
Chapter 6 Daily Program Operations Module



Overview

The Daily Program Operations module allows you to record and maintain information about workers at your site. You can record information about a worker's capabilities, help workers schedule and track appointments with other workers, and assign clients to workers.

The Worker information entered in this module contains the worker's name, Worker ID, phone number, job title, position, supervisor name, status, languages spoken and understood, and a profile.

TIMS compares languages the worker speaks with the client's primary language and notifies you if there is no common language between client and worker. TIMS permits worker-client assignments where there is no common language, but gives you a warning and provides an opportunity to assign the client to a language-compatible worker. Worker Assignments may be transferred to other workers.

The Appointments option is used to schedule appointments for workers at your site. Worker appointments are scheduled with other workers. Client appointments with workers can be viewed but not created or edited on the Worker Appointment window. All modifications to client appointments are done on the client's appointment window.

When worker appointments are scheduled, the date, time, and appointment type (e.g., staff meeting, training session, etc.) are required.

Quick Start

Open the Daily Program Operations module

There are two ways to open the Daily Program Operations module...

- Open the **C**lient menu and select **D**aily **P**rogram **O**perations.
If the current module does not have a Client menu, choose the first menu from the left.

Or

- Click the **D**aily **P**rogram **O**perations button on the toolbar.



Add a Worker

To add a worker...

1. Open the **W**orker menu and select **N**ew or click the **N**ew **W**orker button on the toolbar.



2. Enter the worker's name and click the **O**K button.
3. Enter the remaining information about the worker and click the **S**ave button.

Add a Worker Assignment

To add a Worker Assignment...

1. Open the **W**orker menu and select **A**ssignments or click the **A**ssignments button on the tool bar.



2. Click the **N**ew button.
3. Select the client from the browse list and click the **O**K button.
4. Enter information about the assignment and click the **S**ave button.

Add a Worker Appointment

To add a Worker Appointment...

1. Open the **W**orker menu and select **A**ppointments or click the **A**ppointments button on the tool bar.



2. Click the **N**ew button.
3. Enter the information about the appointment and click the **O**K button.

Worker Information

Worker information includes the worker's name, job title, supervisor's name, identification number, phone number, languages spoken, and profile. This information can be easily modified.

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

Add a Worker

To add a worker...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **New** or click the **New** button on the toolbar.



3. Enter the worker's Last Name, First Name, and Worker ID if known.

The last name and first name fields are required.

 A screenshot of a dialog box titled "New Worker - Add Information". It contains three input fields: "Last Name:", "First Name:", and "Worker ID:". At the bottom, there are "OK" and "Cancel" buttons.

4. Click the **OK** button.

The Worker Information window appears

 A screenshot of the "Worker Information" window. It contains several fields: "Last Name:" (TENSAW), "First Name:" (TRENT), "Middle Initial:" (checkbox), "Job Title:" (dropdown), "Supervisor Name:" (dropdown), "ID:" (input), "Phone:" (input with area code), "Active:" (radio buttons Yes/No), and "Supervisor:" (radio buttons Yes/No). There are also sections for "Languages Spoken:" and "Profiles:" with "Edit..." buttons. At the bottom right, there are "Save" and "Close" buttons.

5. Enter the worker's phone number.

6. Select the worker's job title from the drop-down list.

If the appropriate job title is not among the available options, have a TIMS System Administrator add it to the list using the Table Maintenance command in the System module. Since this is a required field, you may have to temporarily select an inaccurate job title or close the window without saving.

7. Select the worker's supervisor's name from the Supervisor Name list.

If the supervisor's name is not on the list, check the supervisor's record to ensure that they are designated as a supervisor.

8. If the worker is actively working at present, select **Yes** in the Active group.

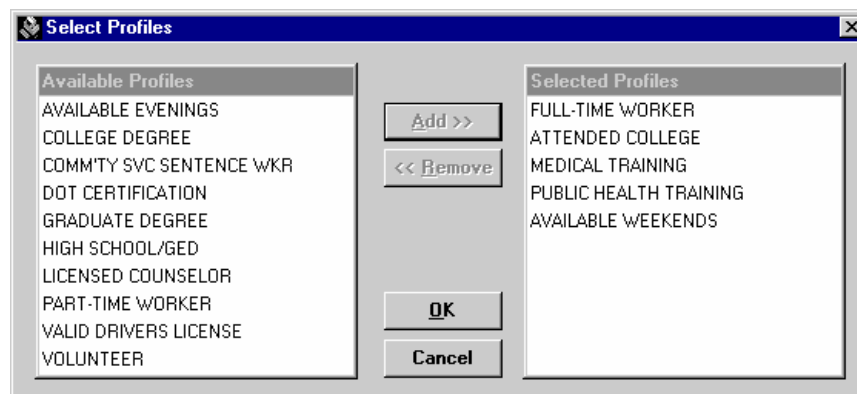
9. If the worker is a supervisor, select **Yes** in the Supervisor group.

This adds the name to the Supervisor Name List.

10. In the Languages Spoken group, click the **Edit** button to select the languages spoken. Select the individual languages the worker speaks or understands in the Available Languages column and click the **Add>>** button. If you make a mistake, select the language in the Selected Languages column and click the **<<Remove** button. Click **OK** when finished.



11. In the Profiles group, click the **Edit** button to select locally defined worker attributes for the current worker. The number and type of profiles available depend on what profiles were defined by the TIMS System Administrator. Select the individual profiles in the Available Profiles column and click the **Add>>** button. If you make a mistake, select the profile in the Selected Profiles column and click the **<<Remove** button. Click **OK** when finished.



12. Click the **Save** button.

13. Click the **Close** button to exit the Worker Information window.

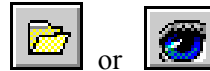
Open a Worker (Change Focus)

The standard method for recording and maintaining information in TIMS is to select a client or worker and then select commands to perform to that person's records. This process is called Change Focus. If you select a command before a worker is in focus, the change focus window will automatically appear enabling you to select one.

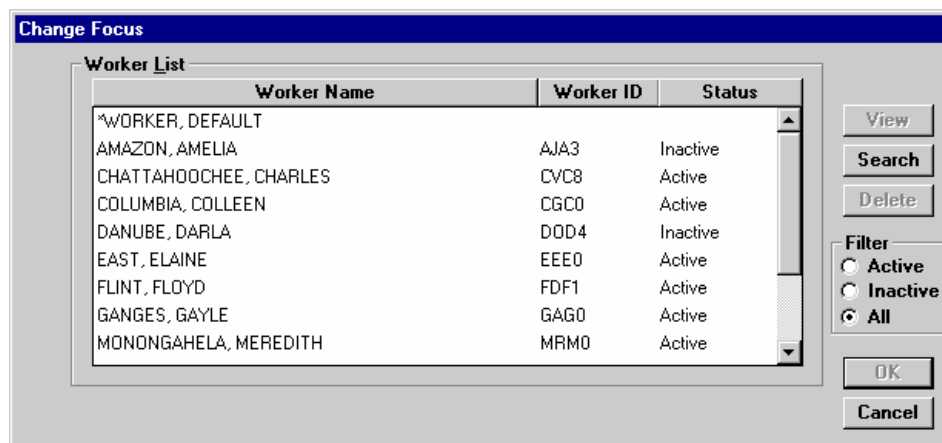
To open a worker (change worker focus)...

1. Open the **Worker** menu and select **Open**.

You can also use the Open or Change Focus buttons on the toolbar.



2. Select the worker you want to open from the list.



3. Click the **OK** button.

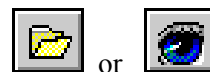
Search for a Worker

The Change Focus window provides basic search capabilities that allow you to find a particular worker quickly.

To search for a worker...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Open**.

You can also use the Open or Change Focus buttons on the toolbar.



3. Click the **Search** button.

- Enter the worker's last name or Worker ID number.

- Click the **OK** button.
- Select the worker from the list of possible matches, or click **Cancel** if none of the workers is the correct one.

Worker Name	Worker ID	Status
BRAZOS, BEATRICE	BZB0	Active
BRAZOS, BENJAMIN	BQB3	Active

- Click the **OK** button.

Edit Worker Information

When the worker's information changes, it should be updated.

To edit worker information...

- Open the **Daily Program Operations** module.
- Open the Worker menu and select **Edit** or click the **Edit** button on the toolbar.



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

- Modify the information.
- Click the **Save** button.
- Click the **Close** button to exit the Worker Information window.

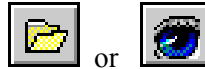
Delete a Worker

If a person was entered as a worker erroneously, they should be deleted. However, workers cannot be deleted once they appear elsewhere in the TIMS database. If a worker is no longer actively working at your facility, they should be marked Inactive instead of deleted. Once you delete a worker, that person will no longer appear in TIMS.

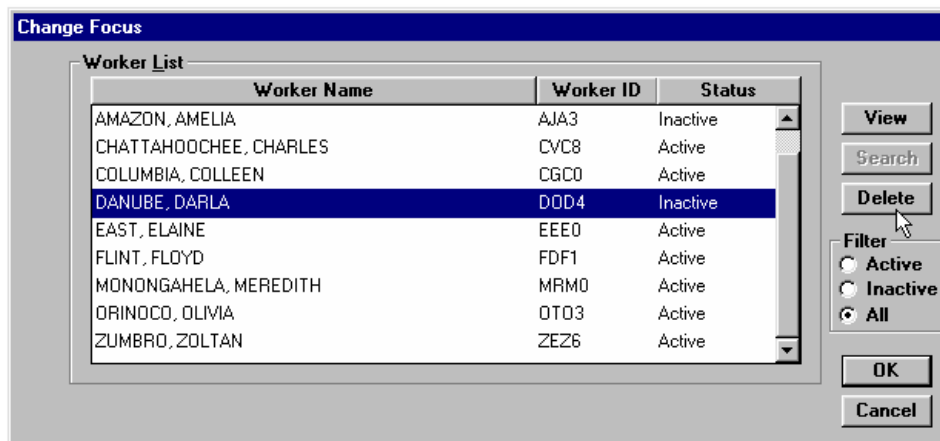
To delete a worker...

1. Open the **Daily Program Operations** module.
2. From the **Worker** menu, select **Open**.

You can also use the Open or Change Focus buttons on the toolbar.



3. Select the worker you want to delete on the Change Focus browse list.



4. Click the **Delete** button.
5. Click **Yes** to confirm that you want to delete the worker.
6. Click **OK** close the Delete Worker confirmation dialog box.
7. Click the **Cancel** button to close the Change Focus window.

Worker Assignments

The Worker Assignment function is used to document a worker's professional relationship with one or more clients. Assignment information includes, assignment date, assignment status, status date, who assigned or reassigned the client, current client assignment (if reassigned), and additional assignment-related comments. During the assignment process, TIMS compares the languages the worker speaks with the client's native language (or ability to understand English) to ensure that the worker and client can communicate. A client can be assigned to more than one worker.

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

Assign a Worker to a Client

Client-Worker assignments should last throughout the client's tuberculosis regimen.

To add an assignment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Assignments** or click the **Assignments** button on the toolbar.



If no worker is currently in focus, the Change Focus window will open, enabling you to select one. The Worker Assignment window is displayed.

Date	Client Name	Status	Status Date
03/25/1998	ALPHA, ANDREW	Current	
03/25/1998	FOXTROT, FELICITY F	Current	
03/25/1998	GOLF, GARRET NEWT	Current	
03/25/1998	ECHO, EDDIE ERNESTO	Reassigned	03/25/1998

Client Information	
Name: ALPHA, ANDREW	Language: ENGLISH
City/County Case No.: []	<input type="checkbox"/> Speak English
State Case No.: 98B130838	<input type="checkbox"/> Understand English
Assignment Information	
Date Assigned: 03/25/1998	Status: Current
Assigned By: ORINOCO, OLIVIA	Status Date: 00/00/0000
Reassigned To: []	
Comment: []	

3. Click the **New** button.

The Client list is displayed.

Last Name	First Name	MI	State Case#	City/County Case#	Primary Language
AARDEMA	ALEXANDER		OFLT66934		SPANISH
ALAPHA	AMES		00FLT9354		JAPANESE
ALLURE	BROWN		GA1250820		ENGLISH
ALLURE	YELLOW		OFLT18145		JAPANESE
AMES	ALEX		OFLT70438		ENGLISH
ARGON	HENRY		097GA1967		ENGLISH
BODACIOUS	GEORGE		OFLT58881		ENGLISH
BUGS	SQA	A	00FLT1970		ENGLISH
BUSSY	ANGELA		OFLT81291		ENGLISH
CLIENT	WITHCONTACTS		GA1965028		ENGLISH
CLOSED	CLIENT		0097GA205		ENGLISH
COFFEE	POT		OFLT66934		ENGLISH
COMPAQ	BRIEF		OFLT66934		ENGLISH

Buttons: View, OK, Cancel

- Select the client to be assigned and click the **OK** button.

If you need additional information about a client that you are about to assign to the current worker, you can click the View button to display a read-only version of the selected client's Client Information window.

- If the selected client and the current worker do not have a compatible language, this warning will appear.

Client Language Validation
The Worker and Client do not have a compatible language! Do you want to keep this assignment?
<input type="button" value="Yes"/> <input type="button" value="No"/> <input type="button" value="Suggest Alternate Workers..."/>

- Click **Yes** to assign the selected client to the current worker even though there is no compatible language between them.
 - Click **No** to cancel the process that would assign the current worker to the selected client.
 - Click **Suggest Alternate Workers** to display a list of workers who have a language compatible with the selected client. If no worker speaks the client's language, the entire list of active workers is displayed.
- Enter data in the Assignment Information area of the window.

Assignment Information			
Date Assigned:	08/01/1997	Status:	Current
Assigned By:	KIDD, KIRK K	Status Date:	00/00/0000
Reassigned To:			
Comment:			

- Enter or select the date the client was assigned to the worker in the Date Assigned field. The current date is entered by default, but the date can be any time between the client enrollment date and the current date.
- Select the name of the supervisor who requested the client-worker assignment in the Assigned By drop-down list.
- Comments related to the client-worker assignment can be added in the Comment box.

- Click the **C**lose button to exit the Worker Assignment window.

Edit a Worker Assignment

Sometimes the information on the Worker Assignment window needs to be updated with current information.

To edit an assignment...

- Open the **D**aily **P**rogram **O**perations module.
- Open the **W**orker menu and select **A**ssignments or click the **A**ssignments button on the toolbar.



If no worker is currently in focus, the Change Focus window will open, enabling you to select one. The Worker Assignment window is displayed.

Date	Client Name	Status	Status Date
03/25/1998	ALPHA, ANDREW	Current	
03/25/1998	FOXTROT, FELICITY F	Current	
03/25/1998	GOLF, GARRET NEWT	Current	
03/25/1998	ECHO, EDDIE ERNESTO	Reassigned	03/25/1998

Client Information	
Name: ALPHA, ANDREW	Language: ENGLISH
City/County Case No.:	<input type="checkbox"/> Speak English
State Case No.: 98B130838	<input type="checkbox"/> Understand English
Assignment Information	
Date Assigned: 03/25/1998	Status: Current
Assigned By: ORINOCO, OLIVIA	Status Date: 00/00/0000
Reassigned To:	
Comment:	

- Select a client from the browse list and click the **E**dit button.
- Modify the Assignment Information and click **S**ave.
Worker languages spoken or understood should match the client's language whenever possible.
- Click the **C**lose button to exit the Worker Assignment window.

Delete a Worker Assignment

When worker assignments are made incorrectly, they should be deleted.

To delete an assignment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Assignments** or click the **Assignments** button on the toolbar.



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

3. Select a client from the browse list and click the **Delete** button.
4. Select **Yes** to confirm that you want to delete this assignment. The assignment will be permanently removed from TIMS.
5. Click the **Close** button to exit the Worker Assignment window.

Reassign a Client

Sometimes clients need to be reassigned to another worker. Once a client has been reassigned to another worker, that client assignment record cannot be modified any further. If additional assignments are required, the current assignment record must be stopped and a new assignment record begun.

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Assignments** or click the **Assignments** button on the toolbar.



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

3. Select a client from the browse list and click the **Reassign** button.
4. Click **Yes** to confirm that you want to reassign the client.

The Select New Worker window is displayed.

Worker Name	Worker ID	Status
CHATTAHOOCHEE, CHARLES	CVC8	Active
COLUMBIA, COLLEEN	CGC0	Active
EAST, ELAINE	EEE0	Active
FLINT, FLOYD	FDF1	Active
GANGES, GAYLE	GAG0	Active
MONONGAHELA, MEREDITH	MRM0	Active
ORINOCO, OLIVIA	OTO3	Active
PURGATOIRE, PATTY	POP4	Active

Filter:
 Active
 Inactive
 All

OK
Cancel

Languages Spoken:
 ENGLISH
 FRENCH
 SPANISH

5. Select the Worker who will now be responsible for the client and click the **OK** button.

Note that the languages the worker speaks are displayed when the worker is selected. The client's status changes to 'Reassigned.' The client's assignment can be viewed on the new worker's assignment window.

6. Click the **C**lose button to exit the Worker Assignment window.

Stop a Worker Assignment

When a client is no longer receiving TB-related services, you can stop the assignment.

To stop an assignment...

1. Open the **Daily Program Operations** module.
2. Open the **W**orker menu and select **A**ssignments or click the **Assignments** button on the toolbar.



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

3. Select the client from the browse list and click the **S**top button.
4. Click **Y**es to confirm that you want to stop the assignment. The client's status will change to 'Stopped.'
5. Click the **C**lose button to exit the Worker Assignment window.

Worker Appointments

TIMS allows you to schedule appointments for workers defined in your TIMS database. To create a worker appointment, the following information can be entered: appointment date and time, appointment type, and appointment location. Worker appointments can be added, edited, voided (cancelled), deleted, confirmed, or rescheduled. After appointments are established, you can filter which appointments are displayed by choosing a status or appointment type.

The Worker Appointment window will display all appointments for the selected worker. This includes appointments with other workers and appointments with clients. Only appointments with other workers can be entered or modified from the Worker Appointment window. All appointments with clients must be entered or modified on the client's appointment window. The client appointment window will display only the 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 worker appointments. Users with High security access can delete worker appointments.

Open the Worker Appointments Window

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

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

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointment** button on the toolbar.



If there is no current worker, the Change Focus window will appear enabling you to select one.

Search: <u>For Date</u> <u>Today</u> <u>All</u>						
Date	Time	Location	Appt. Type	Worker	Client	Status
08/10/1998	08:00 am	EXAMINATION 2	BLOOD TEST		CHARLEY, CASHEW C	PAST DUE
08/10/1998	11:00 am	RADIOLOGY	CHEST X-RAY		CHARLEY, CASHEW C	COMPLET
08/10/1998	02:00 pm	EXAMINATION 1	BACTERIOLC		CHARLEY, CASHEW C	COMPLET
08/10/1998	09:00 pm	EXAMINATION 1	PHYSICAL EX		CHARLEY, CASHEW C	COMPLET
08/12/1998	04:00 pm	CONFERENCE A	STAFF MEET	AMAZON, AMELIA		RESCHED
08/12/1998	09:00 pm	FIELD	FIELD SURVE	COLUMBIA, COLL		SCHEDUL
08/13/1998	08:40 am	RADIOLOGY	CHEST X-RAY		NOVEMBER, NANCY	SCHEDUL
08/13/1998	04:00 pm	CONFERENCE A	STAFF MEET	AMAZON, AMELIA		SCHEDUL
08/15/1998	01:00 pm	EXAMINATION 1	SKIN TEST		JULIETT, JANE J	SCHEDUL

Filter Appointments by Status:

Scheduled

Past Due

Rescheduled

Completed

Canceled

Filter Appointments by Type:

BACTERIOLOGY

BLOOD TEST

CHEST X-RAY

HIV TEST

PHYSICAL EXAM

SKIN TEST

CLIENT DOT

Close

Search for Appointments

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

To search for appointments...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

3. Select the appropriate search option:



- Click the **For Date** button and enter a date to display all the appointments for that date (the Time portion does not affect the filter) and click the **OK** button.

The dialog box titled "Enter Filter Date" contains the following fields and controls:

- Enter Date:** A text input field containing "01/01/1985" with a calendar icon to its right.
- Time:** A text input field containing "01:00" with a time selection icon to its right.
- Radio buttons for **am** and **pm**, with **pm** selected.
- OK** and **Cancel** buttons at the bottom.

- Click the **Today** button to view all appointments for the current date.
- Click the **All** button to view all the worker's appointments.

Filter Appointments by Status

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

To filter appointments by status...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

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

The dialog box titled "Filter Appointments by Status:" contains the following list of checkboxes:

- Scheduled
- Past Due
- Rescheduled
- Completed
- 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...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

3. Select the appointment types you wish to view in the Filter Appointments by Type list.



Add a Single Appointment

If you need to schedule a worker 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...

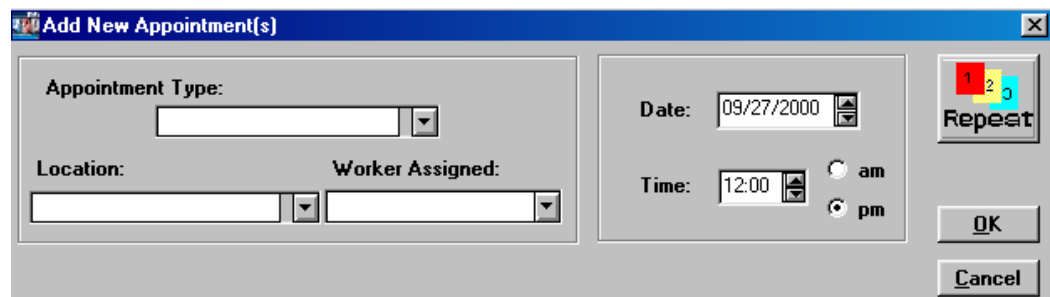
1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



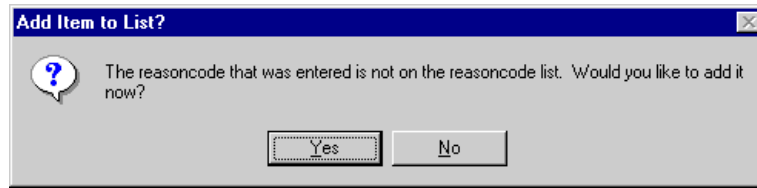
If no worker is currently in focus, the Change Focus window will open, enabling you to select one.

3. Click the **New** button.

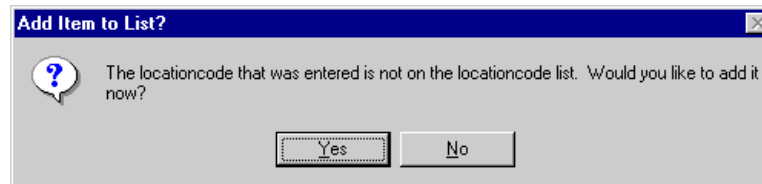
This displays the Add New Appointment dialog box.



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. If appropriate, select the staff member who the appointment is with from the Appointment With list.

Workers cannot be added at the time an appointment is created; the worker 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 a.m. or p.m.
9. Click the **OK** button.

Add a Recurring Appointment

Workers may have the same type of appointment on multiple occasions. TIMS has a Repeat Appointment feature that automates the process of creating repeating worker appointments.

To create a repeating appointment...

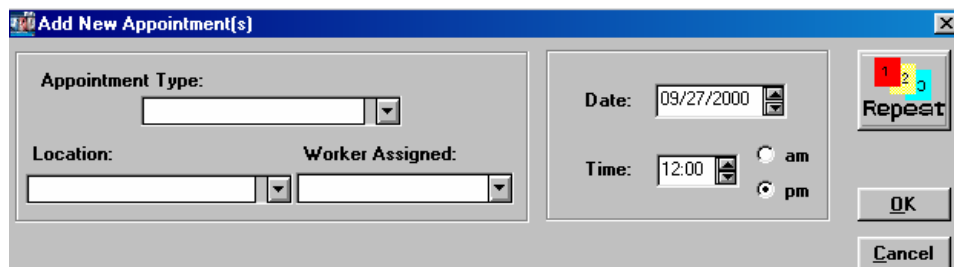
1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

3. Click the **New** button.

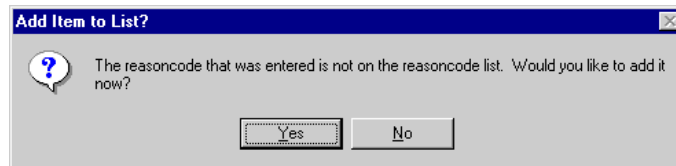
This displays the Add New Appointment dialog box.



4. Click the **Repeat** button.

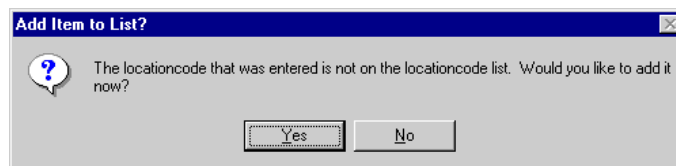


- Select the type of appointment from the Appointment Type list. If the list does not contain the appropriate appointment type, type in a new appointment type description to add it to the list of available options.



- 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.



- If appropriate, select the staff member who the appointment is with from the Appointment With list.

Workers cannot be added at the time an appointment is created; the worker 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. Ensure to specify either a.m. or p.m.
- Select how often you want the appointments to occur from the Repeat Cycle group.

Repeat Cycle

Daily/Weekly Monthly

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

- For Daily/Weekly appointments:

Daily/Weekly

On what day(s):

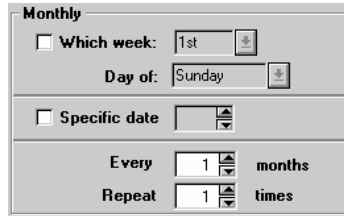
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Every 1 weeks

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:



Monthly

Which week: 1st

Day of: Sunday

Specific date

Every 1 months

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 Worker Appointment

Sometimes it is necessary to adjust the details of an appointment after it has been entered. Only worker-specific appointments can be edited; client appointments with the selected worker that appear in the appointment list cannot be edited. Not all appointment details can be modified.

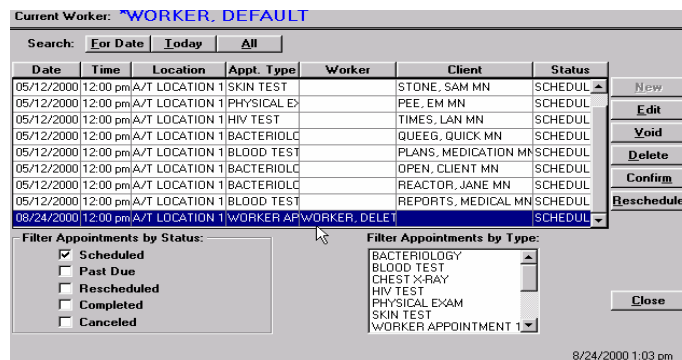
To edit an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

The Worker Appointment window is displayed.



Current Worker: **WORKER, DEFAULT**

Search: For Date Today All

Date	Time	Location	Appt. Type	Worker	Client	Status
05/12/2000	12:00 pm	A/T LOCATION 1	SKIN TEST		STONE, SAM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	PHYSICAL EX		PEE, EM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	HIV TEST		TIMES, LAN MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLOGY		QUEEG, QUICK MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		PLANS, MEDICATION MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLOGY		OPEN, CLIENT MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLOGY		REACTOR, JANE MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		REPORTS, MEDICAL MN	SCHEDUL
08/24/2000	12:00 pm	A/T LOCATION 1	WORKER APPOINTMENT	WORKER, DELET		SCHEDUL

Filter Appointments by Status:

Scheduled

Past Due

Rescheduled

Completed

Canceled

Filter Appointments by Type:

BACTERIOLOGY

BLOOD TEST

CHEST X-RAY

HIV TEST

PHYSICAL EXAM

SKIN TEST

WORKER APPOINTMENT 1

Close

8/24/2000 1:03 pm

3. Select the appointment you want to edit from the Appointments list.
Completed appointments cannot be edited.
4. Click the **Edit** button.
5. 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 a worker appointment, you may have to delete the current appointment and create a new one.

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

Reschedule a Worker Appointment

If necessary, appointments can be rescheduled for another time or date.

To reschedule an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one. The Worker Appointment window is displayed.

Current Worker: *WORKER, DEFAULT

Search: For Date Today All

Date	Time	Location	Appt. Type	Worker	Client	Status
05/12/2000	12:00 pm	A/T LOCATION 1	SKIN TEST		STONE, SAM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	PHYSICAL EX		PEE, EM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	HIV TEST		TIMES, LAN MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		QUEEG, QUICK MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		PLANS, MEDICATION MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		OPEN, CLIENT MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		REACTOR, JANE MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		REPORTS, MEDICAL MN	SCHEDUL
08/24/2000	12:00 pm	A/T LOCATION 1	WORKER AP	WORKER, DELE		SCHEDUL

Filter Appointments by Status:

Scheduled
 Past Due
 Rescheduled
 Completed
 Canceled

Filter Appointments by Type:

BACTERIOLOGY
 BLOOD TEST
 CHEST X-RAY
 HIV TEST
 PHYSICAL EXAM
 SKIN TEST
 WORKER APPOINTMENT 1

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Close

8/24/2000 1:03 pm

3. Select the appointment in the browse list that needs to be changed.
'Completed' appointments cannot be rescheduled.
4. Click the **Reschedule** button.

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

New Appointment Date and/or Time?

Enter Date: 03/18/1997

Time: 01:00 am pm

Buttons: OK, Cancel

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.

Cancel a Worker Appointment

Some appointments need to be canceled without being rescheduled. If the appointment cannot be rescheduled, you may cancel it using the Void function.

To cancel an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

The Worker Appointment window is displayed.

Current Worker: **WORKER, DEFAULT**

Search: For Date Today All

Date	Time	Location	Appt. Type	Worker	Client	Status
05/12/2000	12:00 pm	A/T LOCATION 1	SKIN TEST		STONE, SAM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	PHYSICAL EX		PEE, EM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	HIV TEST		TIMES, LAN MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		QUEEG, QUICK MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		PLANS, MEDICATION MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		OPEN, CLIENT MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		REACTOR, JANE MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		REPORTS, MEDICAL MN	SCHEDUL
08/24/2000	12:00 pm	A/T LOCATION 1	WORKER AP	WORKER, DELE		SCHEDUL

Filter Appointments by Status:

Scheduled
 Past Due
 Rescheduled
 Completed
 Canceled

Filter Appointments by Type:

BACTERIOLOGY
 BLOOD TEST
 CHEST X-RAY
 HIV TEST
 PHYSICAL EXAM
 SKIN TEST
 WORKER APPOINTMENT 1

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Close

8/24/2000 1:03 pm

3. In the browse list, select the appointment that needs to be canceled.
Completed appointments cannot be voided.
4. Click the **Void** button.
5. Click the **Yes** button to confirm that you want to cancel the appointment.

Void Appointment

Appointment will be marked as "Cancelled". Do you want to continue?

Buttons: Yes, No

The Status changes to 'Cancelled.'

Current Worker: **WORKER, DEFAULT**

Search: For Date Today All

Date	Time	Location	Appt. Type	Worker	Client	Status
05/12/2000	12:00 pm	A/T LOCATION 1	PHYSICAL EX		PEE, EM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	HIV TEST		TIMES, LAN MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		QUEEG, QUICK MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		PLANS, MEDICATION MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		OPEN, CLIENT MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		REACTOR, JANE MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		REPORTS, MEDICAL MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	CHEST X-RAY		AMES, ALEX MN	CANCELE
08/24/2000	12:00 pm	A/T LOCATION 1	WORKER AP	WORKER, DELE		CANCELE

Filter Appointments by Status:

Scheduled
 Past Due
 Rescheduled
 Completed
 Canceled

Filter Appointments by Type:

BACTERIOLOGY
 BLOOD TEST
 CHEST X-RAY
 HIV TEST
 PHYSICAL EXAM
 SKIN TEST
 WORKER APPOINTMENT 1

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Close

6. Click the **Close** button.

Delete a Worker Appointment

When an appointment was made in error, it should be removed from the TIMS database.

To delete an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

The Worker Appointment window is displayed.

Current Worker: **WORKER, DEFAULT**

Search: For Date Today All

Date	Time	Location	Appt. Type	Worker	Client	Status
05/12/2000	12:00 pm	A/T LOCATION 1	SKIN TEST		STONE, SAM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	PHYSICAL EX		PEE, EM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	HIV TEST		TIMES, LAN MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		QUEEG, QUICK MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		PLANS, MEDICATION MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		OPEN, CLIENT MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		REACTOR, JANE MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		REPORTS, MEDICAL MN	SCHEDUL
08/24/2000	12:00 pm	A/T LOCATION 1	WORKER AP	WORKER, DELET		SCHEDUL

Filter Appointments by Status:

Scheduled
 Past Due
 Rescheduled
 Completed
 Canceled

Filter Appointments by Type:

BACTERIOLOGY
 BLOOD TEST
 CHEST X-RAY
 HIV TEST
 PHYSICAL EXAM
 SKIN TEST
 WORKER APPOINTMENT 1

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Close

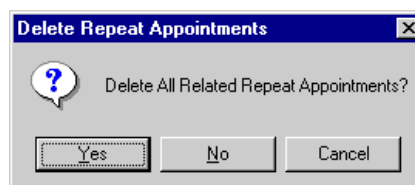
8/24/2000 1:03 pm

3. In the browse list, select the appointment that needs to be deleted.
Completed appointments cannot be deleted.
4. Click the **Delete** button.
The appointment is removed from TIMS.
5. If the selected appointment was a single appointment (not part of a set), click the **Yes** button to delete the appointment, or click the **No** button to end to operation.



6. If the selected appointment was part of a recurring appointment set, you be asked if you want to delete the entire set. Click the **Yes** button to delete the entire set, or the **No** button to delete only the selected appointment.

Completed appointments in the series will not be deleted.



7. Click the **Close** button to exit the Worker Appointment window.

Confirm a Worker Appointment

When an appointment is completed, it should be confirmed.

To confirm an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

The Worker Appointment window is displayed.

Current Worker: **WORKER, DEFAULT**

Search: For Date Today All

Date	Time	Location	Appt. Type	Worker	Client	Status
05/12/2000	12:00 pm	A/T LOCATION 1	SKIN TEST		STONE, SAM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	PHYSICAL EX		PEE, EM MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	HIV TEST		TIMES, LAN MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		QUEEG, QUICK MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		PLANS, MEDICATION MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		OPEN, CLIENT MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BACTERIOLC		REACTOR, JANE MN	SCHEDUL
05/12/2000	12:00 pm	A/T LOCATION 1	BLOOD TEST		REPORTS, MEDICAL MN	SCHEDUL
08/24/2000	12:00 pm	A/T LOCATION 1	WORKER APPT	WORKER, DELE		SCHEDUL

Filter Appointments by Status:

Scheduled
 Past Due
 Rescheduled
 Completed
 Canceled

Filter Appointments by Type:

BACTERIOLOGY
 BLOOD TEST
 CHEST X-RAY
 HIV TEST
 PHYSICAL EXAM
 SKIN TEST
 WORKER APPOINTMENT 1

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Close

8/24/2000 1:03 pm

3. Select the appointment in the browse list that needs to be confirmed.
4. Click the **Confirm** button.
5. Click **Yes** to confirm that you want to mark the appointment as “completed.”

The Status will display ‘Completed’.

Current Worker: **WORKER, DEFAULT**

Search: For Date Today All

Date	Time	Location	Appt. Type	Worker	Client	Status
05/05/1999		CLINIC 1	SKIN TEST		ANEW, ONE	COMPLET
05/10/1999		CLINIC 1	BACTERIOLC		ANEW, ONE	COMPLET
03/12/2000		CLINIC 1	SKIN TEST		QUEEG, QUICK MN	COMPLET
03/12/2000		CLINIC 1	SKIN TEST		ALPHA, AMES MN	COMPLET
03/12/2000		CLINIC 1	SKIN TEST		ARGON, HENRY MN	COMPLET
03/12/2000		CLINIC 1	SKIN TEST		BUGS, SQA MN	COMPLET
03/12/2000		CLINIC 1	SKIN TEST		GORMAN, ZENOBIA MN	COMPLET
03/12/2000		CLINIC 1	SKIN TEST		CLOSED, CLIENT MN	COMPLET
03/12/2000		CLINIC 1	SKIN TEST		ALLURE, YELLOW MN	COMPLET

Filter Appointments by Status:

Scheduled
 Past Due
 Rescheduled
 Completed
 Canceled

Filter Appointments by Type:

BACTERIOLOGY
 BLOOD TEST
 CHEST X-RAY
 HIV TEST
 PHYSICAL EXAM
 SKIN TEST
 WORKER APPOINTMENT 1

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Close

6. Click the **Close** button to exit the Worker Appointment window.

Reports

The Daily Program Operations offers several reports. They are:

- Appointment-By Client (Not available in this version of TIMS)
- Appointment - By Worker (Not available in this version of TIMS)
- Assignment - By Client (Not available in this version of TIMS)
- Assignment - By Worker (Not available in this version of TIMS)
- Assignment - Number and Types of Clients
- DOT Summary - By Worker
- DOT Summary - All Workers

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