# Appointment/Reminder Suite

*Calendar*
*Data Admin*
*Reminder Calls*

# User Guide

20 May 2002



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# *Introduction*

The Kuflink *Appointment/Reminder Suite* (ARS) computerizes your paper calendar book and automates reminder calls:

1. Calendar Module manages appointments and meetings for all staff members.
2. Reminder Module automatically calls clients the day before appointment.
3. Data Admin Module allows authorized personnel to manage internal data.
4. Data is shared between ARS modules and multiple Calendar users.

**Calendar Module**

- Schedule appointments, meetings and other activities with a few mouse clicks.
- Display and print all upcoming appointments for a client on a single sheet.
- Cancel appointments, flag no-shows (who will receive a call to re-schedule).
- Display and print daily schedule of appointments for each staff member.
- View a condensed schedule for all staff in a department to find open slots.
- Manage the wait-list, adding clients and filling cancellations immediately.

**Reminder Module**

- Automatically call clients by phone the day before their appointments.
- Remind them of the date, time, doctor, procedure, expected duration, and any special instructions for new patients.
- Allow client to repeat the information, schedule a later call-back, or connect to the department receptionist during business hours.
- Leave the information on an answering machine, or redial if the line is busy or there is no answer.
- Call "no shows" to remind them that they missed their appointment and will need to call back to re-schedule. Give them the proper phone number to dial.

**Data Admin Module**

- Manage the list of staff members and their work days/hours.
- Add pages to the calendar when necessary, with off-times blocked out.
- Update calendar pages when days/hours change for one or more staff.
- Manage the list of departments (name, abbreviation, phone number, etc.)
- Manage the list of appointment types (name, duration, department)
- Manage the list of meeting types (specific to each department)
- View the list of clients (name, phone numbers, birthdate, MR number, etc.)
- Import patient info from an external text file if necessary.
- View the Wait List, Activity Log, Reminder Calls.
- Customize parameters (company name, phone, permissions, username, etc.)

**Software Installation**

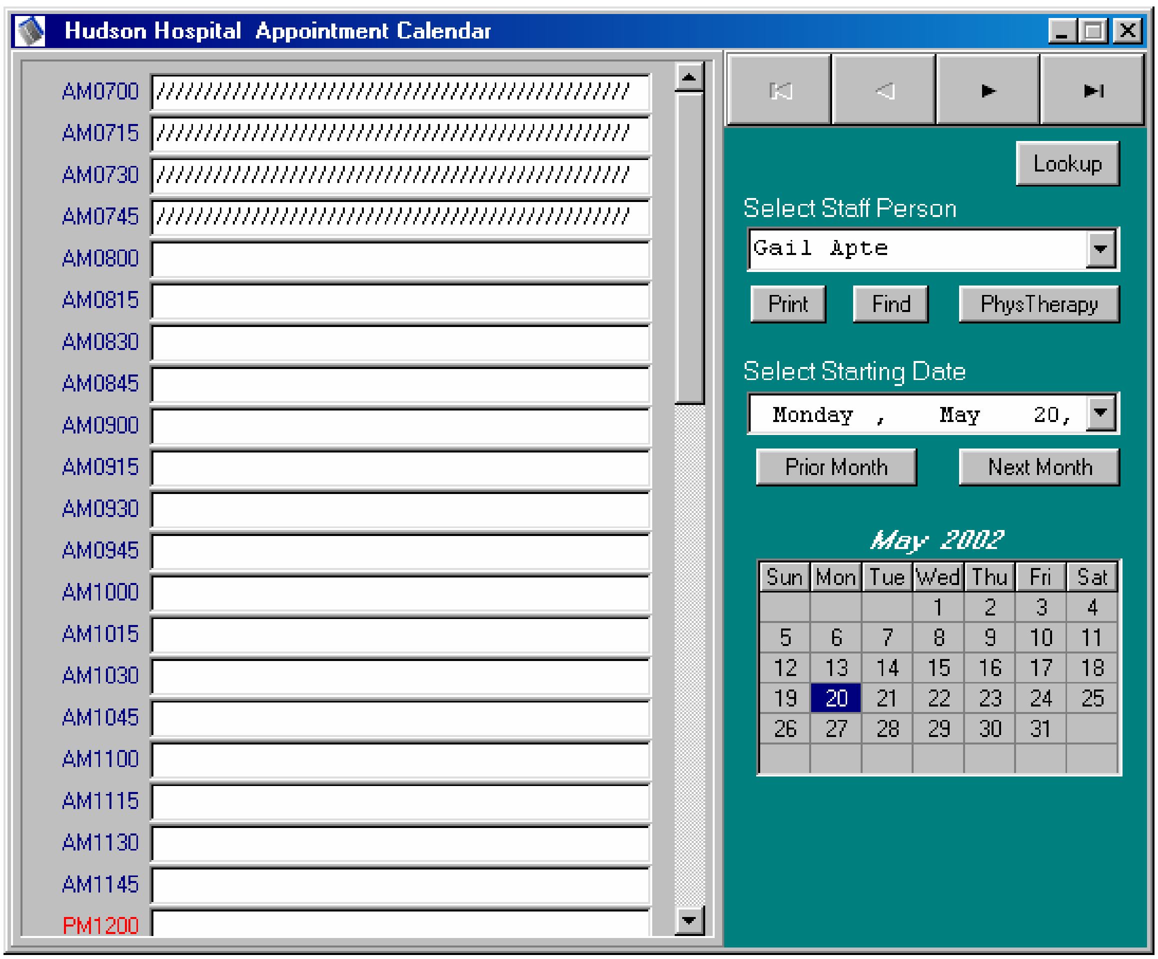
- ARS is compatible with Microsoft Windows 95, 98, ME, NT, 2000 or XP.
- Software must be properly installed on a *Windows ™* computer, which involves the installation of the Borland Database Engine v5.01 as well.
- Database files must be accessible on the local computer or on a shared file server.
- INI file must be properly configured for the computer user and database location (Kuflink.INI, located in the *Windows* directory).
- Run the Calendar program by clicking **Start / Programs / Kuflink / Calendar**. An icon/shortcut can also be created on the desktop if desired.
- Calendar module will be loaded and basic department data read into memory.

# *Calendar Module*

**Pulling up the Calendar**

To display the calendar for a particular doctor, therapist or procedure:

1. Select a staff person or modality by clicking on the arrow at the end of the first box and then clicking on a name from the list that drops down.
2. Select a starting date by clicking on the arrow at the end of the “date line” and then clicking on the desired date on the calendar.
3. Click on the “Get Calendar” button that appears to the left: 11 calendar pages will be retrieved, beginning with the start date.



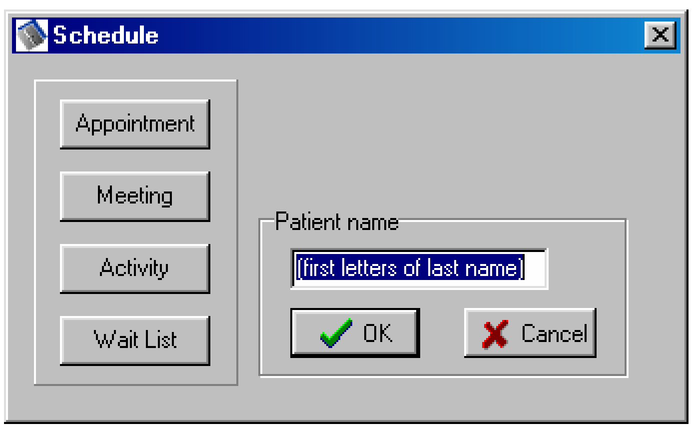

4. Each page is shown divided into 15-minute time slots, from 7 AM to 7 PM. Time slots that are filled with slashes (///////) were blocked out when the calendar page was created, based on the work days/hours of this staff person.

5. To see afternoon time-slots, click in the vertical scroll bar on the right side of the calendar page.
6. To “turn” the pages of the calendar, use the arrows in the upper right:

| | |
|---|---|
| ⏮ | return to start date |
| ◀ | previous day |
| ▶ | next day |
| ⏭ | last day (of this set of pages) |

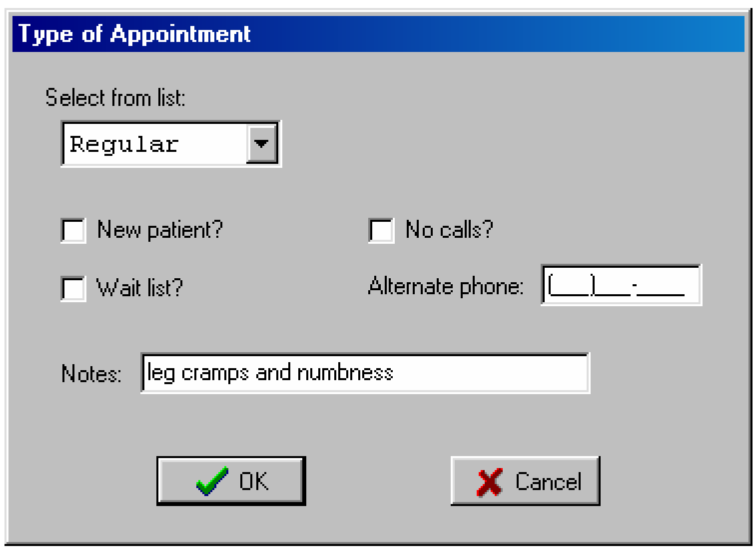
7. As the calendar pages are turned, the “date line” and the calendar beneath it will change to correspond to the date of the page on the screen.
8. To make an appointment, double-click in any open/empty time-slot.
9. Click on the appropriate button:

| | |
|---|---|
| Appointment | schedule a client to see this staff person |
| Meeting | schedule a meeting, either one-time or repetitive |
| Activity | schedule interviews, off-site, personal, or other activity |
| Wait List | add a client to the wait list, or pull a client off the list |

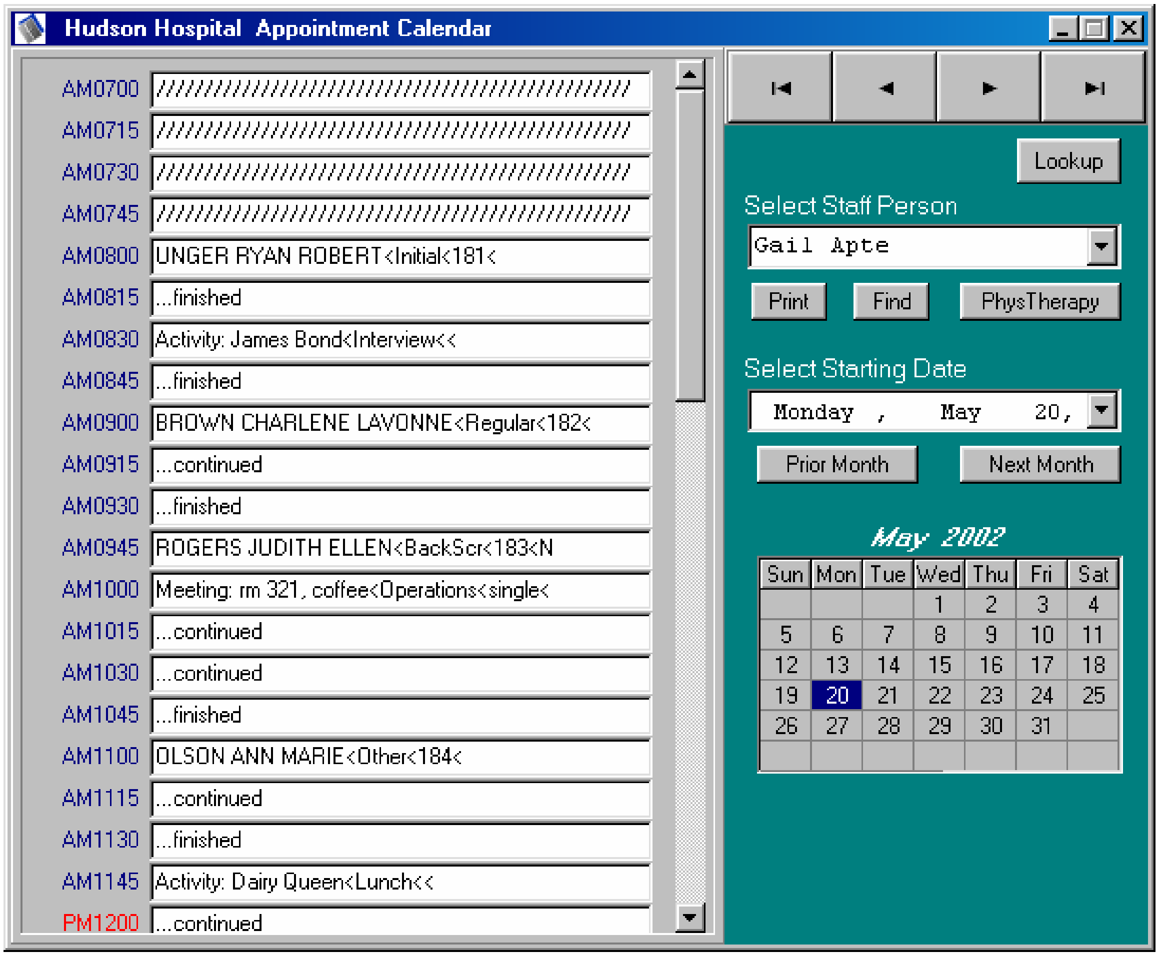


## Making an Appointment

1. Click on the "Appointment" button.  A box will appear to the right.
2. Enter the first few letters of client's last name and click OK.  Letters may be upper or lower case.
3. Click on the client's full name if it appears in the lookup list.  If it doesn't, click on the "New" button and enter the client's name and phone number.
4. Select an appointment type from the drop-down list.
5. If the client has never been seen before, click in the "New" check-box.
6. If the client does *not* wish to receive reminder calls, click in the "No Calls" check box.  This box will automatically be checked for this client the next time.
7. To add this client to the Wait List, click in the "Wait List?" check-box.  The appointment information will be added to *both* the Calendar and the Wait List.
8. If the client has another phone number, enter it in the "Alternate Phone" box. The system will NOT use this number for Reminder calls.
9. Enter any additional information about this appointment in the "Notes" box.  This text will appear on the daily schedule for the staff person, doctor or modality.




10. Click OK to complete the appointment process.
11. The Calendar module will fill in the client info, reserve one or more time slots based on the type of appointment, and schedule a reminder call.
12. Print a complete list of the appointments shown on the screen by clicking on the "Print" button.  This list will be sent to the default printer.
13. Find the next open time slot for this staff person by clicking the "Find" button. The calendar page containing the next available slot will be displayed.
14. Display the calendar for ALL staff by clicking the button with the *department* name on it.  This allows you to locate other staff with open time slots.  You may also print the day's schedule for the entire department (uses multiple sheets).




## Format of Calendar Entries

Appointments are formatted as follows:

**[client name]<[appt type]<[appt no.]<*[N][*]***

*N only if New patient, * only if NoShow*

Meetings are formatted as follows:

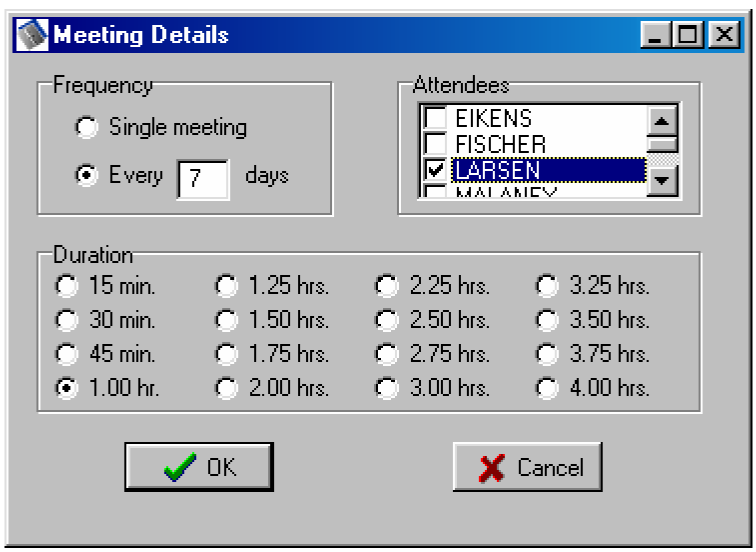
**Meeting: [details]<[mtg type]<[single/repeatXX]<**

Activities are formatted as follows:

**Activity: [details]<[activity type]<<**

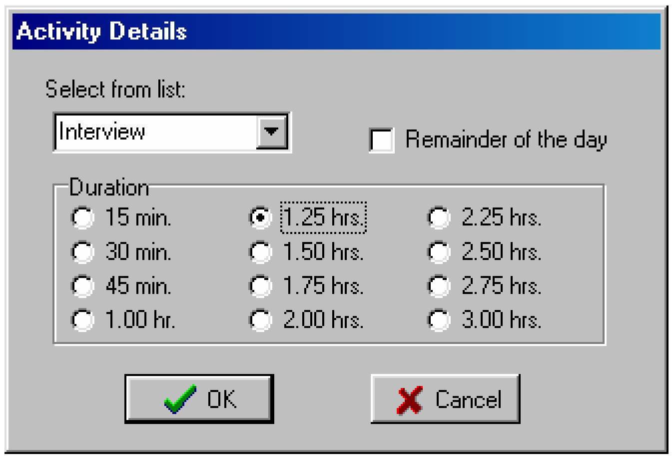
## Scheduling a Meeting

1. Click on the “Meeting” button in the Schedule window.
2. Select the appropriate meeting Type from the drop-down list.
3. Enter meeting details in the box below, such as location, food or beverages provided, subject matter, etc.  Click OK.
4. Specify the *frequency* of the meeting.  For example, weekly meetings occur every 7 days.
5. If multiple staff members will be attending the meeting, indicate this by checking the appropriate boxes in the “Attendees” list to the right.
6. Specify the length of time to be reserved for the meeting by clicking the appropriate check box in the “Duration” section.
7. Click OK to schedule the meeting for this staff person and any others that may have been checked.



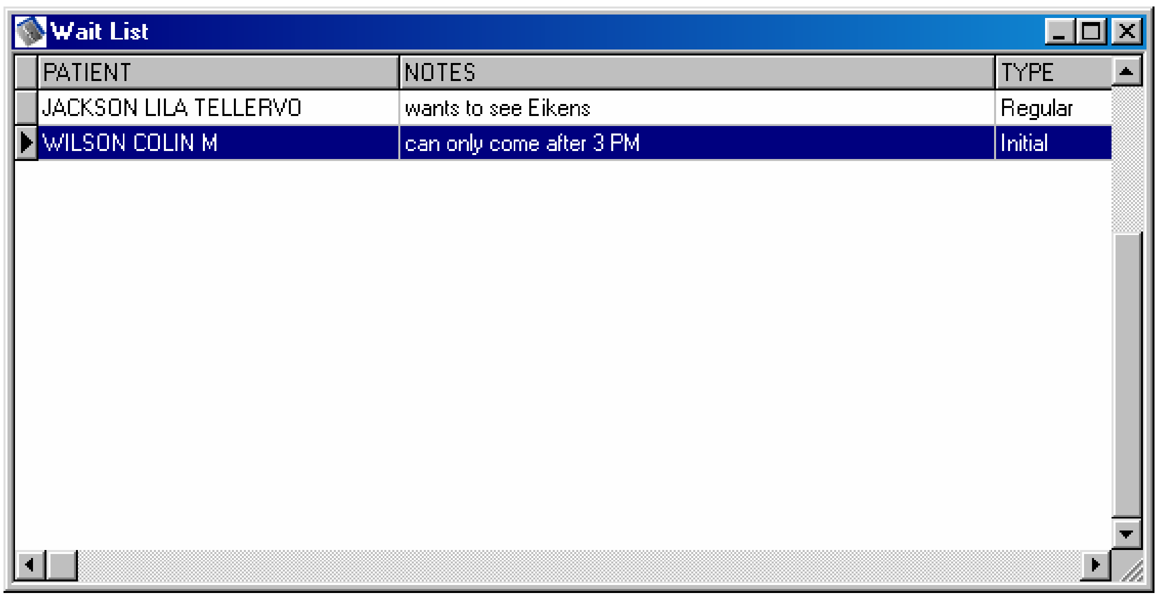
**Scheduling an Activity**

1. Click on the "Activity" button in the Schedule window.
2. Enter details of the activity in the box, such as location, subject matter, etc.
3. Select the type of activity from the drop-down list.
4. Specify the length of time to be reserved for this activity.
5. Click OK to put this activity on the calendar.



**Wait List**

1. Click on the “Wait List” button in the Schedule window.
2. Click Yes to pull a client off the wait list into the open time slot, or No if you wish to add a client to the wait list.
3. If you click NO, then you will be able to select a client and enter information for a future appointment. This data will then be added to the Wait List.
4. If you click YES, then clients currently on the Wait List (for this department) will be displayed. Double-click in any row to move the client from the Wait List to the open time slot.

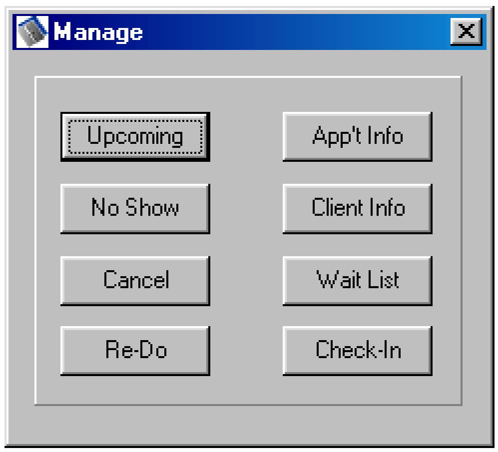



If you wish to return to the calendar without scheduling anything and a *Cancel* button is **not** available, click on the ✕ in the upper right corner of the window.

**Managing Appointments, Meetings, Activities**

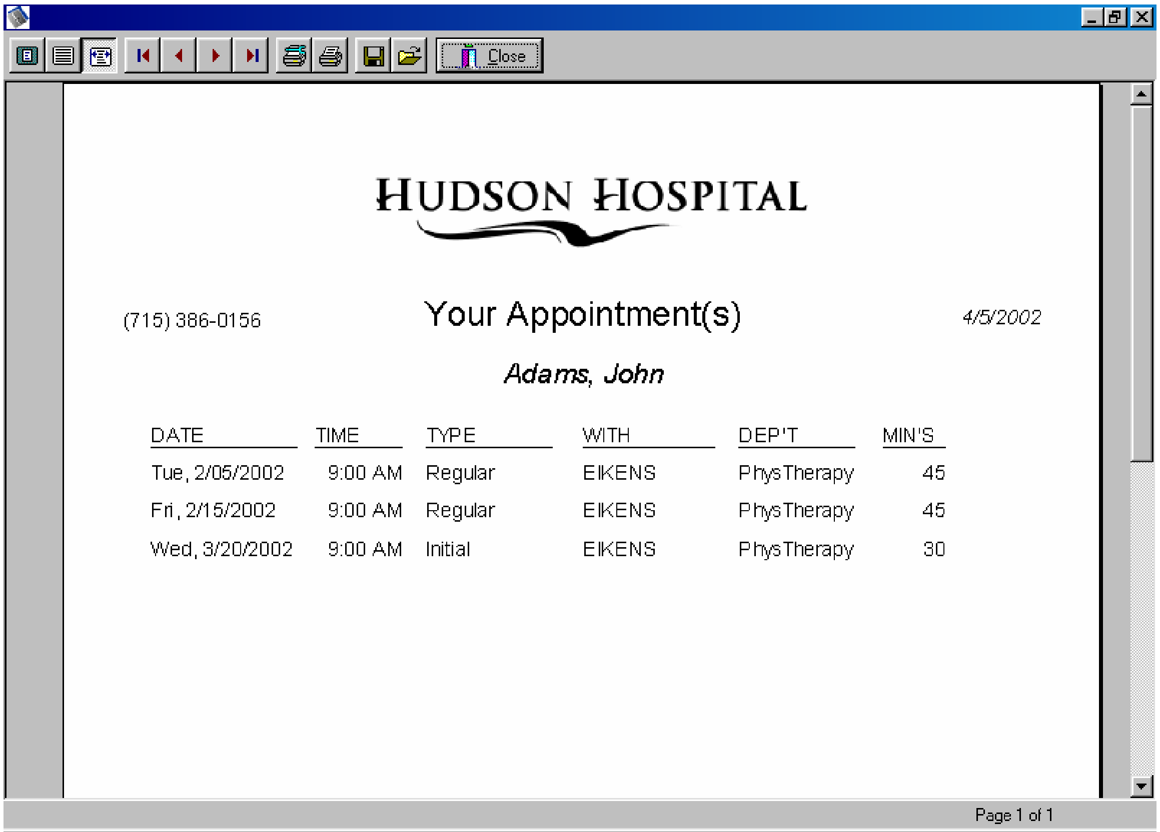
1. Double-click in any time-slot that contains appointment, meeting or activity information.
2. Click on the appropriate button:

| | |
|---|---|
| Upcoming | Display and/or print a list of future appointments |
| No Show | Flag an appointment as a "No Show" |
| Cancel | Cancel an appointment, meeting or activity |
| Re-Do | Erase an entry without logging it as a "cancellation" |
| App't Info | Display detailed information about this appointment |
| Client Info | Display detailed info about this client |
| Wait List | Copy this appointment to the Wait List |
| Check-In | Mark client as having checked in (future use) |



## Upcoming Appointments for this Client

Click on the printer icon to print the list of appointments, or click the Close button to return to the calendar.


Close

HUDSON HOSPITAL

(715) 386-0156 Your Appointment(s) 4/5/2002

*Adams, John*

| DATE | TIME | TYPE | WITH | DEP'T | MIN'S |
|---|---|---|---|---|---|
| Tue, 2/05/2002 | 9:00 AM | Regular | EIKENS | PhysTherapy | 45 |
| Fri, 2/15/2002 | 9:00 AM | Regular | EIKENS | PhysTherapy | 45 |
| Wed, 3/20/2002 | 9:00 AM | Initial | EIKENS | PhysTherapy | 30 |

Page 1 of 1

Another way to display a list of upcoming appointments is to use the “Lookup” button on the main Calendar screen. Enter the client’s last name and select from the list of matching names. All upcoming appointments will be shown as above.

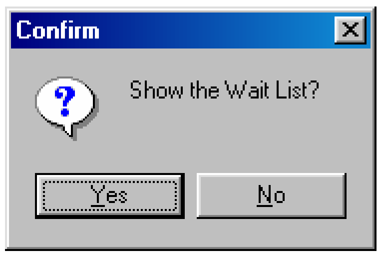
## No Show

Clicking the “No Show” button adds an asterisk (*) to the end of the appointment line and schedules a phone call to the client, telling him/her to call the department phone number to reschedule the appointment.

**Cancel an Appointment**

Clicking the "Cancel" button clears the time slots reserved for this activity, whether it is an appointment, meeting or other activity. If it was an appointment, the reminder call is cancelled and you are asked if the client should be moved to the Wait List.


Whenever time slots are cleared with a "Cancel", you may choose to pull a client from the Wait List to fill the open slot(s).



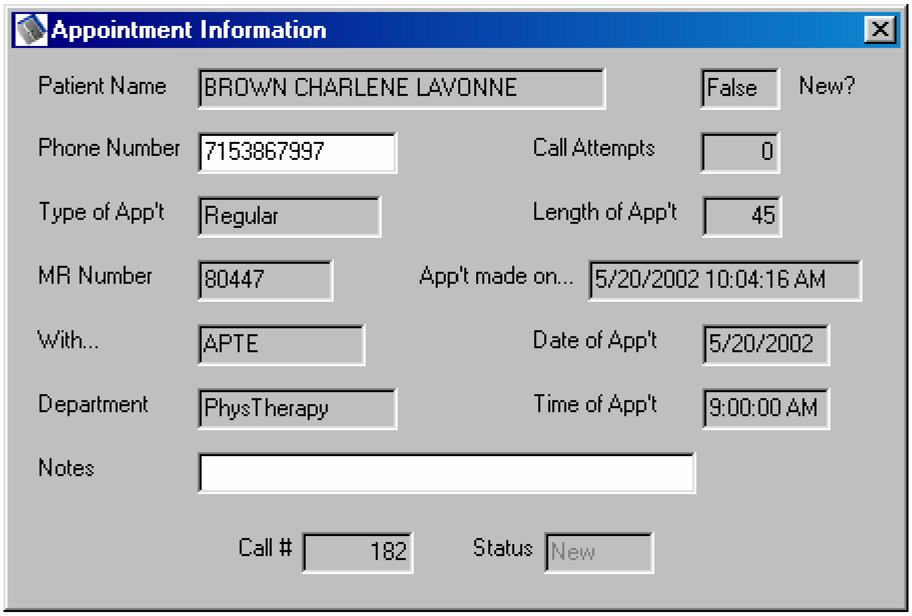

The list of clients on the Wait List will be displayed if you click Yes. Double-clicking on one of them will automatically fill the time slot with the new appointment.

**Re-Do**

Clicking the "Re-Do" button has the same effect as clicking the "Cancel" button, except that the appointment is not marked as a "cancellation" in the activity log. Since reports will be produced showing the number of appointments that are cancelled each month, this button should be used to simply re-schedule an appointment or correct an error that was not the client's fault.

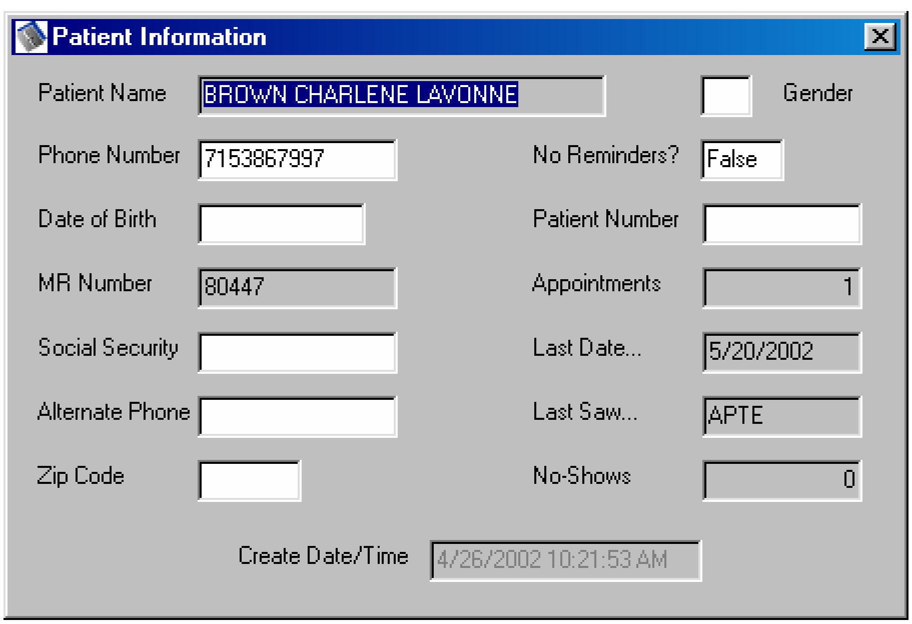
**App't Info**

Clicking the "App't Info" button displays a screen containing everything that is known about the appointment, including the Notes that were entered at the time the appointment was made. You may enter or change data in any box with a *white* background.




## Client Info

Clicking the "Client Info" button displays a screen containing everything that the Calendar system knows about this client, including name, phone numbers, birthdate, social security number, MR number, gender, etc. Some of the fields may be blank if the information has not yet been captured from the hospital database. You may enter or change data in any box with a *white* background.



### Wait List

Clicking the “Wait List” button copies the appointment information to the Wait List, while leaving it on the Calendar. This operation makes it readily available when a time-slot opens up or an identical appointment must be scheduled in the future.

### Check-In

Clicking the “Check-In” button marks the client as having registered for his/her appointment with the department. This function may be used in the future for reporting purposes and/or patient status in the waiting area.

## *Additional Calendar Information*

### Activity Log

Everything you do to the calendar is automatically recorded in the Activity Log, which is a database stored on the computer or file server. The date, time, user name, function, and related information is stored when you schedule appointments, cancel meetings, wait-list clients, etc. This information serves as an audit trail for management reporting and client complaints.

### Scheduling an Appointment without Sufficient Time

You may schedule a one-hour appointment in a half-hour time slot, for example. The length of an appointment is determined by the appointment **Type** that is selected. After you click OK to put the appointment on the calendar, you will receive a warning message that indicates “insufficient time” for this activity. But the system will schedule the appointment regardless and will fill the available time slots.

### Scheduling in Time Slots that are Blocked Out

You may schedule an appointment at 7 AM even though the doctor is not supposed to come in until 8 AM, for example. When time slots are blocked out (///////) and supposedly unavailable for scheduling, you may clear them by double-clicking on each time slot and choosing to Cancel.  This will clear the slashes and make the time slot available for appointments or meetings.

This technique also works when you wish to schedule an appointment before another appointment/meeting/activity has finished.  Simple double-click on the time slot containing the word "…continued" or "…finished" and choose Cancel.

## Adding Pages to the Calendar

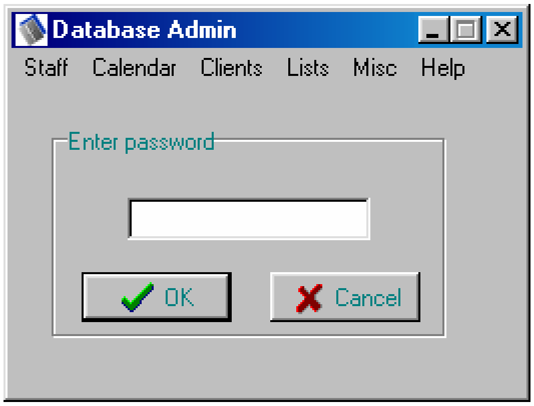
If you enter a starting date and receive the error message "No appointments available for this date" then you will need to add pages to the calendar using the Data Admin module.  The total number of calendar pages in the system at any one time is intentionally limited to improve performance and reduce the amount of storage required.

## Reserving Lunch Time Every Day

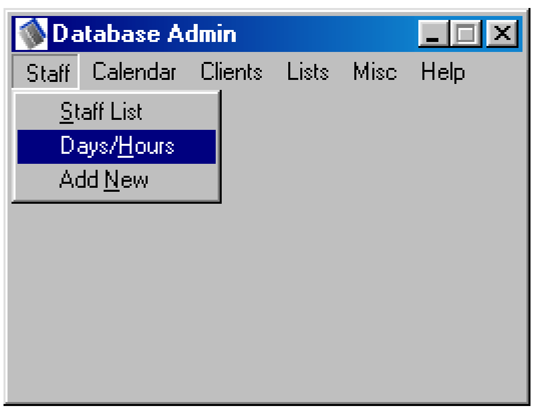
To set aside a time for lunch each day, double-click in an empty time slot at the appropriate (start) time and then click the "Meeting" button.  Select "Luncheon" from the drop-down list and then choose a *Frequency* of every "1" days.  After you pick the Duration and click OK, you will get an error message for every weekend or other day that has a conflict at this time.  These warnings can be ignored; just press Enter or click OK.

# *Data Admin Module*

Click on **Start / Programs / Kuflink / Data Admin** to run the DataAdmin module. You will be asked to enter a password in order to access the functions:



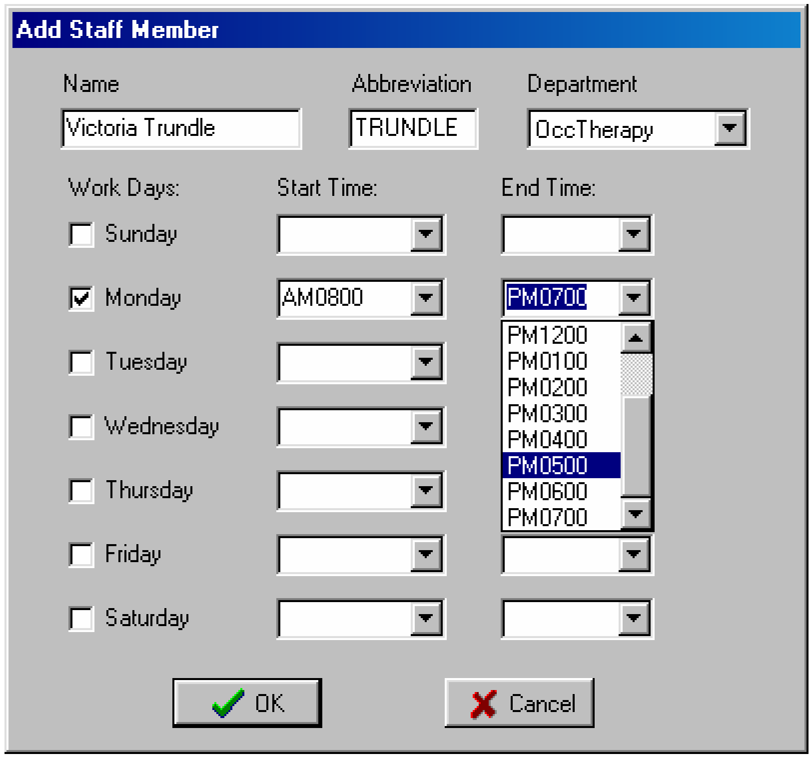

Once you have entered the correct password, you may select from any of the main menu items listed along the top of the window.



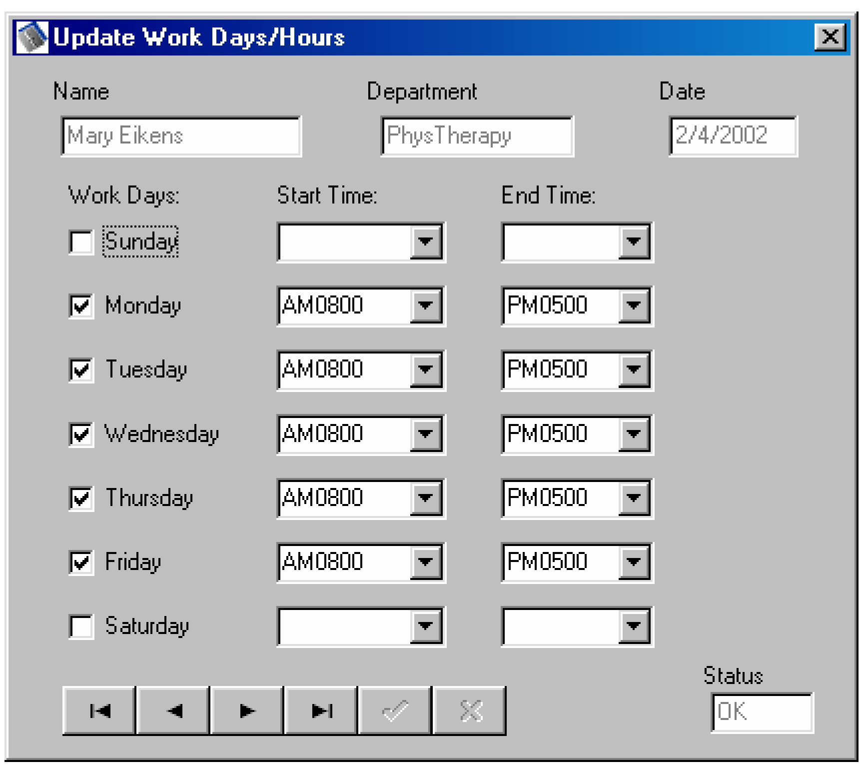

There are a number of "lists" that can be viewed, showing the contents of the internal database tables used by ARS:

| | |
|---|---|
| Staff | doctors, therapists and procedures |
| Clients | patients and their phone numbers |
| App't Types | appointment types, durations, dept's |
| Departments | names, abbreviations, phone numbers |
| Meetings | meeting types by department |
| Reminders | scheduled and completed calls to clients |
| Activity | history log of every calendar change |
| Wait List | clients that are currently wait-listed |
| User Param's | user-specific information, program setup |

**Staff: Add New**

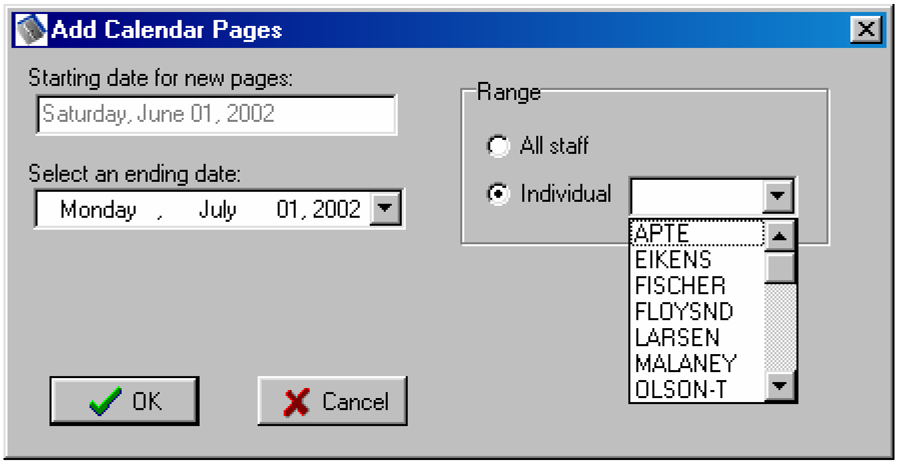



**Staff: Days/Hours**



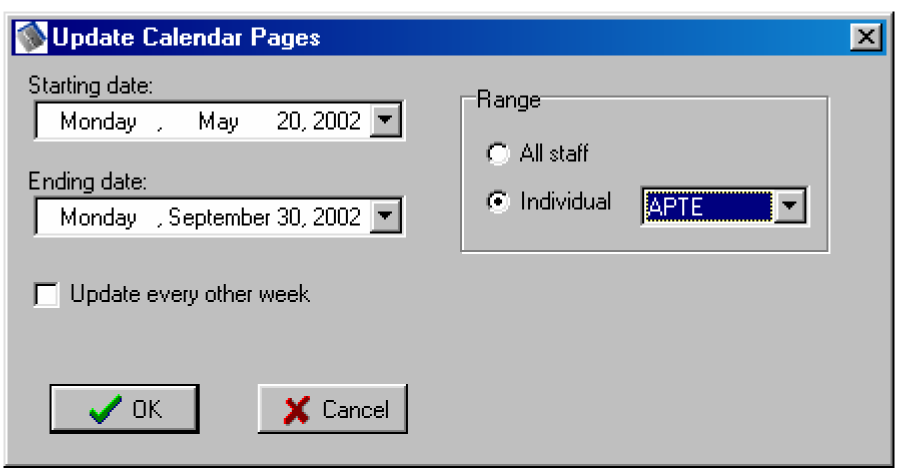
## Calendar: Add Pages

After entering the work days/hours for staff members, add pages to the calendar using this function. The starting date will always default to the first day after the end of the current calendar. You may set the end date to anything beyond the start date, but try to keep the number of calendar pages to a minimum to improve performance.




## Calendar: Update Pages

This function allows you to update the days/hours for one or more staff after calendar pages have already been added. You choose the range of dates for which the new days/hours apply, and whether to skip every other week. The system then goes through the calendar and *blocks* and/or *clears* time slots based on the new work schedule. A warning message is given if an appointment is already scheduled during a time slot that is being blocked. The existing appointment will be retained.



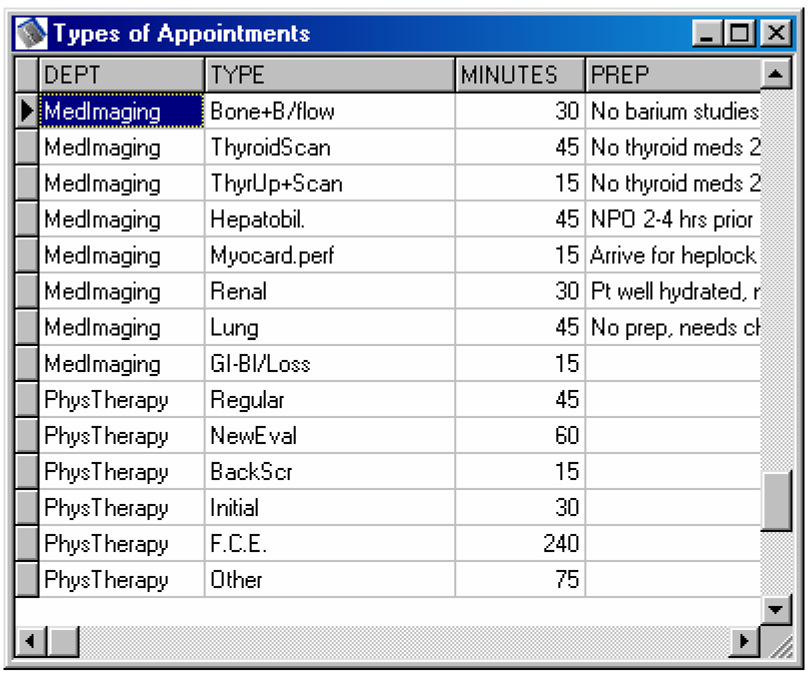
**Lists: Types of Appointment**

Note that the contents of the DEPT field must *exactly* match the corresponding field in the Departments table (see next page).

Even though the TYPE field will accommodate up to 20 characters, please abbreviate your entries to a maximum of 12 characters to stay within the bounds of the Calendar time-slots. DO NOT use any punctuation with the exception of the period, dash and underscore characters.

The PREP and MORE_PREP fields may each contain up to 255 characters of text that will be displayed on the screen when this appointment Type is selected. This gives the scheduler an opportunity to tell the client how to prepare for the procedure.

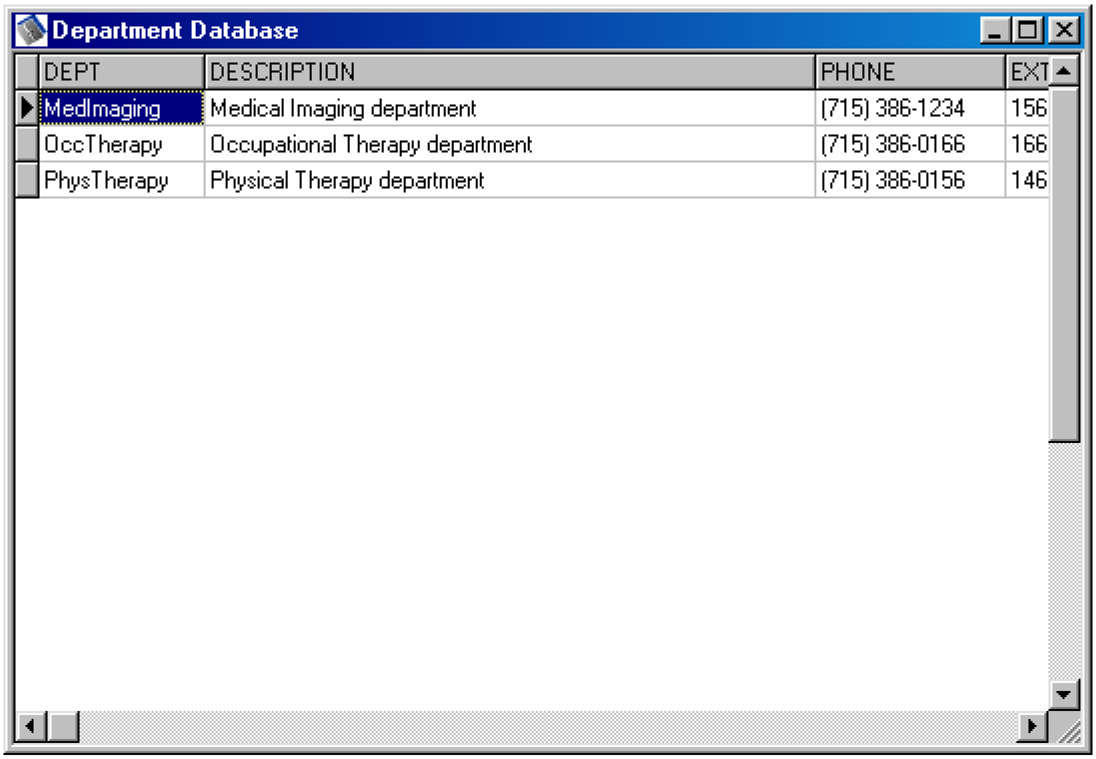
The ABBREV field (scroll to the right) is used in conjunction with the *SubType* parameter in the KUFLINK.INI file. If "SubType=Yes", then this field must contain the Staff Person or Modality to which this type of appointment applies. When an appointment is scheduled, only those Types that match the Modality will be available in the drop-down list.




| DEPT | TYPE | MINUTES | PREP |
|---|---|---|---|
| MedImaging | Bone+B/flow | 30 | No barium studies |
| MedImaging | ThyroidScan | 45 | No thyroid meds 2 |
| MedImaging | ThyrUp+Scan | 15 | No thyroid meds 2 |
| MedImaging | Hepatobil. | 45 | NPO 2-4 hrs prior |
| MedImaging | Myocard.perf | 15 | Arrive for heplock |
| MedImaging | Renal | 30 | Pt well hydrated, r |
| MedImaging | Lung | 45 | No prep, needs cl |
| MedImaging | GI-BI/Loss | 15 | |
| PhysTherapy | Regular | 45 | |
| PhysTherapy | NewEval | 60 | |
| PhysTherapy | BackScr | 15 | |
| PhysTherapy | Initial | 30 | |
| PhysTherapy | F.C.E. | 240 | |
| PhysTherapy | Other | 75 | |

## Lists: Departments

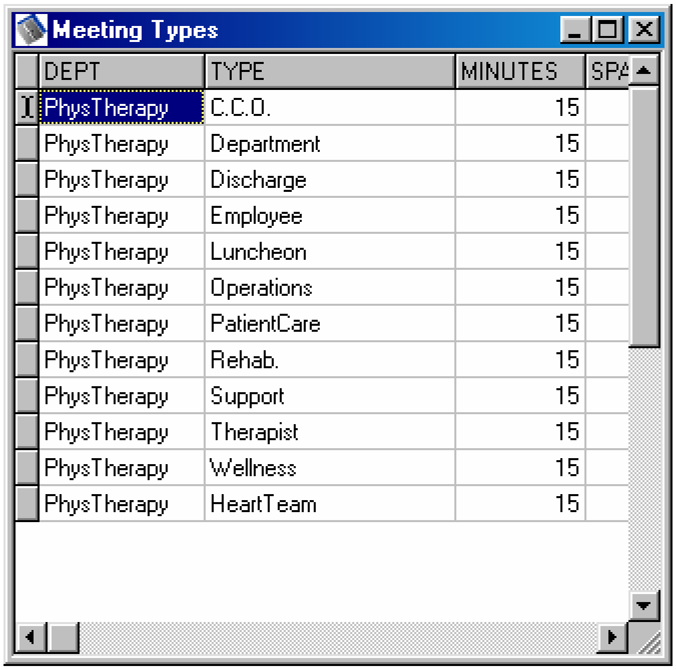
Note that the DEPT field is a unique key which provides an accurate cross-reference to all other data. It must be spelled EXACTLY as it appears in this table when entering Meeting Types and Appointment Types.




| DEPT | DESCRIPTION | PHONE | EXT |
|---|---|---|---|
| MedImaging | Medical Imaging department | (715) 386-1234 | 156 |
| OccTherapy | Occupational Therapy department | (715) 386-0166 | 166 |
| PhysTherapy | Physical Therapy department | (715) 386-0156 | 146 |

**Lists:  Meeting Types**

Note that the MINUTES field is not currently used.  You must specify the length of the meeting when you schedule it.



Meeting Types

| DEPT | TYPE | MINUTES | SPA |
|---|---|---|---|
| PhysTherapy | C.C.O. | 15 | |
| PhysTherapy | Department | 15 | |
| PhysTherapy | Discharge | 15 | |
| PhysTherapy | Employee | 15 | |
| PhysTherapy | Luncheon | 15 | |
| PhysTherapy | Operations | 15 | |
| PhysTherapy | PatientCare | 15 | |
| PhysTherapy | Rehab. | 15 | |
| PhysTherapy | Support | 15 | |
| PhysTherapy | Therapist | 15 | |
| PhysTherapy | Wellness | 15 | |
| PhysTherapy | HeartTeam | 15 | |

Whenever a data table is displayed in "grid" form (as shown above) you can delete a line by clicking on it (once) and then pressing Ctrl - Del.  You may be asked to confirm that you want to delete the record before it disappears.

# *Reminder Module*

This module generally runs on a separate computer, with access to the local area network and a phone line. Reminder calls are made the day before an appointment, beginning around 10 AM and continuing until all clients have been contacted. If the system detects an answering machine, then a message will be left with the appointment information. If the number is busy or no-answer, the system will retry periodically.

Authorized customer personnel can call into the system and enter a passcode for access to the recording functions. The multi-digit passcode is stored in VVOICE32.INI, a text file located in the *Windows* directory. *Admin* phone calls should generally be made in the afternoon/evening so as not to interfere with reminder calls.

The following menu is presented upon successful entry of the passcode:

1 Staff names
2 Department names
3 Types of appointments
4 Special instructions

The system will spell out the abbreviation for the staff member, department or appointment type and then play the voice recording, if any. The caller may then make a new recording by pressing the appropriate digit in response to the menus.

# Kuflink Appointment/Reminder Suite

INI File Parameters
05/20/2002

Filename: *WindowsDir*\KUFLINK.INI

IniSectionHead: Calendar

DataDir=F:\kuflink
Department=PhysTherapy,OccTherapy
Company=Hudson Hospital
Telephone=(715) 386-0100
Start_Time=10:00:00 AM
End_Time=03:00:00 PM
Permit=view change admin
Username=guest
Password=kuflink
Select=Staff Person
SubType=No

Filename: *WindowsDir*\VVOICE32.INI

IniSectionHead: Calendar

PhoneLineType=0
MaxLine=1
CSR_ext=0
CSRonduty=8:00 AM
CSRoffduty=5:00 PM
DelayStart=1
PurgeDays=30
SpchDir= c:\progra~1\kuflink\voice
Passcode=1234
ImportFile=F:\kuflink\rptdown.txt
AreaCodes_Suppress=715
AreaCodes_Local=
AreaCodes_Wats=651,612,763,952
LongDist_DialOne=No
Dial_Prefix=9,
Wats_Prefix=88,9