

Employee Appointment Books



User's Manual

Employee Appointment Books

Health District Information System
HDIS (Windows Ver. 4.0)

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Introduction

This program is designed to assist you in organizing a systematic approach to entering appointments and provides accurate up-to-date records within your health department.

Please review the manual carefully to obtain the maximum benefits. **Little or no prior computer experience is necessary to operate this program.**

About This Manual

The Employee Appointment Module is simple to use. The maximum benefit with the least time spent will be obtained if you start at the first page of this manual and follow the directions exactly as you enter the first record in your computer.

Square boxes in this manual surround the key that you are to press on your keyboard. As an example, when you read

ENTER

The word

TYPE is followed by bracketed [] instructions of what to type into a field.

Note: For Technical Support, email: helpdesk@hdis.org



Navigation

Whenever you see one  click the left side of your mouse once.

Whenever you see two  click the left side of your mouse twice.

Navigation Keys For Entering Information

Tab or **ENTER** to move to next field

Shift **Tab** or **Up** to go back one field

Alt + **R** places you in the receipt screen.

Editing Keys

Backspace deletes one character left of cursor **Delete**
deletes one character

Insert inserting & overwriting modes

When you see a pull-down field, click the arrow to the right to view all your choices.



Starting HDIS

MICROSOFT Windows Users

Start

Programs

Health District Info Systems

HDIS

Health District Information System Menu Bar

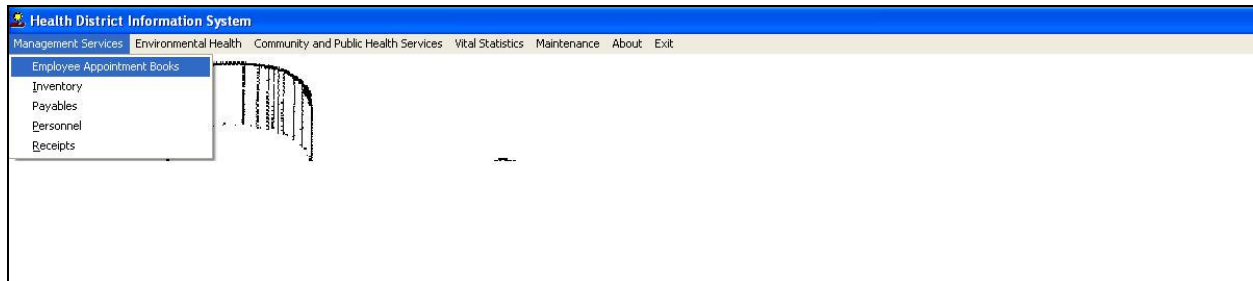
HDIS (Health District Information System) has several different modules designed to assist your health district in its day-to-day operations. The **Employee Appointment Module** is a great addition to these modules and helps simplify scheduling appointments.



Management Services



Employee Appointment Books



Adding a Appointment Book



Maintenance – Appointment Books

Employee Appointment Books - Health District Information System

Book/Print An Appointment Create An Appointment Book In/Out Board - Environmental In/Out Board - Nursing Maintenance Return

Appointment Books
Field Names
General Profile
Printer Setup
Reindex/Pack Appointment Book Data Files

Add/Delete/Modify Appointment Books

| Name | Abbreviation |
|-------------------|--------------|
| | |
| BRIAN LAVELLE | BTL |
| BRODIE NAPAVER | BN |
| DOUG DICKERSON | DD |
| HOLLY COPTER | HC |
| JAMES AMENDOLA | JA |
| JANE SMITH | JS |
| JOE NAPAVER | JN |
| JOHN STOREY | JS |
| MICHELLE WILLIAMS | MW |
| | |
| | |
| | |
| | |
| | |

Close
Add
Delete
Print

The “**Add/Delete/Modify Appointment Books**” window allows you to add the individual employee appointment books. To add an appointment book for an employee, simply click “**Add**” and type the employee’s name in the “**Name**” field, give the book an abbreviation (employee’s initials). When you are finished adding your books, click the “**Close**” button.

Creating an Appointment Book



Create An Appointment Book

Employee Appointment Books - Health District Information System

Book/Print An Appointment **Create An Appointment Book** In/Out Board - Environmental In/Out Board - Nursing Maintenance Return

Appointment Schedule

Create An Appointment Book

Year: 2008 Appointment Book: JOHN SMITH Select Month:

| | | |
|-----|------------|-----|
| Jan | Feb | Mar |
| Apr | May | Jun |
| Jul | Aug | Sep |
| Oct | Nov | Dec |

Create Book Close

The “**Appointment Schedule**” window will create the appointment books for the employees that you just have added in the “**Add/Delete/Modify Appointment Books**” window. Enter the year and choose the employee book. Finally, select which month you wish to create the appointment book. The month that you will select will turn **BLUE**.

| Field/Button | Description |
|------------------|---|
| Year | Enter the year of the book |
| Appointment Book | Select the employee |
| Select Month | Click the month you wish to create the book |
| Create Book | Click to create the book for the month and employee |
| Close | Closes the window |



Create Book

Create An Appointment Book for JOHN SMITH

February, 2008

| Choose Interval | Block Out Days | | | | | | | Block Out Times | | | | | | | | | | | |
|---------------------------------|----------------|-----|-----|-----|-----|-----|-----|---|---|---|---|---|---|---|---|--|--|--|--|
| Interval | Sun | Mon | Tue | Wed | Thu | Fri | Sat | A.M. | | | | | | P.M. | | | | | |
| <input type="text" value="15"/> | | | | | | X | X | <input checked="" type="checkbox"/> 12:00 | <input checked="" type="checkbox"/> 12:30 | <input type="checkbox"/> 12:00 | <input type="checkbox"/> 12:30 | <input checked="" type="checkbox"/> 01:00 | <input checked="" type="checkbox"/> 01:30 | <input type="checkbox"/> 01:00 | <input type="checkbox"/> 01:30 | | | | |
| | X | X | X | X | X | X | X | <input checked="" type="checkbox"/> 02:00 | <input checked="" type="checkbox"/> 02:30 | <input type="checkbox"/> 02:00 | <input type="checkbox"/> 02:30 | <input checked="" type="checkbox"/> 03:00 | <input checked="" type="checkbox"/> 03:30 | <input type="checkbox"/> 03:00 | <input type="checkbox"/> 03:30 | | | | |
| | X | X | X | X | X | X | X | <input checked="" type="checkbox"/> 04:00 | <input checked="" type="checkbox"/> 04:30 | <input checked="" type="checkbox"/> 04:00 | <input checked="" type="checkbox"/> 04:30 | <input checked="" type="checkbox"/> 05:00 | <input checked="" type="checkbox"/> 05:30 | <input checked="" type="checkbox"/> 05:00 | <input checked="" type="checkbox"/> 05:30 | | | | |
| | X | X | X | X | X | X | X | <input checked="" type="checkbox"/> 06:00 | <input checked="" type="checkbox"/> 06:30 | <input checked="" type="checkbox"/> 06:00 | <input checked="" type="checkbox"/> 06:30 | <input checked="" type="checkbox"/> 07:00 | <input checked="" type="checkbox"/> 07:30 | <input checked="" type="checkbox"/> 07:00 | <input checked="" type="checkbox"/> 07:30 | | | | |
| | X | X | X | X | X | X | | <input type="checkbox"/> 08:00 | <input type="checkbox"/> 08:30 | <input checked="" type="checkbox"/> 08:00 | <input checked="" type="checkbox"/> 08:30 | <input type="checkbox"/> 09:00 | <input type="checkbox"/> 09:30 | <input checked="" type="checkbox"/> 09:00 | <input checked="" type="checkbox"/> 09:30 | | | | |
| | | | | | | | | <input type="checkbox"/> 10:00 | <input type="checkbox"/> 10:30 | <input checked="" type="checkbox"/> 10:00 | <input checked="" type="checkbox"/> 10:30 | <input checked="" type="checkbox"/> 11:00 | <input checked="" type="checkbox"/> 11:30 | <input checked="" type="checkbox"/> 11:00 | <input checked="" type="checkbox"/> 11:30 | | | | |

Create Times Close

The “**Create Appointment Times**” window allows you to choose the time between scheduled appointments (**Interval**), days that are available for scheduling appointments (**Block Out Days**), and the times that are available for scheduling (**Block Out Times**).

| Field/Button | Description |
|-----------------|--|
| Interval | Interval of appointment times in minutes |
| Block out Days | Click on the days when appointments are able to be scheduled (x represents no appointment on that day) |
| Block out Times | Click on the times when appointments are able to be scheduled; times with a checkmark will be blocked out. |
| Create Times | Click to create available appointment times |
| Close | Closes the window |



Create Times

Create An Appointment Book for JOHN SMITH

February, 2008

Choose Interval

Interval

15

Verify Interval

Double Check Your Interval !

Then Click OK or Cancel.

OK Cancel

Out Times

P.M.

| | |
|---|---|
| <input type="checkbox"/> 12:00 | <input type="checkbox"/> 12:30 |
| <input type="checkbox"/> 01:00 | <input type="checkbox"/> 01:30 |
| <input type="checkbox"/> 02:00 | <input type="checkbox"/> 02:30 |
| <input type="checkbox"/> 03:00 | <input type="checkbox"/> 03:30 |
| <input checked="" type="checkbox"/> 04:00 | <input checked="" type="checkbox"/> 04:30 |
| <input checked="" type="checkbox"/> 05:00 | <input checked="" type="checkbox"/> 05:30 |
| <input checked="" type="checkbox"/> 06:00 | <input checked="" type="checkbox"/> 06:30 |
| <input checked="" type="checkbox"/> 07:00 | <input checked="" type="checkbox"/> 07:30 |
| <input checked="" type="checkbox"/> 08:00 | <input checked="" type="checkbox"/> 08:30 |
| <input checked="" type="checkbox"/> 09:00 | <input checked="" type="checkbox"/> 09:30 |
| <input checked="" type="checkbox"/> 10:00 | <input checked="" type="checkbox"/> 10:30 |
| <input checked="" type="checkbox"/> 11:00 | <input checked="" type="checkbox"/> 11:30 |

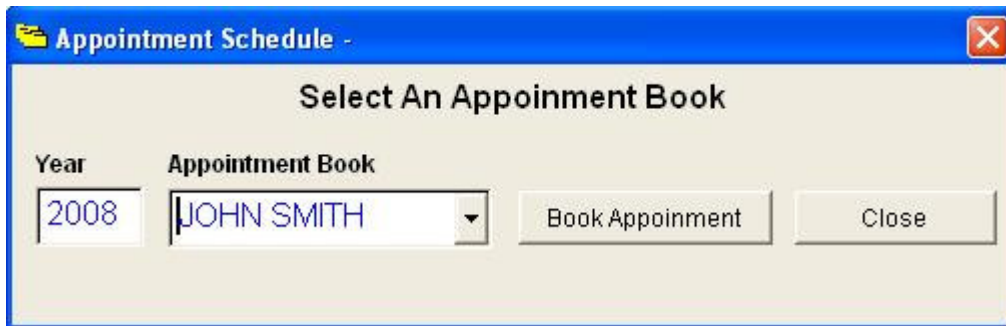
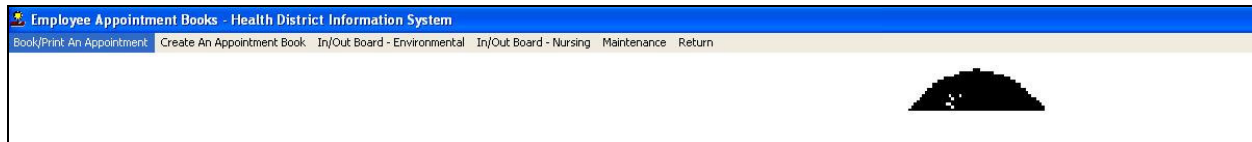
Create Times Close

After clicking the “**Create Times**” button, the window above will appear prompting you to double check your interval. Click “**OK**” to finish creating the book.

Book/Print An Appointment



Book/Print an Appointment



This window allows you to select what book you would like to book appointments. Simply enter the year and choose the appointment book for the employee.

| Field/Button | Description |
|------------------|--|
| Year | Year of the book |
| Appointment Book | Select the employee book you wish to schedule in |
| Book Appointment | Click to navigate to the appointment book window |
| Close | Closes the window |



Book/Print an Appointment

Book Appointment - JOHN SMITH / 2008 / 32-0

| | | | | | | |
|-----|------------|-----|-----|-----|-----|----|
| Jan | Feb | Mar | Apr | May | Jun | NB |
| Jul | Aug | Sep | Oct | Nov | Dec | PB |

| | | | | | | |
|-----|-----|-----|-----|-----|-----|-----|
| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
| | | | | | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | |

Name/Location

Address

Phone **Contact**

Service

Comment

Buttons: Close, Move Appt*, Clear Appt*, Delete Appt*, Add Appt., Search Book for Name, Book Appt., Only Available, Print

| Time | AM/PM | Name | Contact | Phone | Service |
|-------|-------|------|---------|-------|---------|
| 08:00 | AM | | | | |
| 08:15 | AM | | | | |
| 08:30 | AM | | | | |
| 08:45 | AM | | | | |
| 09:00 | AM | | | | |
| 09:15 | AM | | | | |
| 09:30 | AM | | | | |
| 09:45 | AM | | | | |
| 10:00 | AM | | | | |

The “**Book Appointment**” window is where you will book your appointments. The upper left hand corner displays whose appointment book you are in and the year for that appointment book. The month and day that you are scheduling will appear in **BLUE**. The days that appear in **BLACK** are other days in the specified month that are available for scheduling. The days that appear in **RED** are the block out days that are unavailable for scheduling.

| Field/Button | Description |
|-----------------|---|
| Name/Location | Enter the name/location of the appointment |
| Address | Enter the address |
| Phone | Enter the phone number |
| Contact | Enter the contact's name |
| Service | Enter the service |
| Comment | Enter any comments on the appointment |
| Book Appt. | Click a time in the Grid, then click to book the appointment |
| Move Appt.* | Right click to move an appointment from the grid |
| Clear Appt.* | Right click to clear an appointment |
| Delete Appt.* | Right click to totally delete an appointment time from the grid |
| Add Appointment | Click to add an appointment time to the grid |

| | |
|----------------------|--|
| Search Book for Name | Click to search for other appointments with the same name/location |
| Only Available | Click to view available appointment times only |
| Print | Click to open the print window |
| Close | Closes the window |

****** The Appointment Books module can be accessed from any HDIS Environmental Module by clicking ALT-A. All information from the record in that module will be transferred into the appropriate fields in the appointment book (i.e. name/location, address, contact, phone information).**

Print Button



Print

Print

Form:

☒ Print Daily ☐ Print Daily (all times) From To

☐ Print Mailing Labels

☐ Print Envelopes

☐ Print Letters

Output to:

☒ Preview ☐ Print

OK

Close

Print Options

| Field/Button | Description |
|----------------------|---|
| Print Daily | Prints a list of your daily appointments |
| Print Daily | Prints a list of your daily appointments with all times |
| Print Mailing Labels | Prints mailing labels for your appointments |
| Print Envelopes | Prints envelopes for your appointments |
| Print Letters | Prints letters for your appointments |
| Print | Prints the report |
| Preview | Previews the report |

Employee In/Out Board



In/Out Board – Environmental/Nursing

Employee Appointment Books - Health District Information System

Book/Print An Appointment Create An Appointment Book In/Out Board - Environmental In/Out Board - Nursing Maintenance Return

Environmental - In/Out Board

| Name | In | Out | Return | Am | Pm |
|----------------|--------------------------|--------------------------|--------|--------------------------|--------------------------|
| ANN SMITH | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| BERNIE KOSAR | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| BRIAN WILLIAMS | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| DOUG DICKERSON | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| EROCK KIRCHNER | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| JOE CARTER | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| JOHN STOREY | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| KELLY PAVLIK | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| KEVIN MONN | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| LUKE NAPAVER | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| MARK HARBISON | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| MAURA KELLOG | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| RANDALL FOXX | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| SEAN RADIGAN | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| THOMAS LANNING | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| TIM PETT | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| WILLIAM WEEB | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |

Zoom Close

The **Employee In/Out Board** is available for both nursing and environmental workers. Employees can mark whether they are in or out of the office and specify a return time. You can enter specific information on your whereabouts by clicking the **“Zoom”** button. This table can be accessed by all HDIS workstations.



Zoom

The screenshot shows a window titled "Zoom" with a blue title bar. The window contains several input fields and checkboxes. The "Name" field is filled with "BERNIE KOSAR". The "In / Out" and "Return" fields have checkboxes. The "Location" field is empty. The "City" field is a dropdown menu. The "Contact Name" field is empty. The "Contact Phone" field has three dashes. The "Employee Cell" field has three dashes. The "Comments" field is empty. A "Close" button is in the bottom right corner.

| Name | In / Out | Return | AM / PM |
|--------------|---|--------|---|
| BERNIE KOSAR | <input type="checkbox"/> <input type="checkbox"/> | | <input type="checkbox"/> <input type="checkbox"/> |

Location

City

Contact Name

Contact Phone

Employee Cell

Comments

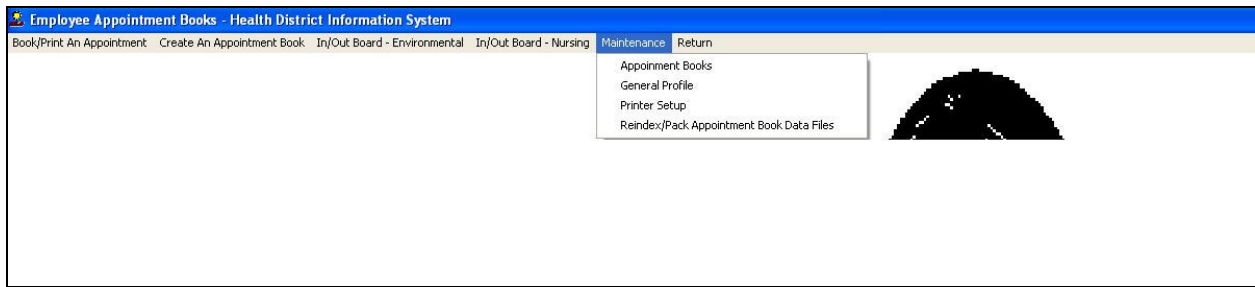
Close

The **Zoom** button allows you to enter specific information if you are out of the office.

Maintenance - Add/Delete/Modify Tables



Maintenance



The maintenance menu contains a list of tables that you can modify for your program.



Appointment Books

Add/Delete/Modify Appointment Books

| Name | Abbreviation |
|-------------------|--------------|
| | |
| BRIAN LAVELLE | BTL |
| BRODIE NAPAVER | BN |
| DOUG DICKERSON | DD |
| HOLLY COPTER | HC |
| JAMES AMENDOLA | JA |
| JANE SMITH | JS |
| JOE NAPAVER | JN |
| JOHN SMITH | JS |
| JOHN STOREY | JS |
| MICHELLE WILLIAMS | MW |
| | |
| | |
| | |
| | |

Close
Add
Delete
Print

| Field/Button | Description |
|---------------|------------------------------------|
| Name | Enter the employee's name |
| Abbreviation | Enter the initials of the employee |
| Close Button | Closes the table |
| Add Button | Adds a contact to the list |
| Delete Button | Deletes a highlighted entry |
| Print Button | Prints the list |



General Profile

General Profile

Demographics | **General** | Management | Environmental | Community & Public Health Services | Vital

Health Department

Division

Address1

Address2

City State Zip

County

Phone #'s FAX #

Federal Tax ID

Commissioner

Client/Server Location

☐ 2007 ☐ 2006 ☐ 2005 ☐ 2004 ☐ 2003 ☐ 2002 ☐ 2001 ☐ 2000 ☐ 1999 ☐ 1998

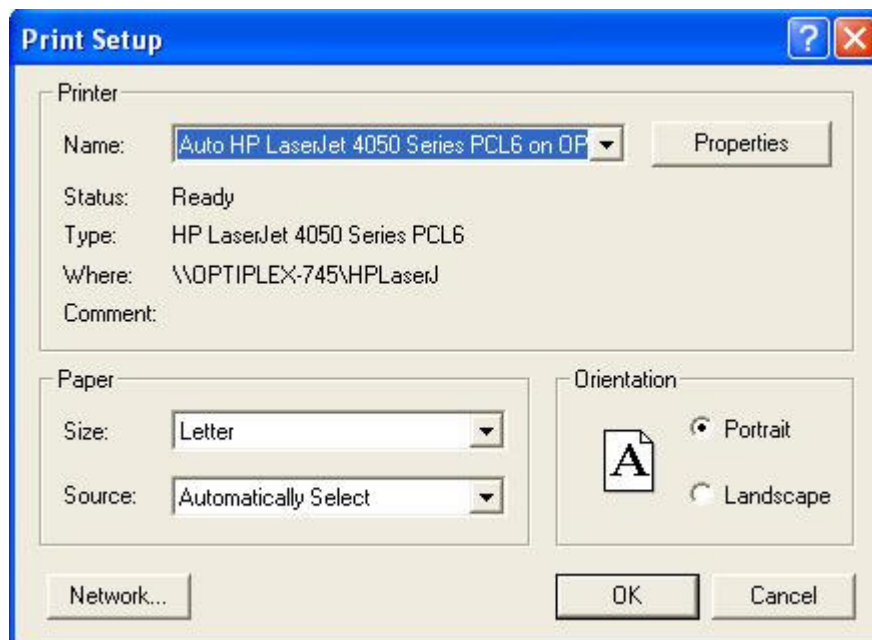
Make Checks Payable to:

Close

The **General Profile** enables you to enter the basic information for your health department.



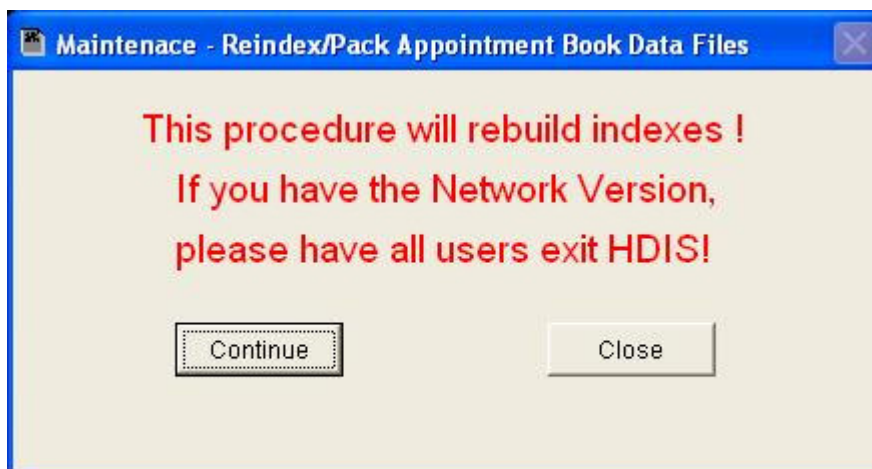
Printer Setup



The print setup allows you to choose from what printer you would like to print. Select the printer in the name dropdown and click “OK”.



Reindex/Pack Appointment Book Files



This function is only needed should your data be corrupt due to a power failure. Please contact CHC Software if you have any questions or concerns.

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helpdesk@hdis.org