Schedules Glossary

A list of commonly used terms in VetView 2.0 including new features for our Scheduling system

Add Special Day: Special Day allows you to flag an entire day, with or without blocking the individual time slots for the day. Special Day with Prevent Scheduling has the effect of blocking out the entire day. Special Day without prevent scheduling will allow you to set the day as a different color and change the comment, but will still allow both time slot and free form scheduling as normal. Use this feature to highlight important days at the hospital or service area, such as VIP visitors or holidays.

Admit: The process to indicate that the patient has been admitted to the hospital as an inpatient and will be staying for some period of time, outside of the bounds of a standard outpatient appointment. You can assign a special color status to admitted patients on the schedule. You can also automate certain processes, such as adding an admitted patient to the census, or notifying the patient's RDVM of the admission via the Comm Worklist.

Apply Template: Allows you to select a previously saved template and paste it to a period of time. You can alternate weeks for block rotations. Note that this only affects time slots. No appointments are changed when pasting a template. If an appointment falls into a time slot when a new template is applied, it will automatically merge into that time slot on the schedule. Otherwise, it will appear as an orphaned appointment, and you will need to manually reschedule it with the client or leave it as a free form.

Appointment Comments: Comments unique to the appointment. Loads as the Time Slot comments if the appointment was scheduled into a time slot, but can be saved and changed to reflect any valuable information for the appointment. Internal usage only.

Appointment Icons: Status icons will start appearing on an appointment once it has been created. The icons we have included with 2.0 include an icon for student, for doctor, for patient check-in, an optional icon for patient sex, and order status icons.

Appointment Personnel: Appointments inherit any personnel from time slots, as well as any Day personnel who were set to auto-add for the day. Additional personnel can be added to the appointment prior to patient check-in, allowing the front desk staff to clarify which users (e.g. what student or tech) will handle each patient as the day progresses. Once the patient has arrived and is checked-in, appointment personnel are locked and rolled over to Episode personnel.

Appointment Search: A more robust search for appointments. Allows you to look up by patient, owner, unit, doctor, appointment type, and by date range. Also allows you to filter by whether the appointment is in a time slot, or is freeform / orphaned, for rescheduling purposes if needed. This screen can also be used to build a printable list of each day's appointments for a unit or service area. Results on this screen can be sent back to the Schedule screen using the Reschedule Selected Appointment features, and will appear in the working queue.

Appointment Status Color: The background of each appointment cell will change based on the status of the episode. VetView uses a set of basic colors for the default, but you can customize these colors to match your school's color branding or disable the colors entirely under Unit Setup.

Appointment Task Type: In addition to Regular Appointments and Request appointments, there are four special appointment tasks that can be transformed into regular appointments or request appointments. These are drop offs, pick-ups, waiting list, and needs appointment tasks. They live on the right hand Task Panel.

Appointment Type Color Bar: In 2.0 we added an appointment type color bar to each appointment cell. This bar allows you to count at a glance how many appointments of each type is on the schedule for the day.

Appointment: The link between a pre-admission and a time slot on a schedule. An appointment reserves that time slot for a specific patient, and allows additional details for the future episode to start being added.

Block Out Time Slot: Individual time slots can be blocked without impacting the rest of the day or other days on the schedule. Time slots can be unblocked as well. Blocked out time slots are pink by default, but you can set a custom color if you want them to appear as something else.

Cancel vs Delete Appointment: A cancelled appointment is an appointment for which you wish to retain a record of it having once been scheduled, e.g. the client cancelled. A *deleted* appointment is one that was made unintentionally, and you do not need to keep a record of it having once been scheduled. Cancelled appointments remain in the system in the status of Cancelled and can be searched against. Deleted appointments are removed from the system and cannot be searched against.

Check-In: The process to indicate that a patient has arrived and has been entrusted to the care of the hospital. You can check in a regular appointment or a drop off appointment. A check mark appears on the schedule to indicate that the patient's PA has been checked in. You can assign a special color status to checked-in patients on the schedule.

Close Episode: The final step to indicate that all charges for the episode have been logged, all medical records are complete and returned, and no further changes should be made to the episode. You can assign a special color to closed episodes on the schedule screen.

Copy/Paste Day: You can set up a "model day" or "model week" and then copy this out over a period of time. For example, if you have your ideal Monday set up, you can replicate that out over to Fridays if the time slots will be identical.

Copy/Paste Time Slot: You can right click on a time slot and copy it, and then right click anywhere else on the schedule to past it. If you are on a calendar view, the time slot will be pasted starting at the new time you selected. You can paste the time slot multiple times this way. You can also drag and drop the copied time slot onto another part of the schedule. Time slots can be copied onto any schedule within the same unit. When you have finished pasting, you can right click on the copied slot in the Working Queue on the left hand task panel and remove the copied slot.

Copy/Paste Week: Once you have built up the time slots for a week's schedule, you can waste this out to future weeks. You can repeat every week, or if you have a regular rotation, you can alternate as many as four weeks.

Day Comments: Important information for each unit that can be set for the day. For example, if you have rechecks only on Fridays, you can put a comment for "Rechecks Only" for every Friday and it will appear at the top of that schedule's column. Special Day comments will override normal day comments.

Day Personnel: The personnel that are scheduled to work that day. Shifts are not defined in VetView, but can be indicated with custom role names if desired (e.g. "8AM Tech" as a role name.) All users can be set to auto-add to episodes for each day, if you utilized one schedule per team or shift. Users who have the faculty, intern, or resident Employee types can be set as auto-admitted / attending DVM on the appointment or episode at the day level as well. **Day personnel is not intended to replace or integrate with payroll systems such as Kronos or OneSource.**

Discharge: The process to indicate that the patient has been returned to their owner and will be sent home, or has been euthanized and no further care will be provided. You can assign a special color for discharged patients on the schedule. You can also automate certain processes, such as notifying the RDVM of the discharge, removing the patient from the census, or automatically closing the episode order upon discharge to prevent further charges.

Drop Off: An appointment task type that indicates that the patient will be dropped off at a specific time prior to their regular appointment. Drop Offs can also have time slots associated with them, so they can act as a replacement for a Regular appointment for units that see patients for an entire day (e.g. Oncology.) For units that use drop offs exclusively, the Day List View should be a primary screen for viewing and manipulating patients, as Regular appointments can be hidden. For units that will not use Drop Offs, these can be hidden from the task panel as well.

Episode Personnel: The users who handle the patient during the actual visit. Episode personnel can be pre-assigned on the schedule or the PA screen, but once the patient is checked in, changes must occur on the patient record in the Episode Personnel section. If the attending DVM changes or the patient will be changing service areas, you will need to use the Transfer Patient feature to record these changes.

Free Form Appointment: An appointment that is on a schedule outside of a time slot. These require a separate privilege than regular appointment scheduling. Other than not having any inherited characteristics or personnel from a time slot, these behave exactly like any other appointment.

Go To Admission: The short cut from an appointment to the PA screen. Only available on appointments, not time slots.

Group Schedules: Unit schedules can be linked by a group name. For example, you may have your cardiology doctors each with their own schedule linked under the group name of Doctor, and then have a separate schedule for tech appointments that is not part of the group. Use group schedules to link any schedules you want to have appear as a sub-unit on the schedule screen, separate from other schedules within the same unit.

Needs Appointment: An appointment task type that indicates the patient will need to be seen again for a future appointment, but the appointment has not been scheduled yet. Creates the PA so that the visit can begin to be documented. Can be included as part of the discharge process so that front desk staff, or later on client coordinators, can contact the client and arrange for the follow up appointment. Includes a shortcut to the communication log to track these contact efforts. These can be hidden from the task panel if your unit will never use this workflow.

No Show Appointment: An appointment that was scheduled, but for which the client did not appear. Remains on the schedule in the status of No Show. A new appointment can be scheduled against the same PA, or you can No Show the entire PA and start over from scratch, depending on your service area's workflow.

Orphaned Appointment: An appointment that does not have an underlying time slot. This includes free form appointments, but also any appointments that were dislodged from their time slots due to template changes. If you have done a major schedule change, you can perform this search to build a list of appointments that may need to be rescheduled.

Patient Reminder: Internal reminders to the hospital can be set to appear on the task panel. These reminders, instead of being sent directly to the client, are meant for internal use – e.g. to manually call the client to schedule an upcoming visit, or to discuss lab results, or to plan for the next step of patient care. If an appointment is scheduled against a reminder, it will drop off this list and change from Incomplete to Scheduled. These can be hidden from the task panel if your unit will never use this workflow.

Personnel Role: Customized roles for each unit's staff as they will be logged against the schedule for the day. Can be tied to employee types, such that only eligible faculty, residents, or interns can be assigned to DVM roles, only staff to staff roles, only tech to tech roles, etc. Roles are not required to use basic VetView schedules, but at least one role must be set up to use any of the Schedule Personnel's features.

Pick-Up: An appointment task type that indicates the patient will be picked up at a specific time. Does not require a time slot (the assumption being that there can be an unlimited number of pick-ups as the only limiting factor was how many patients were actually seen!) A pick up does not require a drop off or regular appointment. Pick-ups may be scheduled from the patient record as well as from the PA screen or the schedule screen. These can be hidden from the task panel if your unit will never use this workflow.

Pre-Admission (PA): A record of a patient's future visit in the hospital. A PA can be added independently of an appointment, but also may contain multiple appointments (for a series of visits) or multiple appointment types (e.g. a drop off, a pick up, etc.) The PA is intended to record all activities for the patient, the client, and the RDVM until the point that the patient is checked in.

Quick PA Lookup: Allows you to find a PA to schedule if you already have the PA number. Displays the PA as an object that can be dragged to other parts of the screen.

Regular Appointment: The classic appointment from UVIS and earlier versions of VetView. This is an appointment scheduled against a PA for a future visit to the schedule's unit.

Request Appointment: Appointments that are scheduled for Request Areas. Unlike a regular appointments, these must have both an episode and an open Request on the episode to schedule. A patient may have a regular surgery appointment with Internal Medicine, and a scheduled Anesthesia request appointment as part of the surgery.

Reschedule: Changes the time of an appointment. This removes the appointment from one time and prepares it to be placed at another.   Logs the appointment as Rescheduled in the appointment log, for any questions about who rescheduled and when.

Save Template: Copies the day or the week select and allows you to save it for later use. For example, you can build out a Block A week and a Block B week, and then save each of those weeks to apply toward a future period of time.

Schedule Screen: The primary screen to display each unit's schedules, their scheduled appointments and open time slots, and to schedule patients into those time slots. Contains three panels that can be expanded and collapsed. Contains four views to adapt to each unit's regular workflows.

Schedule Template: Templates are permanent arrangements of time slots, personnel, and comments. They can be saved and restored from the Schedule screen. All existing templates from UVIS or VetView 1.7 are still present in

Schedules by Unit: The schedule list on the left hand panel is sorted by unit. If a unit has multiple schedules, you can expand and collapse the unit selector to see them all. If a unit only has one schedule, the schedule will appear under its own name instead.

Show/Hide Schedule (formerly schedule active log): Newly created schedules are "hidden" by default. This feature allows you to turn on and off entire schedules without actually deactivating them from the setup screen. For example, if a doctor is on vacation for a month, you can Hide the schedule to prevent any scheduling for that doctor. Hiding a schedule preserves all the time slots and underlying setup until the schedule is ready to be set to Show again.

Time Scale Grid: Additional columns you can add when you have multiple time slots or appointments scheduled within the same span of time. Will automatically add as you add more time slots, but if you are building a template and want to manually add or remove these time scale grids, you can access them via the right click menu on the central panel.

Time Scale: The rows along the left hand side of the central panel that displays the increments of time. The minimum increment is 15 minutes, but you can scale up to an hour in your user preferences. If you have many shorter appointments, a smaller grid may be preferable, but if you have longer appointments, you may wish to scale up to a larger time scale.

Time Slot Comments: Comments unique to the time slot. These comments are locked to the time slot but will initially carry over to any appointment scheduled in the time slot. Internal usage only.

Time Slot Personnel: Personnel can be pre-assigned at a time slot level. For example, if your unit has one primary vet tech who oversees all Tech appointments, you can assign that user to the Tech time slots, and have them automatically added to the appointment when it is scheduled.

Time Slot: A "bucket" of time carved out on a schedule. Time slots have appointment types, so that the time can be reserved for specific types of patients or procedures (e.g. a recheck versus a surgery.) People can be added to time slots. Time slots can exist independently of appointments. If no appointment is ever added to a time slot, it will remain empty on the schedule in the past.

User Preferences: A window that allows the user to customize the Schedule Screen with their preferred schedules, views, time scale, etc. The different options on User Preferences are meant to adapt the schedule screen to different monitor sizes and also different uses and workflows.

Views: Controls the appearance of the central and contents of the right hand panels of the schedule screen. Day View only displays today's appointments. Week View displays appointments from Sunday through Saturday. List View displays all appointments vertically as rows. Calendar View displays them in the classic schedule format. These four options are combined as Day Calendar View, Week Calendar View, Day List View, and Week List View. Each view can be pre-set in User Preferences, but you can change to another view at any time from the central panel.

Waiting List: An appointment task type that indicates that the client wants an appointment on a date or time that is not available. A regular appointment at a later time can be scheduled simultaneously with a Waiting List appointment, so that if something earlier opens up, the waiting list appointment can be slotted in. Should the client then arrive for the earlier appointment, the second later appointment is cancelled upon check-in of the patient. These can be hidden from the task panel if your unit will never use this workflow.

Working Appointments: Any PAs, rescheduled appointments, or copied appointments that appear in the left hand task panel. These can be dragged and drop anywhere else on the schedule screen to generate a new appointment.   The Working Queue can support multiple appointments if they are generated from the Appointment Search screen for bulk reschedules.