



# **Clinician/Staff Guide to Reception Appointment Scheduling**

Instructions for Clinicians and Staff on how to access the new reception  
calendaring system.

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### Overview

The purpose of the first phase of this project is to replace the paper books at the reception desks. Each calendar has been created on the Universities Exchange servers. This allows Clinicians and staff to see these calendars on a series of monitors and computers throughout the hospital.

### What is Needed for Viewing the Calendars in Your Office

In order to view the calendars in your office you need these things:

- **Windows XP/Vista/7** on a PC or Windows XP/Vista/7 parallel installation on a Mac
- **Microsoft Office 2007** – Though you can open the calendars in the Office 2003 version of Outlook, some of the features used in building the calendars may not be visible. These calendars do not open in Entourage 2008 or Thunderbird.
- **CSU Exchange E-mail Account** – If you are able to check your e-mail by going to [mail.colostate.edu](mailto:mail.colostate.edu) or by clicking on the

## Setup for New Users

### Granting Users Access to Outlook Exchange Servers

Before any new employee can use the calendars, they will need to be set up on the University Exchange servers before they will be able to see any of the calendars. Because the e-mail/calendaring system is housed on University servers and not owned by CRG, it is necessary to go through University channels to set new employee's (both salaried and hourly) up on the e-mail/calendaring system properly.

#### Salaried Employees

When setting up a new employee there is a step in the eID process that will talk about setting up e-mail. Exchange for E-mail and Calendaring is the selection that needs to be made.

#### Non-Student Hourly Employees

When setting up a new employee there is a step in the eID process that will talk about setting up e-mail. Exchange for E-mail and Calendaring is the selection that needs to be made.

#### Student Hourly Employees

Students tend to have an eID before they are hired. So we can skip the eID process, and skip to giving them access to the calendars. We will be using the Change E-mail Address functionality of the University eID website. *Inform the student that by no means are we changing their e-mail address, just granting them access to the Calendaring system.*

- Have the student go to <http://eid.colostate.edu>
- From there have them click on 'Change E-mail Address'



- Have them log in using their eID and password and then press 'Continue':

- From here under the header 'Configure your E-Mail address and confirm Calendar Settings' you will see a 'Central Exchange for Calendaring Only' option. Select that then press 'Change E-mail':

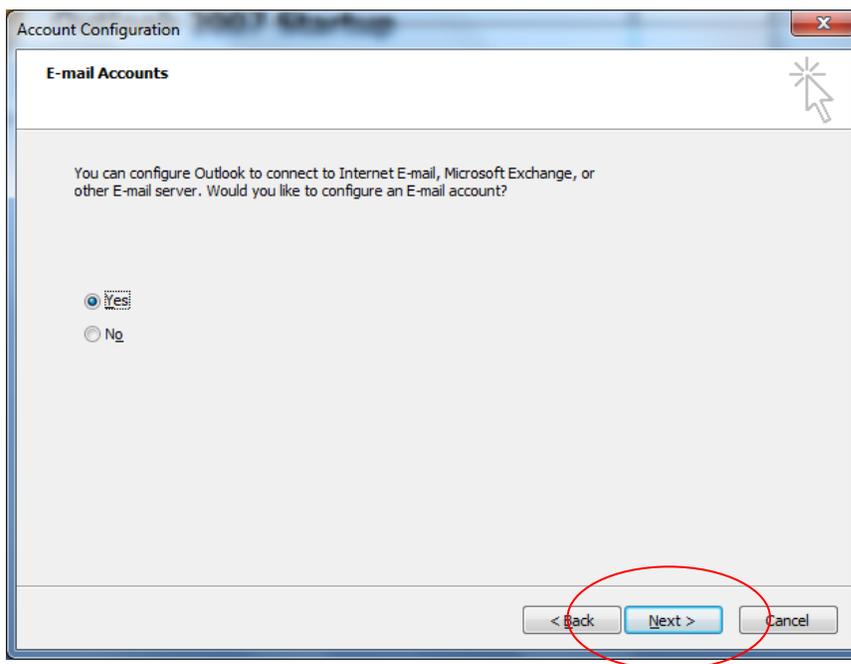
- From here you will need to add them to the proper distribution group which is covered in the next section.

### Setting Up Outlook for Proper Use

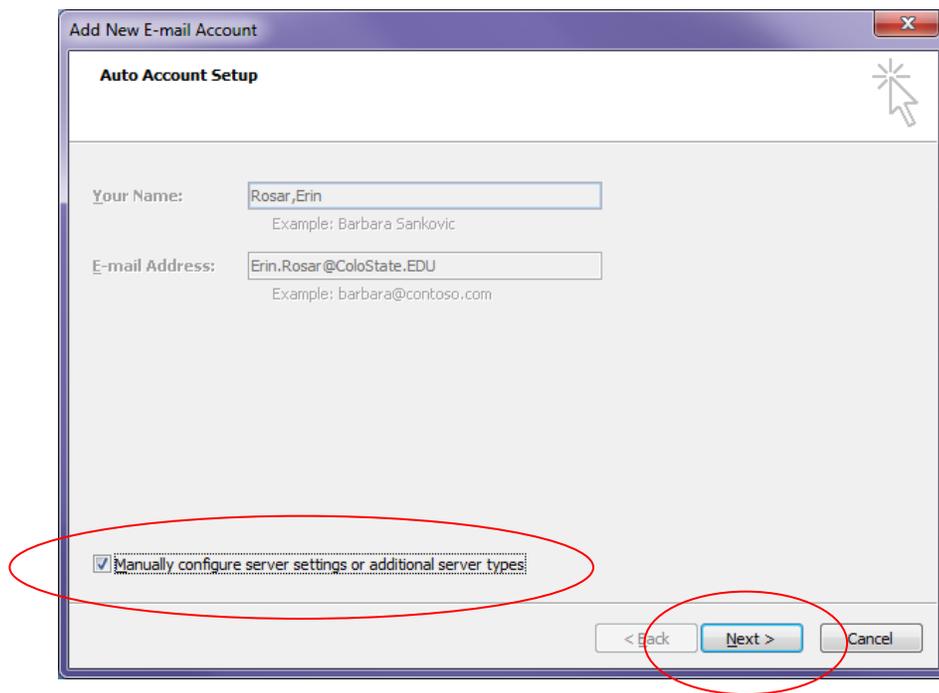
- Have the new user log into the computer using their eID and password.
- Open Outlook 2007, the first screen you will get will be the welcome screen, click 'Next'



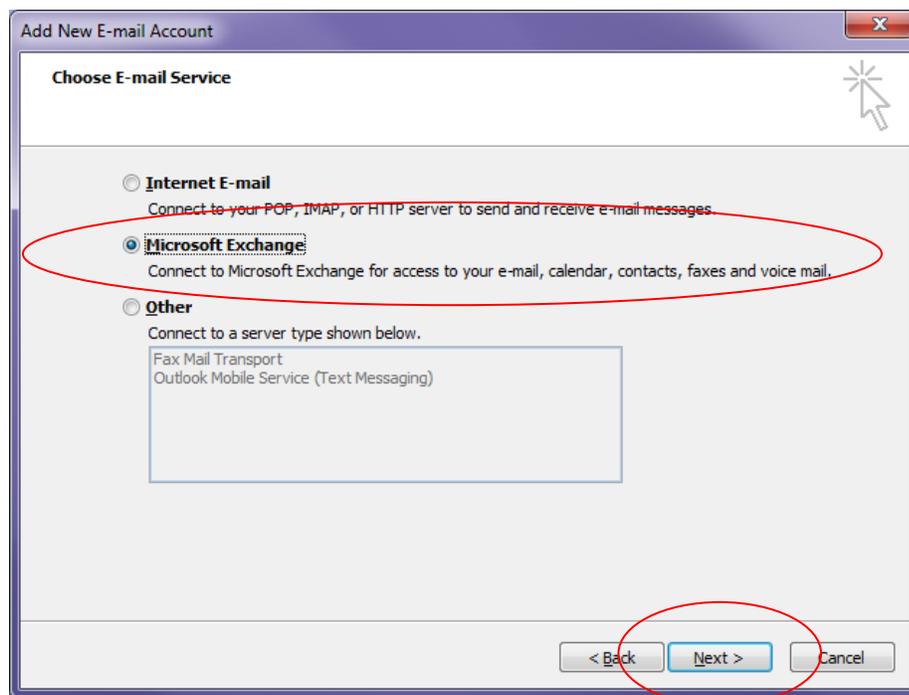
- The next screen will ask you if you would like to configure an account with a Yes or No question, verify that the answer is 'Yes'. Click 'Next'



- The next screen will find the user that is logged in, you can ignore that. check the box next to 'Manually configure server settings or additional server types'. Click Next.



- Next you will click the circle next to where it says Microsoft Exchange. Click Next.



- In the box that says 'Server:' enter 'exchange.colostate.edu', Un-check the box next to 'Use Cached Exchange Mode', verify that the user name is correct. Click Next.

The screenshot shows the 'Add New E-mail Account' wizard window. The title bar reads 'Add New E-mail Account'. The main heading is 'Microsoft Exchange Settings' with the subtext 'You can enter the required information to connect to Microsoft Exchange.' Below this, there are two sections of input fields. The first section is titled 'Type the name of your Microsoft Exchange server. For information, see your system administrator.' It contains a text box for 'Microsoft Exchange server:' with the value 'exchange.colostate.edu' and a checked checkbox for 'Use Cached Exchange Mode'. The second section is titled 'Type the name of the mailbox set up for you by your administrator. The mailbox name is usually your user name.' It contains a text box for 'User Name:' with the value 'Rosar,Erin' and a 'Check Name' button. At the bottom right, there is a 'More Settings ...' button. At the bottom center, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a red circle.

- Click 'Finish'

The screenshot shows the 'Add New E-mail Account' wizard window at the 'Congratulations!' screen. The title bar reads 'Add New E-mail Account'. The main heading is 'Congratulations!' with the subtext 'You have successfully entered all the information required to setup your account.' Below this, there is a message: 'To close the wizard, click Finish.' On the left side, there is a decorative graphic with three envelope icons. At the bottom center, there are two buttons: '< Back' and 'Finish'. The 'Finish' button is highlighted with a red circle.

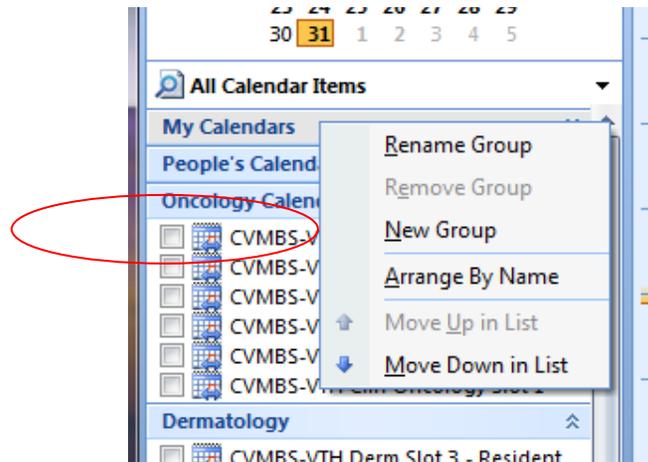
**Once the new user has access to their exchange mailbox, they will need to have either Anna-Lee Mercado or Tracy Keegan add them to the list of people that can see the calendars.**

## Adding Calendars to Outlook

### Adding Calendar Groups

The Calendar groups allow the organization of over fifty calendars that are a part of this project.

- Right-click on the blue bar that says 'My Calendars'



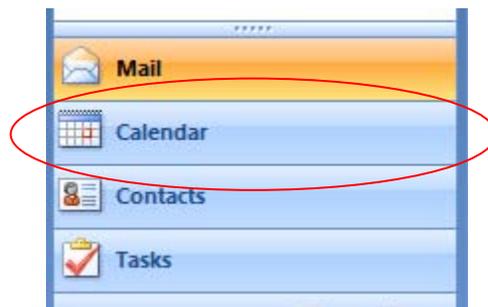
- Left-Click on 'New Group'
- Type the name of the new group. For ease of use, there should be a group title for each of the services at the VTH.
  - Once the groups are created, you can left-click and drag calendars between groups.

### Adding a Shared Calendar to your Outlook

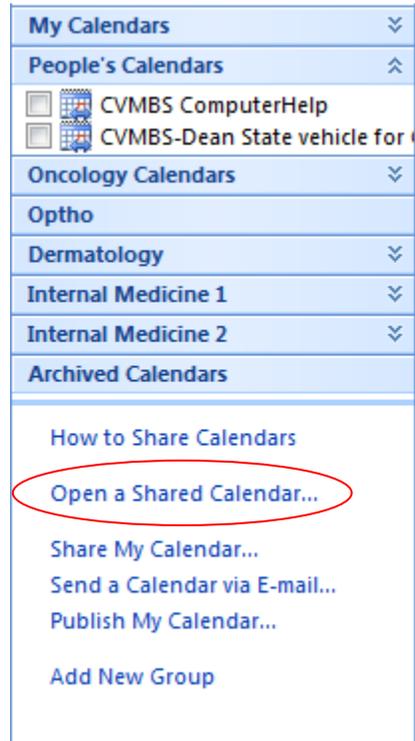
**SEE APPENDIX FOR LIST OF CALENDARS. ALL CLINICIANS HAVE THE ABILITY TO READ ALL SERVICE CALENDARS. YOU CAN CHOOSE TO ADD AS MANY CALENDARS AS YOU NEED TO SEE.**

Adding a Shared Calendar to Outlook on your desktop is extremely easy with Office 2007

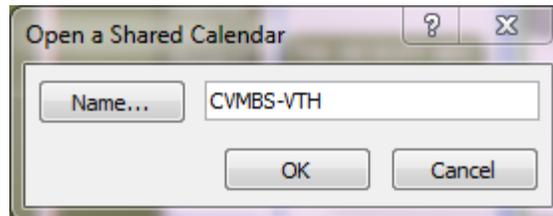
- Open Outlook, and on the left-hand side select Calendar



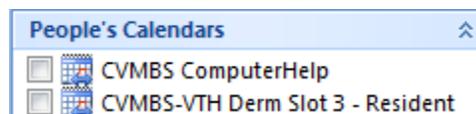
- From there, left-click on 'Open a Shared Calendar' towards the bottom of the column on the left-hand side.



- All of calendars start with "CVMBBS-VTH" so, type that into the search field displayed and click 'OK'. This will bring up a list of calendars you will have to pick from.

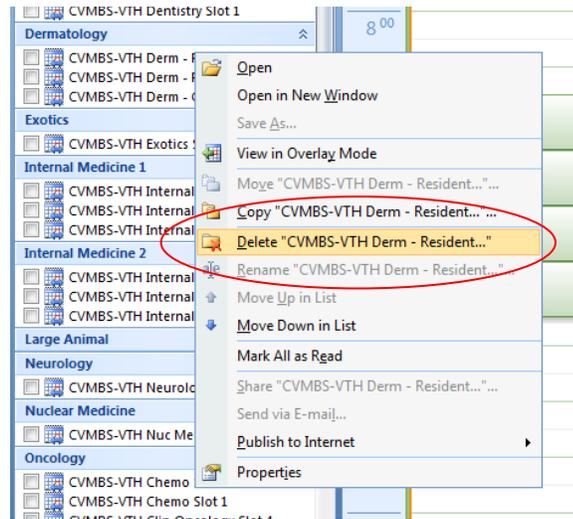


- From this list double-click (left-click) on the calendar you were looking for and you should see it appear in your calendars list under 'People's Calendars'. From here you can left-click and drag the calendar to move it to the group of your choice.



## Removing Shared Calendars from Outlook

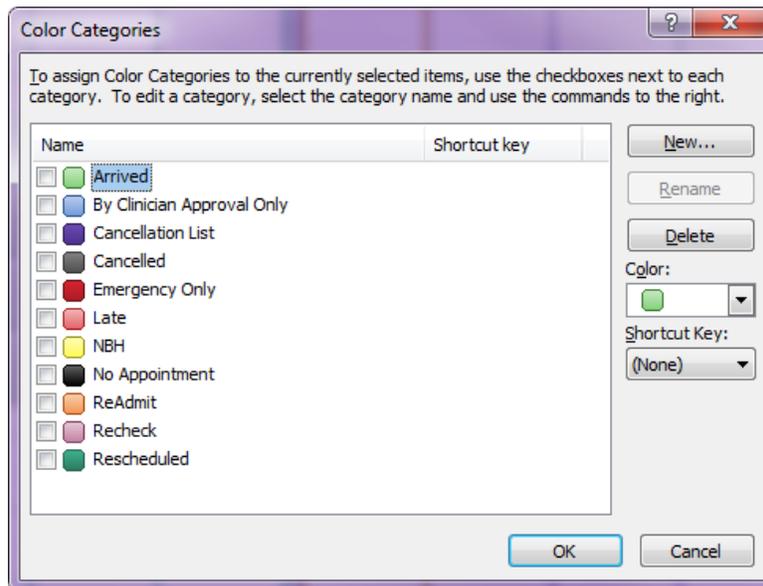
- To remove a shared calendar from Outlook you will right click on the calendar name, and select 'Delete 'CVMBS-VTH ...'



- This will not delete the calendar from everyone's list, just your personal list. Deletion of calendars is a handy way to change the name that it is listed as in your calendar list if the name of the calendar is updated in the global system for any reason.

### What Do All the Colors Mean?

- You'll notice that each of the calendars is extremely colorful. This helps visually differentiate the type of service and the location of the patient in the hospital.
  - Each of the service colors mean something so that with a quick glance you can easily tell what type of appointment, and where that appointment is in the process.



#### Category Colors

- **Arrived** – This category should be chosen when the patient arrives for their appointment. This will indicate to the rest of the hospital that the patient has arrived
- **By Approval Only** – This means that appointments can be made by approval of clinician only.
- **Cancelled** – This is to be selected when the patient cancels their appointment. It will grey out the appointment indicating that another appointment can be scheduled.
- **Cancellation List** – This means that the person would be willing to take an appointment sooner than the one they are scheduled for if one happens to open up.
- **Late** – Indicates that the patient will be arriving late or has not shown up yet.
- **NBH** – Indicates that the appointment is a patient that has never been here or is a new problem for an existing patient.
- **No Appointments** – There are to be no appointments scheduled for these times.
- **Re-Admit** – Indicates that the appointment is a re-admit of a patient
- **Recheck** – indicates that the patient is here for a follow up appointment.
- **Rescheduled** – Indicates that the client cancelled the existing appointment and rescheduled for another time.

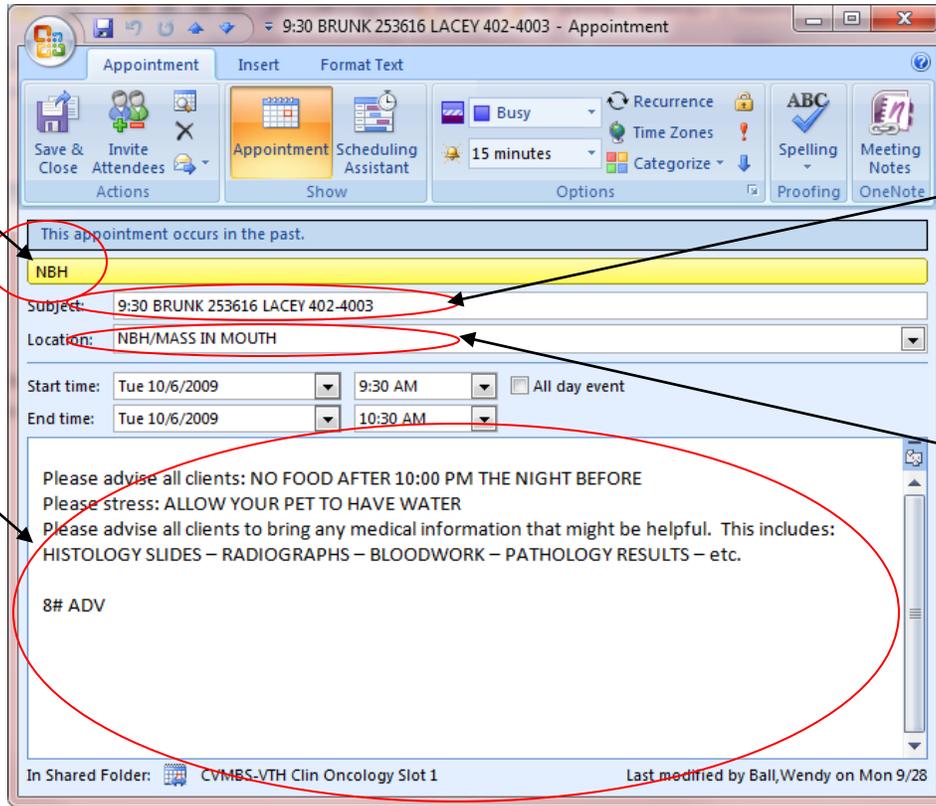
With each of these categories, more than one can be selected at any given time. The result of which is the newest selected category is the majority of the appointment color, with a small box indicating the secondary category. When the appointment is opened, you will be able to see all of the categories across the top of the appointment.

### Reading the Appointments

All of the appointments for each service have been standardized in what information is shown, if you double click on any appointment this is what you should see:

**Category Type and Color.** If there are multiple categories on one appointment they will all be listed where you see the yellow bar in this appointment.

**Details Field:** Contains any information that the reception staff needs to relay to the client at the time the appointment is made. This information is unique to each service.



**Subject Line:** Time slot, Patient Last Name, Case Number, Patient Name, Phone Number

**Location Line:** Specific Clinician (if requested), Primary complaint, Secondary Service (if any)

- So in the actual calendar you will see the appointments spread out over several calendars. Each calendar represents one time slot. So if there are four 10:00 AM appointments, then there are four calendars. Each service has a number of calendars that represents the number of the maximum appointments per hour for that service.
- Here is how the same appointment will appear in the calendar:



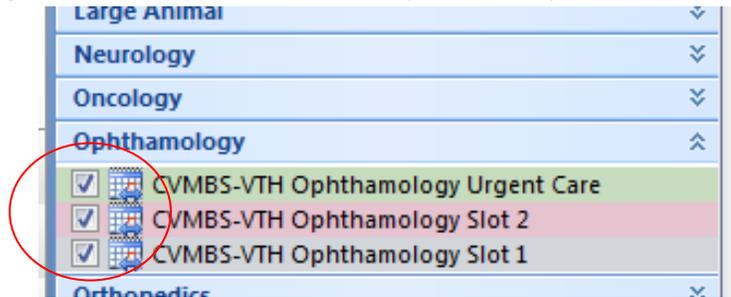
**Bold Text:** Everything that was entered in the Subject Line above.

**Regular Text:** Everything that was entered into Location line above.

### Printing the Calendars

There are several ways to print the schedules. The way that will be listed here is the most direct way to do so.

- Each slot(calendar) will be printed individually, but this gives each service the most room to write and ensures that all of the information in the appointment is shown.
- Start by checking the boxes next to the calendars you wish to print.



- Click on File, then select 'Print', you should see a window like this:

Verify that you have the correct printer.

Check the name of the calendar you're about to print.

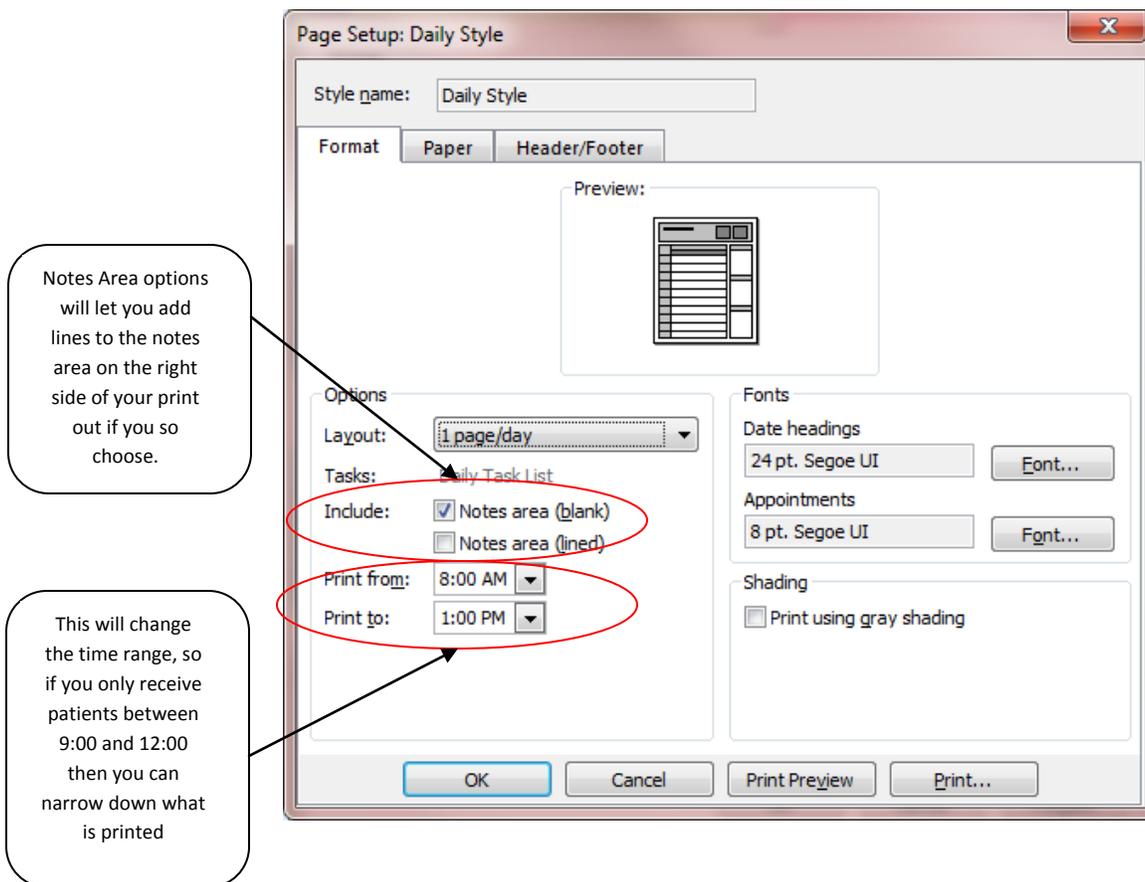
All of the calendars that you've checked should appear in this drop down list

Check that you are printing a Daily Style.

The Page setup button will help you further customize the output of the print style you have chosen.

Check that the date ranges are correct. You can print calendars days in advance with this feature.

- If you chose to further customize the printer output, you can click on the Page Setup button that is highlighted on the previous page. You will find a menu like this:



- For each slot that your service has you will have to go through this process. You can select from the "Print This Calendar" list. So once you've set all of the settings the way you like them you will be able to print quickly using CTRL+'P' and then selecting the next calendar in the drop down menu.

## Troubleshooting and FAQ

Will this system work in Entourage on a Mac?

Unfortunately, at this moment in time the calendars are not accessible via Entourage.

How do I print all of the calendars for my section at once?

There is really no easy way to print the calendars all together on one page. The easiest way right now is to bring up each of the calendars as you would like to see them and then to take a screenshot using the 'Print Screen' button on the keyboard to copy the calendars to the clipboard. Once it is on the clipboard it can then be pasted into a word document or publisher document.

I moved computers, how do I get Outlook to display my calendars again?

To setup the calendars on additional computers, walk through the setup of Outlook according to the instructions found in **Setting up Outlook for Proper Use**. The list of calendars will stay stored on the server so once you set up Outlook; the calendars should already be there.

Can the calendars be seen through the Outlook Web Access page?

The calendars cannot be seen through Outlook Web Access.

I'm a resident/intern/student. Can I get Outlook for my personal laptop so I can see the calendars?

In order to set up Outlook on a personal computer you will need to have Office 2007 installed. It can be purchased from RamTech for an employee/student discount. Once Office 2007 is installed you will need to set up Outlook following the instructions found in the Setup for New Users section.

I went to add a new calendar but I can't see it in the Global Address List.

It is likely that you are in cached mode. In order to switch from cached mode you will need to follow these instructions:

- Open Outlook
- Go to Tools | Options
- Select the Mail Setup Tab
- Click on E-mail Accounts
- Ensure that the Microsoft Exchange is highlighted and click Change
- Uncheck the box that says 'Used Cached Exchange Mode'
- Click Next
- Click OK
- Close Account Settings and the Options menu, and exit Outlook.
- Restart Outlook.
- Look for the calendars once again.

## Appendix

### List of Calendars for this Project

*Last updated 10/8/2009*

#### **Cardiology**

CVMBS-VTH Cardiology Slot 1

#### **CCIPM – Pain Medicine**

CVMBS-VTH CCIPM Slot 1

CVMBS-VTH CCIPM Slot 2

CVMBS-VTH CCIPM Slot 3

CVMBS-VTH CCIPM Research

#### **Community Practice**

CVMBS-VTH Community Practice Slot 1

CVMBS-VTH Community Practice Slot 2

CVMBS-VTH Community Practice Surg 1

CVMBS-VTH Community Practice Surg 2

CVMBS-VTH Community Practice Dental 1

CVMBS-VTH Community Practice Dental 2

#### **Dentistry & Oral Surgery**

CVMBS-VTH Dentistry Slot 1

CVMBS-VTH Dentistry Slot 2

#### **Dermatology**

CVMBS-VTH Derm – Resident 1

CVMBS-VTH Derm – Resident 2

CVMBS-VTH Derm – Clinician

#### **Diagnostic Imaging**

CVMBS-VTH Nuc Med

CVMBS-VTH Outpatient Echo

CVMBS-VTH Underwater Treadmill

**Emergencies**

CVMBS-VTH Emergency

**Exotics**

CVMBS-VTH Exotics Slot 1

**Internal Medicine 1**

CVMBS-VTH Internal Med 1 Slot 1

CVMBS-VTH Internal Med 1 Slot 2

CVMBS-VTH Internal Med 1 Slot 3

**Internal Medicine 2**

CVMBS-VTH Internal Med 2 Slot 1

CVMBS-VTH Internal Med 2 Slot 2

CVMBS-VTH Internal Med 2 Slot 3

**Neurology**

CVMBS-VTH Neurology Slot 1

**Oncology**

CVMBS-VTH Clin Oncology Slot 1

CVMBS-VTH Clin Oncology Slot 2

CVMBS-VTH Clin Oncology Slot 3

CVMBS-VTH Clin Oncology Slot 4

CVMBS-VTH Oncology Recheck 1

CVMBS-VTH Oncology Recheck 2

**Ophthalmology**

CVMBS-VTH Ophthalmology Slot 1

CVMBS-VTH Ophthalmology Slot 1

**Orthopedics**

CVMBS-VTH Orthopedics Slot 1

CVMBS-VTH Orthopedics Slot 2

CVMBS-VTH Orthopedics Slot 3

**Reproduction**

CVMBS-VTH Reproduction Slot 1

**Small Animal Soft Tissue**

CVMBS-VTH Soft Tissue Slot 1

CVMBS-VTH Soft Tissue Slot 2

CVMBS-VTH Soft Tissue Slot 3

**Color Code Cheat Sheet**

### Calendar Color Codes

	Arrived
	By Clinician Approval Only
	Cancellation List
	Cancelled
	Emergency Only
	Late
	NBH/New Problem
	No Appointments
	Re-Admit
	Recheck
	Rescheduled