Avatar Appointment Scheduling

Overview

Avatar Appointment Scheduling facilitates faster check-in and easier scheduling by providing front desk staff access to all the information needed from a single screen with multiple views of staff schedules. Also shows client authorization and eligibility information.

Features

Avatar Appointment Scheduling includes the following functionality:

- View staff calendars
- Add appointments
- Check in clients
- Check out clients
- View and edit appointment details
- Add and remove group members
- Reschedule appointments
- Copy appointments
- Indicate a no show or cancel appointments
- View client data
- View and edit financial eligibility
- View and edit family financial eligibility
- View and edit cross episode financial eligibility (Avatar PM)
- View authorizations
- Chart review
- Overbook appointments
- Delete appointments
- Find new appointments
- Find existing appointments
- View reports

Menu Path

Avatar PM > Appointment Scheduling > Scheduling Calendar

Calendar Navigation

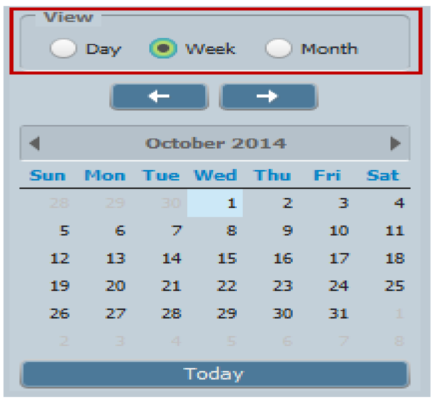
Filters

The **Filter** section on the left-hand side of the screen provides you with several options for filtering the data in the calendar.

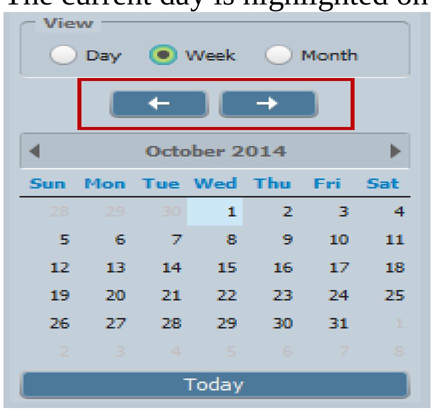
- The **Site** filter allows you to restrict data to a single location.
- The **Team** filter allows you to restrict data to a single team.
- Select the practitioners from the check-off list to include their appointments in the **Scheduling Calendar** view. Only practitioners who have hours associated with the selected site appear in this list.

Calendar View

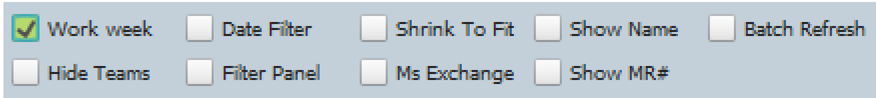
- Select **Day**, **Week**, or **Month** in the **View** field to change the **Scheduling Calendar** view.



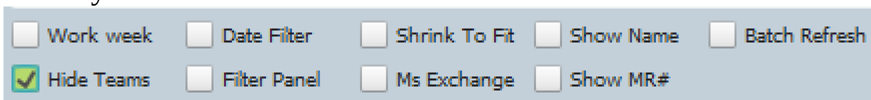
- Click the arrows under the **View** field to move to the previous or next day/week/month. The current day is highlighted on the calendar with a red border around the date.



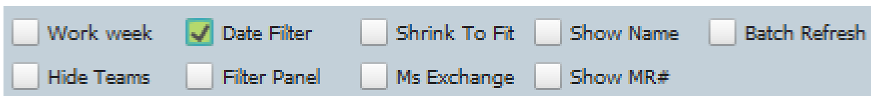
- Check off the **Work Week** field to switch from the full week view to the work week view.



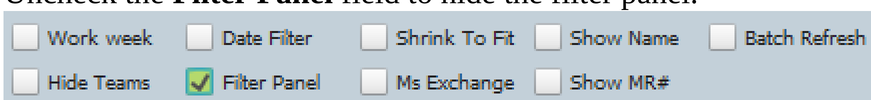
- Check off the **Hide Team** field to hide team appointments for members that are not the Primary or Co-Practitioners.



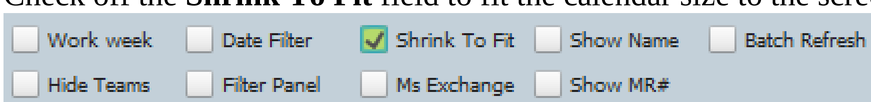
- Uncheck the **Date Filter** field to hide the date filter.



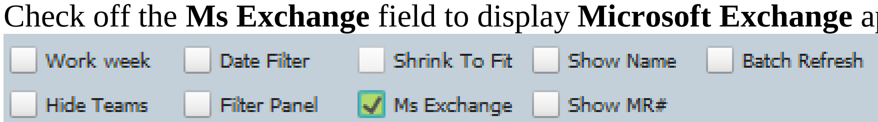
- Uncheck the **Filter Panel** field to hide the filter panel.



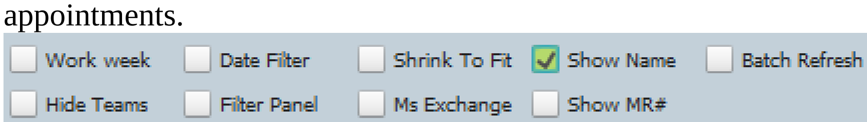
- Check off the **Shrink To Fit** field to fit the calendar size to the screen.



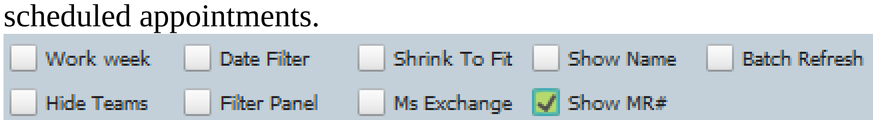
- Check off the **Ms Exchange** field to display **Microsoft Exchange** appointments.



- Check off the **Show Names** field to display the clients' names in their scheduled appointments.



- Check off the **Show MR#** field to display the client's **Medical Record** numbers in their scheduled appointments.



Heads Up!

If multiple practitioner calendars are open, click on the practitioner's name (not the check box) to highlight their appointments on the calendar.

Add Appointment

Overview

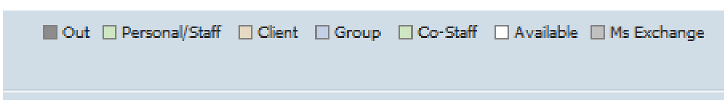
Create an appointment in the **Scheduling Calendar**.

Steps

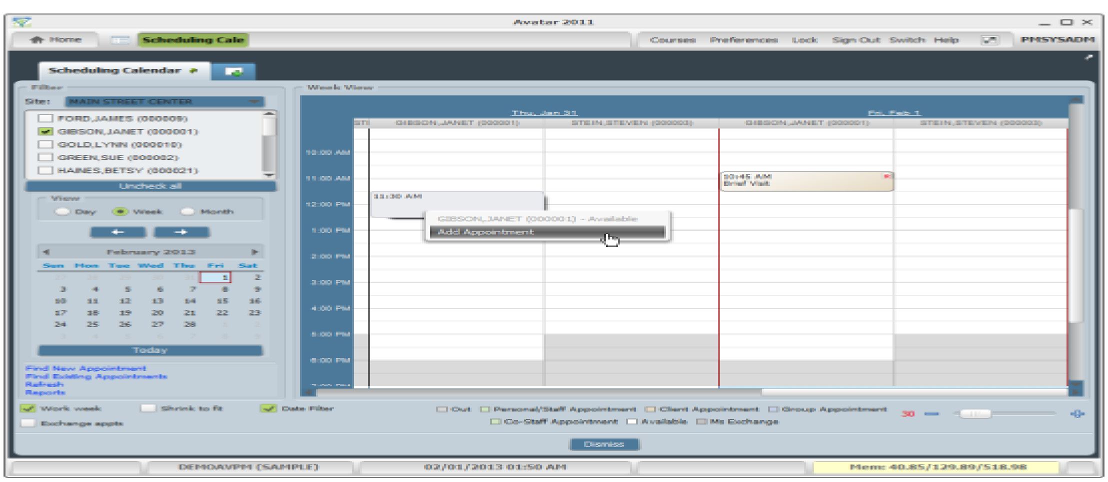
- In the **Calendar** box, select the day of the appointment.

Heads Up!

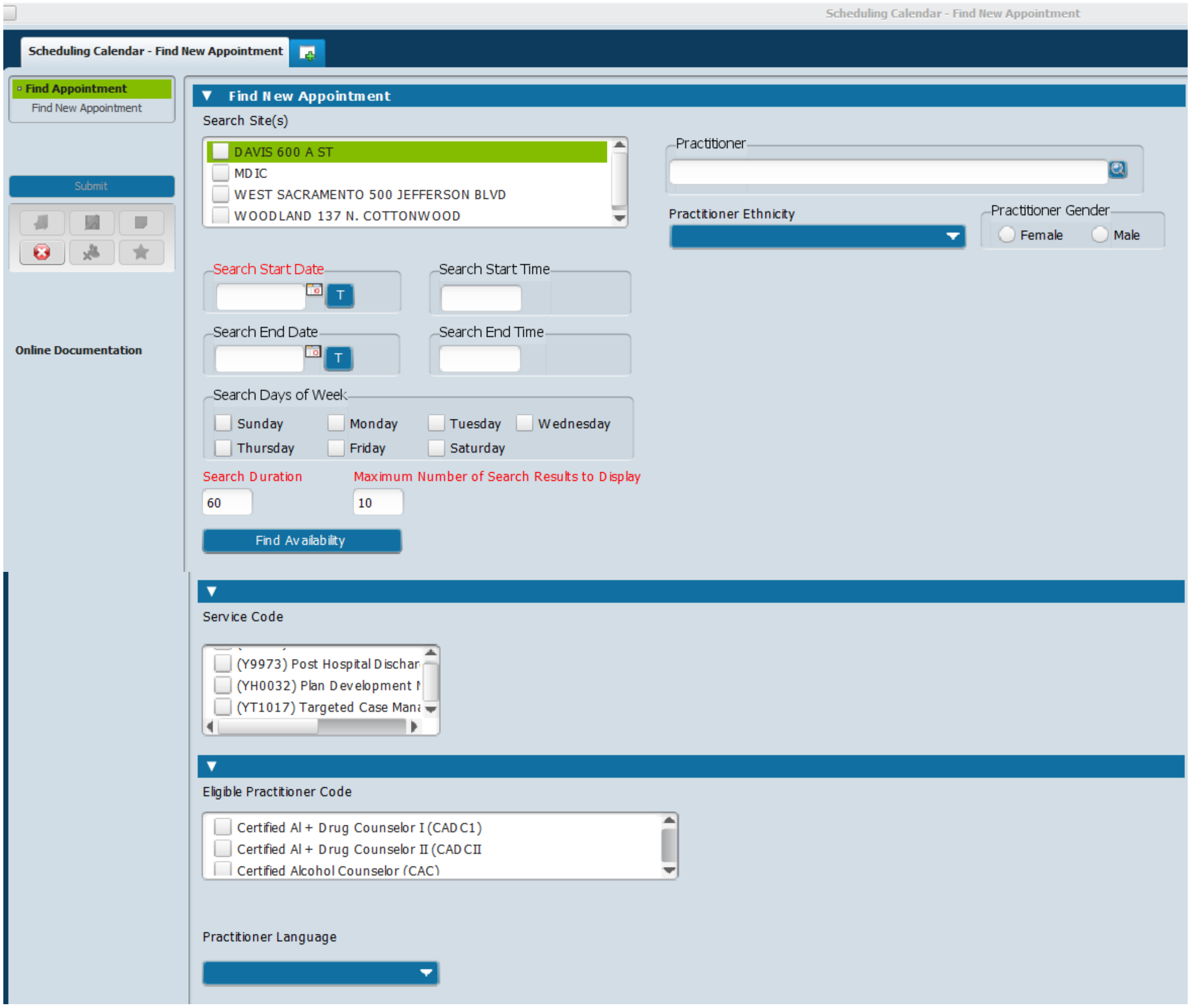
- The calendar is color coded to indicate staff availability.



- Right-click the start time of the appointment and select **Add Appointment**, alternatively in the lower left corner click on **Find New Appointment.**



- If **Find New Appointment** is selected, then Find New Appointment form displays.



- Select all sites that need to be included in the search by checking all that apply, or if all need to be selected, click on the first option and CTRL + A.

- Enter the Practitioner name.

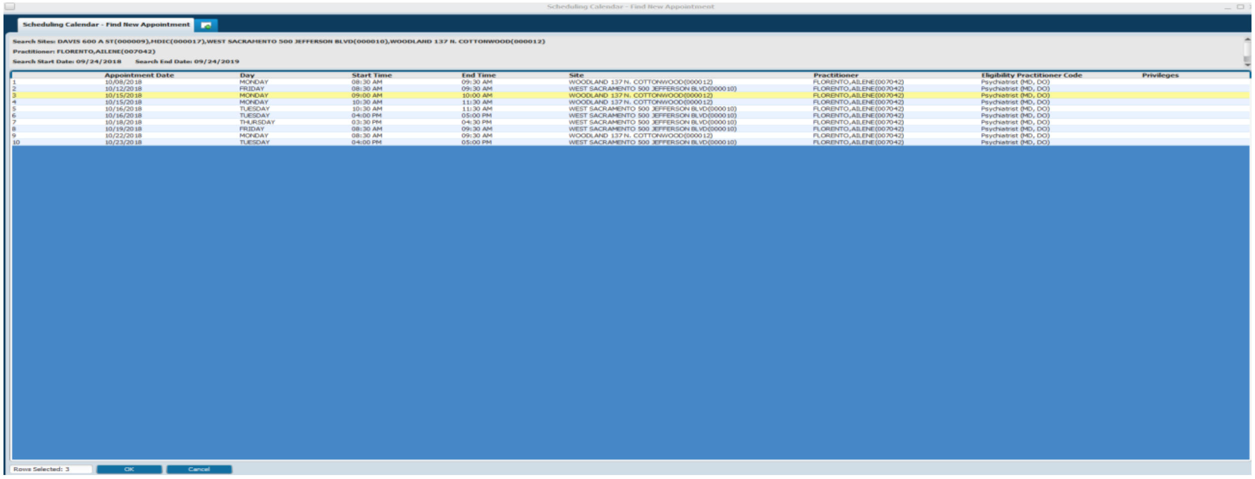
- Populate the **Search Start Date** and **Search Start Time.** Include the **Search End Date** and **Time** if required.

- In the **Search Days of Week,** select all days that need to be included.

- In the **Search Duration** field, the system will auto populate with 60 minutes, change this as needed.

- In the **Maximum Number of Search Results to Display,** the system will auto populate with 10, change this as needed.

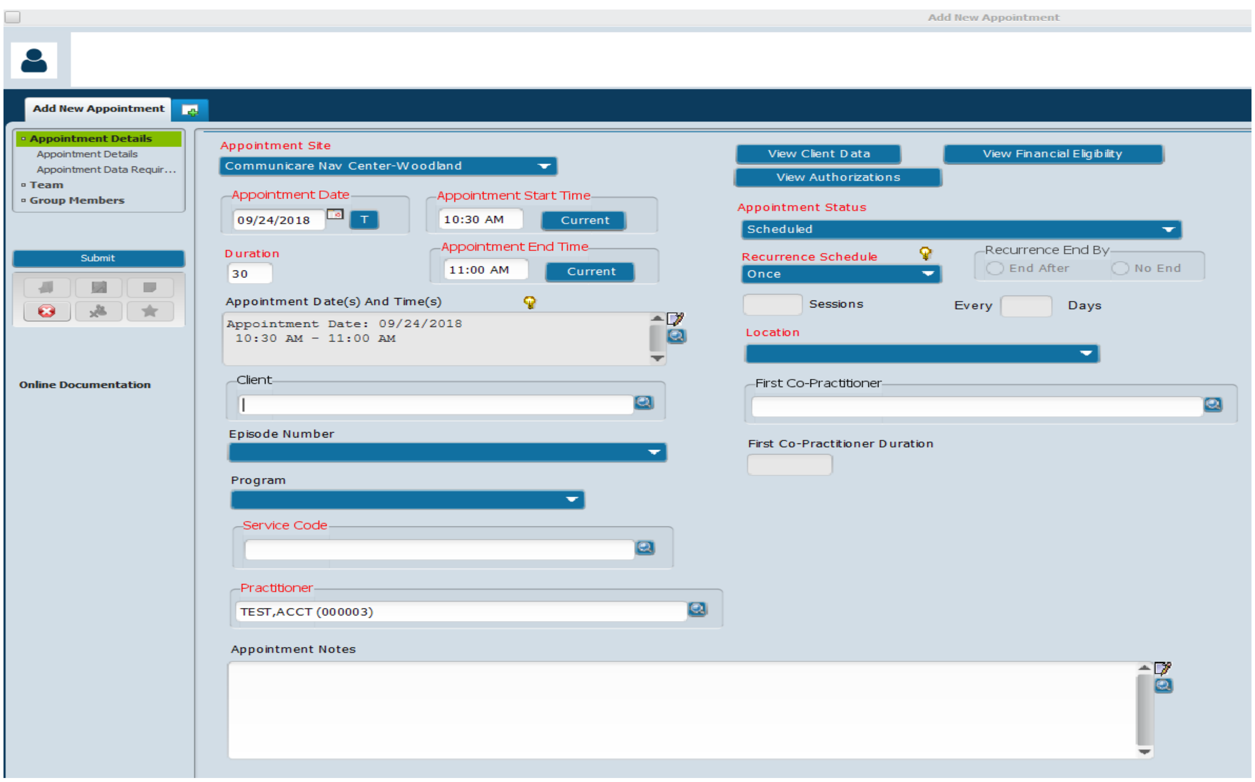
- Click on **Find Availability**, a list of available appointments will display.



- Highlight the appointment that the client wants, click on OK.

- The appointment will schedule and appear on the calendar.

- If **Add New Appointment** is selected, then Add New Appointment form displays.



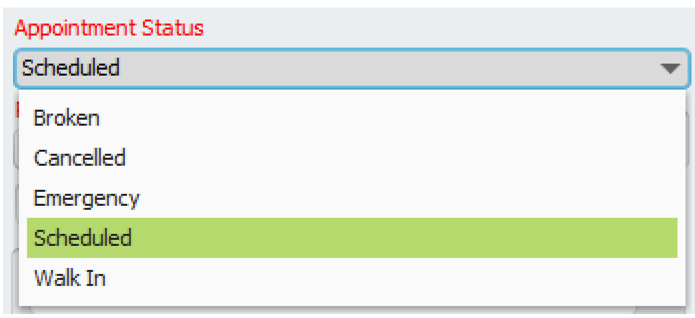
- The **Appointment Site**, **Appointment Date**, **Appointment Start Time, Duration**, **Appointment Start Time**, **Appointment End Time**, and **Practitioner** fields automatically populate from the selections made in the **Scheduling Calendar**. Appointments with an unspecified **End Time** are automatically assigned 30 minute increments. Edit as necessary.

- For Individual Appointments, enter the **Client Name or ID#**, and select the client from the list of matches. Select an open episode for the client from the **Episode Number** drop-down list.

- In the **Program** field, enter the service program that the service will be attached to for billing.

- Enter the **Service Code** Name or ID#, and select the appropriate service code from the list of matches.

- Select the **Appointment Status** from the drop-down list.



- Select the **Recurrence Schedule** from the drop-down list.
  Choosing **Other** in this field allows you to set a customized schedule for how often this appointment will occur. If **Other** is chosen, in the **Every X Days** field, enter the frequency of recurrence.

- If a recurrence other than **Once** is selected, in the **Recurrence End By** field:
  - Select **End After** to set a limit on the number of appointments created.
  - Select **No End** to have this appointment recur for one year from the time entered.

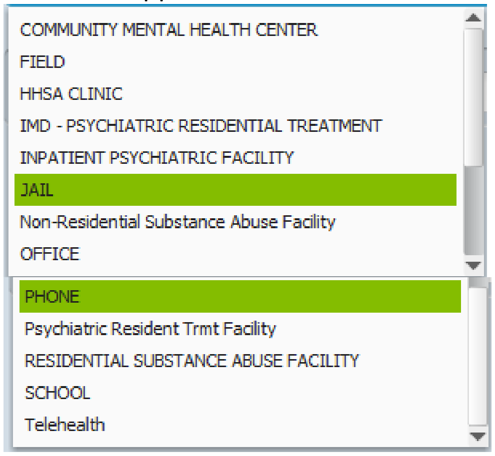
- If a recurrence of **Weekly** is selected, check off which days of the week to schedule in the **Week Days** field.

Heads Up!

If the scheduled staff member is not available during the day/time selected, a message will appear. You will be given the option to have the system search for additional dates during which the staff member is available. Select the desired dates and click **OK**.

- In the **Sessions** field, enter the number of sessions desired for this recurring appointment.

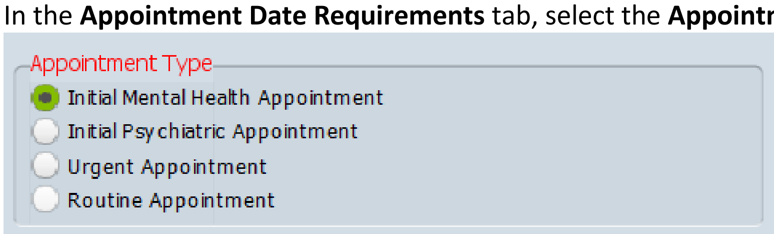
- Select the appointment **Location** from the drop-down list.



Appointment Data Requirements

- In the **Appointment Notes** field, enter any relevant information.

- In the **Appointment Date Requirements** tab, select the **Appointment Type.**

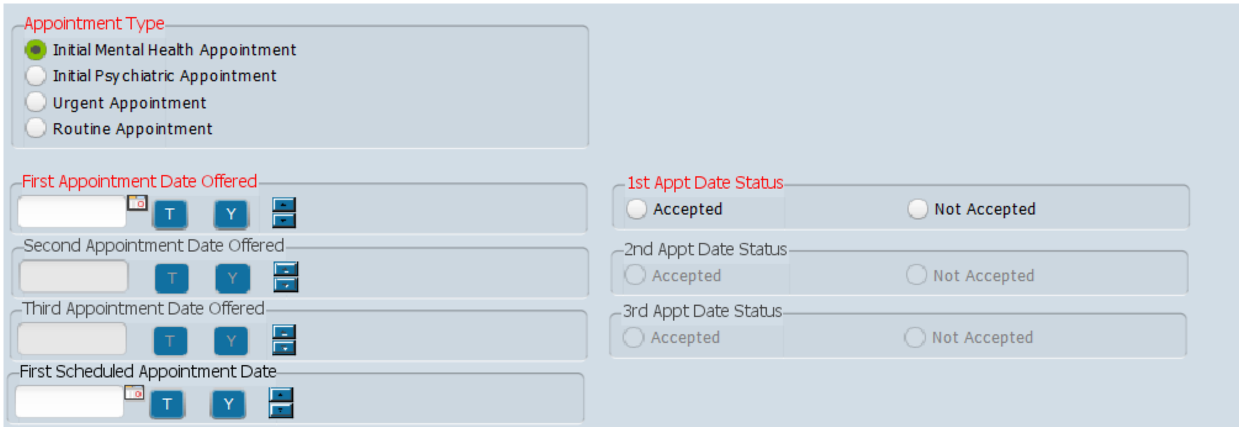


Heads Up!

- Urgent appointment is defined by, “Urgent Condition determined by a CLINICAL practitioner, where there is a situation that without timely intervention is highly likely to result in an immediate emergency psychiatric condition. Time standard for Urgent Care appointments: within 48 hours if the service does not require a pre-authorization. Within 96 hours if the service requires pre-authorization of the plan.”

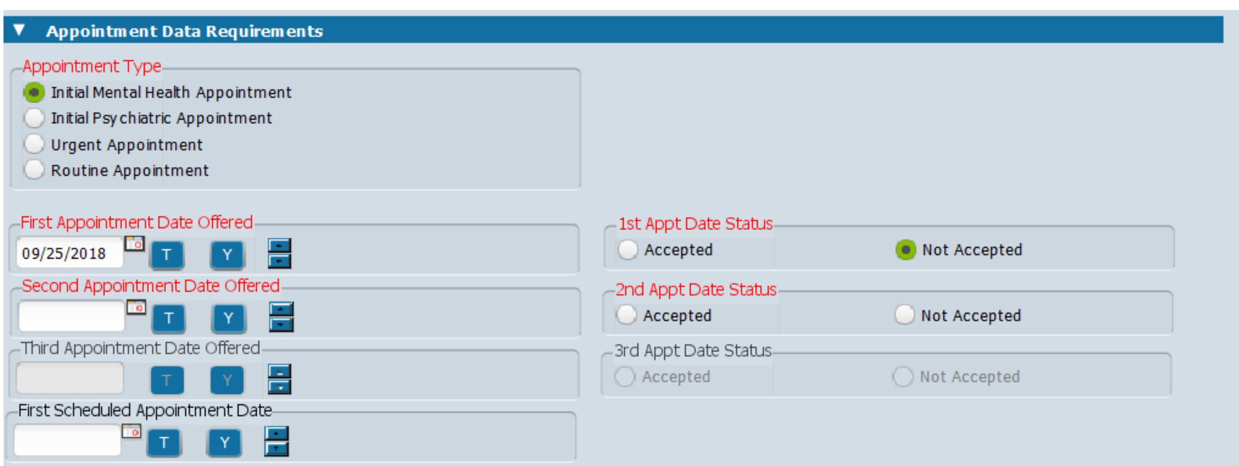
- Routine appointment is an appointment that is not an initial appointment and is not an urgent appointment.

- If **Initial Mental Health Appointment, Initial Psychiatric Appointment** or **Urgent Appointment** is selected, the Offered Appointment series will become required fields.



- In **First Appointment Date Offered,** enter the date of the first appointment offered to the client.

- In **1st Appt Date Status,** if the client accepted the appointment, click on **Accepted**. The additional offered appointments will remain greyed out. If the client refused the offered appointment, select **Not Accepted.** This will make the field **Second Appointment Date Offered,** a required field. The process will continue for the **Third Appointment Date Offered.**



Heads Up!

- A client can advise you prior to making the appointments that they want a certain date. It is a requirement to still offer the first available dates until an appointment is accepted.

- Only a maximum of 3 appointments offered are required for data reporting. If a client is offered a 4th appointment and it is rejected, there is not a requirement to track it.

- Once a client has accepted an offered appointment, the user can skip to **First Scheduled Appointment Date.**

- In the **First Scheduled Appointment Date,** enter the date that the client accepted and that was scheduled.

Heads Up!

- Entering the scheduled date into the **First Scheduled Appointment Date** will lock this date for reporting. In the event that the appointment is rescheduled the data will not be lost.

- Click on Submit.

Find Existing Appointments

Overview

Find previously scheduled appointments by clicking the **Find Existing Appointments** link in the **Scheduling Calendar**.

Steps

- Click **Find Existing Appointments**. The **Find Existing Appointment** form displays.

- In the **Search Site(s)** field, check off the sites to include in the search.

- Enter the **Search Start Date** and **Search End Date**.

- Enter the **Search Start Time** and **Search End Time**.

- Check off the days of the week to include in the search.

- In the **Search Duration** field, enter the block (in minutes) of available time needed.

- Enter the **Maximum Number of Search Results To Display**.

- Enter the **Practitioner Name or ID#**, and select the practitioner from the list of matches
  or
  Select the **Practitioner Ethnicity** and **Practitioner Gender** to include in the search.

- For individual appointments, enter the **Client Name or ID#**, and select the client from the list of matches.
  or
  For group appointments, enter the **Group Name or ID#**, and select the group from the list of matches.

- Enter the **Service Code Name or ID#**, and select the appropriate service code for the existing appointment.
- In the **Eligible Practitioner Code** field, select practitioner codes to filter the search results.
- In the **Practitioner Language** field, filter the search results by a specific language.
- Select whether or not to **Display Cancelled Appointments** in the search results.
- Click **Find Appointment** to display the **Find Existing Appointment Results** screen.
- Select an appointment and click **OK**.

The **Scheduling Calendar** re-displays with the appointment highlighted.

View Details/Edit Appointment

Overview

View or edit the details of an appointment using the right-click menu of the **Scheduling Calendar**.

Details

- The appointment date/time/duration and practitioner/co-practitioner information can be changed directly in the **Scheduling Calendar**.
- Change the date/time by dragging the appointment to the new date/time frame. Increase or decrease the duration by dragging the start or end times. Change the primary practitioner by dragging the appointment to another practitioner's schedule.
- The **Scheduling Calendar's** default appointment duration is 30 minutes If the user adjusts the "zoom" on the lower right-hand corner of the **Scheduling Calendar** screen, increments of 5 between 5 and 30 can be selected. This impacts the user's view of the calendar by zooming, but it also serves as the default appointment length. When set to 15 minutes (as reflected by the red number in the same corner), creating a new appointment will default as 15 minutes in length.

Steps

➢ In the **Scheduling Calendar**, right-click the appointment and select **Details/Edit**. The **Appointment Details** form displays. For recurring appointments, a message appears prompting the user to choose between editing this **Occurrence** of the appointment or the entire **Series**.

Heads Up!

Changes to the series only affect future appointments. At this stage only certain fields are available for editing. For major changes, a new appointment should be created

➢ Make changes to any desired fields in **Appointment Details** and/or **Clinical** sections. If the appointment status is 'Verified,' the **Appointment Details** fields cannot be edited. They will be display-only.

➢ Click **Submit**.

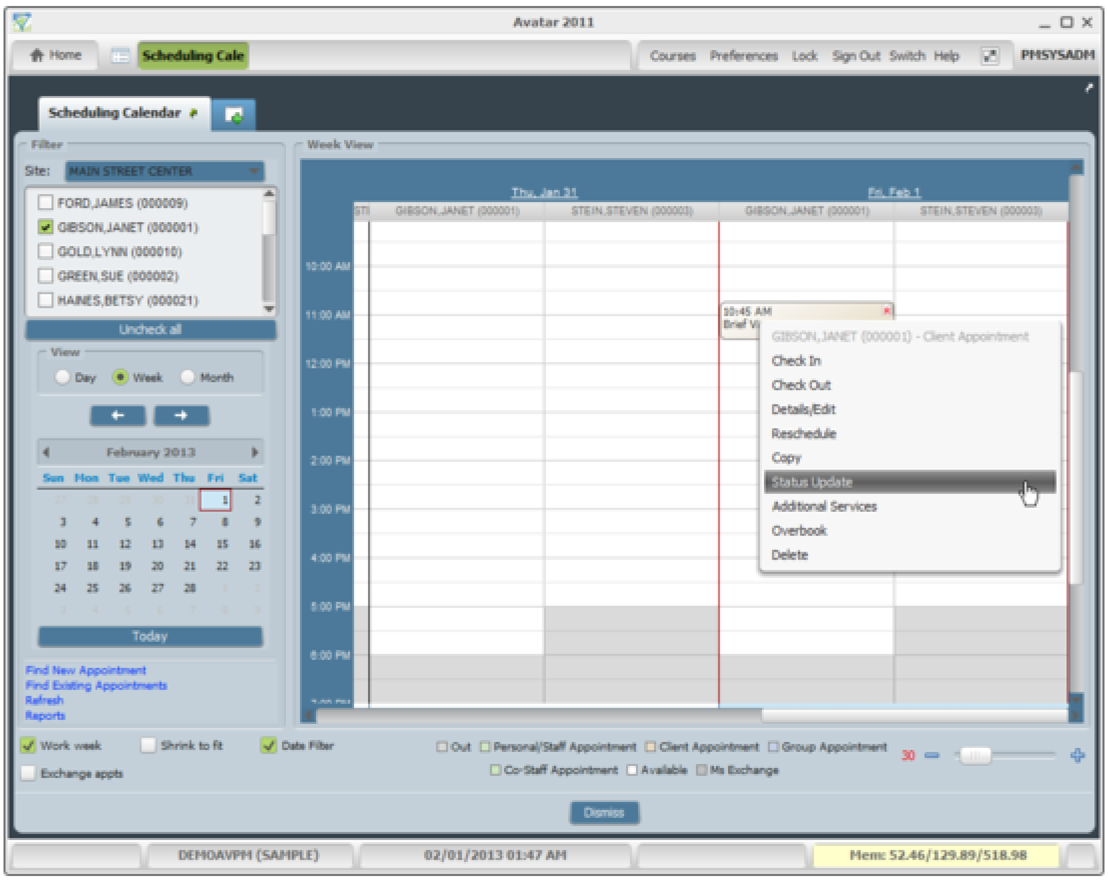
Status Update

Overview

Update an appointment's status using the right-click menu of the Scheduling Calendar.

Steps

- In the Scheduling Calendar, right-click the appointment and select Status Update.



- The Status Update form displays.

- Select the Appointment Status from the drop down list.

- In the Confirmed check box, click Yes if the client confirmed the appointment.

- In the Confirmation Notes field, enter any additional information associated with the appointment confirmation.

- In the Missed Visit check box, click Yes if the client missed the appointment.
  If this box is checked, the Scheduling Calendar will display an on the appointment to indicate a 'No Show.'

- In the Missed Visit Service Code field, select the appropriate code from the drop down list. The missed visit code is documented in the Client Ledger after the schedule is posted.

- In the Missed Visit Notes field, enter any additional information associated with the missed appointment. The missed visit notes are displayed in the Missed Visit Report after the schedule is posted.

- Click Submit.

Disposition Symbols

Please note the following disposition symbols and their meanings:

- Appointment canceled.

- Appointment checked in.

- Appointment confirmed.

- Appointment posted.

- Appointment verified.

- No show.

- Progress note exists.

- Progress note is a draft.

- Progress note is final.

- Progress note required.

- Recurring appointment.

- Appointment includes 3+ team members

Copy/Paste Appointment

Overview

Copy and paste an appointment from the right-click menu of the Scheduling Calendar.

Steps

- In the Scheduling Calendar, right-click the appointment and select Copy.
- To paste an appointment on a different day, select Week in the View field to change the Scheduling Calendar view

.

- Select the day and/or time of the new appointment. (The calendar is color coded to indicate staff availability.)
- Right-click the new time slot and select Paste Appointment.
- If copying from a recurring appointment, a message appears asking if the new instance should be an individual appointment or part of the series.

Heads Up!

Copied appointments can be pasted to a different practitioner, as long as there are no conflicts. To paste to another practitioner, select that practitioner from the Filter list in the Scheduling Calendar view, and copy the appointment to their calendar.

Delete Appointment

Overview

Delete an individual or recurring appointment from the right-click menu of the **Scheduling Calendar**.

Details

- Selecting all appointments (**Ctrl + A**) will deactivate the series.
- For appointments in which the current staff member is a co-staff, the menu is modified to display **Delete Co-Staff** instead of **Delete**.
- If the appointment has two staff members and if the first co-staff member is deleted, the second co-staff member becomes the first staff member.
- Deleting a co-staff appointment only removes the co-staff member from the appointment; it doesn't remove the main appointment.
- If the appointment has a progress note attached and the **Allow Deleting Appointment If Progress Note Attached** field is set to **Do Not Allow** , the appointment may not be deleted.

Steps

- In the **Scheduling Calendar**, right-click the appointment and select **Delete**.

- If the appointment is recurring, select which appointments to delete.

- Select **Yes** to confirm the action.

Reschedule Appointment

Overview

Reschedule an appointment using the Scheduling Calendar.

Details

- Appointments can be rescheduled with a different practitioner, as long as there are no conflicts. To schedule with another practitioner, select that practitioner from the Filter list in the Scheduling Calendar view, and drag the appointment to their calendar.
- Co-staff appointments cannot be rescheduled. The primary staff appointment must be rescheduled, and the co-staff date is adjusted accordingly.

Steps

- If the new day/time is visible in the Scheduling Calendar view, drag the appointment to the new day/time. (The calendar is color coded to indicate staff availability.)
  or
  Right-click the appointment and click Reschedule. To move to a different day, select Week in the View field to change the Scheduling Calendar view.

- Right-click the new day/time and select Paste Appointment.

Heads Up!

For recurring appointments, a message appears prompting the user to choose between editing this Occurrence of the appointment or the entire Series.