

## Scheduling Calendar in IBHIS

- ✓ What it is used for / What goes on it
- ✓ What it looks like
- ✓ Scheduling an appointment
- ✓ Writing progress notes to the appointment
- ✓ Updating the appointment status

LACDMH Quality Assurance Unit – Policy and Technical Development Team 6/23/20

### Scheduling Calendar

(what it is used for & what goes on it)

**Used to: manage appointments, view practitioner availability, and write progress notes**

**All individual & group direct service appointments**  
(with service codes or placeholder codes)

\*A placeholder code is used when you are:


- unsure of the specific service code for that appointment
- scheduling a new client with only a Pre-Admit – use 'Intake Placeholder'

\*Placeholders for assessments & treatment

- Intake
- Initial Medication Evaluation (IME)
- Individual
- Group

**Block Appointment Slots**  
(block off practitioners' availability or unavailability)

- Block for Intake
- Block for IME
- Block - Officer of the Day
- Block - Meeting/Supervision
- Block - Training
- Block - Approved Time Off
- Block - Priority ACCESS Adult
- Block - Priority ACCESS Child
- Block - Other (see comments)



## Scheduling Calendar (what it looks like)



**1** It opens to your calendar at the site that you are associated with

- If you are associated to more than one site, then you will see the additional site(s) on the dropdown

**2** Below the site name it lists all of the practitioners associated to it

- Providers also have access to two (2) generic practitioners for their site:
  - OD [site number] (e.g., OD s6840)
  - Financial [site number] (e.g., Financial s6840)

**3** It defaults to today's date but allows you to select any date

**4** Find New Appointment  
Find Existing Appointment  
Refresh  
Reports

**5** Dismiss: closes the Scheduling Calendar

**6** Allows you to schedule an appointment by right clicking over the selected date/time and clicking **Add Appointment**

## Scheduling an Appointment

**1** Service Code  
Placeholder Code  
Block Code

**2** If you enter a **Group Service Code**, then 'Client' and 'Episode Number' fields gray out and the cursor takes you here

**3** Select **LE00019** (if client only has PreAdmit for an intake, then select PreAdmit)


**4** Defaults to **Scheduled** – see next slide for more info on status

**5** OPTIONAL – May enter notes here and they will be visible in the (1) Upcoming Appointments widget, and (2) [Appointment Contacts] report

Appointment Status (When putting the appointment on the Scheduling Calendar)	
Appointment Status	Situation
Scheduled	Appointment scheduled in advance
Scheduled – No Appointment Reminder	Appointment scheduled in advance <b>AND</b> you do <u>not</u> want it pushed to the Client Portal (e.g., team meeting w/o client present or home visits)
Unscheduled	<u>Walk-Ins/Call-Ins</u> : client walks in or calls for a service at that time without a scheduled appointment  <u>Emergency Field Response</u> : (e.g., PMRT / LET / MET)

### Checking In a Client (OPTIONAL)


Front Desk staff can check in clients for the purpose of alerting the practitioner that their client has arrived



8:00 AM - 9:00 AM  
BOO,BDO - PSYCHOTHERAPY 53+ MIN FF - Location: Office

COZOLINO,SUSAN (049104) - Client Appointment

- Check In
- Details/Edit
- Reschedule
- Copy
- Status Update
- Additional Services
- Overbook
- Delete
- View Summary
- Real Time Inquiry (270) Request
- Individual Service Progress Note
- Scheduled Group Progress Notes
- Medication Service Progress Note
- Crisis Evaluation Progress Note



System Message

**System Message**

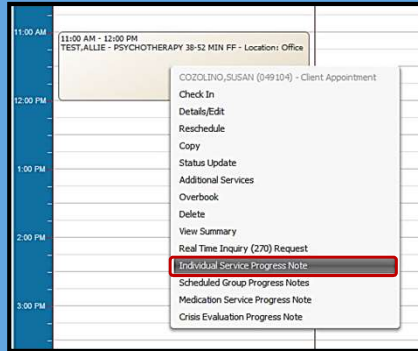
Susan Cozolino, your 08:00 AM ET appointment has arrived.

OK

Below is the pop up message that will automatically be sent to the practitioner

## Writing a Progress Note to the Appointment

Right click over the appointment and select the appropriate progress note form



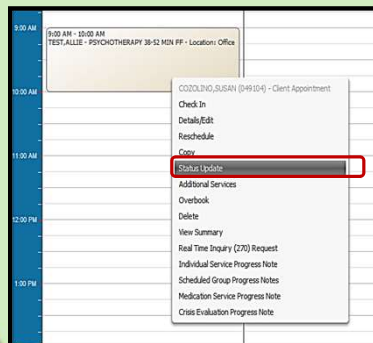
Several fields pre-populate into the Progress Note from the appointment

## Updating the Appointment Status

(No Shows / Cancellations)

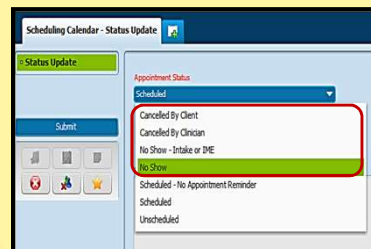
When a client 'no shows' or 'cancels' make sure to update their appointment status

Right click over the appointment and select **Status Update**



Select the appropriate updated Appointment Status:

- **Canceled By Client**
- **Cancelled by Clinician**
- **No Show – Intake or IME**
- **No Show**



## Updating the Appointment Status

Pause the video if you want to review this

Appointment Status Update	Situation	Notes / Claiming
No Show	<ul style="list-style-type: none"> <li>Client does not show up for scheduled appointment</li> </ul>	<p><b>Will NOT create a billable service</b></p> <ul style="list-style-type: none"> <li><b>Non-Billable note</b> – write a note to the appointment</li> <li><b>Billable note</b> – use a Special Use Note (e.g. reviewed chart prior to no show in preparation of visit)</li> </ul>
No Show – Intake or IME (IME=Initial Medication Evaluation)	<ul style="list-style-type: none"> <li>Client/Potential Client does not show up for scheduled INTAKE or Initial Medication Evaluation (IME) appointment</li> </ul>	<p><b>Will NOT create a billable service</b></p> <ul style="list-style-type: none"> <li><b>Non-Billable note</b> – write a note to the appointment</li> </ul>
Canceled by Client	<ul style="list-style-type: none"> <li>Client calls to cancel prior to scheduled appointment</li> <li>Client shows up for scheduled appointment but unable to wait and cancels / walks out</li> <li>Clients walks in and requests an appointment (unscheduled) but unable to wait and cancels / walks out</li> </ul>	<p><b>Will NOT create a billable service</b></p> <ul style="list-style-type: none"> <li><b>Non-Billable note</b> – write a note to the appointment</li> <li><b>Billable note</b> – use a Special Use Note (e.g. reviewed chart prior to no show in preparation of visit)</li> </ul>
Canceled by Clinician	<ul style="list-style-type: none"> <li>Practitioner has to cancel the client's scheduled / unscheduled appointment (e.g., practitioner is sick / emergent issue arises)</li> </ul>	<p><b>Will NOT create a billable service</b></p> <ul style="list-style-type: none"> <li><b>Non-Billable note</b> – write a note to the appointment</li> </ul>

## Selecting 'No Show' or 'Canceled by Client' triggers this pop up message

Scheduling Calendar - Status Update

Status Update

Submit

🗨️
📄
📅

🚫
👤
★

Appointment Status

No Show

Do you want to launch a Special Use Progress Note to document a billable service for this appointment?

OK
Cancel

If you select **OK**, then it opens a Special Use Progress Note...

After submitting the note, it takes you back here...click **SUBMIT**

Scheduling Calendar - Status Update

Status Update

Submit

Appointment Status

No Show

Confirmed

Yes

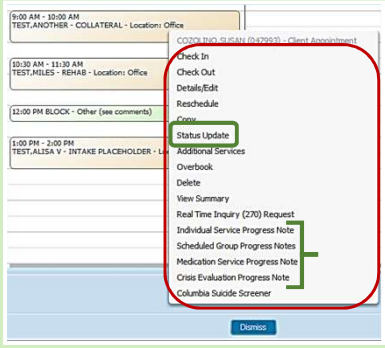
### Icons on Appointments

10:00 AM - 11:00 AM TEST,ALLIE - PSYCHOTHERAPY 38-52 MIN FF - Location: Office	Checked In
11:00 AM - 12:00 PM TEST,ALLIE - PSYCHOTHERAPY 38-52 MIN FF - Location: Office	DRAFT Note
11:00 AM - 12:39 PM TEST,ALLIE - PSYCHOTHERAPY 38-52 MIN FF - Location: Office	FINAL Note
11:00 AM - 12:39 PM TEST,ALLIE - PSYCHOTHERAPY 38-52 MIN FF - Location: Office	FINAL Note & Posted
1:00 PM - 2:00 PM TEST,ALLIE - PSYCHOTHERAPY 38-52 MIN FF - Location: Office	No Show
1:00 PM - 2:00 PM TEST,ALLIE - PSYCHOTHERAPY 38-52 MIN FF - Location: Office	Canceled

## Scheduling Calendar vs My Calendar

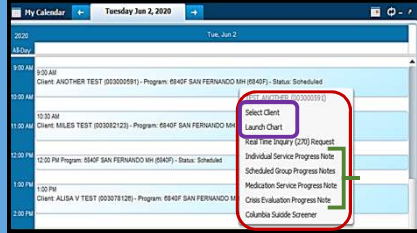
Scheduling Calendar

**Form**  
Add appointments



My Calendar

**Widget**  
CANNOT add appointments



Select Client: (puts the client 'in context') - widgets populate with that client's info

Launch Chart: opens that client's chart

## Let's go into IBHIS...



- Add an Appointment**
- Write a Note to the Appointment**
- Update the Appointment Status**
- Create a Block Appointment**
- Use the Find Existing Appointments**