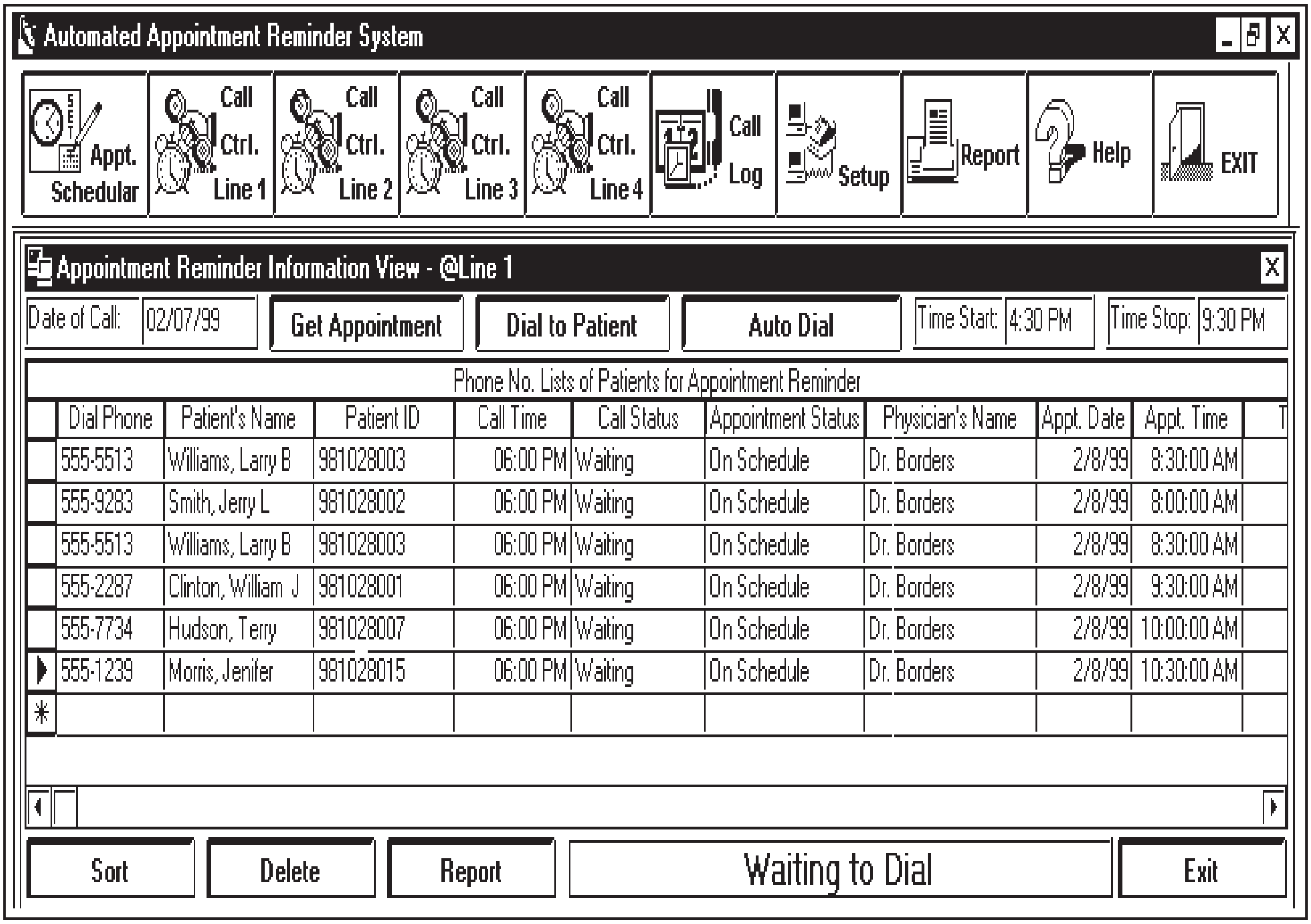


Doc-Calling

Interactive
Patient Scheduling
&
Appointment Reminder System

Table of Contents

Introduction

Welcome to DocCalling user's guide. This manual is a detailed guide to DocCalling system, a fast full-featured and easy to use patient scheduling and appointment reminder software designed to meet the needs of growing demands of healthcare provider's front office professionals.

The DocCalling user's manual is primarily intended for:

1. Medical/Dental/Physiotherapists Office Managers.
2. Medical/Dental/Physiotherapists bill processing professionals
3. Insurance/Claim bill processing professionals

Chapter 1 System Requirements & Installation

This section describes the system requirements and installation procedures. All details provided here are specific for a STAND-ALONE or a SINGLE PC system. Please consult Innovative Automation’s DocCalling Local Area Network (LAN) installation manual for multi-user installation and configuration procedures.

NOTE: Do not install and attempt to run the single-user version of DocCalling software in a LAN environment. The single-user version of DocCalling will not operate in a multi-user mode under network operating system (NOS). In addition, it may lock the entire LAN with loss of data and/or files.

1.1 System Requirements:

The minimum system requirements to install and run DocCalling software are:

Hardware:
Pentium based personal computer (P-133 MHz +) system equipped with a minimum of 64 MB RAM, VGA or Super VGA display unit, a hard disk drive with atleast 28 MB free disk space and a laser printer.

Software:
Microsoft Windows-95/98 or Microsoft Windows-NT 4.0 Workstation.

1.2 Installation:

To install the DocCalling software, follow the steps described below:

1. Insert the DocCalling “Setup” disk in the disk drive.
2. Click on “Start” button.
3. Select “Run” option.
4. Type <Source Disk Drive>:Setup
   Where <Source Disk Drive> is the letter of the disk drive containing DocCalling Setup disk.
   Example: A:Setup followed by pressing Enter key.
5. Follow the instructions displayed by the setup program and insert appropriate disks when prompted to complete the installation.

Chapter 2 Setting Up DocCalling

After successfully installing DocCalling software, you must set it up to serve your practice's requirements. This include the following steps described below, all of which must be completed before using DocCalling software.

Step 1. Setup "Physician" table.
(See Chapter 3, Section 3.1 for details)

Step 2. Setup "Patient" table
(See Chapter 3, Section 3.2 for details)

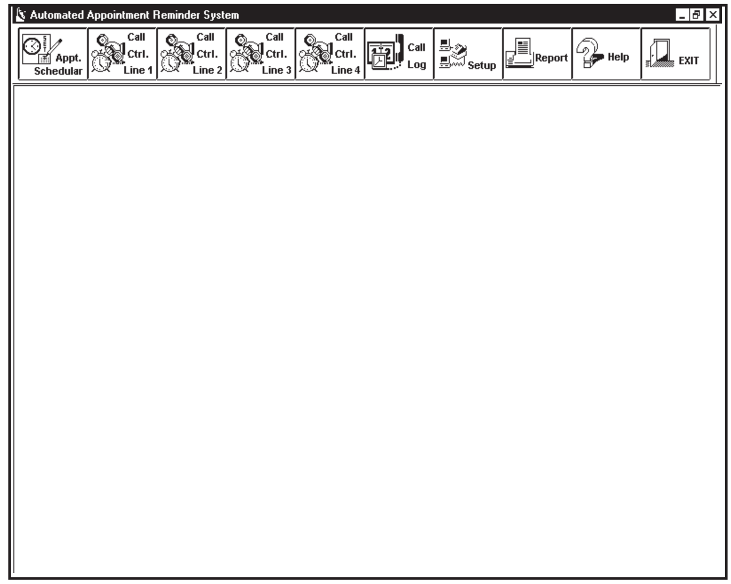
Step 3. Setup "Exam Room" table
(See Chapter 3, Section 3.3 for details)

Step 5. Setup and configure the "Dialogic CTI" drivers for Proline 2V or Dialogic 4 CTI card.
(See the Dialogic Hardware Installation Manual)
Required for Outbound call control.

Step 6. Setup "Call Control" table
(See Chapter 4, Section 4.1 for details)

Chapter 3 Appointment Scheduler

Using the “Appointment Scheduler” module, identifying detail information for physicians, patients and examination rooms are entered.



Screen 1. DocCalling main menu.

3.1 Physician Setup

Adding New Physician

Follow the steps described below:

1. Select “Appointment Scheduler” option from the main menu by a point and click.
2. Click on “Tables” menu item.
3. Select “Doctors” option from the list.

   Follow the steps described below:

   1. Click on “Add” button.
   2. Enter data for the following fields:

Name	Type	Size
Physician Name *	Text	
Phone No (Office)*	Text	
Phone No (Home)	Text	
Physician ID*	Text	
Agency ID	Text	
Clinic ID	Text	
Facility ID	Text	

   3. Repeat Steps 1 and 2 to add another physician.

   Note: Fields marked with * are required for proper operation of the software.

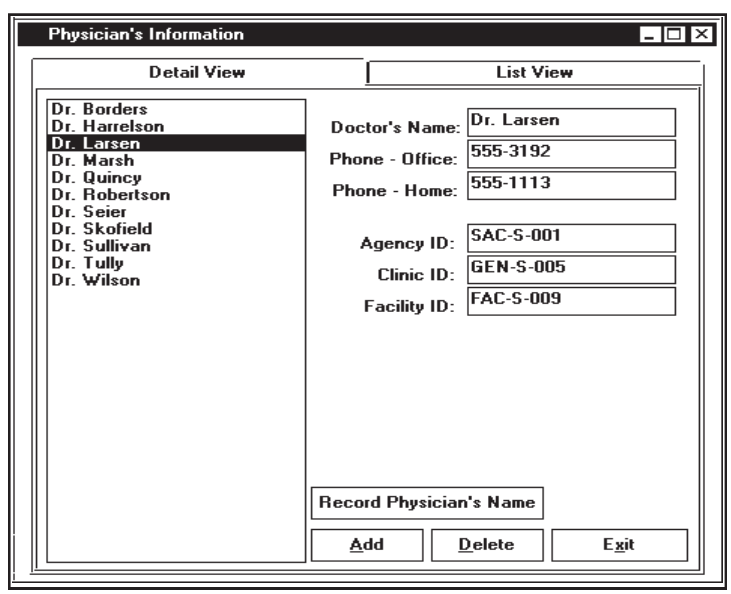
Modifying an Existing Physician

Follow the steps described below:

1. Select “Appointment Scheduler” option from the main menu by a point and click.
2. Click on “Tables” menu item.
3. Select “Doctors” option from the list.

   Follow the steps described below:

   1. Select the desired physician from the list by a point and click.
   2. Edit the desired data fields.



Screen 2. Physician Information Screen.

Deleting Existing Physician

Follow the steps described below:

1. Select “Appointment Scheduler”option from the main menu by a point and click.
2. Click on “Tables” menu item.
3. Select “Doctors” option from the list.

   Follow the steps described below:

   1. Select the desired physician from the list by a point and click.
   2. Click on “Delete” button.

   Note: Delete operation can not be undone and all data associated with the physician will be permanently removed (erased) from the system.

   Repeat Steps 1 and 2 to delete additional physicians.

3.2 Patient Setup

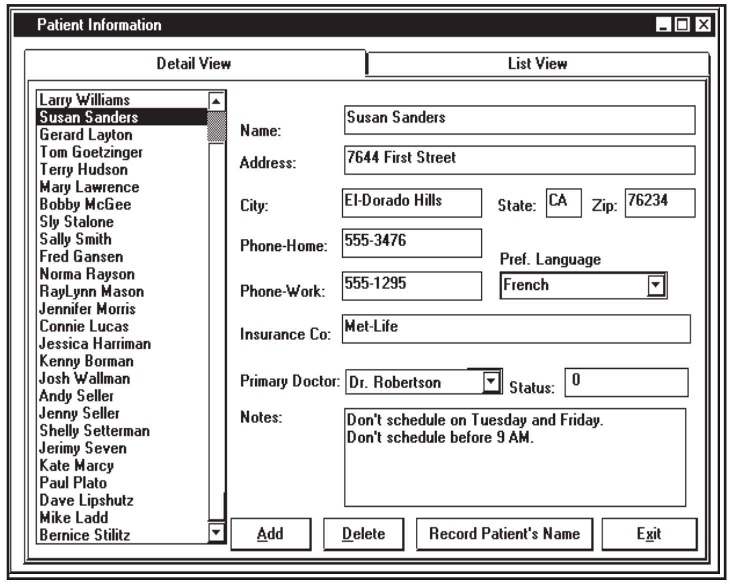
Adding New Patient

Follow the steps described below:

1. Select “Appointment Scheduler” option from the main menu by a point and click.
2. Click on “Tables” menu item.
3. Select “Patients” option from the list.

   Follow the steps described below:

   1. Click on “Add” button.
   2. Enter data for the following fields:



Screen 3. Patient Information Screen.

Name	Type	Size
Patient ID *	Text	
Patient First Name *	Text	
Patient Middle Initials *	Text	
Patient Last Name *	Text	
Address	Text	
City	Text	
State	Text	
Zipcode	Text	
Phone No (Home)*	Text	
Phone No (Work)	Text	
Primary Physician	<pull-down selection list>	
Status	<auto assigned>	
Notes	Text	
Preferred Language	Text	

   3. Repeat Steps 1 and 2 to add another patient.

   Note: Fields marked with * are required for proper operation of the software.

Modifying an Existing Patient

Follow the steps described below:

1. Select "Appointment Scheduler" option from the main menu by a point and click.
2. Click on "Tables" menu item.
3. Select "Patients" option from the list.

   Follow the steps described below:

   1. Select the desired patient from the list by a point and click.
   2. Edit the desired data fields.

Deleting Existing Patient

Follow the steps described below:

1. Select "Appointment Scheduler"option from the main menu by a point and click.
2. Click on "Tables" menu item.
3. Select "Patients" option from the list.

   Follow the steps described below:

   1. Select the desired patient name from the list by a point and click.
   2. Click on "Delete" button.

   Note: Delete operation can not be undone and all data associated with the patient will be permanently removed (erased) from the system.

   Repeat Steps 1 and 2 to delete additional patients.

3.3 Examination Room Setup

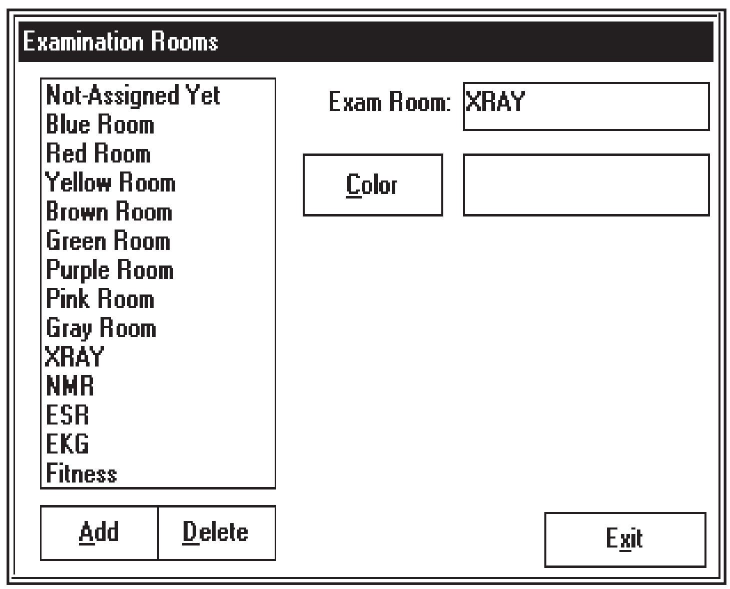
Adding New Examination Room

Follow the steps described below:

1. Select "Appointment Scheduler" option from the main menu by a point and click.
2. Click on "Tables" menu item.
3. Select "Exam Room" option from the list.

   Follow the steps described below:

   1. Click on "Add" button.
   2. Type the desired exam room name.
   3. Click on "Color" button. Select the desired color for the exam room entered in Step 2 above.
   4. Repeat Steps 1 through 3 to add another exam room.



Screen 4. Exam Room Information Screen.

Modifying an Existing Examination Room

Follow the steps described below:

1. Select "Appointment Scheduler" option from the main menu by a point and click.
2. Click on "Tables" menu item.
3. Select "Exam Room" option from the list.

   Follow the steps described below:

   1. Select the desired exam room from the list by a point and click.
   2. Assign the desired color code as needed.

Note: By assigning a new color code to an existing exam room does not change the color previously assigned in the appointment display chart.

Deleting an Existing Examination Room

Follow the steps described below:

1. Select “Appointment Scheduler” option from the main menu by a point and click.
2. Click on “Tables” menu item.
3. Select “Exam Room” option from the list.

   Follow the steps described below:

   1. Select the desired exam room from the list by a point and click.
   2. Click on “Delete” button.

   Note: Delete operation can not be undone.

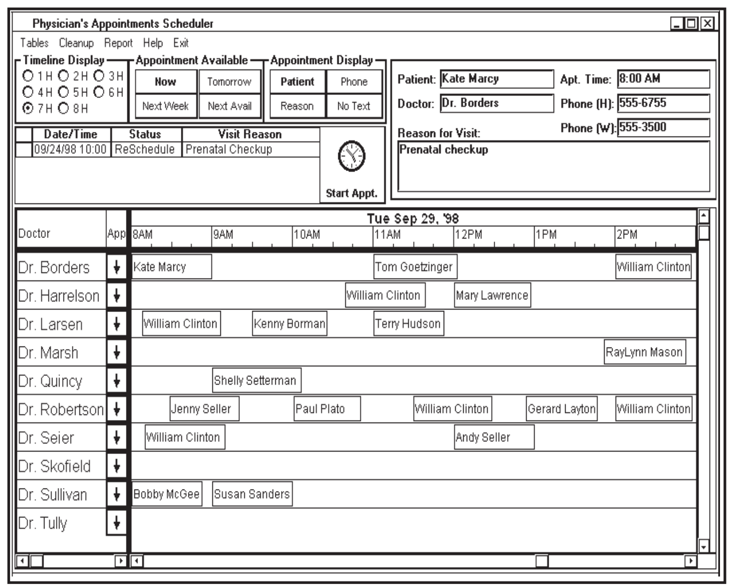
   Repeat Steps 1 and 2 to delete additional exam rooms.

3.4 Appointment Scheduler Setup

Adding New Appointments

Follow the steps described below:

1. Select “Appointment Scheduler” option from the main menu by a point and click.
2. Click on “Time Clock” icon and while keeping the mouse button pressed, drag-and drop to the desired “Physician’s Time Block”. The system displays “Patient Appointment” screen.
3. Select the desired “Patient” from the patient pull-down selection list. Physician’s name is automatically filled in by the system based on where the time block icon was dropped. Appointment time is also automatically filled in by the system based on where the time block icon was dropped. Make any changes, if necessary.



Screen 5. Appointment Scheduler - Patient Info. Screen.

4. Enter “Appointment Duration” such as 15, 30 mins etc. (Default is 30 mins)
5. Enter data for the following:

Name	Type	Size
Appointment Type		
Reason for Visit		
Notes		

6. Repeat Steps 2 through 5 to add an another new appointment.

Modifying Existing Appointments

Follow the steps described below:

1. Select “Appointment Scheduler” option from the main menu by a point and click.
2. Select the desired “Date” by scrolling.
3. Select the desired “Physician”
4. Select the “Patient” whose appointment needs to be modified by a “double” click.

The system displays the selected patient's detailed scheduling information. Modify the desired date and/or time fields. For example, appointment duration from 45 mins to 30 mins would require that "0 Hours 45 Mins" be changed to "0 Hours 30 Mins" or appointment date from 3/10/99 to 3/12/99 keeping the appointment time same would require that "3/10/99 3:00 PM" be changed to "3/12/99 3:00 PM" and this moves it to the new date.

Interactive Modification of Scheduling:
Using the visual scheduling one can interactively change the time block (increasing and/or decreasing the time blocks of a previously scheduled patients) or to move the time block to another day or to assign the time block to a different physician other than the physician who was initially assigned.

Changing Individual Patient's Time Block Size:
The time slot (block) as defined by the "Schedule Bar" can be easily increased to exceed the original time interval or decreased by a simple point and click, follow the steps described below:

Moving Time Blocks:
1. Move the mouse cursor over the desired time "Schedule Bar", the icon shape becomes "Cross Arrow".
2. Point and click (displays the date and time) while keeping the mouse button pressed and mouse icon shape "Cross Arrow" and "drag" to a new time block schedule (time scale is on the top). Release the mouse button.
3. Double click on the "Schedule Bar", notice the newly modified "Appointment Duration" reflecting the change made in previous step.

Increasing Time Block Size:
1. Move the mouse cursor over the desired time "Schedule Bar", the icon shape becomes "Cross Arrow" -- move the mouse to the right until the icon shape changes to "Single Right Arrow".
2. Point and click (displays the date and time) while keeping the mouse button pressed and mouse icon shape "Single Right Arrow" , "drag to the right side" to a new time schedule (time scale is on the top). Release the mouse button.
3. Double click on the "Schedule Bar", notice the newly modified "Appointment Duration" reflecting the change made in previous step.

Decreasing Time Block Size:
1. Move the mouse cursor over the desired time "Schedule Bar", the icon shape becomes "Cross Arrow" -- move the mouse to the left until the icon shape changes to "Single Left Arrow".
2. Point and click (displays the date and time) while keeping the mouse button pressed and mouse icon shape "Single left Arrow" , "drag to the left side" to a new time schedule (time scale is on the top). Release the mouse button.
3. Double click on the "Schedule Bar", notice the newly modified "Appointment Duration" reflecting the change made in previous step.

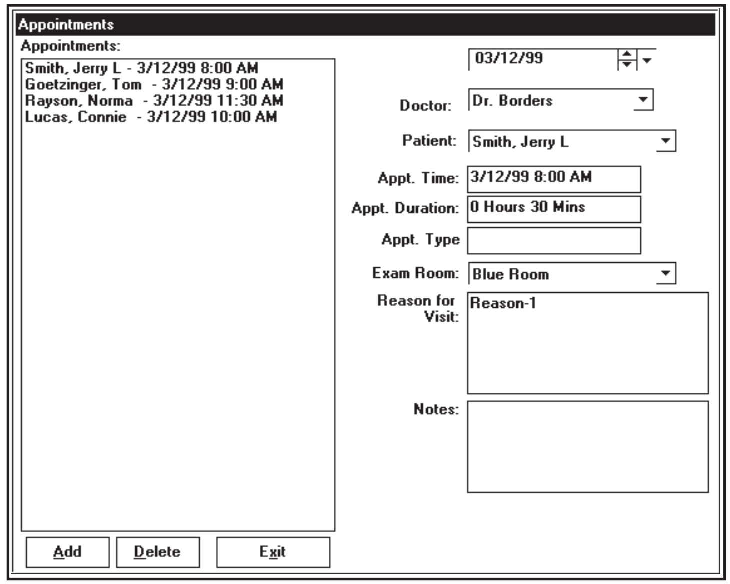
Assigning Patient's Appointment to New Physician
To move a patient's appointment block assigned to another day to a different physician other than the physician who was initially assigned, follow the steps described below:
1. Locate the "Physician" whose schedule will be moved, scroll if necessary.
2. Locate the "Patient" and move the mouse cursor over the desired time "Schedule Bar", the icon shape becomes "Cross Arrow".
3. Point and click (displays the date and time) while keeping the mouse button pressed and mouse

icon shape “Cross Arrow” and “drag” to the desired “Physician’s” new time slot. Release the mouse button. Notice that the “Patient’s Appointment Block” has moved from initially assigned physician to the newly assigned physician. To change the time block size, follow the steps described earlier under “Increasing and Decreasing Time Block Size”.

Deleting Existing Patient Schedules

Follow the steps described below:

1. Select “Appointment Scheduler” option from the main menu by a point and click.
2. Click on “Appointment” menu item.
3. Select “Physician” from the pull-down selection list.
4. Select “Date” from the pull-down date selection list.
5. Point and click and select the desired “Patient” from the patients list displayed under the appointments.
5. Click on “Delete” button.
6. Repeat Steps 3 to 5 to delete any additional schedules.
7. Click on “Exit” button.



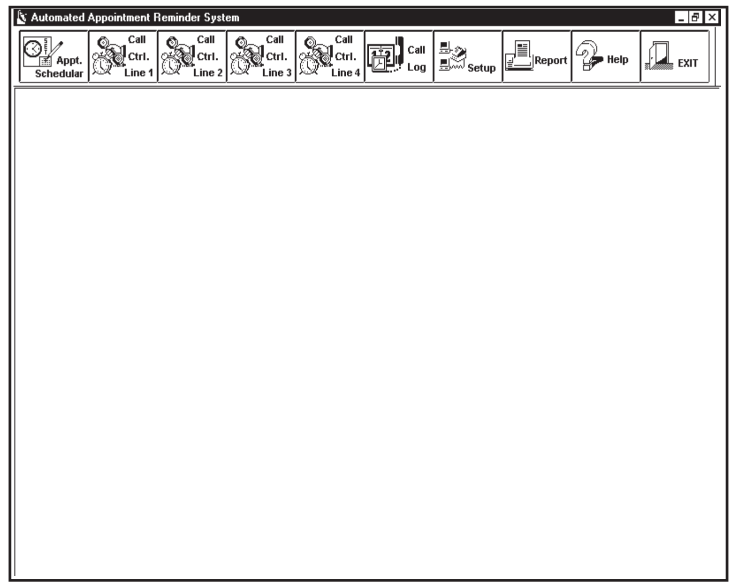
Screen 6. Appointment Scheduler - Deleting Schedules.

Note: Delete operation can not be undone and all data associated with the schedule will be permanently removed (erased) from the system.

Chapter 4 Appointment Reminder & Outbound Call Control

Using DocCalling system's outbound call control module Appointment Reminder (APR) patients can be reminded about their appointments before their office visit. The APR system allows you to configure how many days before the actual appointment, these reminder calls be made and at what time, how many lines to be used simultaneously and how an external data file will be read by the system.

Prior to using appointment reminder, you must install Dialogic ProLine/2V or Dilaog/4 computer telephony interface (CTI) card and configure it with the Dialogic supplied CTI drivers.



Screen 1. DocCalling Main Menu.

4.1 Outbound Call Control Setup

The Setup option allows you to configure the following:

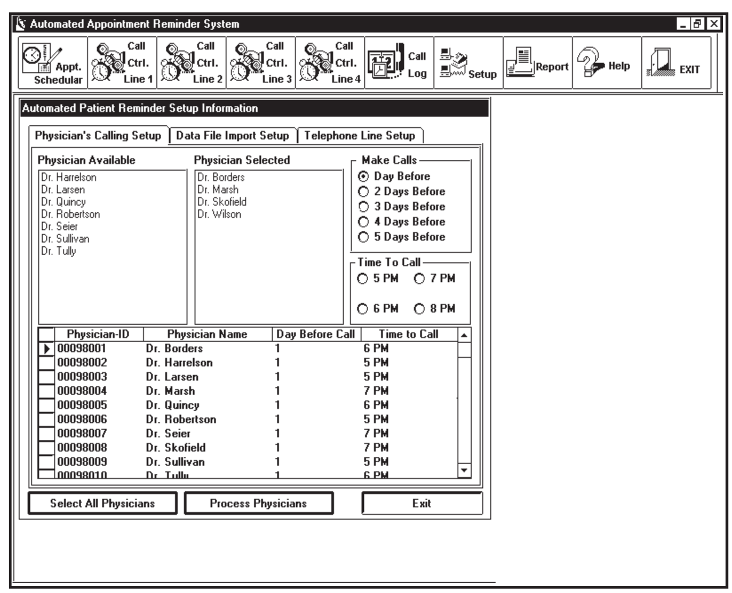
- Days Before Calling
- Time To Call
- Physician Selection
- Date File Import Selection
- Telephone Line Selection

Follow the steps described below:

1. Select "Setup" option from the main menu.

<u>Physician's Calling Setup Tab:</u>

2. Select "Physician" from the list of "Physician Available" by point and click. You may select more than one physician or all physicians.
3. Check "Make Call" the options are: "Day Before, 2, 3, 4 and 5 days". This allows you to setup how many days before the actual appointment, the reminder call be initiated by the system.
4. Check "Time To Call" the options are: 5 PM, 6 PM, 7 PM and 8 PM. This allows you to setup the time when the reminder calls will be made.
5. Click on "Process Physician". This step assigns parameters selected in Steps 3 and 4 to physicians selected in Step 2.



Screen 2. Physician Calling Setup

<u>Data File Import Setup Tab:</u>

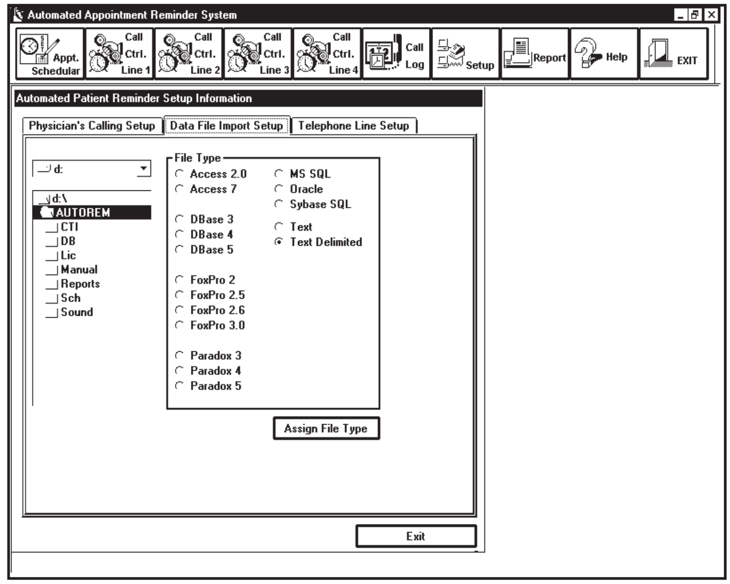
Click on "Data File Import .." tab.

1. Select "Drive" (Where the data file to be read resides)

2. Select “Directory”
(and sub-directory, if necessary
Where the data file to be read resides)

3. Select “File Type”
The standard DocCalling version comes with “Text Delimited” file type only. All other file types are available as options and can be purchased separately, for more info. please contact Sales at Innovative Automation (916-392-9264).

4. Click on “Assign File Type” button.
This step assigns the data file import filter to be used every time the system reads the data file and needs to be performed once as long as data file type remains same.

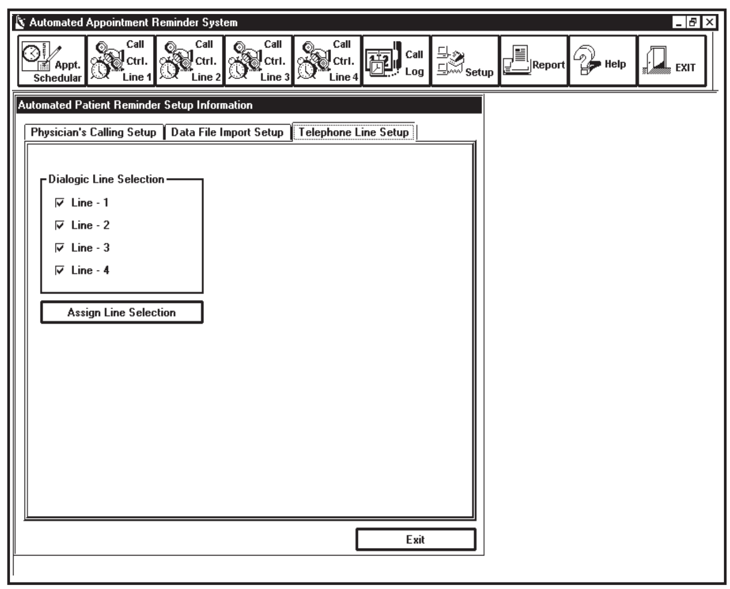


Screen 3. Data File Import Setup.

<u>Telephone Line Selection Tab:</u>
Click on “Telephone Line Setup” tab.

1. Check appropriate number of telephone lines. Ensuring that the DocCalling system and the CTI card installed supports the number of lines checked.
Note:
DocCalling standard version supports a maximum of two telephone lines.
Dialogic Proline/2V supports two analog telephone lines.

2. Click on “Assign Line Selection” button. This step assigns the number of lines to be used by the system.



Screen 4. Telephone Line Selection Setup.

4.2 Starting Outbound Calls

Appointment Reminder Outbound Call

Patient appointment reminder calls are made using this module. This option allows you to read the list of patients scheduled based on parameters defined in Section 4.1 Physician Calling Setup tab, Data File Import tab (if an external data file is to be read) and Number of Telephone Lines tab.

Follow the steps described below:

1. Click on “Call Control Line #1” button from the main menu.

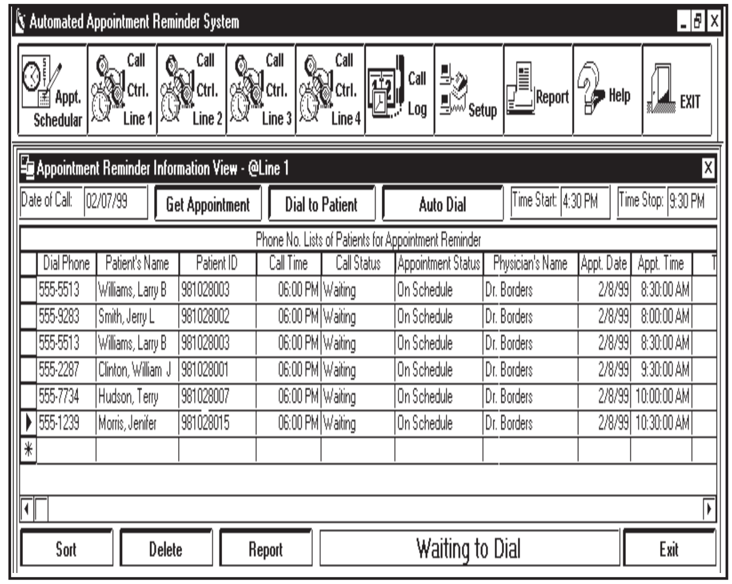
<u>Scheduling Data From DocCalling Scheduler:</u>

2a. Click on “Get Appointments” button.
This step extracts all the appointments for all physicians and populates the grid.

<u>Scheduling Data From External Data File (Scheduler):</u>

2b. Click on “Read Data File” button if an external file is to be read.
Select the data file to be read from the list displayed.
Note: Use Step 2a or 2b based on how you want to read the scheduling information..

3. Click on “Dial to Patient” button. This step starts the telephony and dials each patient and based on the patient’s response - updates the “Call Status”. The following patient response are recognized by the system:
Pressed “1” Keep Appointment
Pressed “2” Cancelled
Pressed “3” Rescheduled
Pressed “4” Replay
4. Click on “Exit” to terminate the session.
<u>Note</u>: You must record the “sound clip” appropriate for your office.



Screen 5. Appointment Reminder outbound Call.

5. Click “Print” to output the “Appointment Status Report”.
<u>Hard Copy Output:</u>
Click on “Printer Icon” for hardcopy outputs, select “Print Range”, “Number of Copies” and “Collate” followed by a click on “OK.”
<u>Export Output:</u>
Click on “Export Icon” and select the desired output formats: Disk File and /or e-Mail routing.
6. Click on “Exit” to terminate the session.

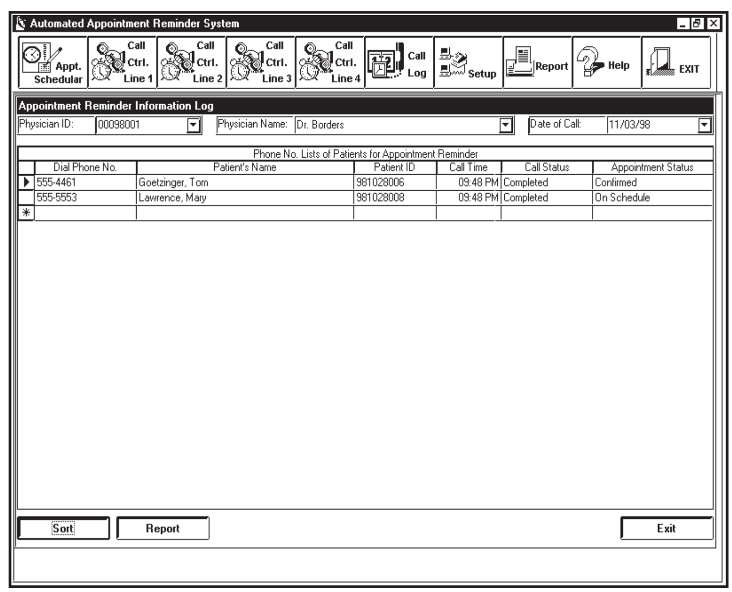
4.3 Monitoring Outbound Calls

Call Log

Follow the steps described below:

1. Click on “Call Log” button from the main menu.
2. Select “Physician ID” from the pull-down selection list.
3. Select “Physician Name” from the pull-down selection list.
4. Select “Date of Call” from the pull-down selection list.
5. Click “Print” to output the “Appointment Log Report”.

<u>Hard Copy Output:</u>
Click on “Printer Icon” for hardcopy outputs, select “Print Range”, “Number of Copies” and “Collate” followed by a click on “OK.”



Screen 6. Appointment Reminder Call Log.

<u>Export Output:</u>
Click on “Export Icon” and select the desired output formats: Disk File and /or E-Mail routing.

6. Click on “Exit” to terminate the session.

Using the "Reporting" you can access data entered in the DocCalling system by a point and click. These reports can be produced for a given physician and for a given date or range of dates. The outputs of these reports can be directed to a disk file or an e-mail distribution in addition to a standard printer.

The DocCalling system supports the following types of report outputs:

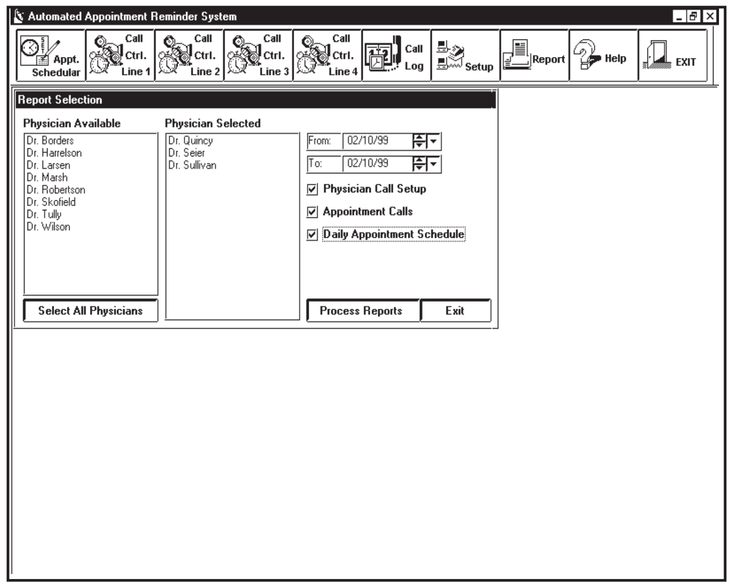
Hard Copy Printer Output
Exportable Disk File Output (ASCII, MS-Word, MS-EXCEL, RTF, TXT, Internet's HTML, etc..)
e-Mail (POP3 compliant mail such as MS-OutLook, MS-Mail, Eudora, etc..)

5.1 Physician's Call Setup

Follow the steps described below:

1. Click on "Report" button.
2. Point and click to select the desired "Physician" from the list of "Physicians Available" list box. The physician selected moves to the "Physician Selected" list box. You may select more than one physician. To remove the physician selected, simply click on it and it moves back to available list.
3. Check report type "Physician Call Setup" option.
4. Click on "Process Report" button. The system displays the output report. The following options are available:

   <u>Hard Copy Output:</u>
   Click on "Printer Icon" for hardcopy outputs, select "Print Range", "Number of Copies" and "Collate" followed by a click on "OK."
   <u>Export Output:</u>
   Click on "Export Icon" and select the desired output formats: Disk File and /or e-mail routing.

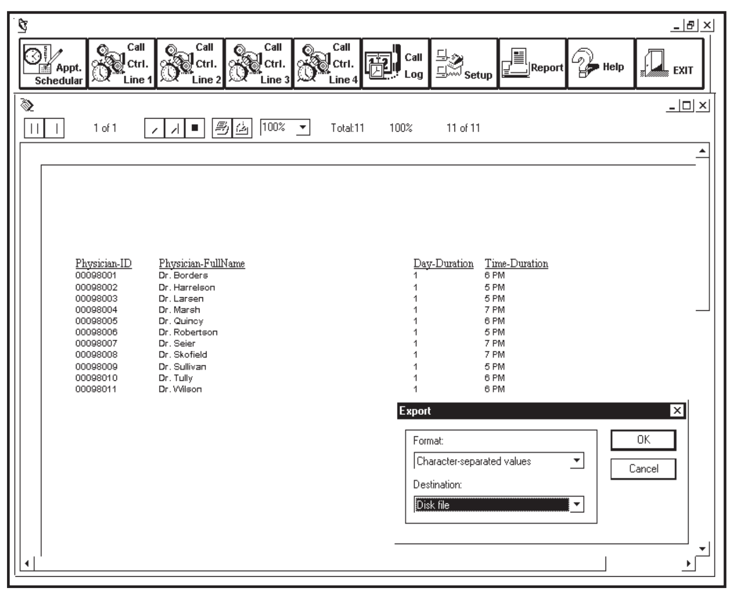


Screen 1. Report Module Screen.

5.2 Appointment Call Setup

Follow the steps described below:

1. Click on "Report" button.
2. Point and click to select the desired "Physician" from the list of "Physicians Available" list box. The physician selected moves to the "Physician Selected" list box. You may select more than one



Screen 2. Report Output Options.

physician. To remove the physician selected, simply click on it and it moves back to available list.

3. Check report type “Appointment Call Setup” option.
4. Define “From” and “To” date ranges using date pull-down selection calendar.
5. Click on “Process Report” button.
   The system displays the output report. The following options are available:
   Hard Copy Output:
   Click on “Printer Icon” for hardcopy outputs, select “Print Range”, “Number of Copies” and “Collate” followed by a click on “OK.”
   Export Output:
   Click on “Export Icon” and select the desired output formats: Disk File and /or e-mail routing.

5.3 Daily Appointment Schedules

Follow the steps described below:

1. Click on “Report” button.
2. Point and click to select the desired “Physician” from the list of “Physicians Available” list box. The physician selected moves to the “Physician Selected” list box. You may select more than one physician. To remove the physician selected, simply click on it and it moves back to available list.
3. Check report type “Daily Appointment Schedule” option.
4. Define “From” and “To” date ranges using date pull-down selection calendar.
5. Click on “Process Report” button.
   The system displays the output report. The following options are available:
   Hard Copy Output:
   Click on “Printer Icon” for hardcopy outputs, select “Print Range”, “Number of Copies” and “Collate” followed by a click on “OK.”
   Export Output:
   Click on “Export Icon” and select the desired output formats: Disk File and /or e-mail routing.

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