

## Function Keys and Keys to Move through Screens:

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Key Name	Function
?	Displays lookup options
F1	Deletes text in a field
F2	Restores text in a field
F7-Q	Exits screen without saving data
F10	Exits Screen (will also save data)
F9	Displays additional actions on a screen
STOP	Exits a list lookup
F	Moves scrolling screens forward
B	Moves scrolling screens backward
N	Moves scrolling screen forward to the Next full day
↑	Jumps to previous field on page
↓	Jumps to next field on page
Page Down	Jumps to next page
Page UP	Jumps to previous page

### Date Shortcuts:

T (Today's date)

T+n (Today plus *n* days; tomorrow would be T+1)

T-n (Today minus *n* days)

### Patient Lookup:

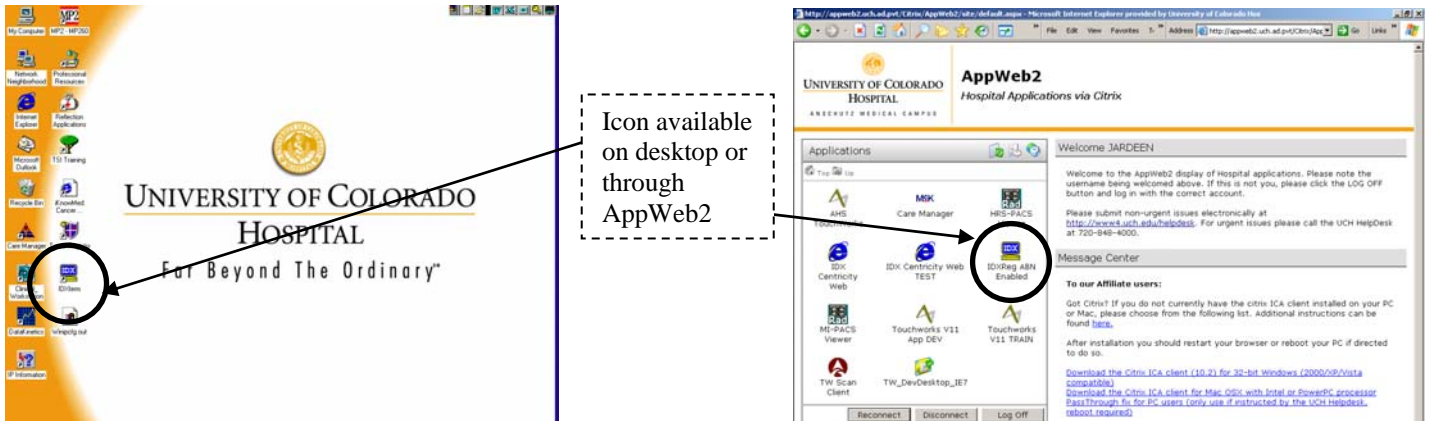
Format	Example
Partial Last Name, Partial First Name	YOSE,SAM (yosemite,samuel)
Medical Record Number	M00138547 or .00138547
Visit Number	H12345678
Partial Last Name, Partial First Name; Year of Birth	YOSE,SAM;1945
R or R/N	Recalls last displayed patient

### Provider Lookup:

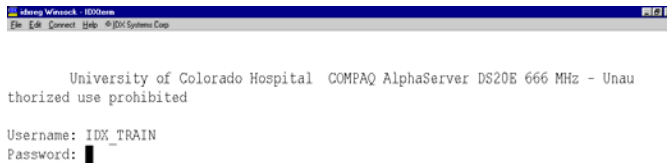
Format	Example
Full Last Name	ELIAS
Partial Last Name	ELIA
Mnemonic	AYE
Provider Number	4275
=	Recalls last displayed Provider

# Logging Into IDX

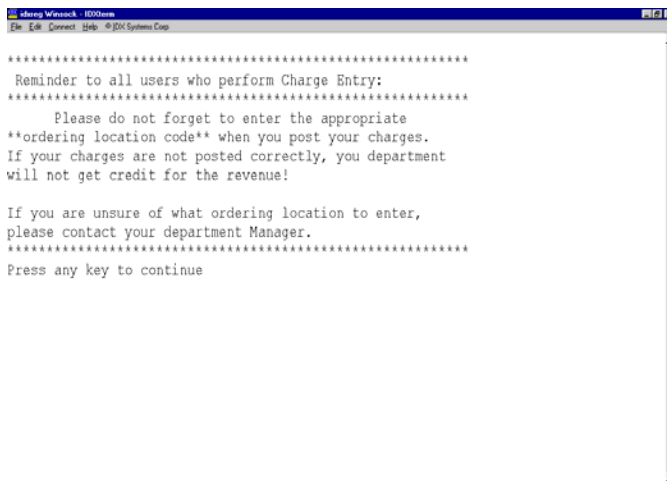
1. Double click the IDXReg icon on your desktop. If the icon is not available, open Internet Explorer. Under "Favorites" select AppWeb2. Double click the IDXReg icon.



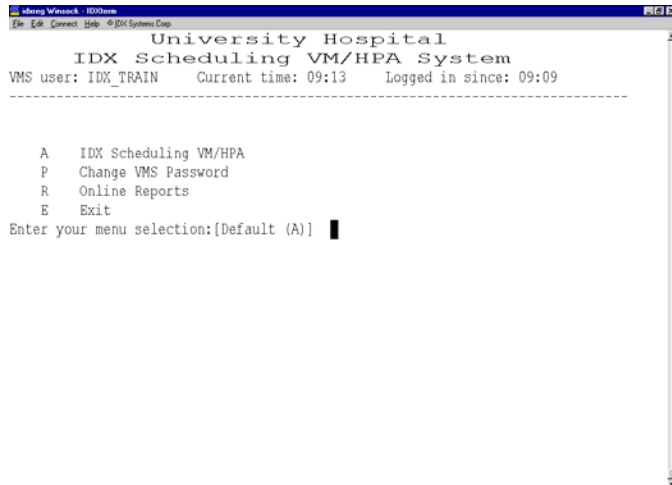
2. Type 1<sup>ST</sup> USERNAME & PASSWORD, then type **ENTER**. (Cursor will not move when entering the password.)



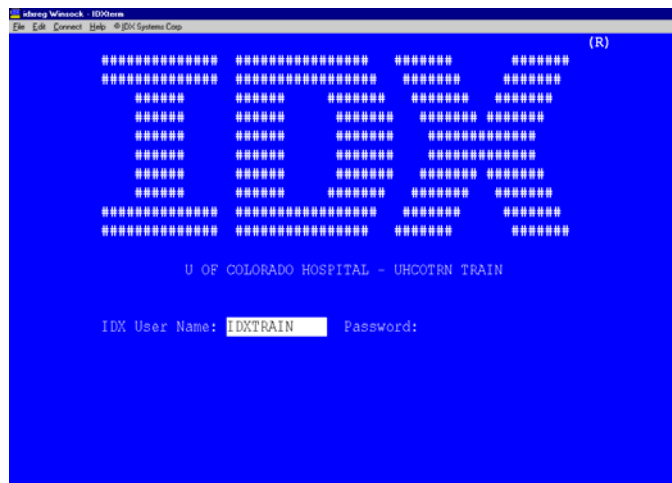
3. Read message and type any key to continue.



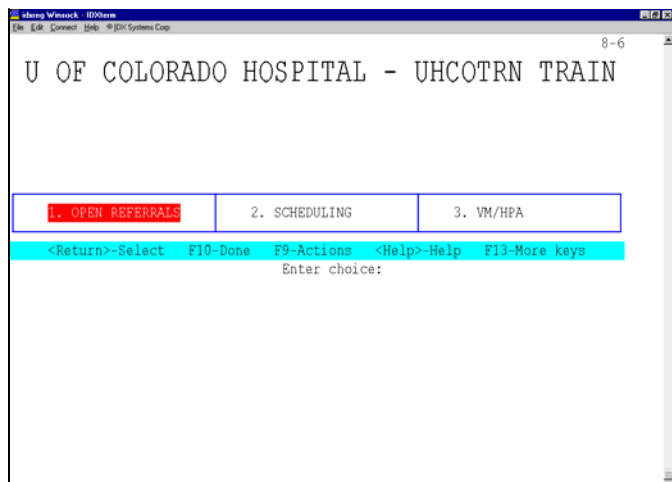
4. Choose appropriate option. Ambulatory users will select [A] IDX Scheduling VM/HPA.



5. Enter 2<sup>nd</sup> Username and Password, then type **ENTER**. (Cursor will not move when entering the password.)



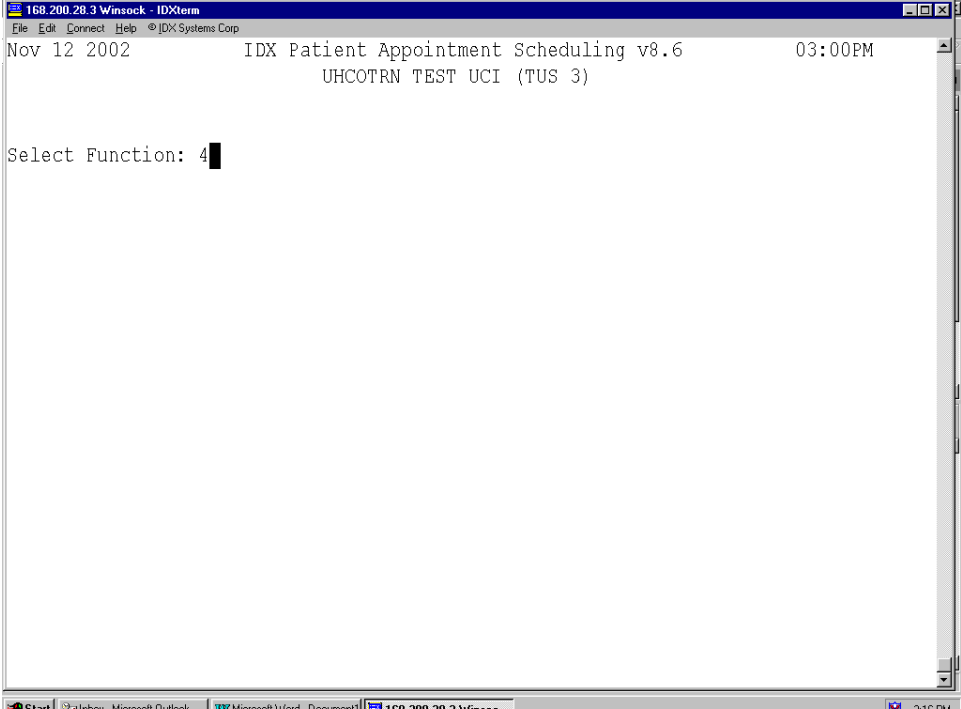
6. At main IDX Scheduling Menu, choose Scheduling and then type **ENTER**.



# Function 4 – Viewing A Provider’s Schedule

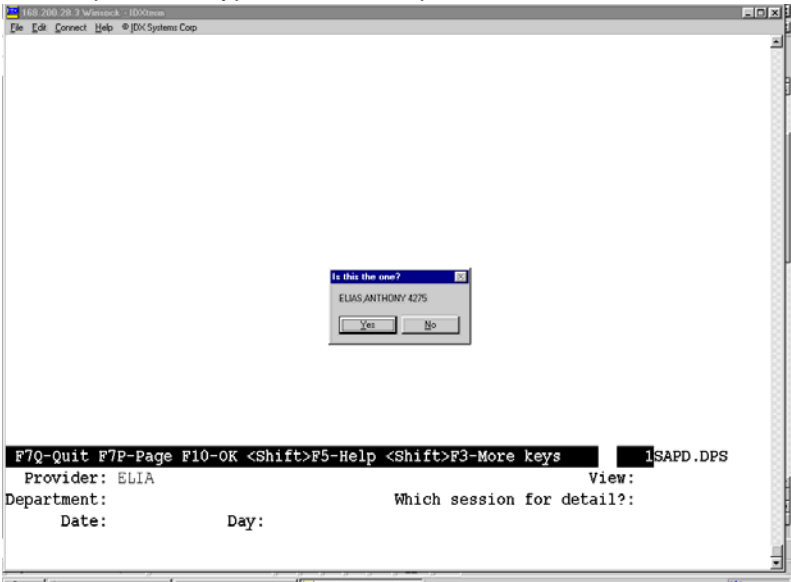
Function 4 will give a brief overview of a daily schedule for a provider, a resource, or an ancillary department.

- 1. At Select Function, Type a 4 – Display Provider’s Schedules.



- 2. In the Provider field, type in a **Provider’s name** using either Partial Last Name, their Mnemonic, or their Provider #.  
Type an (=) to recall the last provider entered.

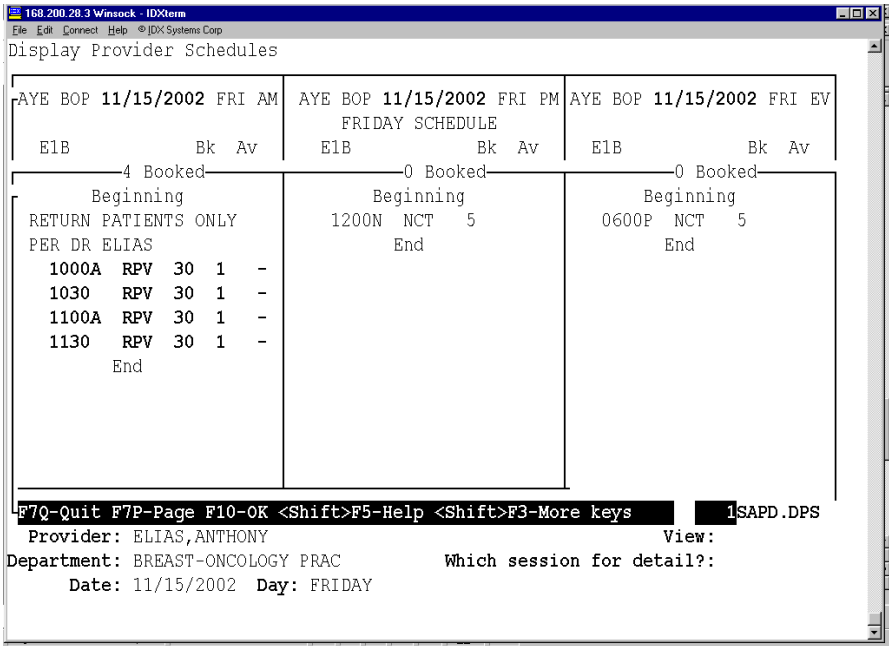
If the Provider only has one department (aka: Practice,) the department will automatically default. If they have more than one department, type a ? in the department field, and make a selection.



- Type in the date. As soon as you type Enter, the Provider's schedule displays. The screen shows all sessions for the date requested. Each column represents one session of the selected day. The left column represents the morning session (AM), the middle column represents the afternoon session (PM), and the right column represents the evening session (EV).

**Provider Information:** appears at top of each of the three columns. Each column contains:

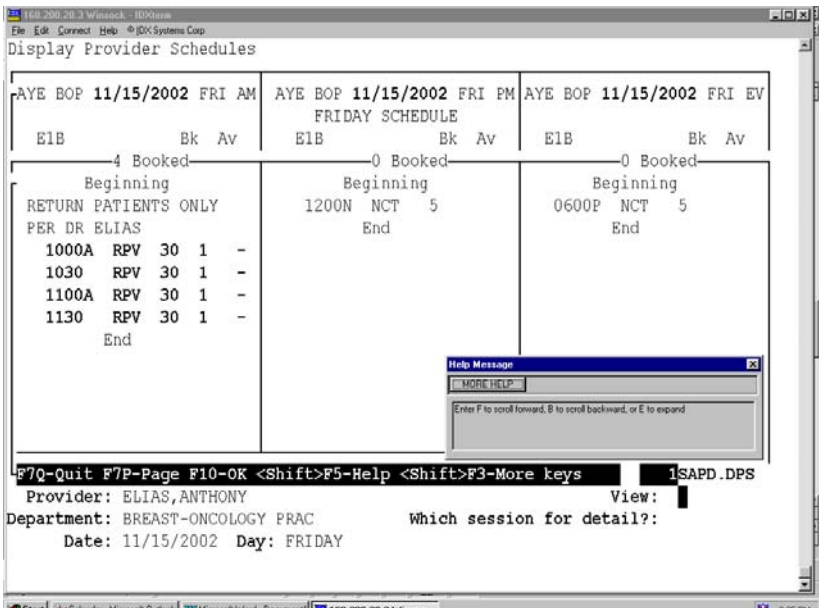
- provider mnemonic
- department mnemonic
- day of week
- location mnemonic
- date of the schedule displayed on this screen
- AM, PM, or EV, depending on the session shown in that column



**Provider's Schedule:** the biggest section of the screen; this is where all the time slots and scheduled appointments are listed. The schedule contains:

- **Time:** time slots set up for each appointment. This column may indicate whether a time slot is frozen (F).
- **Bk:** this column indicates the number of patients booked into this time slot; if a (~) is present, the provider is overbooked in some way.
- **Av:** this column indicates the number of appointments that are still available during this time slot.

- At the View field, type a ?. Type a **Shift, F5** to see More Help: **F** to scroll the schedule forward within this session; **B** to see previous appointment times in this session.



5. At the "Which Session For Detail" prompt, type: **A** to view information about the morning session, **P** to view information about the afternoon session or **E** to view information about the evening session.

Time	Typ	Dur	Bk	Av	Name	MRN	Age	Telephones
Beginning								
F 0100P			0	1				
F 0120	RPV	20	1	-	(A) GUGEL, LARRY (ARR) G118 F/U STUDY	08500900	40	H:303-555- W:303-832-4092
F 0140	NPV	40	~1	-	(N) OATIS, ARIEL	08500922	19	H:303-555- W:720-848-6801
0200P	RPV	20	1	-	(A) GUGEL, VANCE	08500906	16	H:303-555-
0220	RPV	20	1	-	(A) FLOWER, MUM (ARR) ABN NEED TO BE SIGNED	08500653	76	
0240	RPV	20	1	-	(P) STAPLE, JUSTINA	08500798	25	H:720-555- W:303-832-8576
0300P			0	1				

F7Q-Quit F7P-Page F10-OK <Shift>F5-Help <Shift>F3-More keys 1SAPD.DPS

Provider: GOTTHARD, DEB NP View:  
 Department: FMGP-GENERAL MEDICIN Which session for detail? PM  
 Date: 05/22/2009 Day: FRIDAY

The new information appearing on this screen includes:

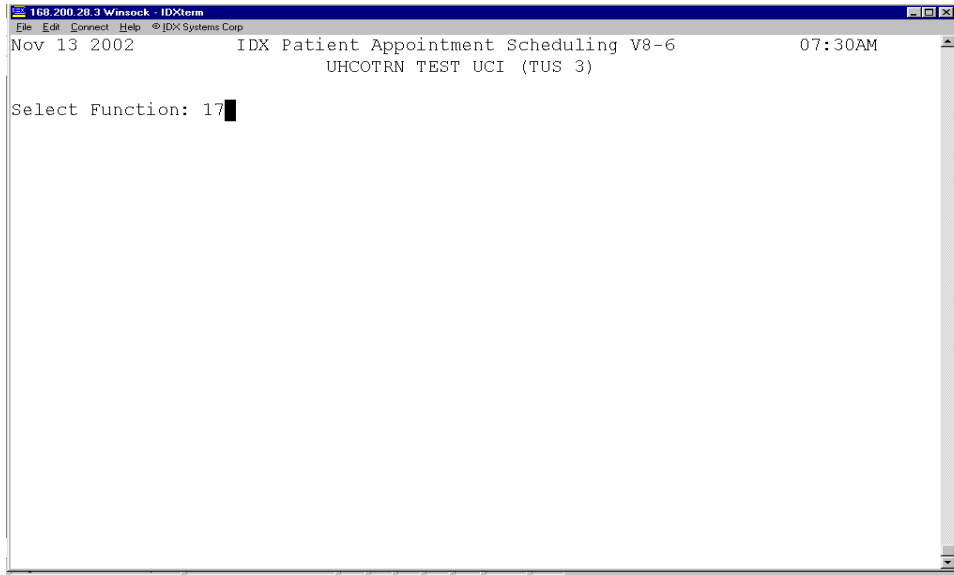
- status of the visit
  - A = Arrived
  - P = Pending
  - R = Rescheduled
  - N = No Show
- name of the patient booked into each slot.
- patient's medical record number
- patient's age
- patient's Home and Work phone numbers
- additional information about the visit

6. To return to the 1<sup>st</sup> screen, in the "Which Session for Detail" field press the **F1** key to clear the text and then press **Enter**.

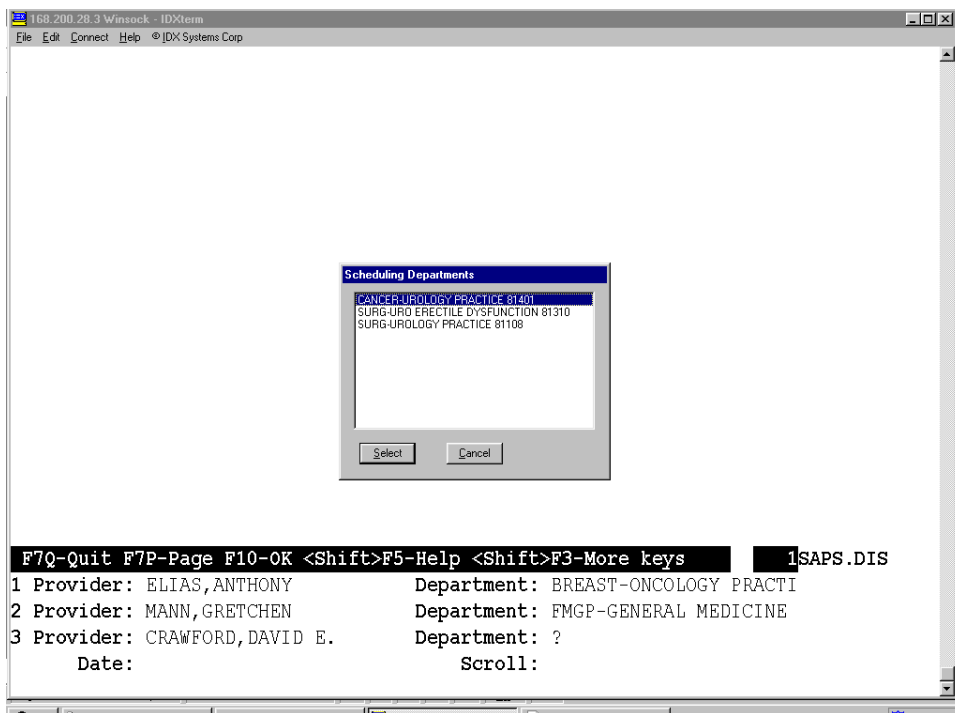
# Function 17 – Viewing Multiple Provider’s Schedules

*Function 17 will display schedules for up to three providers.*

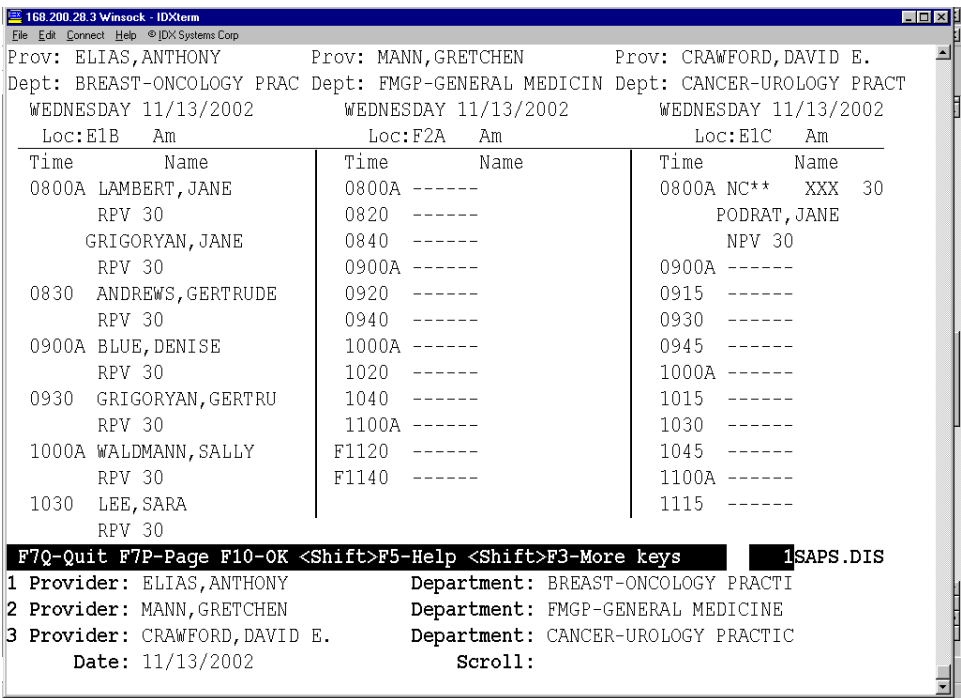
1. At Selection Function, type **17** – Display Multiple Provider’s Schedules and type **Enter**.



2. Type in the **Providers’ names (up to three Providers)**.

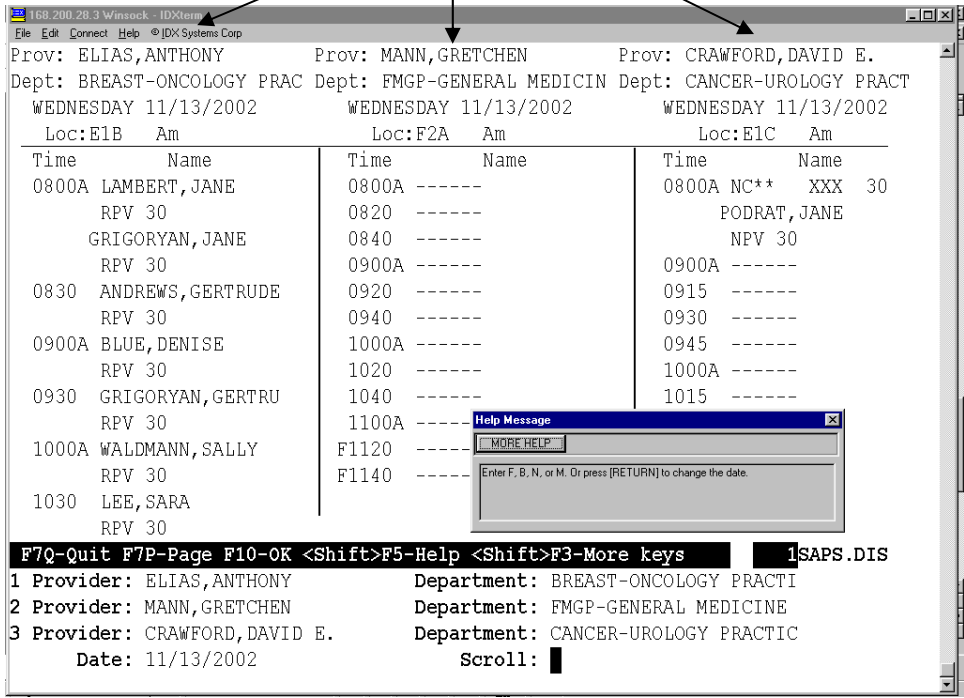


3. The date will automatically default in today’s date. Type **Enter** to accept the default or enter the date desired.



4. In the "Scroll" field, type **F** to scroll forward in the schedule (see later appointment times in this or the next session;) type **B** to see previous appointment times in this or previous session, type **A** for the morning session, type **P** for the afternoon session, type **E** for the evening session, type **N** to view the next day's schedule.

At the top of each column, the system identifies the provider, department, date, location and session.

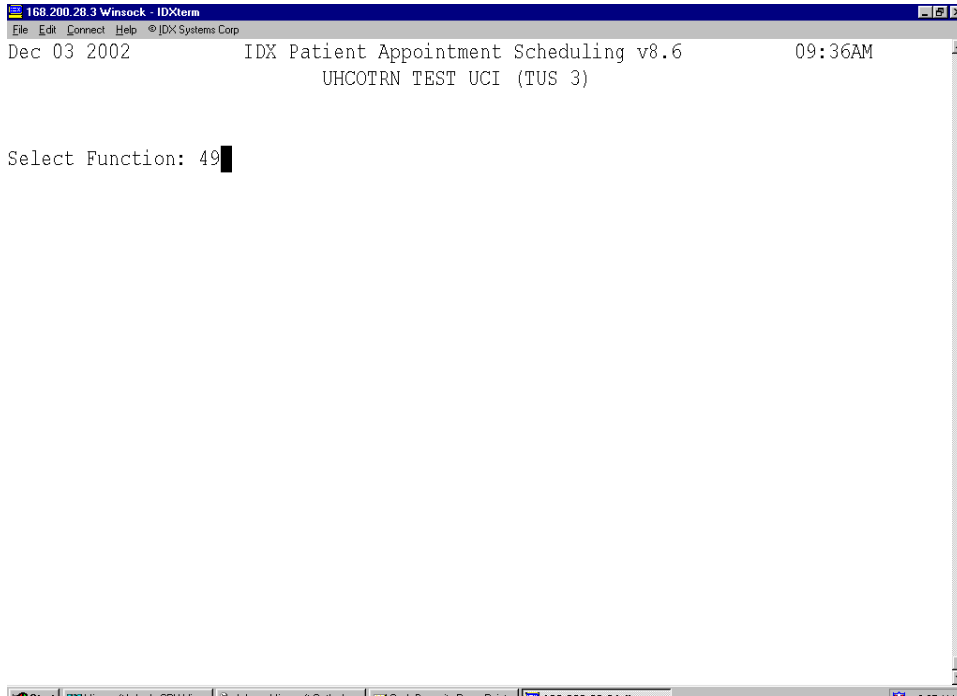


5. Type **F7,Q** to exit to Function 17.

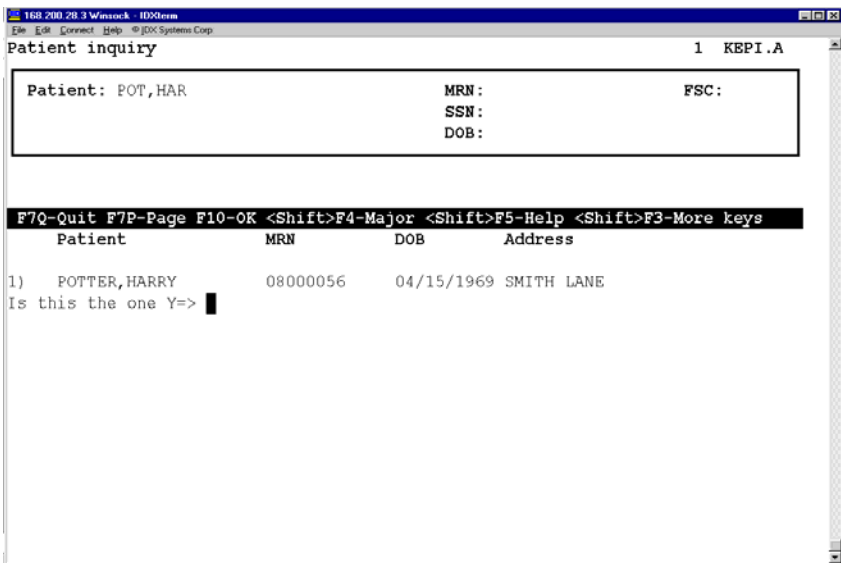
This screen lists all time slots for the session displayed. If a time slot is booked, the patient's name, visit type and duration is shown. If a time slot is not booked, a series of dashes (----) appear.

# Function 49 – Viewing Patient Appointment, Demographic, Insurance, & Referral Information

1. At Select Function, type **49** – Patient Inquiry and then type **Enter**.

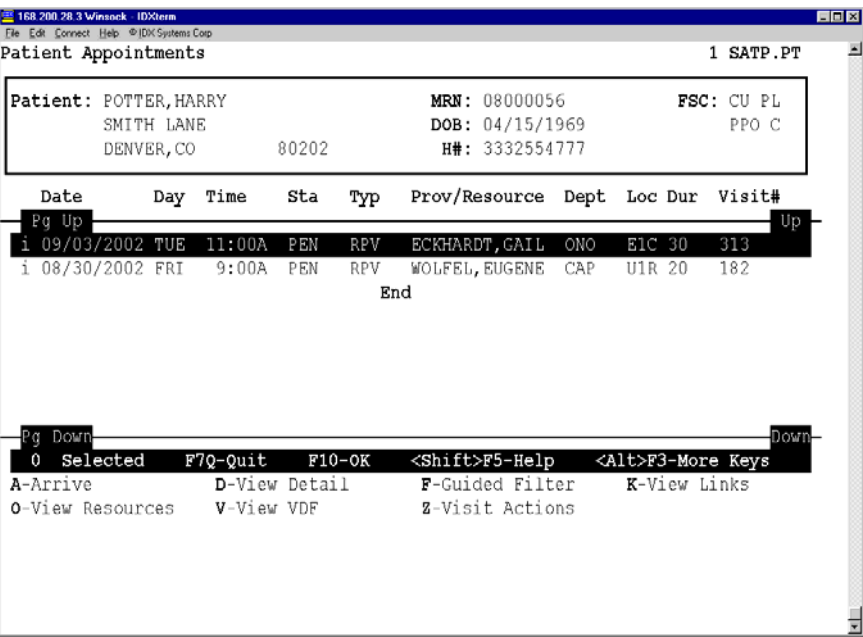
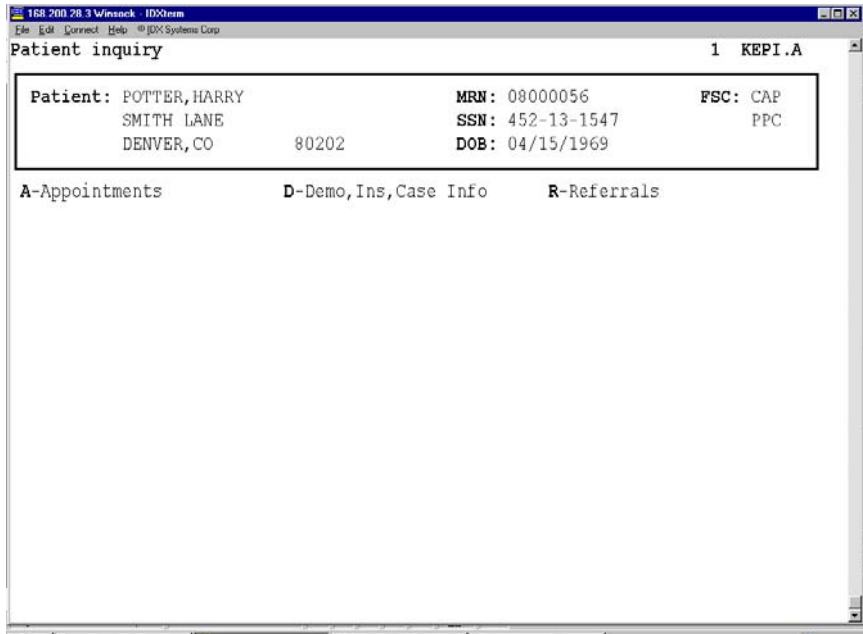


2. Type in the **Patient's name** using either Partial Lastname, Partial Firstname; Visit # or Medical Record #.



3. At the "Is this the one" prompt, type **Y** or **N**. The Patient's complete information will display on the top of the screen. To access additional actions (A - Appointments, D - Demographics, I - Insurance, R - Referrals), type **F9**.

4. Type an **A** to view the Patient's Appointments.



Date = date the appointment is scheduled to occur.

Day = day of the week the appointment is scheduled.

Time = time the appointment is scheduled.

Sta: status of the appt; if the status is followed by an asterisk (\*), that appt is linked to one or more primary appointments, ancillaries, or resources.

Typ: the appt's visit type; if resource appt, an "R" is listed in this column.

Prov/Resource: the provider or resource for which the patient is scheduled.

Dept: the provider's or resource's department.

Loc: the clinic where the appt is located.

Dur: the duration of the appt.

Visit #: a unique visit number assigned to the appointment by the system.

5. To view the Reason for the Visit or who the Referring Doctor is, type a **V** – View VDF.

6. Type **F7,Q** to return to the Patient Action Screen.

168.200.28.3 Winsock - IDXterm  
File Edit Connect Help © IDX Systems Corp

Patient inquiry 1 KEPI.A

<b>Patient:</b> POTTER, HARRY	<b>MRN:</b> 08000056	<b>FSC:</b> CAP
SMITH LANE	<b>SSN:</b> 452-13-1547	PPC
DENVER, CO 80202	<b>DOB:</b> 04/15/1969	

A-Appointments      D-Demo, Ins, Case Info      R-Referrals

7. To view a Patient's Demographic or Insurance information, type **D** – Demo, Ins, Case Info. Select the appropriate registration option (1. Registration Only, 2. FSC only, 3. All 3). Type **3** to view all of the registration information.

168.200.28.3 Winsock - IDXterm  
File Edit Connect Help © IDX Systems Corp

View Registration - Patient: POTTER, HARRY M08000056 1UURE.PT1

**Name:** POTTER, HARRY      **SSN:** 452-13-1547      **MRN:** 08000056

**AKA1:**      **AKA2:**

**AKA3:**      **DMRN:**

**DOB:** 04/15/1969 **Age:** 33 Y **Sex:** M      **MS:** SINGLE      **Other MRN:**

**FSC:** CU PLANS MANAGED CARE CAP      **Relig:**

**Addr L1:** SMITH LANE      **Home PH:** 3332554777      **Race:**

**Addr L2:**      **Email:** HOGWARTH@YAHOO.COM

**City,ST:** DENVER, CO      **HIPAA Contact:** NO CONTACT

**Zip:** 80202      **County:** DOUGLAS      **Guar:** POTTER, SALLY

**Relationship to Guar:** SPOUSE

**Empl DN:** UNIV COLO HOSP      **Work PH:** 303-372-5333      **Ext:** 89

**Free Txt:** UNIV COLO HOSP      **Addl Info:** Y      **TX:**      **Status:**

**Addr L1:** AOB-SUITE 100, CAMPUS BO      **Deceased:** N      **VIP:**

**Addr L2:** ATTN: HUMAN RESOURCES      **PCP:** KENNEDY, JAMES

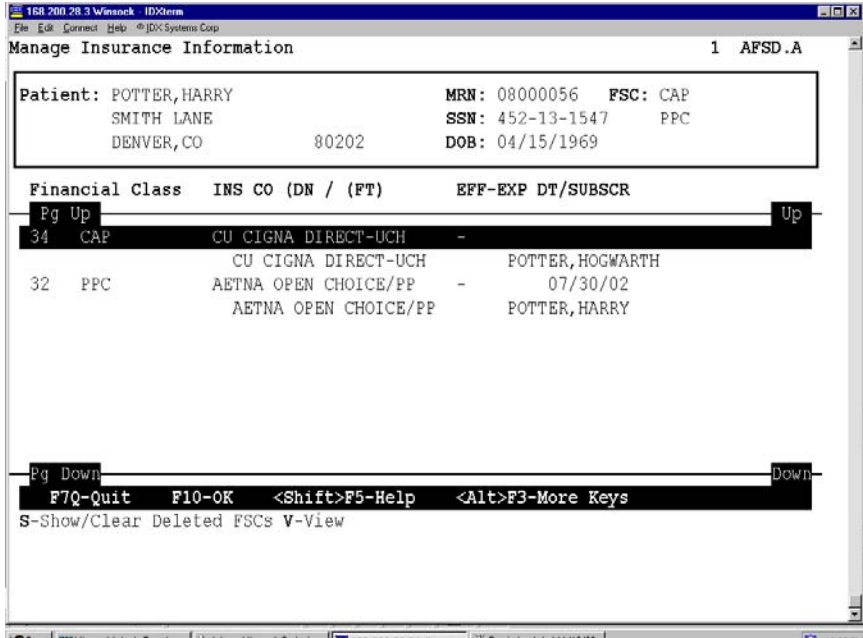
**City,ST:** DENVER, CO      **POR:**

**Zip:** 80262      **Add:** 08/27/2002 **By:** GENSC **Upd:** 10/25/2002 **By:** GENSC

Jump to page: █

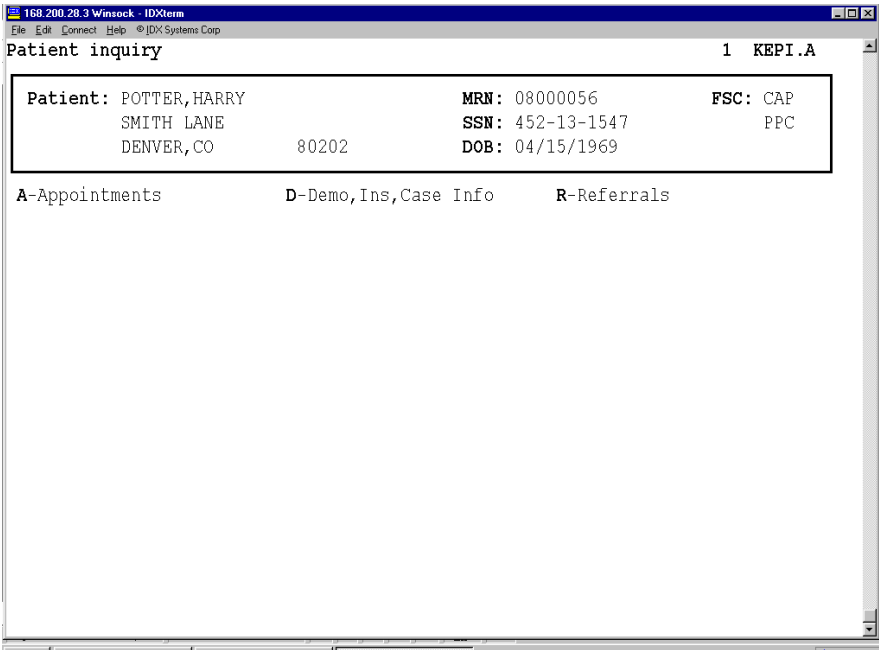
8. Type **Page Down** to view additional registration screens.

9. Type **F10** to continue to the Insurance screen.

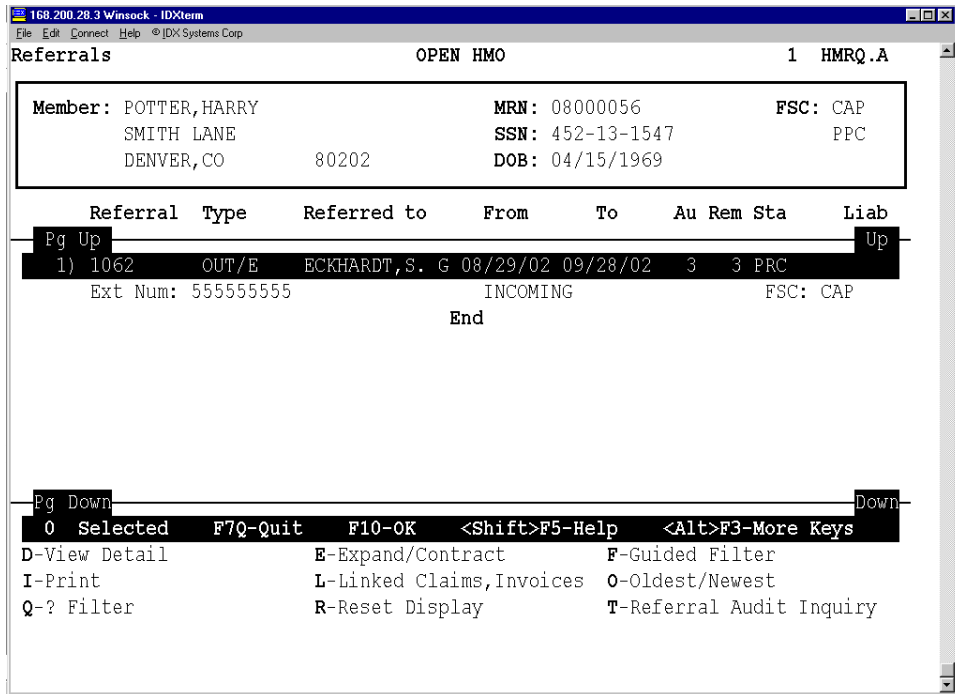


All of the patient's payment options will be listed. To see details (phone numbers, contact information, etc.) type **V** – View.

10. Type **F7,Q** to return to the Patient Inquiry Screen.



11. To view the referrals for a patient, type **R** – Referral.



- Referral = System generated referral #
- Referral Type:
  - Output
  - Mental
  - Global
  - PTOTST
- Referred to = Referred to Provider
- From and To = Valid From & Valid To Dates
- Au and Rem = Authorized & Remaining Visits
- Referral Status:
  - PRC = Pended Referral Coord.
  - APP = Approved
  - DUP = Duplicate
- Ext Num = Authorization #

12. To see the Reason for the Referral and the Referring from Provider, select the referral, then type an **E** – Expand/Contract.

13. To view the entire detail on a Referral, select the referral, and type a **D** – View Detail.

14. Type **F7,Q** to return to the Patient Inquiry Screen.

# Logging Out of IDX

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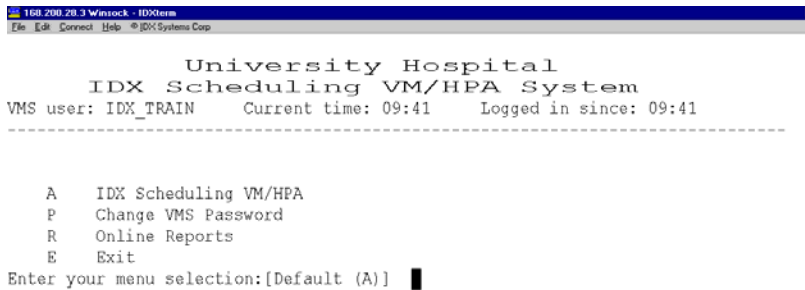
1. Type **F7,Q** until you reach the following screen:



```
168.200.28.3 Winsock - IDXterm
File Edit Connect Help ©IDX Systems Corp
Nov 27 2002      IDX Patient Appointment Scheduling v8.6      12:45PM
                  UHCOTRN TEST UCI (TUS 3)

Select Function: █
```

2. Type **F10** until you reach the following screen:



```
168.200.28.3 Winsock - IDXterm
File Edit Connect Help ©IDX Systems Corp

          University Hospital
          IDX Scheduling VM/HPA System
VMS user: IDX_TRAIN   Current time: 09:41   Logged in since: 09:41
-----

A  IDX Scheduling VM/HPA
P  Change VMS Password
R  Online Reports
E  Exit
Enter your menu selection:[Default (A)] █
```

3. Select option **E** from the Menu.