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 , press the **enter** key on your keyboard.

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.

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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

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

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

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**).

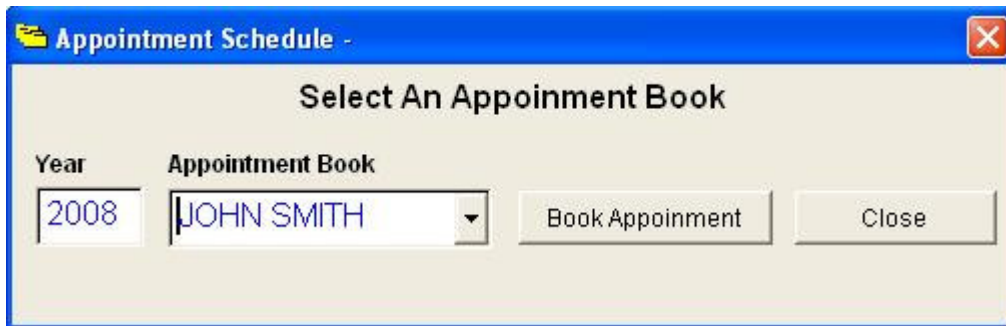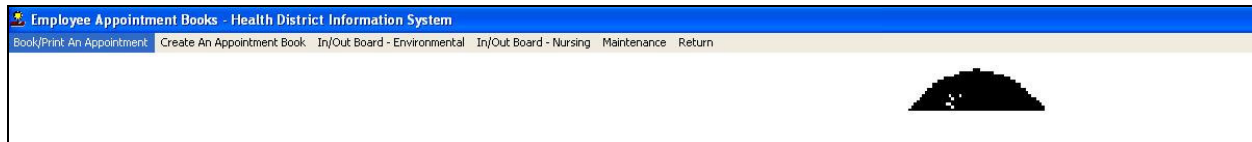| Field/Button	Description
Interval	Interval of appointment times in minutes
Block out Days	Click on the days when appointments are able to be scheduled (x represents no appointment on that day)
Block out Times	Click on the times when appointments are able to be scheduled; times with a checkmark will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

Create Times

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

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

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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 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

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.
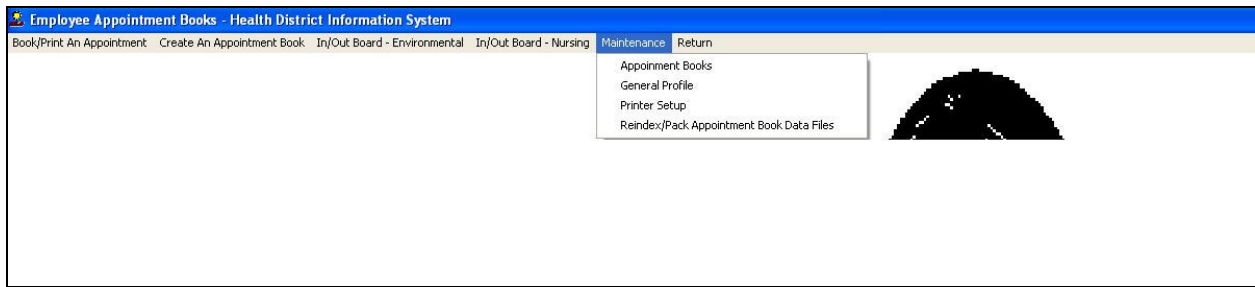
Zoom

The **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

| 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 icon] **General Profile**

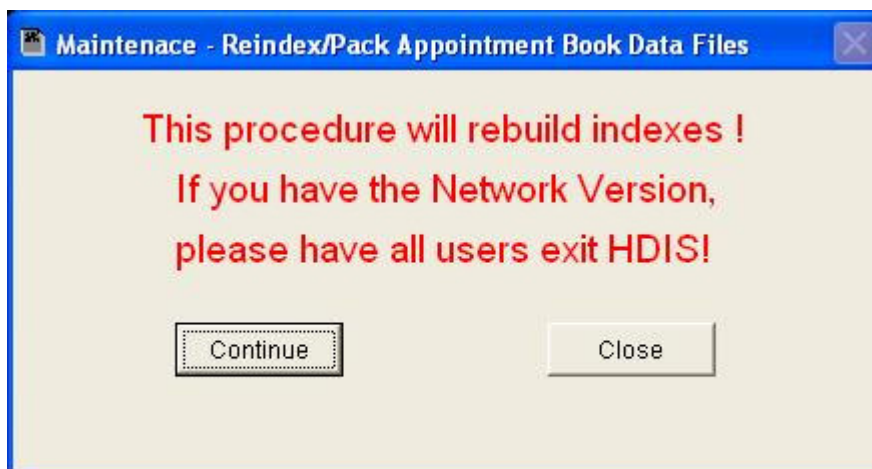The **General Profile** enables you to enter the basic information for your health department.

🖐 **Printer Setup**
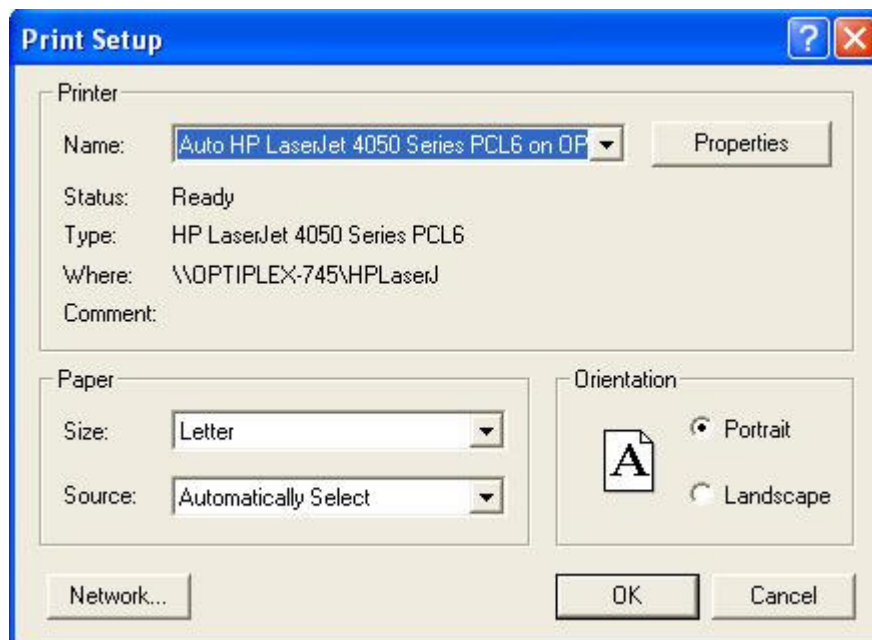
The print setup allows you to choose from what printer you would like to print. Select the printer in the name dropdown and click "**OK**".

🖐 **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.