

The Provider Scheduler module is utilized to handle consumer referrals. Many agencies have regularly scheduled times that they can handle referrals. You are able to set these up in the Provider Scheduler so that the MCO knows your availability and can schedule appropriately.

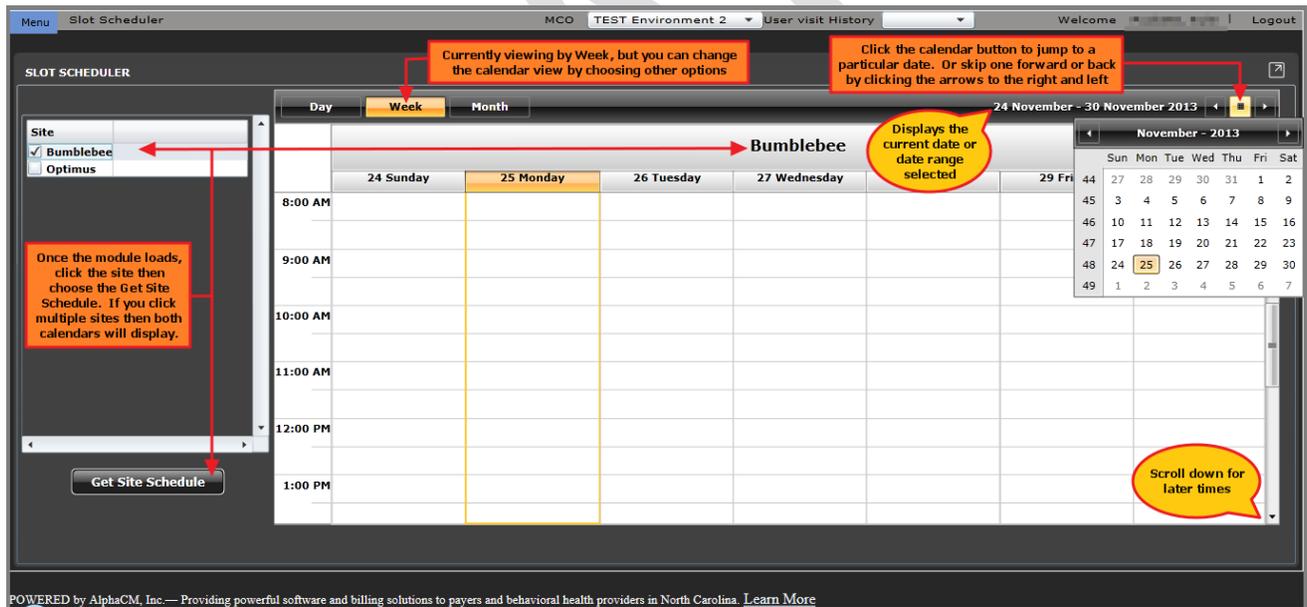
To launch the Provider Scheduler; click **Menu > Provider Scheduler**

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Module View

When the module loads, you will be presented with a blank calendar with your provider sites listed in the left hand column. In order to pull down and view the site specific schedule, you'll need to click the checkbox next to the site name, then click Get Site Schedule.



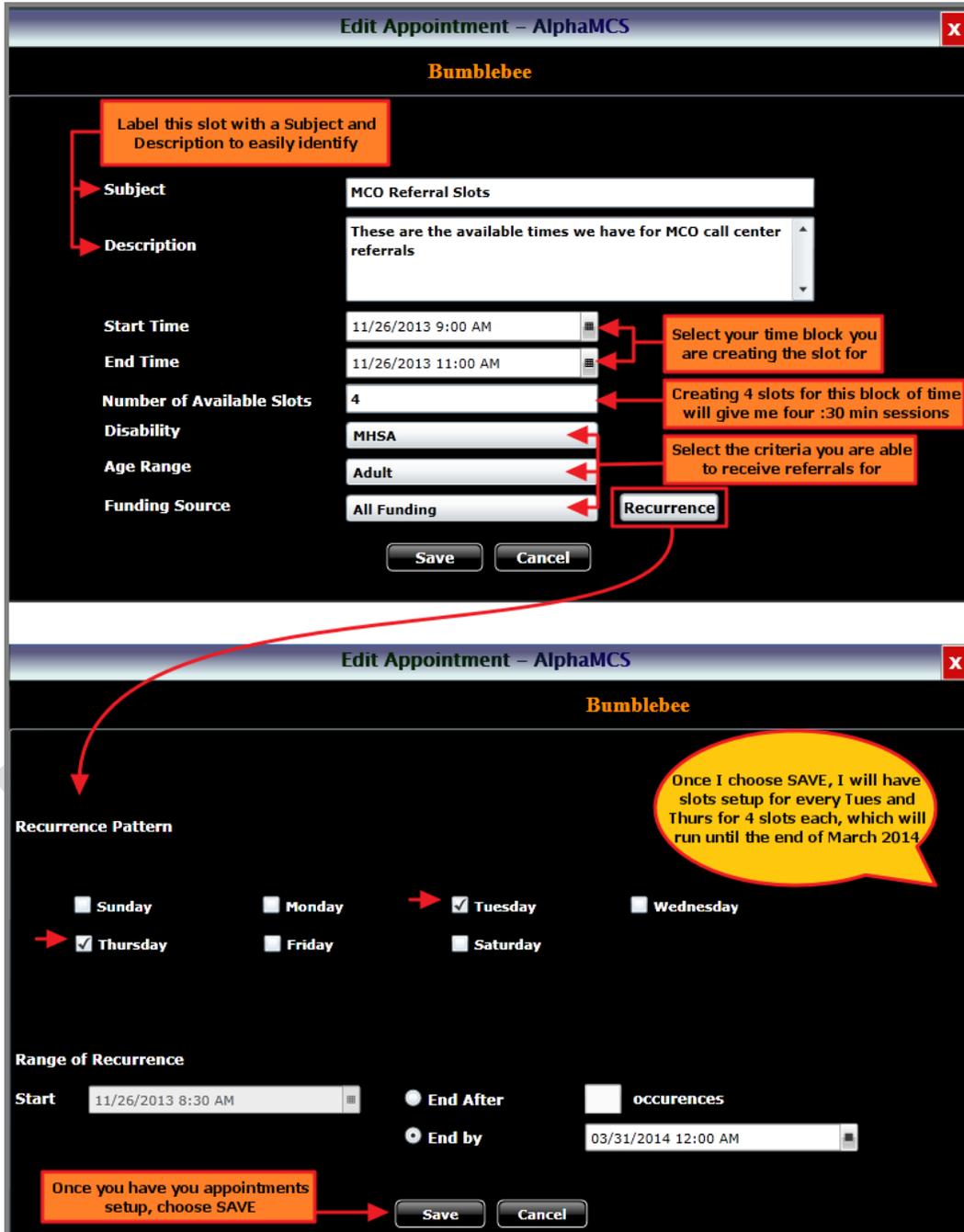
The screenshot shows the Slot Scheduler interface. On the left, a list of sites includes 'Bumblebee' (checked) and 'Optimus'. A 'Get Site Schedule' button is at the bottom. The main area shows a weekly calendar for 'Bumblebee' from Sunday to Friday. Callouts include: 'Currently viewing by Week, but you can change the calendar view by choosing other options' pointing to the 'Week' tab; 'Click the calendar button to jump to a particular date. Or skip one forward or back by clicking the arrows to the right and left' pointing to the date navigation arrows; 'Displays the current date or date range selected' pointing to the date '24 November - 30 November 2013'; 'Once the module loads, click the site then choose the Get Site Schedule. If you click multiple sites then both calendars will display.' pointing to the site list; and 'Scroll down for later times' pointing to the bottom of the calendar grid.

NOTE: If your company is set up as an Open Access provider, you won't be able to create open slots in the **Provider Scheduler**. You can check to see if your company is one of these providers by going to the **Provider Details** module, Provider **Base** tile. Refer to the **Provider Details** document

NOTE: You are not allowed to schedule walk-ins to Slots, these are reserved for the MCO. However you can reschedule MCO referrals to other slots

Creating Slots [\(TOP\)](#)

Create available slots for the MCO to refer consumers to your agency. Find the time you want to create the slot for and double click:



The screenshot displays two windows of the 'Edit Appointment - AlphaMCS' interface. The top window shows the main appointment details for 'Bumblebee' with the following fields:

- Subject:** MCO Referral Slots
- Description:** These are the available times we have for MCO call center referrals
- Start Time:** 11/26/2013 9:00 AM
- End Time:** 11/26/2013 11:00 AM
- Number of Available Slots:** 4
- Disability:** MHSA
- Age Range:** Adult
- Funding Source:** All Funding

Annotations in the top window include:

- A red box pointing to the Subject and Description fields: "Label this slot with a Subject and Description to easily identify"
- A red box pointing to the Start Time field: "Select your time block you are creating the slot for"
- A red box pointing to the Number of Available Slots field: "Creating 4 slots for this block of time will give me four :30 min sessions"
- A red box pointing to the Age Range field: "Select the criteria you are able to receive referrals for"
- A red box labeled "Recurrence" pointing to the bottom right of the form.

The bottom window shows the 'Recurrence Pattern' section with the following settings:

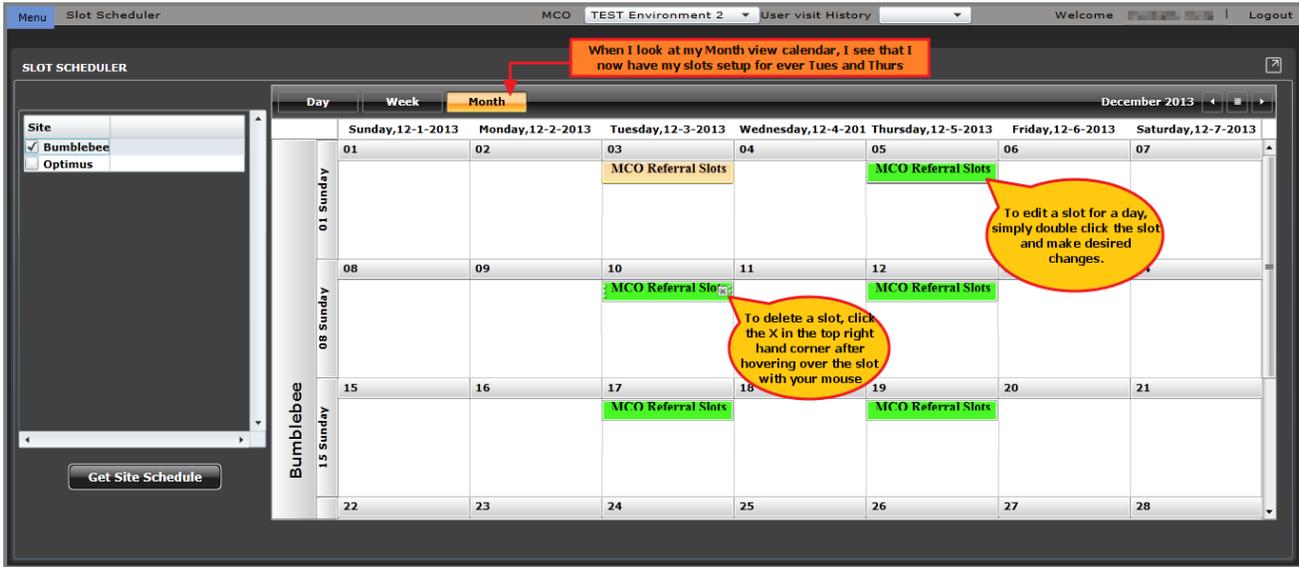
- Recurrence Pattern:**
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
- Range of Recurrence:**
 - Start:** 11/26/2013 8:30 AM
 - End After:** occurrences
 - End by:** 03/31/2014 12:00 AM

Annotations in the bottom window include:

- A yellow speech bubble: "Once I choose SAVE, I will have slots setup for every Tues and Thurs for 4 slots each, which will run until the end of March 2014"
- A red box pointing to the Save button: "Once you have you appointments setup, choose SAVE"

Slots on the Calendar [\(TOP\)](#)

Now that I've created my open slots, I can view them for the month by clicking the Month calendar view:



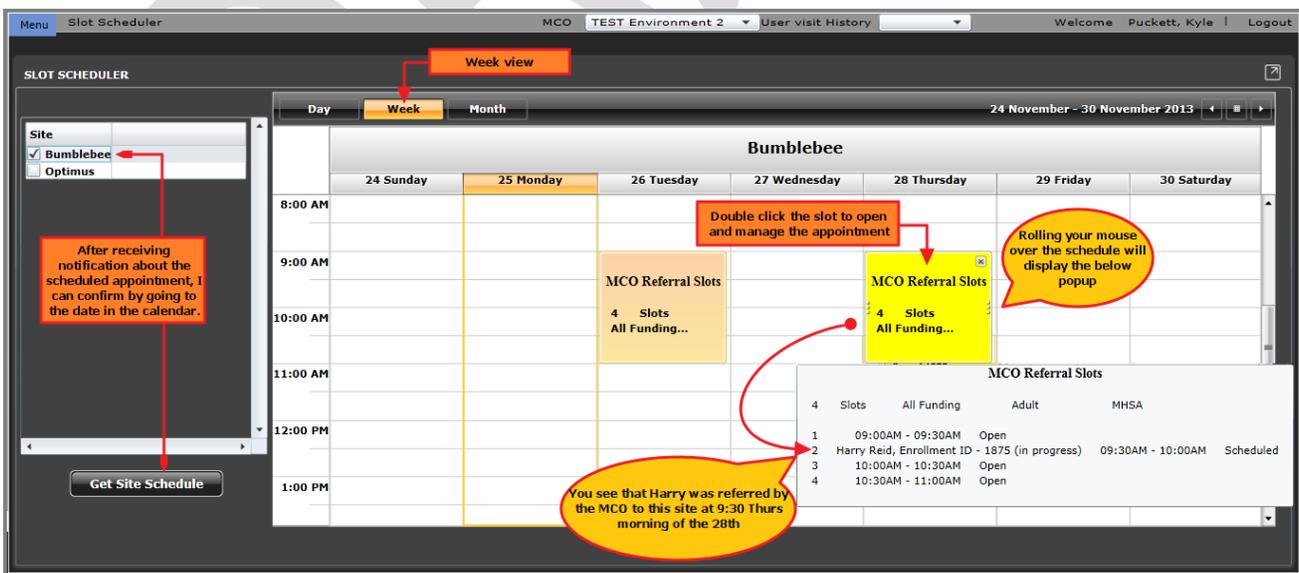
When I look at my Month view calendar, I see that I now have my slots setup for ever Tues and Thurs

To edit a slot for a day, simply double click the slot and make desired changes.

To delete a slot, click the X in the top right hand corner after hovering over the slot with your mouse

After a Consumer is Referred

Once a consumer is referred, everyone at your agency with a portal user account will receive an email stating so. You can confirm and record the results of the appointment from the scheduler:



After receiving notification about the scheduled appointment, I can confirm by going to the date in the calendar.

Double click the slot to open and manage the appointment

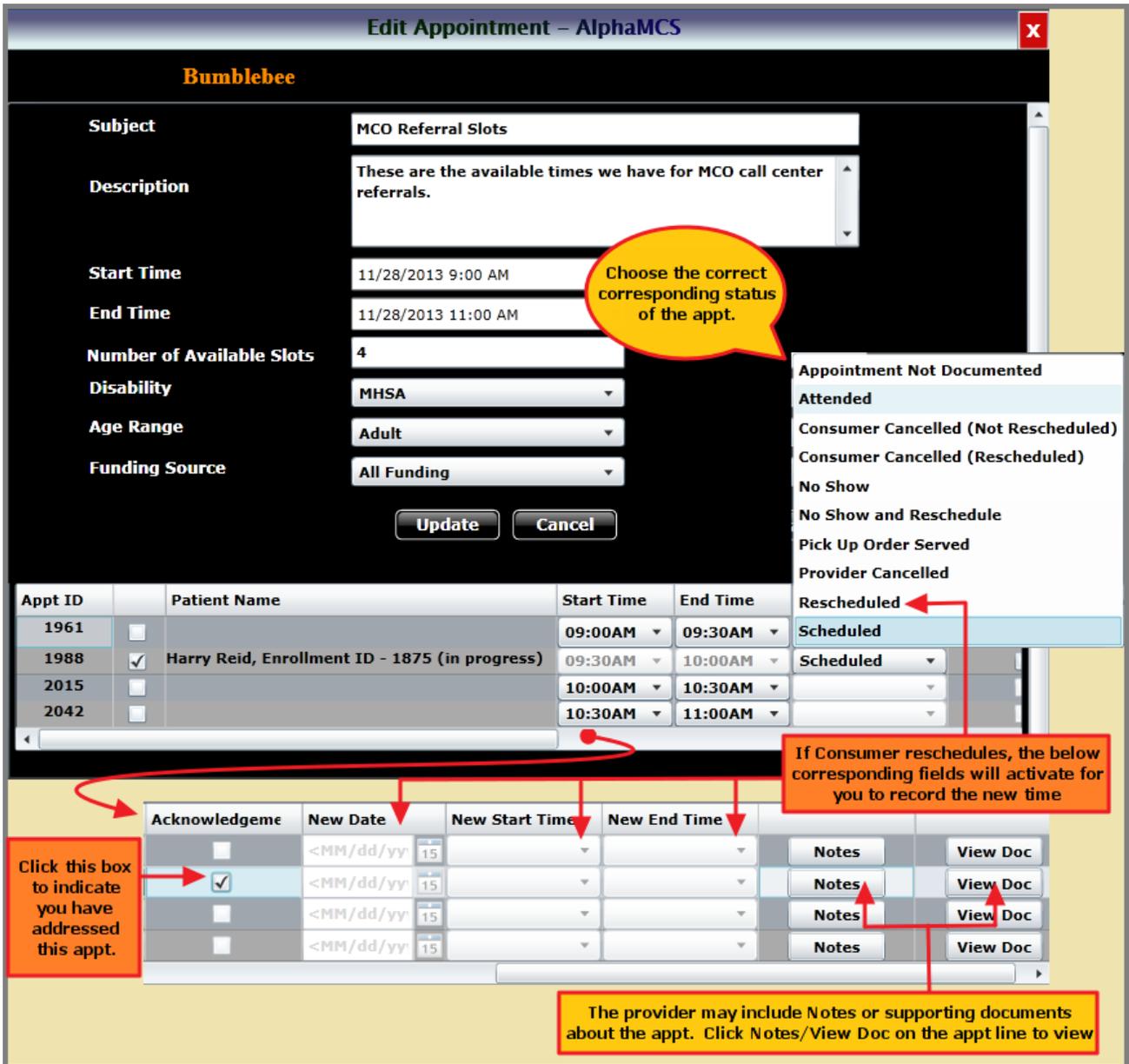
Rolling your mouse over the schedule will display the below popup

You see that Harry was referred by the MCO to this site at 9:30 Thurs morning of the 28th

MCO Referral Slots				
4	Slots	All Funding	Adult	MHSA
1	09:00AM - 09:30AM	Open		
2	Harry Reid, Enrollment ID - 1875 (in progress)	09:30AM - 10:00AM	Scheduled	
3	10:00AM - 10:30AM	Open		
4	10:30AM - 11:00AM	Open		

Managing the Appointment [\(TOP\)](#)

To manage the appointment, you want to first locate it on your schedule then double click the slot. After double clicking the slot, the below window will open for you to manage the appointment:



Edit Appointment - AlphaMCS

Bumblebee

Subject: MCO Referral Slots

Description: These are the available times we have for MCO call center referrals.

Start Time: 11/28/2013 9:00 AM

End Time: 11/28/2013 11:00 AM

Number of Available Slots: 4

Disability: MHSA

Age Range: Adult

Funding Source: All Funding

Buttons: Update, Cancel

Appointment Status List:

- Appointment Not Documented
- Attended
- Consumer Cancelled (Not Rescheduled)
- Consumer Cancelled (Rescheduled)
- No Show
- No Show and Reschedule
- Pick Up Order Served
- Provider Cancelled
- Rescheduled
- Scheduled

Appt ID	Patient Name	Start Time	End Time	Status
1961		09:00AM	09:30AM	Scheduled
1988	Harry Reid, Enrollment ID - 1875 (in progress)	09:30AM	10:00AM	Scheduled
2015		10:00AM	10:30AM	
2042		10:30AM	11:00AM	

Appointment Management Table:

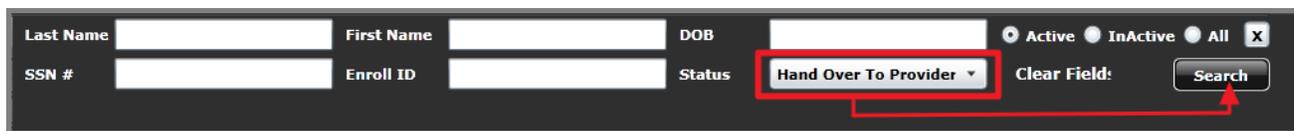
Acknowledgeme	New Date	New Start Time	New End Time	Notes	View Doc
<input type="checkbox"/>	<MM/dd/yy> 15			Notes	View Doc
<input checked="" type="checkbox"/>	<MM/dd/yy> 15			Notes	View Doc
<input type="checkbox"/>	<MM/dd/yy> 15			Notes	View Doc
<input type="checkbox"/>	<MM/dd/yy> 15			Notes	View Doc

Callouts:

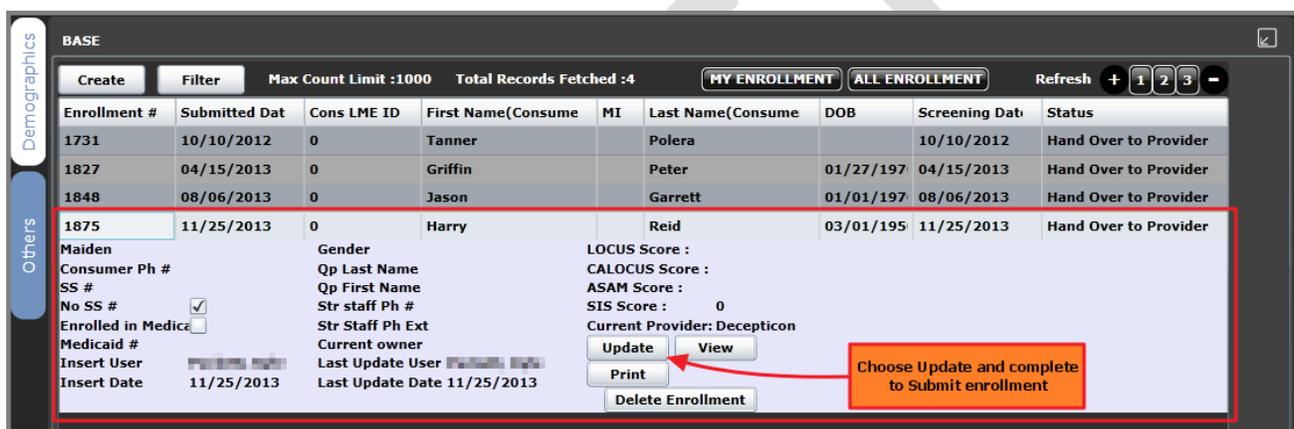
- Choose the correct corresponding status of the appt.** (Yellow speech bubble pointing to the status dropdown)
- Click this box to indicate you have addressed this appt.** (Red box pointing to the Acknowledgeme checkbox)
- If Consumer reschedules, the below corresponding fields will activate for you to record the new time** (Red box pointing to New Date, New Start Time, and New End Time)
- The provider may include Notes or supporting documents about the appt. Click Notes/View Doc on the appt line to view** (Red box pointing to Notes and View Doc buttons)

Completing the Referral [\(TOP\)](#)

Since this is an Enrollment Request, and once the appointment is in session, you can go to your Enrollment Module and use the Filter to search for enrollments that were handed over to you by the MCO:



Results



Enrollment #	Submitted Dat	Cons LME ID	First Name(Consume	MI	Last Name(Consume	DOB	Screening Dat	Status
1731	10/10/2012	0	Tanner		Polera		10/10/2012	Hand Over to Provider
1827	04/15/2013	0	Griffin		Peter	01/27/197	04/15/2013	Hand Over to Provider
1848	08/06/2013	0	Jason		Garrett	01/01/197	08/06/2013	Hand Over to Provider
1875	11/25/2013	0	Harry		Reid	03/01/195	11/25/2013	Hand Over to Provider

Once you have completed the task at hand, in this case an enrollment and assessment, you can now go back to your provider scheduler, **open** the appointment and choose **Attended**, then **SAVE** to complete.

By now you have noticed block changes colors as the MCO begins to reserve slots:

- If a block is **GREEN**, that means all the slots in it are still available. For example, if you have three slots and all three are still available, the block will be green.
- If a block is **YELLOW**, some of the slots have been reserved but not all. If you have one or two of their three slots still available, the block will be yellow.
- If a block is **RED**, all the slots have been reserved. All three slots have been reserved and nothing else can be scheduled here.

NOTE: You can go to the appointment and double click on it to check the Acknowledgement checkbox so the MCO knows you're aware of the appointment. Once the appointment has/has not happened, you can go back into the appointment and enter a Status. This information appears on the MCO side once Saved.

What if the Consumer Cancels, then Reschedules? [\(TOP\)](#)

If a consumer is a No Show, cannot be reached or reschedules then you can always ask the consumer when their initial appointment date was, or you can refer back to the consumers **Enrollment** form that was handed over to you by the MCO and review the **Provider Attempts** section on the bottom of the **Clinical Page** of the Enrollment (if you do not know off hand).

Updating original Appointment then rescheduling

Find the appointment from with in your blocked off Slots and change the status accordingly

Appt ID	Patient Name	Start Time	End Time	Status	Acknowl
1961		09:00AM	09:30AM		
1988	Reid, Harry, Enrollment ID - 1875	09:30AM	10:00AM	Rescheduled	
2015		10:00AM	10:30AM		
2042		10:30AM	11:00AM		

Acknowledgeme	New Date	New Start Time	New End Time	Notes	View Doc
uled	12/03/2013	10:30AM	11:00AM	Notes	View Doc
				Notes	View Doc
				Notes	View Doc

Once the you have changed the status, the New Date, Start and End time field will be enabled for you to record your new time

Choose SAVE when done

New Appointment View on 12/3/13 after clicking SAVE

Bumblebee
03 Tuesday

MCO Referral Slots

4 Slots All Funding Adult MHSA

MCO Referral Slots			
4	Slots	All Funding	Adult MHSA
1	09:00AM - 09:30AM	Open	
2	09:30AM - 10:00AM	Open	
3	10:00AM - 10:30AM	Open	
4	Reid, Harry, Enrollment ID - 1875	10:30AM - 11:00AM	Scheduled

Enrollment View – Clinical Page; Provider Attempts

Provider Attempts

Service ID	Provider ID	Phone #	Appointment Date	Hour	Minute
	Bumblebee	910-555-9999	11/26/2013	09	00

Add Modify
Remove

Service ID: Hour: 09 Minute: 30

Provider ID: Bumblebee Search Accepted?

Phone #: 910-555-9999 Denial Reason: Other

Appt. Dt.: 11/26/2013

Comments: Consumer could not make original appt date, rescheduled for following Tues at 10:30AM

Active

Modify Cancel

Save

Select a row, and choose Modify, then choose Modify

Record the reason the consumer declined. In this example, the consumer could not make the originally schedule appointment and has been rescheduled.

If the consumer accepted the original Appointment and attended, then simply check the Accepted checkbox

Once complete, choose Modify to stamp your update to the enrollment

Record your rescheduled time on the Enrollment

Provider Attempts

Service ID	Provider ID	Phone #	Appointment Date	Hour	Minute
	Bumblebee	9105559999	11/26/2013	09	00

Add Modify
Remove

Service ID: Hour: 10 Minute: 30

Provider ID: Bumblebee Search Accepted?

Phone #: Denial Reason:

Appt. Dt.: 12/03/2013

Comments: Original appt date rescheduled for 12/3/13

Active

Ok Cancel

Save

Click the Add button, record your rescheduled time then choose OK

Once the consumer has shown up for the appointment, you can check the Accepted checkbox accordingly

Provider Attempts

Service ID	Provider ID	Phone #	Appointment Date	Hour	Minute
	Bumblebee	9105559999	11/26/2013	09	30
	Bumblebee	9105559999	12/03/2013	10	30

Add Modify
Remove

Save

Choose SAVE once complete