

# Community-Wide Scheduling

FUNCTIONALITY BRIEF



MEDITECH's Community-Wide Scheduling simplifies appointment scheduling and increases both user efficiency and appointment accuracy. It automatically searches patient and provider schedules and tracks room, equipment, and resource availability for organizations of all sizes, including multi-facility networks. The solution supports both centralized and decentralized scheduling as well as ambulatory integration to accommodate an organization's needs across care settings. Resource, Patient, Department, Waitlist, and Group modes ensure that the Scheduler Desktop is tailored to a variety of users and workflows. In addition to supporting scheduling functionality, Community-Wide Scheduling tracks patient compliance, offers a statistical desktop, and generates standard reports to advance oversight of all appointment and user activity.

## Define Appointment Search Criteria

Community-Wide Scheduling makes it easy for users to find an appropriate time slot. Using scheduler-defined criteria—including appointment type, earliest and latest start times and dates, and specific days to exclude from the search—the software automatically searches for the first available time slot. The search can encompass all facilities or can focus on one or more specific facilities within your enterprise.

A patient-centric search mode provides quick access to insurance, resource, and additional information about a selected appointment. Alternative search modes include department, appointment book, resource, waitlist, or meeting. To further streamline scheduling, you can create sets of appointments that are commonly booked together. You can define the minimum time between appointments, booking order, maximum duration, and associated orders. Appointments within the set can include appointments from multiple facilities—for example, an office visit in a clinic and then an X-ray appointment in a hospital.

## View Schedules in a Variety of Formats

With Community-Wide Scheduling, you can view and book patient appointments, group appointments, and staff or non-patient meetings, along with all of the resources associated with each type of appointment. Function-specific desktop modes—including Resource, Patient, Department, Waitlist, and Group—provide immediate, centralized access to scheduler tools for booking, editing, and viewing all appointments; and for registering or checking-in patients. From these centralized desktops, you can also:

- View a single patient's appointment history and upcoming appointments.
- Search for an available time slot within a specific department or facility, or across an enterprise.
- Schedule appointment sets, series, and recurring appointments.
- Display booked and pending appointments for a single department or multiple departments.
- Define an appointment type to be available for selection across multiple facilities.
- Search for appointments in either a daily or weekly appointment book format.

- Cancel or reschedule appointments using drag-and-drop and cut-and-paste functionality while maintaining the original appointment criteria.

The screenshot displays the CWS Scheduler Desktop interface for the Canton Medical Center, Radiology department. The main window shows a scheduling grid for Radiology Technologists on Thursday, March 02, 2017. The grid is organized by time slots (07:00 to 17:30) and resources (MART, CALC, CALA, MACO). Appointments are listed with patient names, phone numbers, and appointment types like 'Mammo Appts' and 'Upper GI'. A sidebar on the right contains navigation and action menus.

Time	MART	CALC	CALA	MACO
07:00	[5] 73%	[5] 81%	[6] 70%	[2] 26%
08:00	Mammo Appts	Bare, John 401-543-4057 Upper GI	Simons, Frank 781-774-7000	<Other Groups> Other Locations
08:30	Fisher, Wendi 405-443-4951		Staff Meeting Radiology	
09:00	Mammo Appts			
10:00	Francis, Leslie 401-456-5045	Brown, Thomas 781-774-5435		
10:30	Mammo Appts	NUC MED - CARDIAC Radiology	<Mult Appts 2>	
11:00				
11:30	Lunch	Lunch	Lunch	Lunch
12:00				
12:30				
13:00	Cooke, Henry 401-445-0594 Upper GI	Gray, Michael 401-445-6044		Johnson, David 774-781-3345
13:30	Falls, Kenneth 401-556-0548	Gray, Theresa 401-445-6069	King, Lauren 401-556-7064	
14:00	Braga, Henry 781-774-7774	Harrington, John 401-334-0543	NUC MED - CARDIAC Radiology	Johnson, Robert 401-445-0665
15:00				
16:00			Gray, Thomas A 978-456-8044	
17:00				
17:30				

## Manage Group Appointments

A Group Scheduling Desktop enables users to book and manage multiple patients to schedule group appointments (e.g., group therapy). When managing group appointments you can:

- Move members from one group to another.
- Edit, cancel, or reschedule existing booked groups.
- Copy single or series group appointments for future sessions.
- View details of a booked group, including an audit trail.
- Record copayments collected from patients.
- Enter group notes at any point during the group management process.
- Document patient arrival or unexpected absence, or cancel an appointment.
- Trigger charge and collection batches to the Billing Department upon appointment completion.

## Minimize Scheduling Errors and Missed Appointments

Real-time access to patient information across care settings ensures accuracy and protects against scheduling errors. User-defined rules flag dangerous or unusual values, preventing harmful or costly errors. Conflict rules are organization-defined and can be based on the patient's gender, age, insurance, or other scheduled appointments. The system highlights any existing conflicts for schedulers (e.g., resource groups, or appointment sets), and flags patients who are frequent no-shows or have a history of bad debt.

A compliancy routine on the desktop takes this a step further by offering a single area from which users can track patient non-compliance.

To prevent missed appointments and promote timely follow-up care, your organization can create templates for letters and messages. You can define the specific events that trigger letters and messages, along with appointment-specific instructions. Examples include:

- Appointment reminders
- Cancellation notices
- Health maintenance reminders (mammograms, physical exams, etc.).

## Improve Resource Allocation

Community-Wide Scheduling helps your staff manage personnel, rooms, and equipment through organization-defined resource schedules. Staff can use a basic resource schedule template or create new schedules. In either case, the schedule will reflect any time or use restrictions for equipment and rooms, as well as the practices of specific physicians. When creating resource schedules, you can:

- Link appointment types with specific days or resources.
- Determine whether a resource can be overbooked or scheduled during unavailable times.
- View combined schedules for multiple resources as a single grid.
- Define appointment duration based on appointment type and/or resource.
- Collect data to evaluate the efficiency and frequency of resource use.
- Enable managers to plan and schedule staff meetings.
- Drag and drop, copy and paste, or transfer appointments on the Scheduling Grid.

## Manage Waitlists to Optimize Appointment Utilization

A Waitlist, accessible from the Scheduler Desktop, provides an efficient way to manage incoming pending appointment requests and to view the pending appointments for specific locations. From the Waitlist, staff can schedule patients as soon as an appropriate time slot becomes available, minimizing or eliminating inefficiency due to cancellations. The Waitlist enables schedulers to:

- Maintain and prioritize waitlisted appointment lists.
- Track how long a patient remains on a Waitlist.
- Easily move patients from the Waitlist to scheduled appointment times.
- Record latest dates acceptable for patient appointments.
- Prioritize lists of patients waiting for specific appointments.

Schedulers also benefit from patient compliance tracking. For each patient, staff can access: the number of booked or attended appointments, whether the patient was a no-show or cancellation, and the patient's check in/out times.

## Review Scheduling Reports and Statistics

From the Scheduler Desktop, users can access standard and custom reports with the click of a button. This allows them to see daily appointment schedules, pending/waitlisted appointments, appointment activity, and more. Managers can easily evaluate appointment and Waitlist statistics using the Community-Wide Scheduling Statistical Desktop. This desktop provides an easy way to compile appointment, compliance, location, and wait-time statistics. Managers can narrow the focus of the information by selecting various combinations of dates, facilities, locations, resources, resource groups, appointments, and appointment statuses. They can also view and print the extended details of appointment or wait-time statistics, including patient name(s) and appointment date and time.

Taking reporting a step further, your organization's stakeholders can review census data in Business and Clinical Analytics to gauge patient volumes, monitor patient trends, and manage occupancy levels.

## Benefit from Integrated Scheduling Functionality

One of the key strengths of Community-Wide Scheduling is its system-wide integration. Often the initial point of contact in the care process, Community-Wide Scheduling plays a major role in capturing patient census, demographic, and visit-specific information, and making it immediately available across the EHR in preparation for patient arrival. Other benefits of this integration include the ability to:

- Select and register a scheduled appointment, complete with any demographics captured during scheduling, in Registration.
- Associate an existing referral with the appointment during scheduling and automatically decrement units of service and receive problem warnings.
- Automatically trigger charges for attended, no-show, and other appointment statuses, and send these charges to Revenue Cycle.
- Scan documents at the point of contact and submit to the patient's eChart.
- Link appointment types to Order Management to automatically trigger orders when booking.
- Send query information pertaining to medical necessity (e.g., allergy and ICD-10 diagnosis information) to Abstracting.
- Process patient appointments requested through the Patient and Consumer Health Portal.
- Integrate with schedules for Ambulatory appointments and Surgical Services cases.

For more information, contact a MEDITECH Marketing Consultant.