SCHEDULING

BUSINESS MODEL SOFTWARE TRAINING

GoodLooking

BUSINESS MODEL SOFTWARE

<u>Scheduling and the Patient Menu: Recommended Training Course Agenda</u>

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how a patient would flow through the GoodLooking software. The sequence of courses can be changed based on agency training needs and schedule; however the content of each course should remain as stated.

Recommended Course Attendees: Management, Office Staff, Intake & Schedulers

🕐 : 2 hours

COURSE TITLE	COURSE DESCRIPTION	🕐
The Patient Menu & Tabs	Learn how to navigate through the Patient Menu and various tabs in GoodLooking software.	30 Minutes
Adding E-records, Events, & Attributes	Learn how to scan and use various documents within GoodLooking software.	5 Minutes
How to Enter Start of Care Date for Patients Transitioning Into the Software.	Learn how to enter a Start of Care date for transitioning patients into GoodLooking Software.	10 Minutes
Scheduling from the Patient Menu	Learn how to navigate and use the Patient menu.	10 Minutes
Scheduling from the Schedule Tab	Learn how to navigate and use the Schedule.	10 Minutes
Monthly Schedule	Learn how to locate and view a monthly schedule for various agents.	5 Minutes
Episode Schedule	Learn how to locate and view an episode schedule for patients.	10 Minutes
Filter Options	Learn about the various filter options within the schedule.	5 Minutes
Printing Options	Learn about various printing options for schedules.	5 Minutes

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COURSE TITLE	COURSE DESCRIPTION	🕐
Updating Multiple Visits at One Time	Learn how to update multiple visits at one time using the schedule features.	10 Minutes
Copying Visits to Other Days/Week	Learn how to copy visits to other days/weeks using the schedule features.	10 Minutes

IMPORTANT TIPS TO SHARE:

- Explain how to use the search alphabet at the top and the Advanced Search options.
- Explain to participants, if they are a Medicare agency transitioning, how to correct Episode dates and the SOC date from the Patient Menu.
- Explain how they can update multiple visits at once, using the List tab and give real examples of why they would do this. (Ex. A nurse goes on vacation)
- Make sure that participants know they do NOT have to use the Patient Menu to schedule. We do have an alternate scheduling screen available in the Schedule tab.
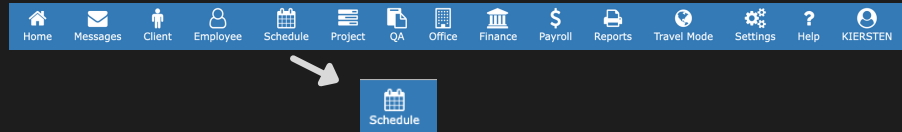
Schedule an Event

1
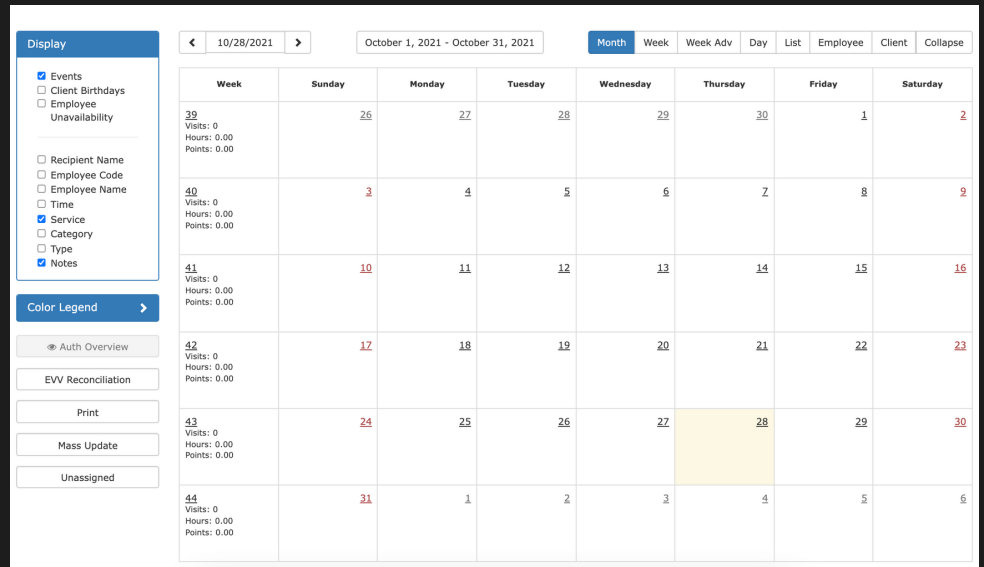
Go to 'Schedule' Tab

- On your home page, click the 'Schedule' tab at the top tool bar

2

Choose the Date

- The schedule page will present a calendar for the current month. Click on the number date that you want to create an event for.

3

Add the Event

- The 'Add Event' form will open. Complete the details of the event in the form fields and assign it to the necessary recipients for that particular event.
- If you want to assign it to an entire group or office, you simply type in the name or location and it will appear on that particular set of recipient's schedules.
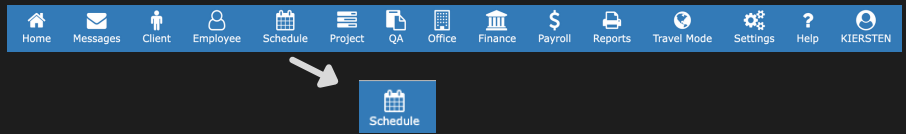- Don't forget to click 'Save.'

Save
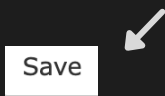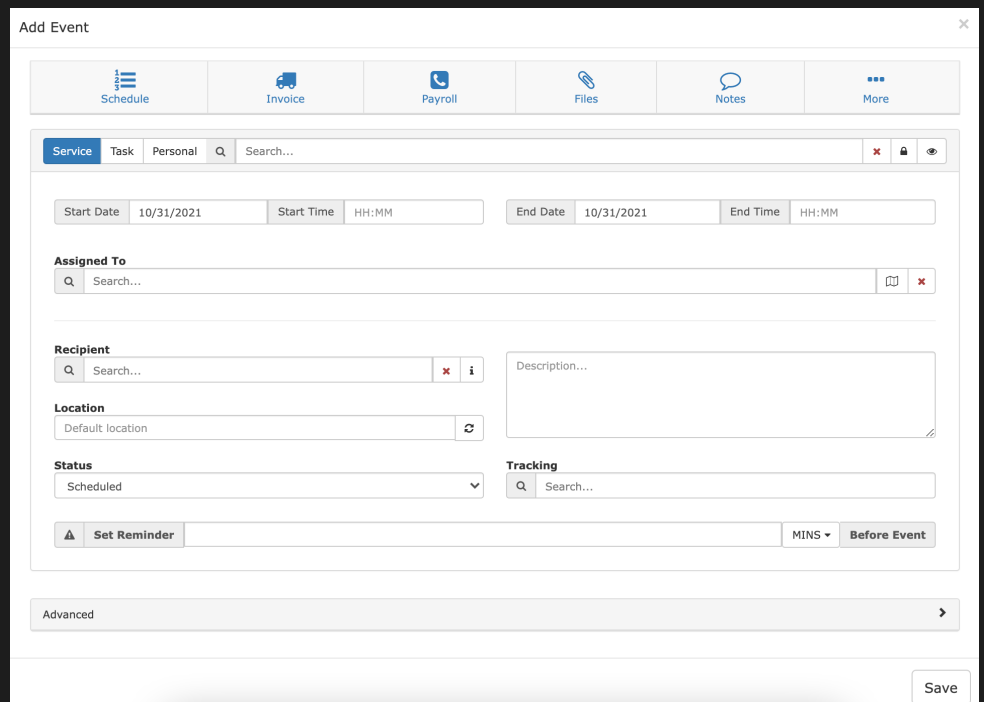
Update Multiple Events
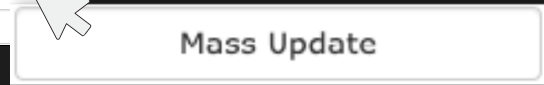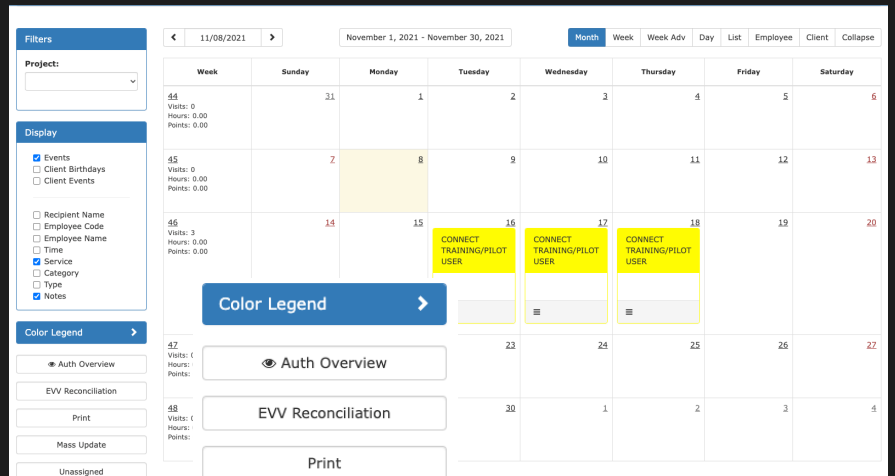
1 **Go to 'Schedule' Tab**
- On your home page, click the 'Schedule' tab at the top tool bar
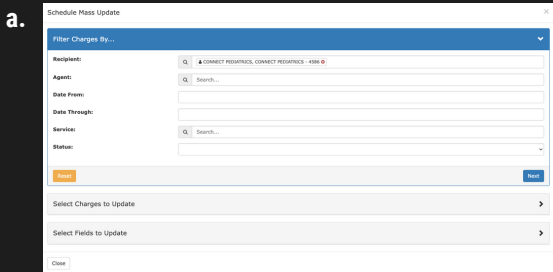

2 **Mass Update**
- The schedule page will present a calendar for the current month. Click on the 'Mass Update' button on the side bar options to the bottom left.
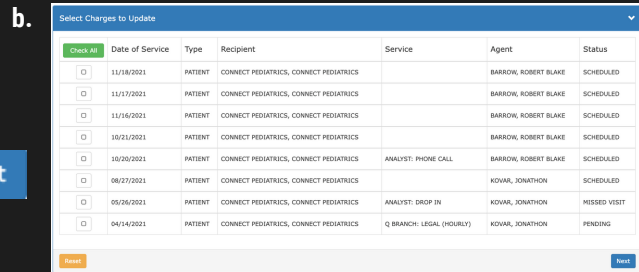

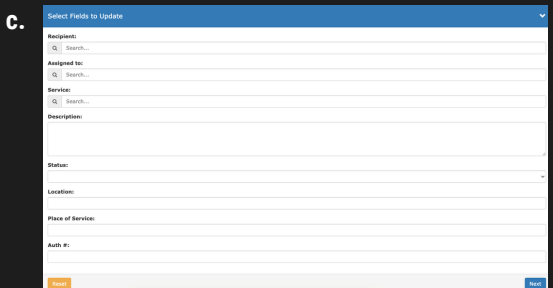**3** **Choose the Event You Want to Apply Updates To**
- When the 'Schedule Mass Update' form opens, there will be three sections to go through:
  a. Begin with the 'Filter Charges By...' so you can find the event you want to Mass Update. Click 'Next'.
  b. It will direct you to the next section, 'Select the Charges to Update' where you will check the line items you want to apply it to. Click 'Next'.
  c. The third and final section, 'Select Fields to Update' will allow you make changes to event details. Click 'Next'.
- Once all sections are completed, click 'Submit'.