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About this Guide

This axiUm User Guide will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the Scheduler module.
• Use axiUm features for day-to-day tasks.

The examples in the axiUm User Guide show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm User Guide may look different from your axiUm setup.

Document Conventions

This manual uses the following styles to identify the different interface elements:

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace Fonts</strong></td>
<td>Data entered by the user.</td>
</tr>
</tbody>
</table>
## Document Icons

This guide also uses the following icons to identify the different document elements:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🖋️</td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Important information or steps you must take. For example, if you do not complete this step you may be unable to complete a task later on.</td>
</tr>
<tr>
<td>💡</td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
<tr>
<td>🍎</td>
<td>Challenges and extra steps. For example, steps that take you beyond the basic procedures.</td>
</tr>
</tbody>
</table>
Scheduling staff can use the Scheduler module to:

- Search for available time blocks
- Enter patient appointments
- Administer cancellations and no-shows
- Manage recall appointments
- Organize wait list appointments

This chapter covers the following topics:

- About book method of scheduling
- Opening the Scheduler module
- About the Scheduler window

Read the following sections to familiarize yourself with the features of the Scheduler module.

1 About Book Method of Scheduling

The book method of scheduling is different from other methods in that it is typically used in grad clinics and faculty practices.

This manual contains information specific to book method of scheduling. For information on shared features common throughout all modes of scheduling, follow the cross-references indicated in the topic heading.
2 Opening the Scheduler Module

There are different methods to access the Scheduler module:

- Icon
- Actions menu
- Desktop

The following instructions describe these methods.

▲ To open the Scheduler module using the icon:

Click ![Scheduler icon](image).

▲ To open the Scheduler module using the Actions menu:

From the Actions menu, click **Scheduler**.

▲ To open the Scheduler module using the Desktop:

From the Desktop, click ![Scheduler icon](image).
The next section shows the Scheduler module window.

3 About the Scheduler Window

This is how the Scheduler window may look when you open it for the first time:

You are now ready to begin using the Scheduler window.
This chapter covers the setup tasks you must complete before using the Scheduler module. You must have access rights (i.e., administrator access level) to access some of these windows.

This chapter covers the following topics:

- Setting up for book method
- Setting up Scheduler display features
- Setting up appointment activities

At the end of this chapter you will be familiar with these tasks.

Before you set up the Scheduler module, you must carefully analyze the needs of your institution’s scheduling workflow. Thoroughly consider the scheduling requirements specific to your institution, clinic, or provider type. For information on the Scheduler module’s various modes, refer to the axiUm User Guide for Scheduler: Shared Features and see About Scheduling Modes on page 1.

1 Setting up for Book Method

This section covers the following topics:

- Setting up Scheduler module for book method
- Setting up providers for book method
- Setting up clinic locations
- Setting up clinics
- Setting up chairs in clinics
- Setting up books for clinics
- Adding chairs to books
- Granting users access to books
• Manually setting up provider working schedules for your students

### 1.1 Setting up Scheduler Module for Book Method

By setting up your Scheduler's viewing mode right now, you can see the way Scheduler behaves as you successfully complete other setup instructions outlined in this manual.

▼To set up your Scheduler module:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Scheduler Options icon.

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 796.

3. Go to the Scheduler Type section.
4. Select the Book option.
5. Click Accept.

axiUm saves the changes.

6. Click (Close).

axiUm closes the Scheduler Options window and returns to the Maintenance window.

You have successfully set up the Scheduler module for book method of scheduling.

Next, you must set up providers to use book method. For instructions on setting up providers to use book method, read the next section, Setting up Providers for Book Method.

1.2 Setting up Providers for Book Method

You must start by giving yourself access to use book method. Once you have given yourself book method access, you must give another provider access to book method.

This section covers the following topics:

- Granting yourself access to book method
- Creating provider records with access to book method

Granting Yourself Access to Book Method

When you give yourself access to book method, you can later see other providers added to the same book.

▼ To grant yourself access book method:

1. Go to Maintenance module's Office tab.
2. Double-click the Users icon.

axiUm displays the Users List window. For information on the Users List window, refer to the axiUm Reference Manual for Maintenance and see Users List Window on page 468.
3. Search for a user. For our example, we will search for you (the administrator), Axium Admin.

4. From the list view, highlight a record.

5. Click (Edit Record).

axiUm displays the Users window. For information on the Users window, refer to the axiUm Reference Manual for Maintenance and see Users Window on page 493.
6. Click the **Additional** tab.

axiUm displays the Additional tab. For information on the Users window’s Additional tab, refer to the axiUm Reference Manual for Maintenance and see *Users Window - Additional Tab* on page 499.
7. Go to the **Scheduling** section.

8. From the **Scheduler** drop-down field, select **Book**.

9. Click **Save**.

    axiUm saves the changes.

10. Click **Close**.

    axiUm closes the Users window and returns to the Users List window.

You have successfully given yourself access to book method.

Next, you must give other providers access to book method. For instructions on creating providers, see the next section, *Creating Provider Records with Access to Book Method* on page 10.

**Creating Provider Records with Access to Book Method**

Next you must create providers by setting up user accounts, and grant these providers access to book method of scheduling. By setting up providers right now, you have defined subjects to use for the remaining setup requirements in this manual.

This section covers the following topics:

- Creating a provider record with access to book method
- Copying provider records with access to book method

For this example, we will create the following provider records:

- Ken Klaahsen
- Lisa Jaaks
- Chris Wiid
- Sandy Rhabb
Creating a Provider Record with Access to Book Method

For this example, we will create a provider record for Ken Klaahsen.

▼To create a provider record with access to book method of scheduling:

1. Go to Maintenance module's Office tab.
2. Double-click the Users icon.

axiUm displays the Users List window. For information on the Users List window, refer to the axiUm Reference Manual for Maintenance and see Users List Window on page 468.

3. Click (Create a new Record).

axiUm displays the Users window. For information on the Users window, refer to the axiUm Reference Manual for Maintenance and see Users Window on page 493.
4. Click the **Personal** tab.

axiUm displays the Personal tab. For information on the Users window’s Additional tab, refer to the axiUm Reference Manual for Maintenance and see *Users Window - Personal Tab* on page 495.

5. Go to the **Account** section.

6. Enter the fields and options. For our example, we will enter the following:

   - **Level**: Grad Student
   - **User Logon**: ken

7. Go to the **Name/Address** section.

8. Enter the fields and options. For our example, we will enter the following:

   - **Last Name**: Klaahsen
   - **First Name**: Ken
9. Click the **Additional** tab.

axiUм displays the Additional tab. For information on the Users window’s Additional tab, refer to the axiUм Reference Manual for Maintenance and see *Users Window - Additional Tab* on page 499.

10. Go to the **Scheduling** section.

11. From the **Scheduler** drop-down field, select **Book**.
12. Click Save.

axiUm saves the entries you have so far. axiUm also displays an additional tab, the Provider tab.

13. Click the Provider tab.

axiUm displays the Provider tab. For information on the User window’s Provider tab, refer to the axiUm Reference Manual for Maintenance and see Users Window - Provider Tab on page 511.

14. Go to the Provider section.

15. Enter the fields and options. For our example, we will enter the following:

- User is a treating provider: selected
- Prov Type: G, Graduate Student
- ID: 150

16. Click Save.

axiUm saves the entries.
17. Click Close.

axiUm closes the Users window and returns to the Users List window.

The new user record is listed in the Users List list view.

You have successfully granted another provider access to book method of scheduling.

Repeat these instructions to add the other providers. For instructions on creating additional providers with access to book method of scheduling, see next section, Copying Providers with Access to Book Method.

Copying Providers with Access to Book Method

Before you begin, you must have a provider record with access to book method of scheduling. For instructions on creating a provider record with access to book method of scheduling, see Creating a Provider Record with Access to Book Method on page 11.

The easiest way to create similar provider records is by copying the first provider’s record. For this example, we will copy Ken Klaahsen’s user record to create the following provider records:

- Lisa Jaaks
- Chris Wiid
- Sandy Rhabb
To create a provider record using the copy method:

1. Go to Maintenance module's Office tab.
2. Double-click the Users icon.

axiUm displays the Users List window. For information on the Users List window, refer to the axiUm Reference Manual for Maintenance and see Users List Window on page 468.

3. Search for a user. For our example, we will search for Ken Klaahsen.
4. From the list view, highlight the record.
5. Click (Copy User).

axiUm displays the Copy User window. For information on the Copy User window, refer to the axiUm Reference Manual for Maintenance and see Copy User Window on page 471.

6. Enter the fields and options. For our example, we will enter the following:
   - Logon Id: lisa
   - Prov. Type: G, Graduate Student
   - New Provider Code: 151
7. Click OK.
axiUm saves the changes, closes the Copy User window, and displays the Users window. For information on the Users window, refer to the axiUm Reference Manual for Maintenance and see Users Window on page 493.

8. Click the Personal tab.

axiUm displays the Personal tab. For information on the Users window’s Additional tab, refer to the axiUm Reference Manual for Maintenance and see Users Window - Personal Tab on page 495.

9. Go to the Name/Address section.

10. Enter the fields and options. For our example, we will enter the following:

   • Last Name: Jaaks
   • First Name: Lisa

11. Click Save.
axiUm saves the entries.

12. Click **Close**.

axiUm closes the Users window and returns to the Users List window.

The new user record is listed in the Users List list view.

You have successfully created a user record by copying another user record.

Repeat these instructions to copy additional user records for providers Chris Wiid and Sandy Rhabb.

Next, you must set up the clinic location. For instructions on setting up the clinic location, refer to the axiUm User Guide for Scheduler: Shared Features and see *Setting up Clinic Locations* on page 7.
1.3 Setting up Clinic Locations

For instructions on setting up clinic location, refer to the axiUm User Guide for Scheduler: Shared Features and see Setting up Clinic Locations on page 7.

1.4 Setting up Clinics

Next you must defined your clinic and allows users to access this clinic in axiUm.

This section covers the following topics:

- Defining clinics
- Granting users access to clinics

Defining Clinics

For instructions on defining clinics, refer to the axiUm User Guide for Scheduler: Shared Features and see Defining Clinics on page 9.

When you have successfully defined a clinic, next you must grant users access to that clinic. For instructions on granting users access to clinics, refer to the axiUm User Guide for Scheduler: Shared Features and see Granting Users Access to Clinics on page 11.

Granting Users Access to Clinics

Before you begin, make sure you have defined a clinic. For instructions on defining clinics, see previous section, refer to the axiUm User Guide for Scheduler: Shared Features and see Defining Clinics on page 9.

For instructions on granting users access to clinics, refer to the axiUm User Guide for Scheduler: Shared Features and see Granting Users Access to Clinics on page 11.

When you have successfully set up clinics, next you must set up chairs in the clinic. For instructions on setting up chairs in the clinic, refer to the axiUm User Guide for Scheduler: Shared Features and see Setting up Chairs in Clinics on page 17.

1.5 Setting up Chairs in Clinics

Before you begin, make sure you have defined a clinic. For instructions on defining clinics, see previous section, refer to the axiUm User Guide for Scheduler: Shared Features and see Defining Clinics on page 9.

For instructions on setting up chairs in a clinic, refer to the axiUm User Guide for Scheduler: Shared Features and see Setting up Chairs in Clinics on page 17.
When you have successfully set up chairs in the clinic, next you must set up a book for the clinic. For instructions on setting up a book for the clinic, see next section, *Setting up Books for Clinics* on page 20.

### 1.6 Setting up Books for Clinics

Before you begin, make sure you have defined a clinic. For instructions on defining clinics, see previous section, refer to the axiUm User Guide for Scheduler: Shared Features and see *Defining Clinics* on page 9.

This section covers the following topics:

- Opening the Books window
- Setting up books with reservations
- Setting up books without reservations

This is like purchasing an appointment book and indicating the days and times booking staff are allowed to use it to book appointments.

The book can be available during clinic time (mimic the associated clinic’s schedule). If you open the book (the Scheduler window’s Active tab) before the time defined in the book, it will not show any chairs or providers until you reach the book’s open hours. For this reason, you must define your book time to encompass the associated clinic’s time. For example, if your clinic is open from 8:00am to 5:00pm, the associated book must be defined from 7:00am to 6:00pm to allow for booking time before and after clinic hours.

Also, any book time not defined is assumed the book is closed, and booking staff cannot book appointments during this time. For example, if all booking staff must take their lunch break between 12:00pm and 1:00pm as a policy at your institution, you can define your book’s open hours from 7:00am to 12:00pm and then 1:00pm to 6:00pm, and you cannot use the book during the undefined time range of 12:00pm to 1:00pm.

**Opening the Books Window**

Use the Books window to create new books and modify existing ones.

**▼ To open the Books window:**

1. Go to *Maintenance* module and click on *Scheduler* tab.
2. Double-click the *Books* icon.

axiUm displays the Books window. For information on the Books window, refer to the axiUm Reference Manual for Maintenance and see *Books Window* on page 668.
You have successfully opened the Books window. You will be using this window for book setup procedures in the following sections.

**Setting up Books for Chairs with Reservations**

For this example, we will create a book called Grad Clinic Book, and the book is open all day from 7:00am to 6:00pm, all year round, for the next five years.

**\(\text{▼ To set up a book with reservations:}\)**

1. Open the **Books** window.

   For instructions on opening the Books window, see *Opening the Books Window* on page 20.

2. Click **Clear Data**.

   axiUm clears the fields and options.

3. Enter the fields and options. For our example, we will enter the following:

   - **Name:** Grad Clinic Book
   - **Book has reservations:** selected
   - **Book for selected:** Chairs

4. Click **Add a new Record**.

   axiUm saves the new record and displays it in the list view.
You have created a book record. You must now further define this book.

5. Click (Book Definitions).

axiUm displays the Book Definitions window. For information on the Book Definitions window, refer to the axiUm Reference Manual for Maintenance and see Book Definitions Window on page 671.

6. Enter the fields and options. For our example, we will enter the following:
   - From Date: August 27, 2010
   - To Date: August 27, 2015
   - Open on: Monday - Sunday
Setting up for Book Method

- **Open at:** 07:00 AM (Monday - Sunday)
- **Close at:** 06:00 PM (Monday - Sunday)

---

**Important Note:** If you do not create a break for lunch hour in the Book Definition window (i.e. the gap between two defined time ranges), and the booking staff does not want to book appointments during their lunch hour, they must enter their lunch hour in their provider schedules.

---

7. Click ✽ (Add a new Record).

axiUm saves the new record and displays it in the list view.

8. Click ✗ (Close).

axiUm closes the Book Definitions window and returns to the Books window. The new book is displayed in the list view.
9. Click (Close).

axiUm closes the Books window and returns to the Maintenance window.

You have successfully set up a book for a clinic. You can have more than one book for one clinic. For example, one for each group manager who oversees a group of providers in the clinic. You can also have one book for each group manager who oversees a group of providers over multiple clinics.

Next you must grant chairs access to the book. For instructions on granting chairs access to the book, see next section, *Adding Chairs to Books* on page 26.

Setting up Books without Reservations

▼To set up a book without reservations:

1. Open the Books window.

   For instructions on opening the Books window, see *Opening the Books Window* on page 20.

2. From the list view, highlight a record. For our example, we will select Grad Clinic Book.

3. Deselect the Book has reservations checkbox.

4. Click (Modify Record).

   axiUm saves the changes.
You have created a book without reservations.

Setting up Books for Providers

To set up a book to view providers:

1. Open the Books window.
   
   For instructions on opening the Books window, see Opening the Books Window on page 20.

2. From the list view, highlight a record. For our example, we will select Grad Clinic Book.

3. Enter the fields and options. For our example, we will enter the following:
   
   - Book has reservations checkbox: selected
   - Book for selected drop-down field: Providers

4. Click (Modify Record).

   axiUm saves the changes.
You have created a book for provider

1.7 Adding Chairs to Books

Before you begin, make sure you have:

- Set up chairs in the clinic. For instructions on setting up chairs, refer to axiUm User Guide for Scheduler: Shared Features and see Setting up Chairs in Clinics on page 17.
- Defined a book for a clinic. For instructions on defining books for clinics, see Setting up Books for Clinics on page 20.

By adding chairs to books, you are selecting chairs available for booking during these dates and times. The chairs you select here are permanently added to the selected book, meaning you will always see them when you open this book in the Scheduler module. If you do not see chairs in the book, you cannot book appointments in that chair for the providers associated to those chairs.

To add chairs to books:

1. Go to Maintenance module and click on Scheduler tab.
2. Double-click the Books icon.

axiUm displays the Books window. For information on the Books window, refer to the axiUm Reference Manual for Maintenance and see Books Window on page 668.
3. From the list view, highlight a record. For our example, we will select Grad Clinic Book.

4. Click (Book Definitions).

axiUm displays the Book Definitions window. For information on the Book Definitions window, refer to the axiUm Reference Manual for Maintenance and see Book Definitions Window on page 671.

5. From the list view, highlight a record. For our example, we will select the only record available.

6. Click (Book’s Chair Selection).

axiUm displays the Book’s Chair Selection window. For information on the Book’s Chair Selection window, refer to the axiUm Reference Manual for Maintenance and see Book’s Chair Selection Window on page 673.
7. Go to the Chairs (Not included in book) list box and highlight all the following chair names:
   - DC01
   - DC02
   - DC03
   - DC04

8. Click ➡️ (right arrow).

   axiUm moves the highlighted items from the Chairs (Not included in book) list box to the Chairs (Included in book) list box.

9. Click Close.
axiUm closes the Book’s Chair Selection window and returns to the Book Definitions window.

You have successfully set up columns in the Scheduler module’s Active tab to display chairs available at the selected clinic.

Next you must grant users access to this book. For instructions on granting users access to this book, see next section Granting Users Access to Clinics.

1.8 Granting Users Access to Books

Before you begin, make sure you have defined a book for a clinic. For instructions on defining books for clinics, see Setting up Books for Clinics on page 20.

Now you must give users access to the book so that booking staff can book appointments and providers can see their own schedules.

▼To give user access to the book:

1. Go to Maintenance module and click on Scheduler tab.

2. Double-click the Books icon.

axiUm displays the Books window. For information on the Books window, refer to the axiUm Reference Manual for Maintenance and see Books Window on page 668.

3. From the list view, highlight a record. For our example, we will select Grad Clinic Book.

4. Click (User Access).
axiUm displays the User Accessibility for Books window. For information on the User Accessibility for Books window, refer to the axiUm Reference Manual for Maintenance and see *User Accessibility for Books Window* on page 676.

5. Search for a user record by entering the fields and options in the **Selection Criteria** section and clicking the **Search** button. For our example, we will search for Ken Klaahsen.

6. From the **Users with No Access (searched for)** list box, highlight a record. For our example, we will highlight Ken Klaahsen’s name.

7. Click ➔ (right arrow).

axiUm moves the user’s name from the Users with No Access (searched for) list box to the Users with Access list box.
8. Repeat steps 5 to 7 for the remaining providers:

- Lisa Jaaks
- Chris Wiid
- Sandy Rhabb

9. Click (Close).

axiUm closes the User Accessibility for Books window and returns to the Books window.

At this point in the setup, you will see all the chairs you put in it, and Scheduler shows the display options (like time increments, and hours of operation) as you set up earlier.
You do not see any provider schedules at this point because we have not yet created each provider's work schedule. This is next. For instructions on setting up provider schedules, see next section, *Manually Setting up Provider Working Schedules for Your Students* on page 32.

Next you must define provider working schedules for your students. For instructions on defining provider working schedules for your students, see next section, Manually Setting up Provider Working Schedules for Your Students.

### 1.9 Manually Setting up Provider Working Schedules for Your Students

Before you begin, make sure that you have given your students access to the book. For instructions on granting users access to books, see *Granting Users Access to Books* on page 29.

Setting up provider working schedules is the equivalent of defining each provider’s work hours. This allows booking staff to book appointments for providers, and can see who is working and when.

For this example, we will define provider Ken Klaahsen’s work schedule, and he will be working from 8:00am to 12:00pm, every day of the week.

**To set up provider working schedules:**

1. Go to *Maintenance* module and click on *Scheduler* tab.
2. Double-click the *Provider Schedules* icon.
Setting up for Book Method

axiUm displays the Provider Working Schedules window. For information on the Provider Working Schedules window, refer to the axiUm Reference Manual for Maintenance and see Provider Working Schedules Window on page 735.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - **Provider field**: Ken Klaahsen
   - **Description**: Fall Semester
   - **From Date**: September 1, 2011
   - **To Date**: November 30, 2012
   - **days of the week**: Monday - Sunday

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
Next you must define each selected work day.

6. Go to the Monday checkbox and click Details.

This displays the Provider Schedule Detail window. For information on the Provider Schedule Detail window, refer to the axiUm Reference Manual for Maintenance and see Provider Schedule Detail Window on page 739.

Next we define the provider’s working hours.

7. Click (Clear Data).

axiUm clears the fields and options.

8. Enter the fields and options. For our example, we will enter the following:

- Clinic: Grad Clinic
- Start: 8:00 AM
• **End:** 12:00 PM
• **Chairs:** DC01

9. Click ![Add a new Record](image).  

axiUm saves the new record and displays it in the list view. This is the provider’s morning schedule.

Next you must define the provider’s afternoon schedule.

![Provider Schedule Detail](image)

10. Click ![Clear Data](image).

axiUm clears the fields and options.

11. Enter the fields and options. For our example, we will enter the following:

• **Start:** 01:00 PM
• **End:** 05:00 PM
• **Chairs:** DC01

12. Click ![Add a new Record](image).

axiUm saves the new record and displays it in the list view. This is the provider’s afternoon schedule.
You have set up a provider’s working schedule for one work day (Monday). Next you must define the provider’s work schedule for the remaining work days (Tuesday – Sunday).

13. Repeat steps 6 to 12 for the remaining work days. For our example, you must define the work days for Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.

14. Click (Close).

axiUm closes the Provider Schedule Detail window and returns to the Provider Working Schedules window.

When you have finished defining all the work days for the selected provider (in our example, Ken Klaahsen for Monday – Sunday), you must define the work schedule for the remaining providers.

15. Repeat steps 3 to 14 for the remaining providers. For our example, these are:

- Lisa Jaak
- Chris Wiid
- Sandy Rhabb

You can copy provider working schedules by clicking (Copy Schedule). However, axiUm does not copy the original provider’s chair, and instead, selects the next available chair listed in the Select Chairs window. For information on the Select Chairs window, refer to the axiUm Reference Manual for Maintenance and see Select Chairs Window on page 741.

16. Click (Close).

axiUm closes the Provider Working Schedules window and returns to the Maintenance window.
You have successfully created work schedules for multiple providers.

At this point in the setup, the Scheduler window’s Active tab displays the chairs (i.e., columns) you added to the associated book, and each chair (i.e. column) displays the associated provider’s schedule.

To create non-clinic times, go to the Scheduler window’s Active tab, right-click a time block, and select Non-Clinic Times. This is typically used when students are on rotation and therefore are in a different clinic in a different book in a different chair, or are unavailable due to illness.

You can begin using the book method of scheduling, or you can continue setting up additional Scheduler features.

For instructions on using the book method of scheduling, see Using Scheduler on page 41.

To set up additional Scheduler features, continue reading the rest of this chapter.

2 Setting up Scheduler Display Features

This section shows you how to use Scheduler module’s display features that are specific to book method of scheduling. For additional Scheduler display features, refer to the axiUm User Guide for Scheduler: Shared Features and see Setting up Scheduler Display Features on page 24.
2.1 Setting up Column Display in Active Tab

This section covers the following topics:

- Setting up columns permanently
- Setting up columns sessionally

Setting up Columns Permanently

For instructions on setting up columns permanently, see *Adding Chairs to Books* on page 26.

Setting up Columns Sessionally

You can set up a book to allow users to temporarily change its column setup. This allows users to dynamically add and remove columns for the current session. When you close the Schedule module, next time you open it, axiUm resets the columns to their original display.

▼ To set up axiUm to use dynamic columns:

1. Go to Maintenance module and click on Scheduler tab.
2. Double-click the Books icon.

axiUm displays the Books window. For information on the Books window, refer to the axiUm Reference Manual for Maintenance and see *Books Window* on page 668.

3. From the list view, highlight a record. For our example, we will select Grad Clinic Book.
4. Click the Allow dynamic columns for providers/chairs checkbox.
5. Click (Modify Record).
axiUm saves the changes.

6. Click (Close).

axiUm closes the Book window and returns to the Maintenance window.

3 Setting up Appointment Activities

For instructions on setting up wait lists, refer to the axiUm User Guide for Scheduler: Shared Features and see Setting up Wait Lists on page 46.
This chapter covers the tasks you can accomplish using the book method of scheduling.

This chapter covers the following topics:

- Booking by provider
- Booking by chair
- Sessionally displaying columns

At the end of this chapter you will be familiar with these tasks.

1 Booking by Provider

When you book appointments by provider, you are selecting to view multiple providers regardless of their clinic location.

Before you begin, make sure you have the following:

- The provider is set up for book method. For instructions on setting up providers to use book method, see Setting up Providers for Book Method on page 7.
- The provider has a work schedule so that their availability is displayed in the Scheduler window’s Active tab. For instructions on creating a provider work schedule, see Manually Setting up Provider Working Schedules for Your Students on page 32.
To book an appointment by available provider:

1. Go to the Scheduler module’s Active tab.
2. Enter a new appointment.

For instructions on entering a new appointment, refer to the axiUm User Guide for Scheduler: Shared Features and see Entering New Regular Appointments on page 71.

You have successfully booked an appointment by provider availability.

2 Booking by Chair

When you book appointments by chair, you are selecting to view all the chairs in a selected clinic.

This section covers the following topics:

• Booking by chair with reservations
• Booking by chair without reservations

2.1 Booking by Chair with Reservations

Before you begin, make sure you have the following:

• The provider has a work schedule so that their availability is displayed in the Scheduler window’s Active tab. For instructions on creating a provider work schedule, see Manually Setting up Provider Working Schedules for Your Students on page 32.

• Your book set up to book by chairs using reservations. For instructions on defining your book to book appointments by chairs use reservations, see Booking by Chair with Reservations on page 42.

To book an appointment by available chair with reservations:

1. Go to the Scheduler module’s Active tab.
2. Enter a new appointment.

For instructions on entering a new appointment, refer to the axiUm User Guide for Scheduler: Shared Features and see Entering New Regular Appointments on page 71.

You have successfully booked an appointment by chair availability using a book with reservations.
2.2 Booking by Chair without Reservations

When you book by chair reservations, you are viewing open columns that display chair name only, no provider names.

Before you begin, make sure your book is set up to book appointments by chairs with no reservations. For instructions on defining your book to book appointments by chairs use no reservations, see Booking by Chair without Reservations on page 43.

To book by chair without reservations:

1. Go to the Scheduler module’s Active tab.
2. Enter a new appointment.

For instructions on entering a new appointment, refer to the axiUm User Guide for Scheduler: Shared Features and see Entering New Regular Appointments on page 71.

You have successfully booked an appointment by chair availability using a book with no reservations.

3 Sessionally Displaying Columns

You can add and remove columns (chairs and providers) on the fly. This dynamic column display feature applies to the current session only. When you close the Scheduler module, axiUm resets the columns to their original display.

This section covers the following topics:

- Adding columns for this session
- Deleting columns for this session
- Restoring columns

Before you begin, make sure that your book is set up to use dynamic columns. If you have the following indicator on the Scheduler window’s Active tab, your book is already set up to use dynamic columns:
If the Scheduler window’s Active tab does not display this, you must set up your book to use dynamic columns. For instructions on setting up book for dynamic columns, see Setting up Columns Sessionally on page 38.

3.1 Adding Columns for this Session

For this example, we will add the column for chair RC01.

▼To dynamically add a column:

1. Go to the Scheduler module’s Active tab.
2. Do one of the following:
   - Go to any column heading, right-click to display a list of options, and select the Select Providers/Chairs option.
   - Click \(\text{ }\) (plus sign).

axiUm displays the Book’s Chair Selection window. For information on the Book’s Chair Selection window, refer to the axiUm Reference Manual for Maintenance and see Book’s Chair Selection Window on page 673.
3. From the **Chairs (Included in book)** list box, highlight a record. For our example, we will select **RC01**.

4. Click ➤ (right arrow).

   axiUm moves the highlighted items from the Chairs (Not included in book) list box to the Chairs (Included in book) list box.

5. Click ✗ (Close).

   axiUm closes the Book’s Chair Selection window and returns to the Scheduler window’s Active tab.

   axiUm displays the column for the selected chair.
You have successfully added a column using the dynamic display feature.

### 3.2 Deleting Columns for this Session

There is more than one method to deleting columns for this session.

This section covers the following topics:

- Deleting columns by selecting column heading
- Deleting columns using dynamic display indicator

For this example, we will delete the column for chair DC01 (i.e., provider Ken Klaahsen).
Deleting Columns by Selecting Column Heading

▼To delete a column by selecting a column heading:

1. Go to the Scheduler module’s Active tab.
2. Go to the column heading that you want to delete. For our example, this will be the column associated to the provider Ken Klaahsen.
3. Right-click to display a list of options.

4. Select the Remove Providers/Chairs option.

axiUm deletes the selected column.

You have successfully removed a column using the dynamic display feature by using the column selection method.
Deleting Columns Using Dynamic Display Indicator

To delete a column by selecting a column heading:

1. Go to the Scheduler module’s Active tab.

2. Click (plus sign).

axiUm displays the Book’s Chair Selection window. For information on the Book’s Chair Selection window, refer to the axiUm Reference Manual for Maintenance and see Book’s Chair Selection Window on page 673.

3. From the Chairs (Included in book) list box, highlight a record. For our example, we will select DC01.

4. Click (left arrow).
axiUm moves the highlighted items from the Chairs (Included in book) list box to the Chairs (Not included in book) list box.

5. Click (Close).

axiUm closes the Book’s Chair Selection window and returns to the Scheduler window’s Active tab.

axiUm no longer displays the column.
You have successfully removed a column using the dynamic display feature by using the dynamic display indicator method.

In the Appointment Expert, if you select an appointment for a chair that you removed for this session only, and then book this appointment with this chair, axiUm returns the associated chair back into the Active tab and either books or hovers the selected appointment block.

### 3.3 Restoring Columns

You can restore column by closing and re-opening the Scheduler window. Alternatively, you can restore columns while the Scheduler window is open.

For this example, the column for chair DC01 (i.e., provider Ken Klaahsen) is deleted and we will restore the book to display this column again:
To restore columns to the default display:

1. Go to the Scheduler module’s Active tab.
2. Go to any column heading.
3. Right-click to display a list of options.
4. Select the Restore Book option.

axiUm restores the columns to the default column display.
You have successfully restored the column display in the Scheduler window’s Active tab.