

# WELFORD CHART NOTES NEWSLETTER

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## **APPOINTMENT SCHEDULER ENHANCEMENTS** (*User's Manual, pgs. 941-942*)

Version 5.0 includes a number of enhancements to the Appointment Scheduler. Let's explore them:

### **AUTO-OPEN OPTION**

If you use the Scheduler each day as one of the first things you look at, you might want to have the Scheduler open each time you start up the program, so you don't have to press ViewAppointments each day. To activate this feature:

1. Press ViewAppointments\ **OPTIONS**.
2. Check **Auto-Open** and press **Ok**.

### **SHOW PROCEDURE TYPE OPTION**

You can color-code each type of procedure using ViewAppointments\ **Edit\Procedure Types**, then press the **COLOR** button to adjust the color for each Procedure Type (*User's Manual, pg. 804*). However, some users would like to see the name of the procedure type on the screen, rather than relying solely on the color scheme. To see the procedure type:

1. Press ViewAppointments\ **OPTIONS**.
2. Check **Show Procedure Type** and press **Ok**.

### **STAY OPEN WHEN ADDING OPTION**

Ordinarily, if you press ViewAppointments\ **Add**, once you add the appointment and press **Ok**, the **Edit Appointment** window closes. However, if your job is to add appointments all day, you might want to have the **Edit Appointment** window to stay open after pressing **Ok** until you press **CANCEL**. To activate this feature:

1. Press ViewAppointments\ **OPTIONS**.
2. Check **Stay open when adding** and press **Ok**.

The screenshot shows the 'Appointment Options' dialog box with the following settings:

- Maximum appointments per slot: 1
- Start Time: 9:00 a.m., Stop Time: 5:00 p.m.
- Interval: 10 minutes, Show Continued: checked
- Show Forbidden Description: checked, Show Warning Description: checked
- Completion status to display: Pending, Completed, Canceled, Rescheduled, No show, Left (All selected)
- Show Confirmed: checked, Show Unconfirmed: checked
- Auto No-Show after: 8 hours, Right column shows: Comment (selected), Type of Visit
- Warn before 2 appointments for same patient: checked
- Grid Row Height: 20, Grid Point Size: 20
- Grid Font: (empty)
- Use mouse to move appointments: checked
- Permit appointments in the past: unchecked
- Stay open when adding: checked (highlighted)**
- Auto-Open: checked (highlighted)**
- Show Procedure Type: checked
- Update every: 0 seconds

### **APPOINTMENT CARDS RECOGNIZE ALL @FUNCTIONS**

When designing your appointment cards, you previously could only include certain limited @functions, like @PracticeName, @Hon, @PatientName, and certain appointment-specific @functions such as (*User's Manual, pg. 53*):

|               |  |
|---------------|--|
| @ApptComment  | Comment associated with this appointment         |
| @ApptDate     | Date upon which the appointment is to take place |
| @ApptProvider | First Provider associated with this appointment  |
| @ApptReason   | Reason for the appointment                       |
| @ApptTime     | Time at which the appointment is to take place   |

Starting with version 5.0, you can include any of the program's @functions on your appointment card. Let's add the patient's birthdate to the appointment card:

1. Press **ViewAppointments\PRINTAppointment Card**.
2. In the **Text** field, type in the contents of the box to the right.
3. Press **Ok**. (Note: if you are reading this newsletter online, you can press **Edit\COPY** to copy the text in the box to the right to the Windows clipboard, then in **Welford Chart Notes** press **Edit\Paste** to paste the text into the **Print Appointment Card** window.)

```
^C@PRACTICENAME
^C@PRACTICEADDRESS
^C@PRACTICECITY
^C@PRACTICEPHONE

@HON @NAME
Date of birth: @BIRTHDATE
has an appointment on @APPTDATE at @APPTTIME
with @APPTPROVIDER

@PROCEDUREREMINDER
```

To see a list of all of the program's @functions, press **Tools\@functions** from the Main Menu. You can read about each @function in the on-screen help: look for "@functions, table of". From there, click on any @function to see a detailed description of the @function, along with examples.

### COMPLETION LEFT WITHOUT BEING SEEN

If the patient leaves the office without being seen, you can designate this by double-clicking the appointment or right-clicking the appointment and setting **Completion** to **Left without being seen**. This is different from being **Canceled** or **Rescheduled** and documents the patient's noncompliance. Make sure you contact such patients to reschedule them so they get proper follow-up. You can locate all patients who have left without being seen (or who canceled their visits) using **ViewAppointments\REPORT**, and check **Canceled** and **Left without being seen** under **Completion status**.

### NEXT APPOINTMENTS PREVIOUS APPOINTMENTS IN DESCENDING CHRONOLOGICAL ORDER

When you press **ViewAppointments\NEXT APPT**, you can toggle between seeing the Previous Appointments in ascending or descending chronological order by right clicking on the word **Date**.

### OCTOBER QUARTERLY UPDATE RELEASED

This month we are releasing the October, 2006 Quarterly Update. The update includes new medications, diagnostic terms, drug interactions, drug dosing information, spelling words, drug-disease Alerts, Web Links, algorithms, medication test reminders, cross-reacting allergies, and dozens of new patient education brochures. This update has over 6800 drug interactions with over 2500 references, over 11,500 Alerts, over 9900 Web Links, and over 1400 Brochures, including new or revised Brochures on alcoholism, amyloidosis, aphthous stomatitis, attention deficit-hyperactivity disorder, candidiasis, diabetes mellitus, Lyme disease, Paget's disease, pancreatitis, panic disorder, rheumatoid arthritis, scleroderma, SIADH, smoking, stroke, Waldenstrom's macroglobulinemia, anidulafungin, cisplatin, conivaptan, estrogens, measles-mumps-rubella-varicella vaccine, methylphenidate, omalizumab, rotavirus vaccine, varenicline, and varicella-zoster vaccine.

### HOW DO I GET THIS QUARTERLY UPDATE?

To obtain the October Quarterly Update, you must be an active subscriber to the Comprehensive Support Package. If you have let your support package lapse and would like to renew and obtain the latest version, contact MEDCOM Information Systems at 800-424-0258.

### SEND US YOUR TIPS

If you have tips, shortcuts, questions, or suggestions for future newsletter topics, please send them to us at:

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