
Chapter 2 Client Module



Overview

TIMS is a client-centered application. All information stored and processed in TIMS is in some way connected to people receiving tuberculosis-related services in your community. Most information is related directly to the client: name and address, the results of medical tests, records of the treatment they are receiving, and so forth. Other information is indirectly associated with clients: the names of the facilities that provide services, the names of the people providing those services, etc.

Use the Client module to add, edit, and maintain information about people receiving tuberculosis-related services at your facility. The application's client-centered approach provides easy access to specific client information. For this reason, the functions of the Client module can be accessed from each of the other client-centered modules (Surveillance and Patient Management).

The Client module enables you to:

- Add a new client to the TIMS database
- Modify existing client information
- Track multiple addresses for a client
- Track additional names (aliases) for a client
- Track client telephone numbers
- Maintain client appointments
- Record client dispositions
- Track a client's origins

Quick Start

Open the Client Module

1. To open the Client module, click the **Client** button on the toolbar, or select **C**lient from the current primary menu (the first menu on the left).



Add a New Client

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **N**ew, or click the **New Client** button on the toolbar.



3. Complete as much information as possible in the New Client dialog box and click **OK**.
4. Follow the on-screen instructions to either add the new client or select their previously existing record from the list of possible matching records.

Edit an Existing Client

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **E**dit, or click the **Edit Client** button on the toolbar.

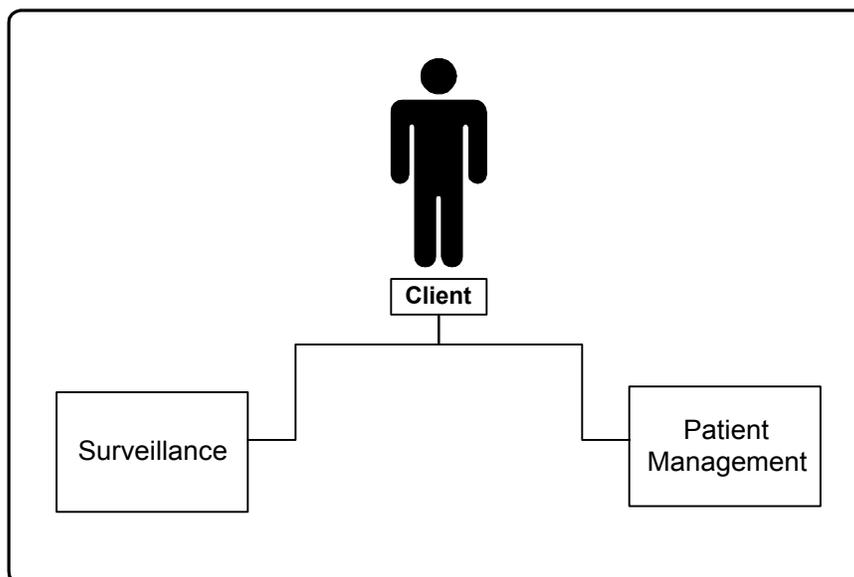


3. Select a client from the Change Focus dialog box and click **OK**.
4. Change information on the Client Information screen as necessary.

Working with Client Information

TIMS is client-centered like the facilities it is designed to support. Every feature of the application is related to the client in some way: clients are tested and treated, and workers are assigned to work with clients, etc.

These functions are also available in the other client-centered modules, **Surveillance** and **Patient Management**.



Open the Client Module

To open the Client module...

- Click the **C**lient button on the toolbar, or select **C**lient from the current primary menu (the first menu on the left).



Add a New Client

TIMS attempts to ensure that no duplicate clients are entered in the system by searching for existing clients as an integral part of the Add Client procedure.

First and last names are the minimum required information needed to add a client. However, since other modules require additional client information, it is best to complete as much information as possible.

Note: Users with low access privileges cannot add or edit client records.

To add a new client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **N**ew or click the **New Client** button on the toolbar.



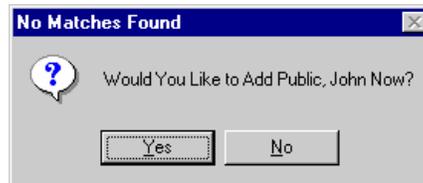
3. Complete as much information as possible in the New Client - Set Search Criteria dialog box. You must provide at least the client's first and last names.

4. Click **OK**. The Search Client dialog box will automatically appear. Click **Cancel** to abandon the Add New Client operation and return to the main menu.
5. Click **Yes** to search for matching clients in the TIMS database. Click **No** to skip the client search and add the new client immediately. Click **Cancel** to return to the New Client - Set Search Criteria dialog box.

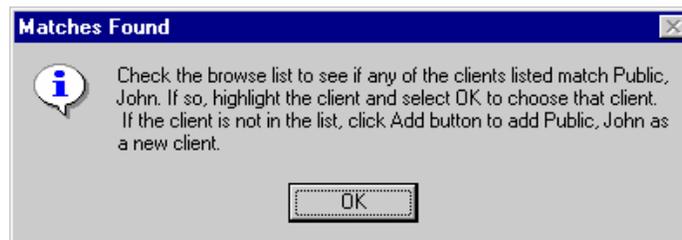
If you did not see the Search Client dialog box, your TIMS system administrator has configured TIMS to always check for matches in System Preferences.

6. Do one of the following:

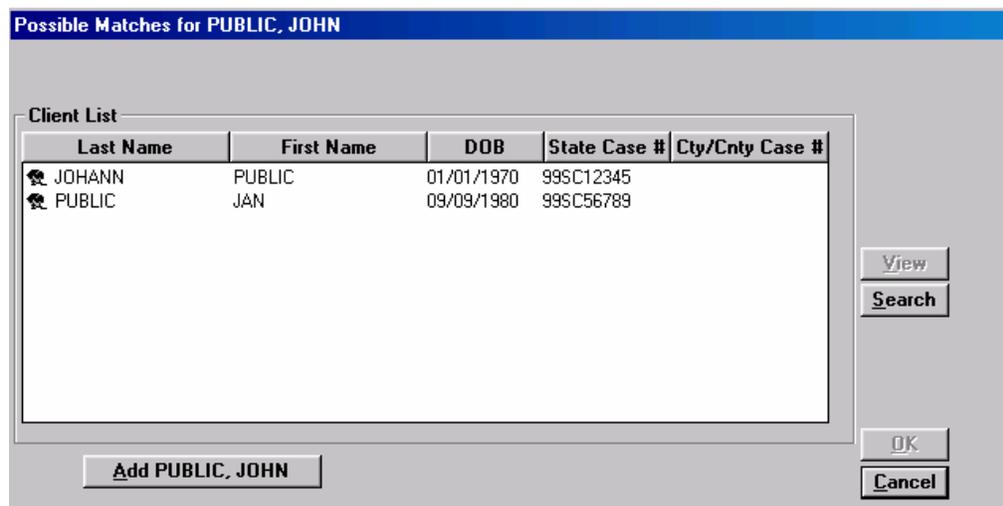
2.If no matches are found, click the **Y**es button to add the new client. Click the **N**o button to abandon the Add New Client operation and return to the main menu.



- If TIMS finds possible matches, click the **OK** button to close the Matches Found dialog box.



- Evaluate the possible client matches. If one of the displayed entries is the client you are trying to add, click on the record to select it and click the **OK** button (enabled when you selected a client). If you need additional information, select the record and click the **V**iew button (enabled when you selected a client) to display additional information about that client. If none of the displayed records are a match, click the **A**dd button. Click the **C**ancel button to abandon the Add New Client operation and return to the main menu.



The Search function is disabled at this point because you are currently performing a search. The search function is available during the Change Focus operation, which uses this same window.

7. The Client Information window is displayed.

Open the Client Information Window

Additional client information can be entered any time after a client record has been added to the TIMS database. The Client Information window appears immediately after a new client has been entered.

To open the Client Information screen at other times...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **E**dit or click the **Edit Client** button on the toolbar.



Add Identification and Demographic Information

The Client Information window enables you to add and edit identification information as well as demographic information such as date of birth, race, and ethnicity.

Note: Although you can save client information without a State Case Number, the Report of Verified Case of Tuberculosis (RVCT) in the Surveillance module requires it.

Client - [Client Information]
Client Window Help

Current Client: DOE, JANE

Last: DOE First: JANE Middle:

Client Identifiers
State Case Number: 000000123 Social Security #: 834-34-3434
City/County Case Number: Date of Birth: 02/02/1999 Age: 3

Sex
 Male Female Unknown

Ethnicity (Select one)
 Hispanic or Latino Not Hispanic or Latino Unknown

Race: (Select one or more)
 American Indian or Alaska Native Native Hawaiian or Pacific Islander
 Asian White
 Black or African American Unknown

Country of Origin
 U.S. Not U.S. Unknown Date Entered U.S.: 00/0000

Language
Primary Language: ENGLISH

Address
Alert
Alias
Name
Phone
Save
Close

To add or complete client identification and demographic information...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.

3. Add or complete all available information in the Client Identifiers section.

Client Identifiers	
State Case Number: 97GA00001	Social Security #: 123-45-6789
City/County Case Number:	Date of Birth: 01/01/1960 Age: 37

- If you don't know the client's date of birth, right-click the Date of Birth field and select **Unknown** from the menu that appears.
- A question mark icon will appear once you leave the Date of Birth field.



4. Add or complete the client demographic section of the Client Information window.

See Appendix SUR I (RVCT Form Completion Instructions) for additional information.

Sex <input type="radio"/> Male <input type="radio"/> Unknown <input checked="" type="radio"/> Female	Ethnicity (Select one) <input type="radio"/> Hispanic or Latino <input type="radio"/> Unknown <input type="radio"/> Not Hispanic or Latino
Race: (Select one or more) <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> Asian <input type="checkbox"/> White <input type="checkbox"/> Black or African American <input type="checkbox"/> Unknown	

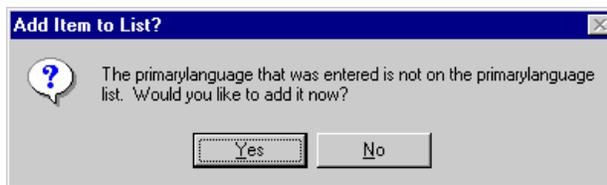
5. Enter the client's Country of Origin.

Country of Origin	
<input type="radio"/> US Date Entered U.S.: 03/1998 <input checked="" type="radio"/> Not US <input type="radio"/> Unknown	GHANA

- If you select Not US, select the client's country of origin from the drop-down list and enter the date they arrived. Right-click **Date Entered US** to record the date as unknown or partially unknown. For partially unknown dates, enter the year the client arrived before you select **Unknown** from the shortcut menu. A question mark icon will appear once you leave the Date Entered US field.
6. Select the client's primary language from the Language list.
 The Understand English and Speak English check boxes appear only if the Primary Language is not English. Select **Understand English** if the client can understand the English language. Select **Speak English** if the client can speak the English language.

Language	
Primary Language:	SPANISH
<input checked="" type="checkbox"/> Understand English	<input type="checkbox"/> Speak English

- If the appropriate language is not in the list, you can type it in to add it.



7. Click the **S**ave button.
8. Click the **C**lose button.

Edit a Client Name

Only users with System Administrator, High, or Medium user privileges can modify client names.

To change a client name...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Click on the **Edit Client Information** button on the toolbar to open the Client Information window.
3. Click the **N**ame button.
4. Edit or replace the information in any of the three Name fields.



5. Click the **S**ave button.
6. Click the **C**lose button.

Client Addresses

TIMS can track an unlimited number of addresses for a single client. These addresses can be used to provide clinic personnel with additional information to contact clients.

Types of addresses:

- Current** The Current Address is the client's current primary residence. Current addresses appear in bold type.
- Reporting** The Reporting Address is the official address used for surveillance. Reporting addresses must be within the same state as the site entering the record. The Reporting Address appears in red. The Reporting Address is automatically generated into Question 4 a, b, c, d, & e in the Surveillance module. See *Appendix SUR I (RVCT Form Completion Instructions)* for details.
- Previous** All other addresses are considered previous addresses and are maintained for historical purposes.

Note: Users with Low access privileges cannot add, edit, or delete client address records.

Add a Client Address

City, State, County, and **Within City Limits** entries are required to complete a client address record.

To record a client address...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Click on the **Edit Client Information** button on the toolbar to open the Client Information window.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Click the **Address** button.

This displays the Client Addresses dialog box.

Street Address	City	State	Start Date	Reporting
			05/29/1997	[B] Current

Reporting Address
 Current Address

Current Address:
 Street: _____
 Address: _____
 City: _____ State: _____ Date: 05/29/1997
 Within City Limits:
 Yes No Unknown

County: _____ Zip: _____ Census Tract: _____

4. Click the **New** button.

5. Enter the address information as completely as possible.

Current Address

Street: 1234 MAIN ST

Address: APT A32

City: ATLANTA State: GA Date: 01/01/1998

Within City Limits:
 Yes No Unknown Reporting Address

County: FULTON Current Address

Zip: 30309 - Census Tract:

6. Select **Current Address** if this address is the client's current primary residence. Select **Reporting Address** if this address should be used as surveillance data.
7. Click the **S**ave button.
8. Click the **C**lose button.

Edit a Client Address

You can change an existing client address using the Edit feature.

To change a client address...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Click on the **Edit Client Information** button on the toolbar to open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **Address** button.
4. Select the address you want to change and click the **E**dit button.

Street Address	City	State	Start Date
150 PULASKI ST	MEDFORD	OR	02/13/1998
JACKSON COUNTY JAIL	MEDFORD	OR	12/21/1997

5. Make the necessary changes to the address information. You can cancel your changes by clicking the **U**ndo button.
6. Click the **S**ave button.
7. Click the **C**lose button.

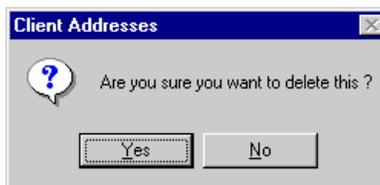
Delete a Client Address

Invalid or out-of-date client addresses can be removed from the TIMS database. However, you may want to maintain a list of previous addresses as historical records or to assist with client location.

Note: Deleting the Reporting Address will remove the information from the Report of Verified Case of Tuberculosis (RVCT) in the Surveillance module.

To delete a client address...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Click on the **Edit Client Information** button on the toolbar to open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **Address** button.
4. Select the address you want to delete and click the **Delete** button.
5. Click the **Yes** button to delete the selected address. Click the **No** button to cancel the delete operation.



6. Click the **Close** button.

Client Phone Numbers

TIMS enables you to enter and store an unlimited number of phone numbers for a single client. This enables you to track home, work, and other numbers where the client can be reached.

You must enter both the phone number and a description to record a client phone number.

Note: Users with Low access privileges cannot add, edit, or delete client phone numbers.

Add a Client Phone Number

To record client phone numbers...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **Phone** button.
This displays the Phone Number dialog box.

Phone Number	Description
() -	

Phone Number: () -

Description:

New Edit Delete Save Close

4. Click the **New** button.
5. Enter the Phone Number and a Description of that number in the appropriate fields.

Phone Number: (503) 555-1101

Description: HOME

6. Click the **Save** button.
7. Click the **Close** button.

Edit a Client Phone Number

To make changes to a client phone number...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **Phone** button.
4. Select a Phone Number record in the list and click the **Edit** button.

Phone Number	Description
(503) 555-1101	HOME
(503) 555-1102	WORK (M - F)
(503) 555-1103	WORK (SAT + SUN)

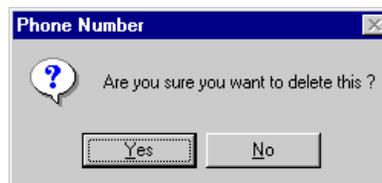
5. Make the necessary changes to the selected phone number record.
6. Click the **Save** button.
7. Click **Close** button.

Delete a Client Phone Number

You can remove invalid or out-of-date phone numbers from a client's record. Client phone numbers should only be removed if they are not valid. Out-of-date numbers should be kept for historical reference.

To remove a phone number from a client's record...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **Phone** button.
4. Select a Phone Number record in the list and click the **Delete** button.
5. Click the **Yes** button to delete the selected record. Click the **No** button to cancel the delete operation.



6. Click the **Close** button.

Client Aliases

People are sometimes known by more than one name and/or date of birth. To help ensure that a client is not entered in the database more than once, TIMS enables you to record aliases and will search for these additional names when adding new clients.

Last Name is required to record a client alias.

Note: Users with *Low* access privileges cannot add, edit, or delete client aliases.

Add a Client Alias

To add a client alias...

1. Open a client-centered module (Client, Surveillance, or Patient Management).

2. Open the Client Information window.

If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Click the **A**lias button.

This displays the Client Aliases dialog box.

Last Name	First Name	M. I.	Date of Birth
			00/00/0000

Last Name:

First Name:

Middle Name:

Date of Birth:

New Edit Delete Save Close

4. Click the **N**ew button.

5. Enter the alias information in the appropriate fields. Aliases that are not in a standard *Lastname, Firstname* format should be entered entirely in the Last Name field.

6. Click the **S**ave button.

7. Click the **C**lose button.

Modifying a Client Alias

You can change an existing client alias using the Edit feature.

To change a client alias...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **A**lias button.
4. Select an alias from the list and click the **E**dit button.

The screenshot shows a window titled "Client Aliases" with a table and a form below it. The table has columns for Last Name, First Name, M. I., and Date of Birth. The form below the table has fields for Last Name, First Name, Middle Name, and Date of Birth.

Last Name	First Name	M. I.	Date of Birth
BRADFORD	JANISE	P	01/01/1960
BRADDY	JANI	P	01/01/1960

Below the table, the form fields are:

- Last Name: BRADDY
- First Name: JANI
- Middle Name: P
- Date of Birth: 01/01/1960

Buttons on the right side of the window include New, Edit, Delete, Save, and Close.

5. Change the information on the alias form.
6. Click the **S**ave button.
7. Click the **C**lose button.

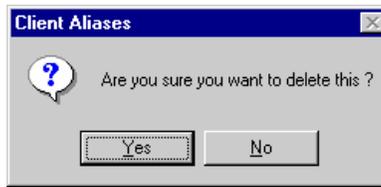
Deleting a Client Alias

Invalid client aliases can be removed from the TIMS database.

To delete a client alias...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **A**lias button.
4. Select an alias from the list.
5. Click the **D**elate button.

6. Click the **Yes** button to delete the selected alias. Click the **No** button to cancel the delete operation.



User - Defined Alerts

It may be worthwhile or even necessary to inform clinic staff about certain characteristics of a particular client. They may be hard to treat, dangerous to themselves or others, or have some other characteristic that should be called to the attention of those asked to provide services to them. TIMS enables you to enter a brief user-defined alert that can be viewed by all TIMS users by clicking the client's alert flag button on the Focus Line.

The screenshot shows a window titled "Red Flags" with a light gray background. It contains four checkboxes arranged in two columns. The first column has "TB Drug Resistant" and the second column has "Non-Adherent", "Smear Positive", and "User-Defined Alert". Below the checkboxes is a text input field with the label "alert reason:".

Note: Users with Low access privileges cannot add, edit, or delete user-defined alerts.

Add a User-Defined Alert

To add a user-defined alert...

1. Open a client-centered module (Client, Surveillance, or Patient Management).

2. Open the Client Information window.

If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Click the **A**lert button.

This displays the Alert dialog box.

The screenshot shows a dialog box titled "Alert" with a blue title bar. It contains a text input field labeled "Reason:". Below the text field are four buttons: "Add", "Clear", "Save", and "Close".

4. Click the **A**dd button.

5. Enter an alert message about the client in the Reason field. You can use up to 28 characters.

6. Click the **S**ave button.

Edit a User-Defined Alert

You may need to change an alert after it was initially entered.

To change an alert...

1. Open a client-centered module (Client, Surveillance, or Patient Management).

2. Open the Client Information window.

If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Click the **A**lert button.

4. Edit or replace the alert message in the Reason field.

5. Click the **S**ave button.

Deleting a User-Defined Alert

You can delete a user-defined alert if the described alert condition is no longer valid.

To delete a user-defined alert...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **A**lert button.
4. Click the **C**lear button. Do not enter any additional text.
5. Click the **S**ave button.

Disposition

The Disposition feature enables you to record the final outcome of a client's relationship with your facility.

While actively enrolled in a TB monitoring or treatment plan at your facility, the client is considered *Open*. When the relationship between the client and your facility ends, you should assign the *Closed* disposition to the client. The Client - Facility relationship may end for a variety of reasons: the therapy is complete, the client moved, the client is lost, etc.

The screenshot shows a software window titled "Current Client: BRADY, JAN". The "Current Status" is displayed as "Open" in green text, with a "Change..." button to its right. Below this is a table with two columns: "Disposition" and "Date". The table contains one row with the date "08/23/2000". To the right of the table are buttons for "New", "Edit", and "Save". Below the table is a "Disposition" section with a list of radio button options: "Completed Therapy", "Moved", "Not TB", "Died", "Lost", "Refused Treatment", "Adverse Reaction", "Other", "Unknown", "Active TB Developed", and "Provider Decision". A "Date:" field next to the list shows "08/23/2000". At the bottom right of the window is a "Close" button and a timestamp "8/23/2000 2:25 pm".

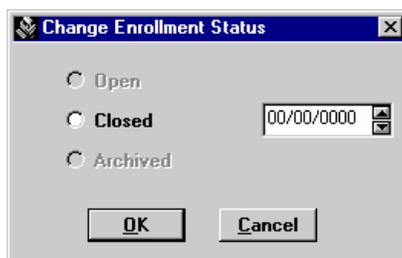
Close a Client

Closing a client terminates your relationship with the client. You may view but cannot change closed clients in TIMS. However, a client can be re-opened for processing if the conditions change and the client will resume services at your facility.

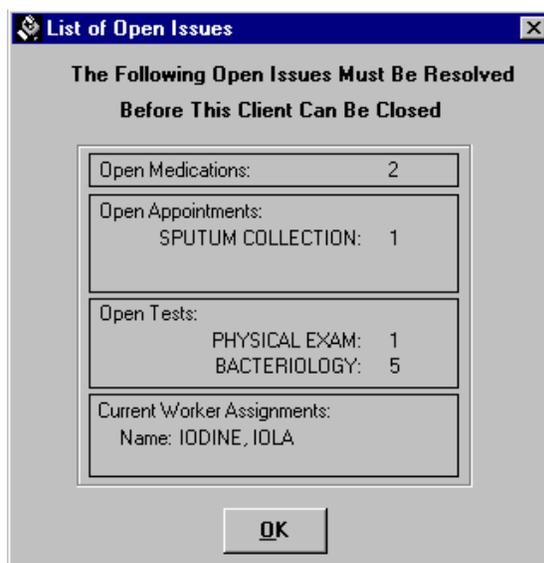
You cannot Close a client if they have pending Medications, Appointments, Tests, and/or Worker Assignments. Attempting to close a client without resolving these issues will produce an error message.

To close the client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **D**isposition.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **C**hange button in the Current Status group.
4. Select **C**losed.
5. Enter or select the date the client relationship was closed and click the **O**K button. Click the **C**ancel button to abandon the Close Client operation.



6. If there are any unresolved issues that will prevent you from closing the client, click the **O**K button to close the List of Open Issues dialog box and proceed to the appropriate areas to resolve.



- Click the **OK** button to close the Select Disposition dialog box, once all outstanding client issues have been resolved.



- Select the appropriate disposition. If the selected disposition displays additional information, add as much information as is available. Click the **Undo** button to clear the current information.



- Click the **Save** button.
- Add additional dispositions by clicking the **New** button and completing the information for the new disposition.
- Click the **Close** button.

Edit a Disposition

Some dispositions can be modified after they have been entered.

To edit a disposition...

- Open a client-centered module (Client, Surveillance, or Patient Management).
- Open the **Client** menu and select **Disposition**.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
- Select the disposition you want to edit by clicking on it and click the **Edit** button.
If the **Edit** button is not enabled, the selected disposition cannot be edited.
- Make the necessary changes to the disposition.
- Click the **Save** button.
- Click the **Close** button.

Re-Open a Client

All dispositions can be reversed. If a client returns to your facility for treatment, you can re-open them by using the Disposition command.

To re-open a client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **D**isposition.
If no client is currently in focus, the Change Focus window will open, allowing you to select one.
3. Click the **C**hange button in the Current Status group.
4. Select **O**pen in the Change Enrollment Status dialog box.
5. Click the **O**K button.
6. Click the **C**lose button to exit the Disposition window.

Origination

You can record a client's origins in TIMS using the Origination feature. A client can have one of three origins:

Contact	The client is identified as a TB suspect through their association with an existing client.
Transferring from Another Location	This feature is not available in the current release of TIMS.
Neither	A client, who was originally entered at your facility, but has no documented association with another client.

View a Client's Origins

To view the current client's origins...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **O**rigination.

The Client menu is available in the Client, Surveillance, Patient Management, and Program Evaluation modules.

Client is . . .

a Contact Transferring from Another Location Neither

List of Source Cases:

Last Name	First Name
BRAVO	BEATRICE

<-Add

Delete->

List of Non-Source Cases:

Last Name	First Name
ALPHA	ANDREW
CHARLEY	CASHEW
DELTA	DAHLIA
ECHO	EDDIE
FOXROT	FELICITY
GOLF	GARRET

Close

Changing Client Origins: Contact to Neither

If a client was incorrectly identified as a Contact, you can change the client's Origination record. (A Contact is someone identified by a client whose relationship is such that they may be at-risk for TB infection. See the *Patient Management* chapter for details.)

To change the active client from Contact to Neither...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **O**rigination.

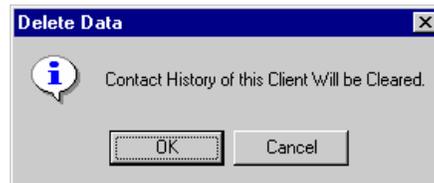
3. Select **Neither** in the Client is group.

Client is . . .

a Contact Transferring from Another Location **Neither**

4. Click the **OK** button to close the Delete Data dialog box and complete the change.

The current client will no longer be associated with the previously identified contact.



5. Click the **C**lose button.

Changing Client Origins: Neither to Contact

If a client is incorrectly identified as a non-contact client, they must be properly identified as a contact of an existing client.

To record a contact relationship with the active client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **O**rigination.

If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select **a Contact** in the Client is group.

Client is . . .

a Contact Transferring from Another Location **Neither**

4. Select the client who originally identified the current client as a contact and click the **<-Add** button.

List of Source Cases:

Last Name	First Name

<-Add

Delete->

List of Non-Source Cases:

Last Name	First Name
BRAVO	BEATRICE
ALPHA	ANDREW
CHARLEY	CASHEW
DELTA	DAHLIA
ECHO	EDDIE
FOXTROT	FELICITY

5. Select any additional clients who identified the current client as a contact.
The client will then be listed as a contact on each of the source case's contact windows.
6. Click the **C**lose button.

Client Appointments

TIMS enables you to schedule appointments for the clients defined in your TIMS database. To create a client appointment, the following information can be entered: appointment date, time, type, location, and the worker who will service the client for the appointment. Client Appointments can be added, edited, voided (cancelled), deleted, checked in, confirmed, or rescheduled. After appointments are established, you can filter appointments by choosing a status or appointment type. The Client Appointments window will display all appointments for the selected client.

TIMS provides the capability to search for existing appointments by date and time. You can also choose to display appointments for today, a specific date, or all appointments scheduled for a worker.

Note: Users with Low, Medium, and High security access can add, edit, and view client appointments. Users with High security access can delete worker appointments.

Open the Client Appointments Window

To begin working with client appointments, you must first open the Appointments window.

To open the current client's appointment window...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

Current Client: **INDIA, IKE**

Search:

Date	Time	Appointment Type	Location	Worker	Status
04/16/1998	01:15 pm	BACTERIOLOGY	EXAMINATION 1	BRAZOS, BENJA	COMPLETED ✓
04/18/1998	01:00 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
04/21/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
04/21/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	RESCHEDULED
05/05/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
06/02/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
06/16/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED

Filter Appointments by Status:

Scheduled

Past Due

Rescheduled

Completed

Canceled

Filter Appointments by Appointment Type:

BACTERIOLOGY
BLOOD TEST
CHEST X-RAY
HIV TEST
PHYSICAL EXAM
SKIN TEST

Search for Appointments

You can search appointments for the selected worker by using the For Date, Today, or All filters.

To search for appointments...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select the appropriate search option:



- Click the **F**or Date button and enter a date to display all the appointments for that date (the Time portion does not affect the filter).
- Click the **T**oday button to view all appointments for the current date.
- Click the **A**ll button to view every appointment.

Filter Appointments by Status

You can separate appointments that will appear in the browse list by selecting one or more appointment statuses.

To filter appointments by status...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

- Click one or more status designations for the appointments you wish to view in the browse list: Scheduled, Past Due, Rescheduled, Completed, or Canceled.



Filter Appointments by Type

You can separate appointments that will appear in the browse list by selecting one or more appointment types.

To filter appointments by type...

- Open a client-centered module (Client, Surveillance, or Patient Management).
- Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

- Select the appointment type you wish to view in the Filter Appointments by Appointment Type list.



Add a Single Appointment

If you need to schedule a client appointment that will not occur regularly or will occur only one time, use the Single appointment option. This is the default option.

To schedule a single appointment...

- Open a client-centered module (Client, Surveillance, or Patient Management).
- Open the **C**lient menu and select **A**ppointments, or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

- Click the **N**ew button.

This displays the Add New Appointment(s) dialog box.

4. Select the type of appointment from the Appointment Type list. If the list does not contain the appropriate appointment type, type in a new appointment type description to add it to the list of available options.

5. Select the location at your facility where the appointment will actually take place from the Location list. If the location is not on the current list, you can type in the location name to add it to the list of available options.

6. Select the staff member who will actually perform the procedure required by the appointment from the Worker Assigned list.

Workers cannot be added at the time an appointment is created; they must have been previously defined in the Daily Program Operations module.

7. Enter or select the appointment date in Date box.
8. Enter or select the appointment time in Time box. Be sure to specify either am or pm.
9. Click the **OK** button.

Add a Recurring Appointment

In many cases, a client will need to return repeatedly for the same type of appointment. TIMS has a Repeat Appointment feature that automates the process of creating repeating client appointments.

To create a repeating appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments.

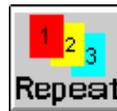


If no client is currently in focus, the Change Focus window will open, allowing you to select one.

- Click the **N**ew button.

This displays the Add New Appointment(s) dialog box.

- Click the **R**epeat button.



- Select the type of appointment from the Appointment Type list. If the list does not contain the appropriate appointment type, type in a new appointment type description to add it to the list of available options.

- Select the location at your facility where the appointment will actually take place from the Location list. If the location is not on the current list, you can type in the location name to add it to the list of available options.

- Select the staff member who will actually perform the procedure required by the appointment from the Worker Assigned list.

Workers cannot be added at the time an appointment is created; they must have been previously defined in the Daily Program Operations module.

- Enter or select the appointment date in Date box.
- Enter or select the appointment time in Time box. Be sure to specify either am or pm.

10. Select how often you want the appointments to occur from the Repeat Cycle group.

The image shows a dialog box titled "Repeat Cycle". It contains two radio buttons: "Daily/Weekly" and "Monthly". The "Daily/Weekly" radio button is selected.

- Select **Daily/Weekly** for appointments that should occur more than once a month.
- Select **Monthly** for appointment that should occur on a monthly basis.

11. For Daily/Weekly appointments:

The image shows a dialog box titled "Daily/Weekly". It has a section "On what day(s):" with a list box containing the days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Below this are two spin boxes: "Every 1 weeks" and "Repeat 1 times".

- Select the day(s) of the week you want the appointment to occur in the **On what day(s)** list. You can select more than one day.
- Enter or select how frequently you want the appointment to occur in the **Every ___ weeks** box.
- Enter or select the number of cycles in the **Repeat ___ times** box.

12. For Monthly appointments:

The image shows a dialog box titled "Monthly". It has a section "Which week:" with a checkbox and a spin box set to "1st". Below this is a "Day of:" section with a spin box set to "Sunday". There is also a "Specific date" section with a checkbox and a spin box. At the bottom are two spin boxes: "Every 1 months" and "Repeat 1 times".

- If you want the appointment to occur on a specific day and week each month (for example, every third Thursday of the month), select **Which week**, then select a week and day of the week.
- If you want the appointment to occur on a specific date each month, select **Specific date** and enter or select the date.
- For all monthly appointments, enter or select how frequently you want the appointment to occur in the **Every ___ months** box.
- Enter or select the number of times the appointment occurs in the **Repeat ___ times** box.

13. Click the **OK** button.

Edit a Client Appointment

Some features of a client appointment may be changed if necessary. However, other appointment management functions (such as Reschedule, Cancel, etc.) should be used where appropriate. The Edit function enables you to change the appointment location, worker, and time. Appointment type and date cannot be changed with the Edit function, nor can you change a single appointment to a recurring appoint, or a recurring appointment to single appointment.

To edit a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select the appointment you want to edit from the Appointments list and click the **E**dit button.

You cannot edit a completed appointment.

4. Make the necessary changes to the appointment.

Not all appointment details can be changed once they have been entered. If you cannot make the necessary changes to an appointment, you may have to delete the current appointment and create a new one.

5. Click the **O**K button.
6. Click the **C**lose button.

Reschedule a Client Appointment

Client appointments can be moved to a different day or time if necessary. Rescheduling appointments is preferable to canceling or deleting them, since this better reflects the client's compliance with his or her treatment regimen.

To reschedule a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select the appointment to be rescheduled in the Appointments list.

Date	Time	Appointment Type	Location	Worker	Status
04/16/1998	01:15 pm	BACTERIOLOGY	EXAMINATION 1	BRAZOS, BENJA	COMPLETED
04/18/1998	01:00 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
04/21/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
04/21/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	RESCHEDULED
05/05/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
06/02/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
06/16/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED

4. Click the **Reschedule** button.

The New Appointment Date and/or Time dialog box appears.



The dialog box is titled "New Appointment Date and/or Time?". It contains two input fields: "Enter Date:" with a date picker showing "03/18/1997" and "Time:" with a time picker showing "01:00" and radio buttons for "am" and "pm". There are "OK" and "Cancel" buttons at the bottom.

5. Enter or select the new date for the appointment in the **Enter Date** box.
6. Enter or select the new time for the appointment using the **Time** box. Be sure to specify am or pm.
7. Click the **OK** button.
8. Click the **Close** button.

Cancel a Client Appointment

Occasionally a client will need to cancel an appointment. If the appointment cannot be rescheduled, you may cancel it using the Void function.

Note: You will not have to opportunity to confirm that you want to cancel the appointment.

To cancel a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select the appointment you want to cancel in the appointments list.
4. Click the **V**oid button.

The selected appointment is canceled.

Search:

Date	Time	Appointment Type	Location	Worker	Status
03/12/2000		SKIN TEST	CLINIC 1	*WORKER, DEFA	COMPLETED ✓
05/12/2000	12:00 pm	CHEST X-RAY	A/T LOCATION 1	*WORKER, DEFA	CANCELED

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Check-In, Close

Filter Appointments by Status:

- Scheduled
- Past Due
- Rescheduled
- Completed
- Canceled

Filter Appointments by Appointment Type:

- APPOINTMENT 1
- APPOINTMENT 2
- APPOINTMENT 3
- APPOINTMENT 4
- BACTERIOLOGY
- BLOOD TEST
- CHEST X-RAY

8/23/2000 2:40 pm

Delete a Client Appointment

Client appointments should be deleted only if they were entered accidentally and are not valid for the current client. If the client needs to cancel or reschedule, use the appropriate function to ensure that an accurate appointment compliance record for the client is maintained.

To delete a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select the appointment you want to delete from the Appointments list.
4. Click the **D**elate button.

If the selected appointment was a single appointment and not part of a recurring appointment set, click **O**K to delete the appointment.



5. If the selected appointment was part of a recurring appointment set, you will be asked if you want to delete the entire set. Click the **Y**es button to delete the entire set, or the **N**o button to delete only the selected appointment.

Completed appointments in the series will not be deleted.



Client Check In

When a client arrives for his or her appointment, they should be checked in to indicate that they have appeared for their appointment. A check indicates the client has appeared, but does not imply that they have been treated or tested.

To check in a client...

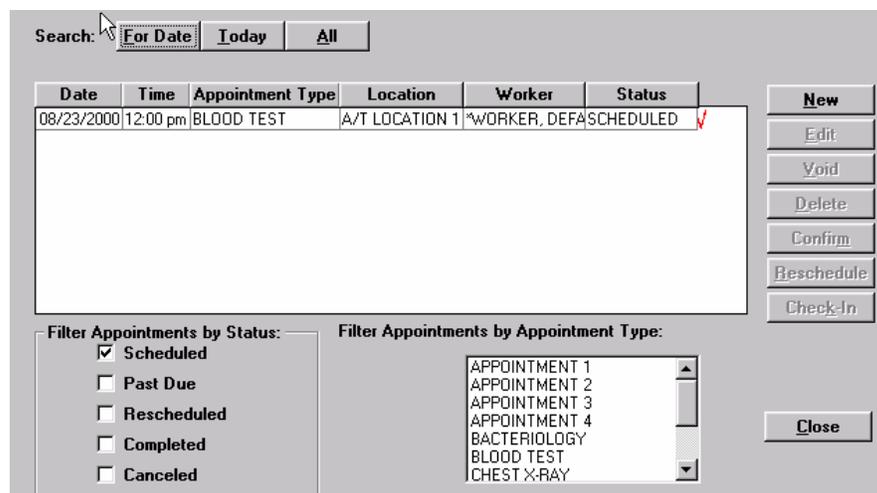
1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select the appointment the client has appeared to fulfill from the Appointments list.
4. Click the **C**heck-**I**n button.

A check mark will appear next to the appointment indicating the patient has arrived, but the appointment status will not change until the appointment is complete.



Confirm / Complete a Client Appointment

Once the client has completed an appointment it must be marked **Complete**. This ensures that the client's record is up-to-date and that he or she is not considered non-adherent.

To confirm that a client's appointment has been completed...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **Appointments** button on the toolbar.



If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Select the completed appointment from the Appointments list.
4. Click the **C**onfirm button.

This will mark the appointment 'Completed'.

Search:

Date	Time	Appointment Type	Location	Worker	Status
08/23/2000	12:00 pm	BLOOD TEST	A/T LOCATION 1	*WORKER, DEFA	COMPLETED ✓

Filter Appointments by Status:
 Scheduled
 Past Due
 Rescheduled
 Completed
 Canceled

Filter Appointments by Appointment Type: