## POSSIBLE ROLES: CLINIC/SYSTEM MANAGER / HEAD NURSE | PROCESS 3.1.0: DEFINING PROVIDER APPOINTMENT SCHEDULES

#	Step	Observations	Menu options or screen information
0	Preliminary steps: Create a new clinic service provider If necessary, ask your system administrator to create a new service provider for you as this is an System Admin task (Administration > Users)  Note: The new provider must have the "Service Provider" and the "Calendar" tick boxes selected, to appear in the Appointment Schedule drop-down menu:  Daniel Messer Jane Fisher	User Administration  Username:  Cetal  Password:  unchanged  Service Provider:  First Name:  Dr. Cetal  Middle Name:  Last Name:  Samad  Default Facility  Federal Tax ID:  UPN:  See  Authorizations:  NPI:  Taxonomy:  20700000X  Access  Control:  Control:	Administration Users
1	Include service provider in appointment page In order to open the service provider schedule:  •Go to Visits Calendar  • Select her/his name in the drop-down menu  •Select the appropriate starting date	Xorier Gonzalez August 2008-05-13 Day View - Go Today Charles Hoser - Go Today All Facilities - < Tuesday, May 13, 2008 >>  J Fisher  8 00	⊡· Visits ··· Calendar
2	Enter In Office Event First, select the Add event button to define the provider's schedule start time: • Select Visit Category: In Office • Select the appropriate Service Provider • Select Preferred Category (main service) • Add a comment (will be displayed in schedule) • Ensure the appropriate Time is selected, and • Save the schedule data	Category: In Office	05-13 □ Day View ▼ Go Today Add Search  <- Tuesday, May 13, 2008 >>  J Fisher
3	Set repetition pattern The time frame of all events should be defined for the longest period possible. This will minimise the need to update the appointment schedules often (check User's Manual if needed)	Hint: Locate the appropriate starting date if the provider has an irregular schedule. Eg. If provider will be at the clinic on Fridays only, go to the Friday before the current date and set repeats to every week.	Repeats every v day v until 2008-05-31 day workday week month year
4	Enter Lunch time Event A lunch time period should be defined for the service provider. • Select Visit Category: Lunch • Select the appropriate Service Provider • Enter the duration of this event in minutes. • Set repetition pattern • Save the schedule data.	Category: Lunch	05-13 □ Day View ▼ Go Today Add Search  << Tuesday, May 13, 2008 >>  J Fisher
5	Enter Out of Office Event The end of daily consultation should complete the schedule.  • Select Visit Category: Out of Office • Select the appropriate Service Provider • Set repetition pattern • Save the schedule data.	Category: Out Of Office	05-13 Day View • Go Today Add Search  << Tuesday, May 13, 2008 >>  J Fisher
6	Verify the resulting schedule	3 Fisher  9 50 N. Counsellor - Gender-based Vidence 9 54 9 55 9 46 13 00 13 15 13 16 11 10 11 10 11 15 11 30 11 44 220 LUNCH 1 50 1 15 1 35 1 36 2 36 2 76 2 76 2 76 2 76 2 76 2 76 2 76 2 7	