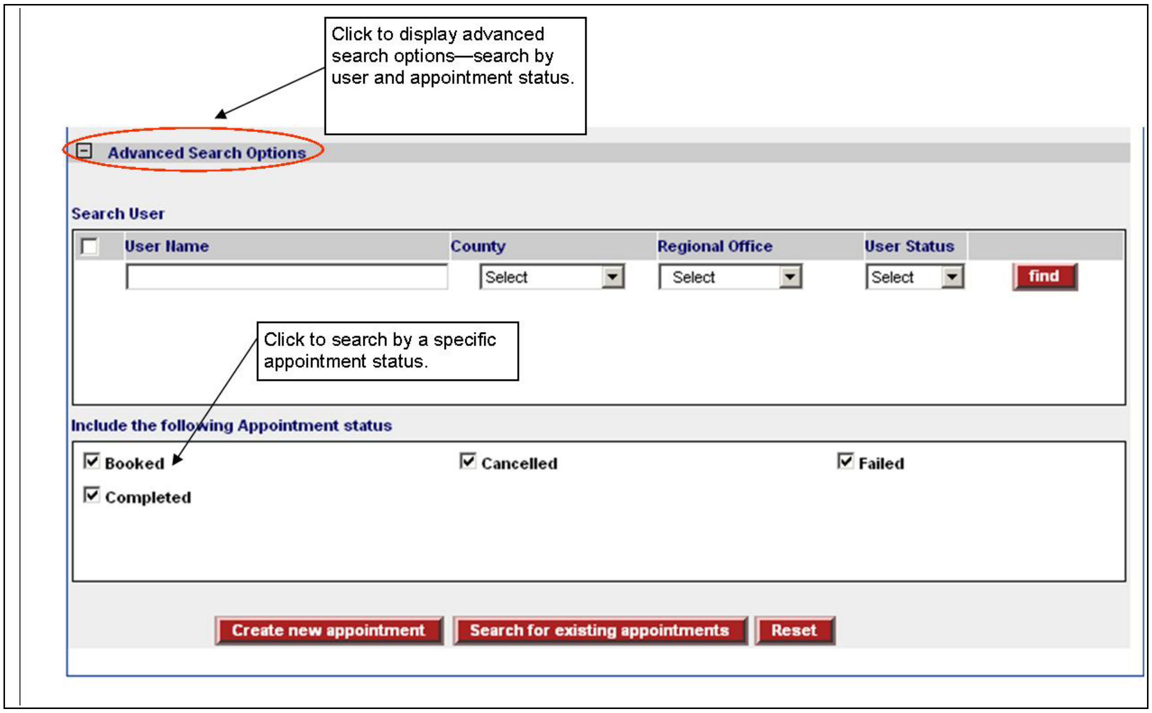



**Figure 4-6, Main Scheduling Search screen**

### *4.3 Search by user and appointment status*

**Step 1.** Enter a user name, (last, first) and click on find. Select the user from the list.
**Step 2.** Select the appointment status.
**Step 3.** Click on 'Search for existing appoint'.

The system displays all the appointments set by user and appointment status.

#### *4.3.1 Display search results*

Figure 4-7. One or more appointment may be added to a Web Message or printing multiple appointments by putting a check mark in the select box next to the appointment and clicking the attach button.

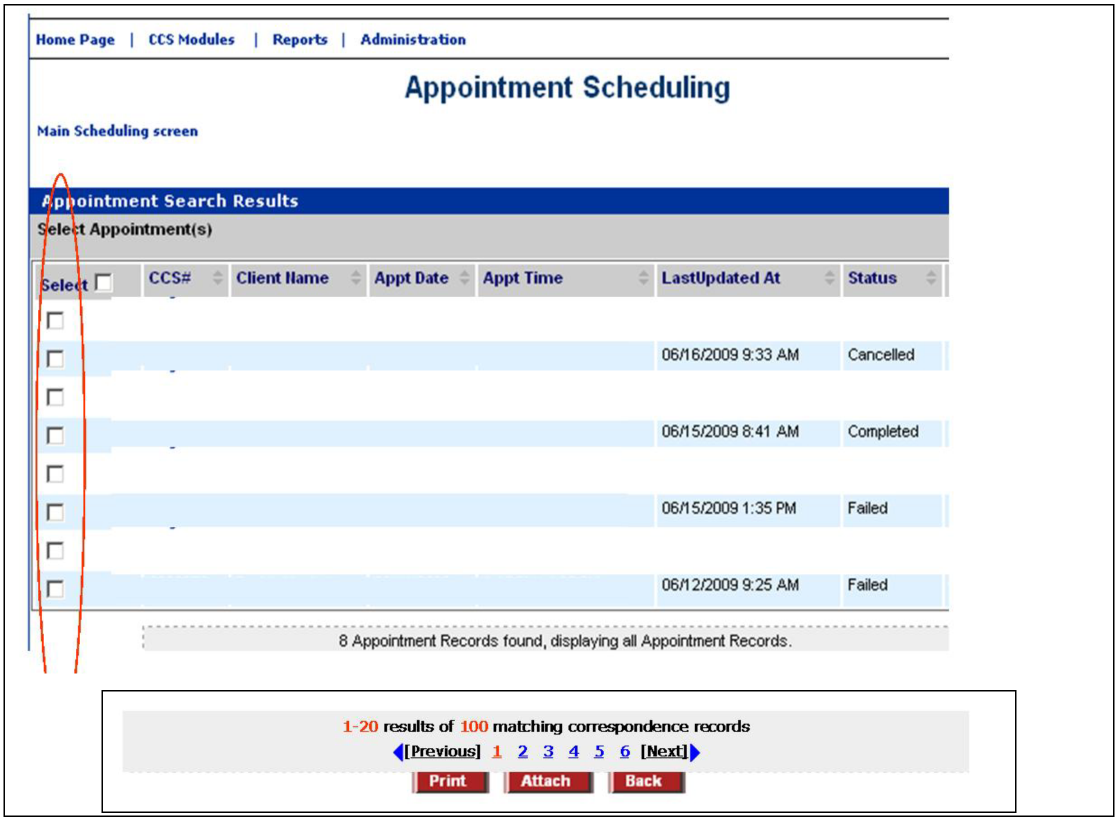



**Figure 4-7, Scheduled appointment results screen**

To print all appointments check the select box in the in the title row and click on the print button.

## 5 ADDING AN APPOINTMENT

The option to set a new appointment is available on the Main Appointment Scheduling screen.

**Step 1.** Select a patient. Please reference Section 4 for instructions on searching for and selecting a patient.

**Step 2.** Since only one patient can be selected when setting a new appointment, remove the check mark from the other patient records, if applicable.

**Step 3.** Click the 'Create New Appointment' button after the patient has been selected.

Figure 5-1 displays search screen to select a user to set an appointment.

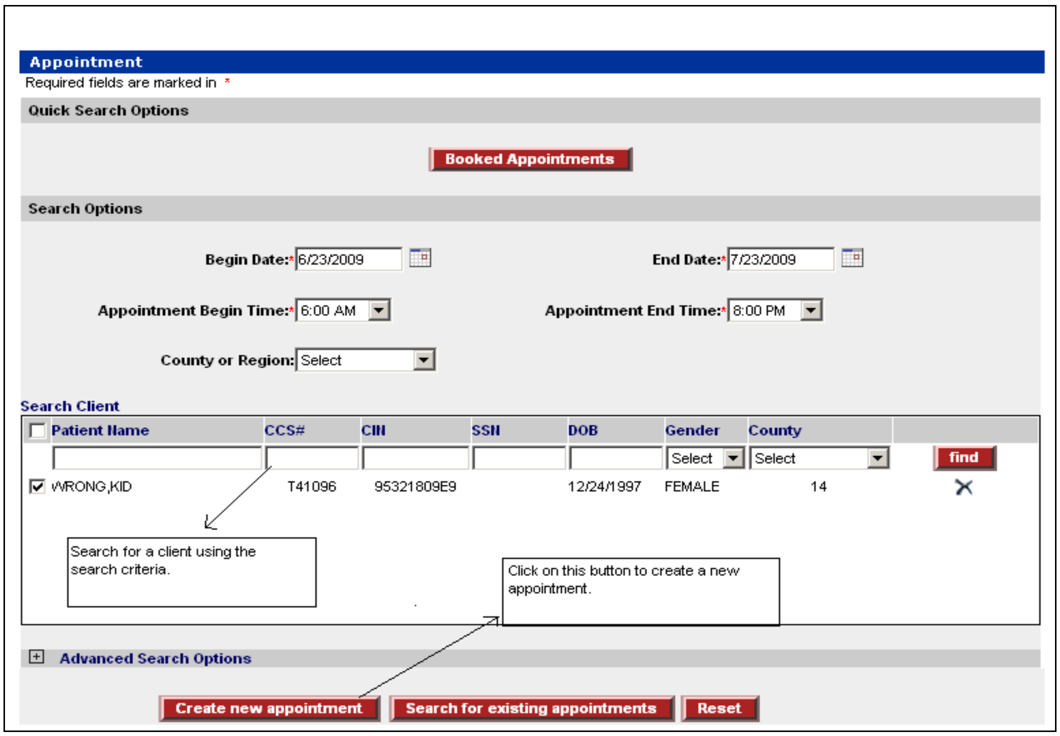


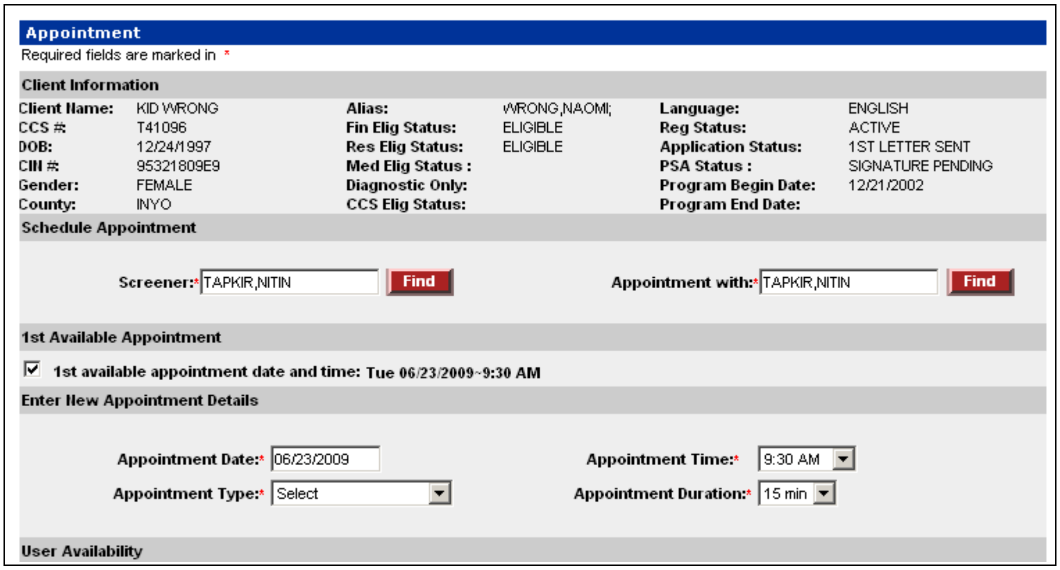

**Figure 5-1, Creating a new appointment**

### 5.1 Setting 1st available appointment

Verify the name showing in the header is the correct client. The user logged in will display in the Screener's field. The name may be changed in the Appointment With field.

**Step 1.** Check the box next to 1st available
**Step 2.** Click the 'Save' button.

Figure 5-2 displays setting the 1st available appointment with the day, date, and time.



**Appointment**

Required fields are marked in *

**Client Information**

| | | | | | |
|---|---|---|---|---|---|
| **Client Name:** | KID WRONG | **Alias:** | WRONG,NAOMI; | **Language:** | ENGLISH |
| **CCS #:** | T41096 | **Fin Elig Status:** | ELIGIBLE | **Reg Status:** | ACTIVE |
| **DOB:** | 12/24/1997 | **Res Elig Status:** | ELIGIBLE | **Application Status:** | 1ST LETTER SENT |
| **CIN #:** | 95321809E9 | **Med Elig Status :** | | **PSA Status :** | SIGNATURE PENDING |
| **Gender:** | FEMALE | **Diagnostic Only:** | | **Program Begin Date:** | 12/21/2002 |
| **County:** | INYO | **CCS Elig Status:** | | **Program End Date:** | |

**Schedule Appointment**

Screener:* TAPKIR,NITIN Find    Appointment with:* TAPKIR,NITIN Find

**1st Available Appointment**

☑ 1st available appointment date and time: Tue 06/23/2009~9:30 AM

**Enter New Appointment Details**

Appointment Date:* 06/23/2009    Appointment Time:* 9:30 AM

Appointment Type:* Select    Appointment Duration:* 15 min

**User Availability**

**Figure 5-2, Setting 1st available appointment**

Appointments may be scheduled by selecting the 1st available appointment or by selecting another date and time from the calendar.

### *5.2 Enter New Appointment Details*

Figure 5-3 displays setting a new appointment by entering the appointment details. This option allows a user to set an appointment by a specified date, time and duration based on user's availability. The green boxes indicate the user is available and the red boxes indicate user is unavailable.

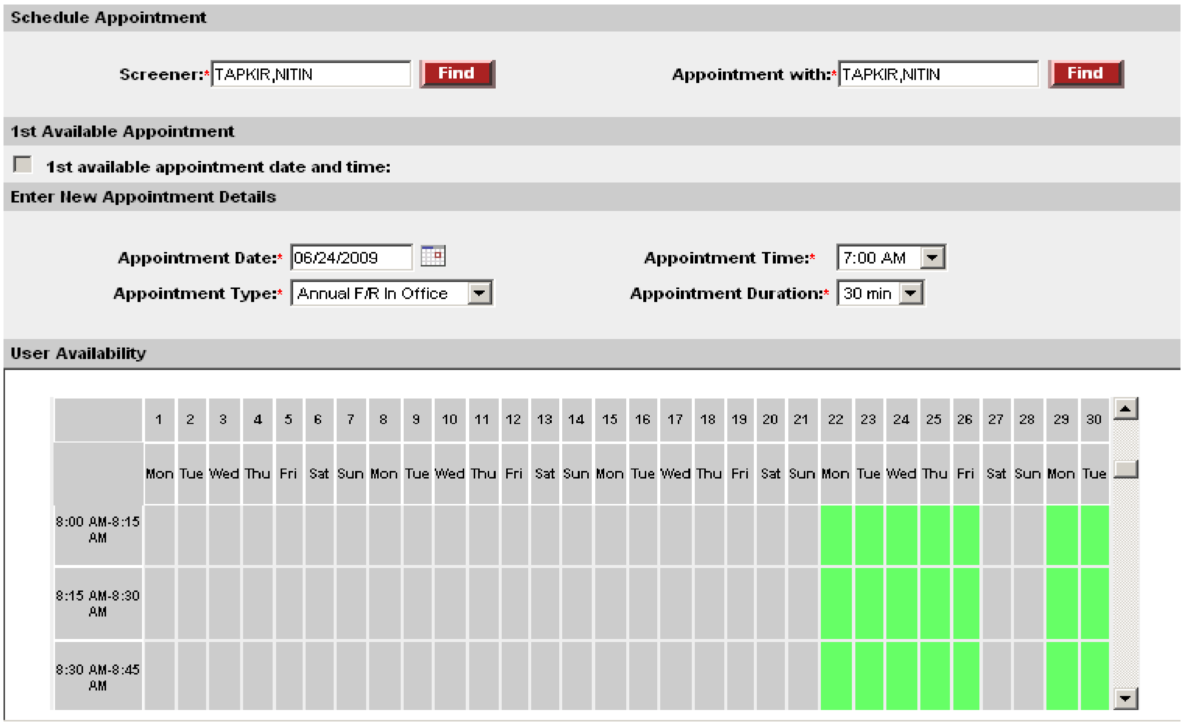



**Figure 5-3, Entering a detailed appointment**

#### *5.2.1 Setting appointment by date, time and duration*

Verify the name showing in the header is the correct client's. Your name will display in the screener's field. If necessary, change the name in the Appointment With field.

**Step 1.** Skip the 1$^{st}$ Available Appointment check box
**Step 2.** Enter or select the date in the Appointment Date calendar.
**Step 3.** Select the Time in the Appointment Time table.
**Step 4.** Select the Appointment Duration from the Appointment Duration table.
**Step 5.** Select Type of Appointment from the Appointment Type table.
**Step 6.** Click on the Save button to save the appointment.

# 6 EDITING AN APPOINTMENT

## *6.1 Editing an appointment date, time and duration*

A current appointment may be edited by changing the date, time, appointment type or duration by clearing the existing values in the appointment detail fields, entering new values and clicking on the Save button.

You may also remove the check from the box on the 1st available appointment to enter in appointment details. By updating the fields in either place the appointment will be changed to reflect the new date or time.

There are a few restrictions.

- The client may not be changed.
- Date may not be in the past
- Date and time must be within the user's availability
- Cannot edit a past appointment except for updating the status to failed, completed or cancelled.
- Cannot change the status of a future cancelled appointment to booked appointment.
- Cannot change the status of failed appointment to booked appointment.

**Important Note: An appointment cannot be deleted after it is created.**

### *6.1.1 Rules for selecting and changing the status.*

A booked appointment status may be changed to Cancelled, Failed or Completed. If the booked status is changed the reason for cancellation or failure is required. An appointment with a status of Cancelled, Failed or Completed may not be changed after it has been selected and saved.

Cancellation Reasons:

- Sick child
- Conflicting appointment
- Unrelated emergency
- Forgot appointment
- Interviewer sick
- No transportation
- Other
- Parent unavailable
- Client unavailable

Failed Reasons:

- Client did not show
- Interviewer oversight
- Other

Figure 6.1 – displays how an appointment may be cancelled, a reason selected and the record updated with a new status.


**Figure 6-1, Cancellation status and reason**

Figure 6.2 – displays how a status of failed may be added to an appointment, a reason selected and the record saved with a new status.


**Figure 6-2, Failed status and reason**

# 7 APPOINTMENT LETTER

An appointment letter *may be* generated at the time of scheduling but is not required. (*See Appendix 8 – sample of letter)* By checking the box next to Generate Appointment Letter and clicking on save button the Edit Correspondence screen will appear to issue the letter and/or adding additional carbon copies, free text and print. If you decide later to generate a letter even after you have saved the booked appointment you may do so from the Edit Appointment screen.

Figure 7.1 displays the check box next to Generate Appointment.

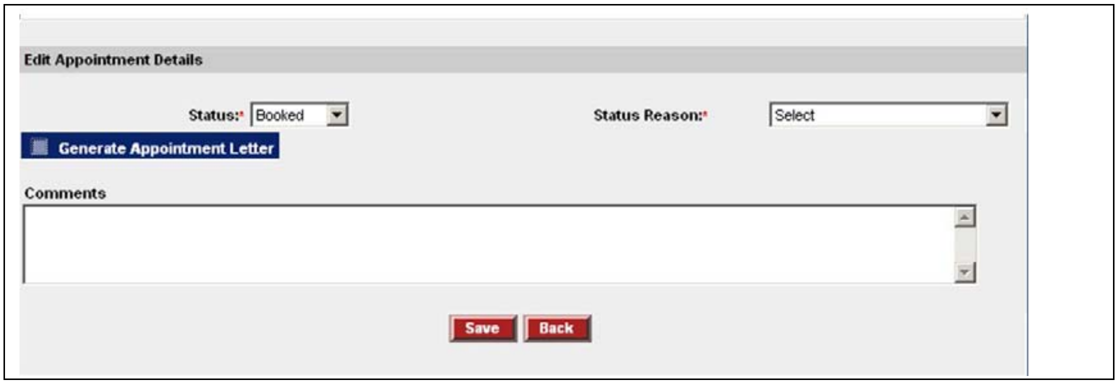



**Figure 7-1, Generating an Appointment Letter**

When a time or date has changed for an appointment a new letter maybe generated through the Edit Appointment screen. To reissue an existing letter you must use the Correspondence module. *Note: See the Correspondence section in the manual for additional rules and requirements for generating a letter.*

# 8 APPENDIX

**Appointment Notification Letter**

Dear [Primary Addressee]:
To determine eligibility for services, an interview has been arranged.
Your appointment has been scheduled as follows:

| | |
|---|---|
| Date: | [list here] |
| Time: | [list here] - [list here] |
| Appointment with: | [list here] |
| Contact number: | [list here] |
| Additional Information: | [Free Text] |
| Location: | [list here] |

(An Annual Assessment Fee of $20.00 *may* be assessed and is payable at the time of the interview.)

**Please contact me if you are unable to keep your appointment.**

Please bring or send the following checked items prior to your interview:

☐ Copy of your most recent State and Federal income tax forms.

(If you did not file a State or a Federal income tax form, send other income documents to list, unemployment insurance benefits award letter, state disability income, employers written verification of earnings, bring **pay** stubs vs **wage** stubs)

☐ Health Insurance Verification

Attach the health insurance form that is attached to this notice.

(Ask your insurance representative to assist you. Send your health insurance policy or booklet.)

☐ Current Medi-Cal card for your child (if eligible for Medi-Cal).

☐ Residence Verification (i.e. drivers license, utility bill, voter registration, CA rent or mortgage receipt, etc.)

☐ Guardian, Child Custody, Adoption Verification (if you are not the biological parent)

☐ Legal/Parental Medical Responsibility (if you are not the biological parent)

Please let us know an interpreter is needed for this appointment.

☐ Other:______________________________________________

If you have questions, or would like to give us more information, please call the [Legal County] County CCS office at [County Office Phone Number].