Scheduling and Registration Library Guide
(Specialty Hospital)

Vision 4.3 (January 2013)

SourceMedical
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Vision Basics

Before we begin, there are a few basics that should be reviewed about the Vision software. Understanding these basic features will help you better understand the more complex features of the system.

Logging In

Logging into Vision requires a Username and Password. After double clicking on the Vision icon, you will see the above screen where your personal Username and Password can be entered. After entering both the Username and Password, click Log in.

Keep in mind, the Username and Password are case sensitive and the system may require a change to the Password on a periodic basis. Depending on your facility’s settings, the system may or may not allow the same password to be used again.

Be aware that if the Username and/or Password are repeatedly entered incorrectly or if a user has exceeded the time span for system inactivity, the account will become locked and will need to be unlocked by the system’s administrator. The number of attempts a user will have when entering a password and the time span for inactivity are determined by the facility’s settings.
System Wide Features

Arrow 1:
The first arrow at the top points to the software header, which displays the Source Medical software that you are currently using. You will also find the name of your facility.

Arrow 2:
The second arrow points to the Vision Toolbar that contains all of the general categories of the Vision system. By left clicking on any of these toolbar headers, you will see a list of specific modules in the system you can open. For example, if you were to left click on the “Scheduling and Registration” toolbar header you would find links to modules such as Post Charges or Payments & Adjustments.

Arrow 3:
The third arrow points towards the picture icons that are direct links to the specific modules in the Vision system. These are quick and easy ways to get to these modules if you know exactly where you want to go. For example, instead of left clicking on the “Scheduling and Registration” toolbar followed by left clicking Post Charges, you may simply left click on the Post Charges icon. Keep in mind that not all modules are accessible from the picture icons.

Arrow 4:
The fourth arrow points to the Vision Managers. Left clicking on any of the given managers will open that manager, which will have a number of picture icons. Like the picture icons from Arrow 3, the icons found in the managers are direct links to the specific modules.

Arrow 5:
The fifth arrow points to the Open Windows. In the above screen, you will see that there are currently no open windows. As you open different modules in the system, a link to that open module will appear in the Open Windows box. Always be aware of what windows you have opened so that you can avoid potentially duplicating your work.
Scheduling and Registration Libraries

Vision Libraries are the central data storage lists for many of the data elements used throughout the system; therefore, they are a core component of the Vision system. Proper setup and maintenance is critical in ensuring optimal performance and functionality of the software and proper reporting.

The following documentation outlines the Scheduling and Registration Libraries which are typically managed by front desk supervisory staff or super users. Many of these libraries are dependent on other libraries being built. These dependencies will be noted on each item.

The Scheduling and Registration Libraries have been broken into three different categories based on overall impact on the facility.

- **Required** – Required libraries are required throughout the system including other libraries and should be populated before moving forward with the library building process.
- **Recommended** – Recommended libraries are not required for product functionality, but play a key role in maximizing utilization of the system. While they are not required, we recommend that they be populated during the building process.
- **As Needed** – As Needed libraries have minimal impact on the system or are populated with necessary data during the installation. Users should only focus on these libraries once all required and recommended libraries have been populated.

Navigation

The **Library Manager** is directly accessed from the “Libraries” button located on the menu bar toward the top of the home screen. It can also be accessed from the Facility Drop-Down Menu and Scheduling and Registration Manager.

In the Libraries list on the left side of the window, users locate the desired library by using the scroll bar in the Libraries window. In order to add or modify library entries, the desired library must be selected by left-clicking on the library description.
Existing library elements will be displayed in the grid below the library list.

![Library Grid](image)

Once library elements are displayed, users can search existing elements using the search window to ensure that duplicate entries are not entered.

![Search Window](image)

To add a data element to a Library, click the **ADD** button at the bottom of the screen.

To update or change a data element, select the data element and click the **UPDATE** button at the bottom of the screen.

To remove a data element, select the data element and click the **REMOVE** button at the bottom of the screen. **Removing a data element makes that item inactive. Elements cannot be deleted from the system.**

To inquire or view a data element without the ability to save changes, select the data element and click the **INQUIRE** button at the bottom of the screen.

Note: When adding or modifying a library entry, all **BOLD** fields are required to be populated prior to saving. **Non–bolded fields are not required for saving, but they may be important for use at the facility so it is important to determine which non–bolded fields should be populated.**
Required

Rooms Library

The Rooms Library stores a list of all of the facilities Operating, Procedure and Inpatient rooms, along with patient beds. If the facility utilizes semi–private inpatient rooms, the beds associated with each room should be built before creating the room.

Dependencies – The Rooms Library is not directly dependant on any library to be able to save entries. However, if the facility bills for room time, the appropriate entries will need to be made in the CDM Library before the entries can be completed.

General Tab

Once information has been entered on this tab, the room can be saved and used for scheduling.

- **Name** – Enter the name of the room or bed as it will appear on the schedule and in reports.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
• **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.

• **Can be Scheduled?** – This item is checked by default and indicates that this room should be made available to schedule in.

• **Dedicated Procedure Room** – This item can be checked to allow reports to distinguish between operating rooms and procedure rooms.

• **Room Type** – Choose the appropriate label for the room being created. The list includes a number of options, not all of which should be used. The rooms you create should correspond to one of the following options: ‘OR/Procedure,’ ‘PAT,’ ‘Examining,’ and ‘Inpatient.’

• **Room Style** – When "Inpatient" is chosen as the **Room Type**, this field is made available. Use this field to identify whether the room is ‘Private’ or ‘Semi–Private.’

• **Min. allocation interval (minutes)** – Set the time interval that will be used for scheduling in this room.

• **Inpatient** – When the Room is a Semi–Private Inpatient Room, select the beds that belong in the room from the list on the right and click the **Add** button to assign them to this room.

• **Total Number of Beds** – This field will update automatically as beds are added and removed from the room.

• **Default Checkout Time, Turnover Time (Minutes), Revenue Group** – This fields have no impact on functionality and can be left blank.

### Billing Tab

For facilities that bill patients for room time, this tab will need to be completed on each entry so that charges can be automatically generated.

**Note:** The CDM library needs to be populated with appropriate room charge entries before the information can be added on this tab.

- **Time Calculated** – If the fee for the room is calculated based on the time (number of minutes) the patient spends in the room, fill in these fields with the appropriate information.
  - **Base Time Fee** – Select the entry from the Charge Master that corresponds with the base room charge
  - **Number of Minutes Included in Base Time Fee**
  - **Additional Base Time Fee**
  - **Number of Minutes Included in Additional Base Time Fee**
  - **Charge per Billing Increment**
  - **Billable Incremental Minutes beyond Base Time Fee**
  - **Inpatient Fee**
- **Additional Base Time Fee** – If your fee structure includes an additional non–recurrent charge for a set length of time additional to the **Base Time Fee**, select the appropriate charge from the list.
- **Number of Minutes Included in Additional Base Time Fee** – Enter the number of minutes beyond those included covered by the **Base Time Fee** that are covered by this charge.
- **Charge per Billing Increment** – Select the recurrent charge that applies to time spent in the room beyond the **Base and Additional Base Times**.
- **Billable Incremental Minutes Beyond Base Time Fee** – Enter the number of minutes covered by each billing increment.

- **Inpatient Fee** – If the fees for the room are charged on a daily basis, not according to a time calculation, select the appropriate charge from the Charge Master.

## Schedules Library

The **Schedules** Library is used to determine which items from the **Rooms** Library are available for scheduling on the daily schedule or for inpatient stays.

**Dependencies** – At least one entry with the “Can be Scheduled” checkbox marked must be present in the **Rooms** Library before this library build can start. However, it is recommended that all schedulable rooms be set up prior to building this library.

<table>
<thead>
<tr>
<th>Schedule Items (VTDB)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
</tr>
<tr>
<td>House, Gregory</td>
</tr>
<tr>
<td>Lind, Christopher</td>
</tr>
<tr>
<td>Add</td>
</tr>
<tr>
<td>Add All</td>
</tr>
<tr>
<td>Remove</td>
</tr>
<tr>
<td>Remove All</td>
</tr>
</tbody>
</table>

OR 1
OR 2
OR 3

The items listed on the left are all the entries from the **Rooms**, **Staff** and **Providers** Libraries that are marked as ‘can be scheduled’. Despite their inclusion on the list, staff members and providers will never appear on the daily schedule, and so should remain in the left column.

To make a room schedulable, select it by left–clicking the item from the list on the left and then clicking the **Add** button. The selection now appears on the right (as shown above). Multiple items can be selected and added at once by holding the ‘Ctrl’ key on your keyboard while selecting multiple items.
Schedule Views Library

The Schedule Views Library is where the rooms, created in the Rooms Library, and selected as schedulable in the Schedules Library are organized into the various groupings as they will be viewed in the Scheduling Module.

Dependencies – At least one room must be selected in the Schedules Library to begin the build of this library. Both the Rooms and Schedules Libraries must be completed to be able to complete the build of this library.

- **Schedule View Description** – Enter a name for the view that describes the rooms contained therein. (e.g. OR View, Imaging, Inpatient).
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by reactivating the item.
- **Schedule View Type** – The selection made from this drop down identifies which scheduling window this view will appear in; the ‘Daily’ View or the ‘Inpatient’ Bed View. The ‘Extended’ option is not relevant for the SH setting.
- **Inpatient View** – Select this checkbox when the view is identified as ‘Inpatient’ using the selection made in the Schedule View Type Field.
The items listed on the left are items from the **Schedules** Library. The list is filtered based on what **Schedule View Type** is selected. When “Inpatient” is chosen, only inpatient rooms (as indicated in the **Rooms** Library) are shown. When “Daily” is chosen, all other rooms are displayed.

To add a room to the Schedule View, select it by left–clicking the room in the list on the left and then clicking the **Add** button. The room now appears on the right (as shown above). Multiple items can be selected and added at once by holding the ‘Ctrl’ key on your keyboard while selecting multiple items.

**Specialties Library**

The Specialties library allows users to add and manage the specialties of procedures and providers at the facility. Specialties can be associated to providers and procedures in the corresponding library to allow for filtering of facility reports.

![Specialties Library Screenshot]

- **Description** – Enter the name of the specialty.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop–down lists throughout the system. However, they can be added back to the drop–down lists at any time by re–activating the item.
Provider Groups Library

Provider Groups are used to allow Vision to produce reports on Physician activity by group in addition to by individual surgeon. The Scheduling Module makes use of these groups to allow surgeons in a group to share block time. Surgeons in a provider group can also be allowed to view each other’s patients’ charts.

This library is not required if you do not anticipate taking advantage of these features. It is advised that they are created prior to building the Provider Library if you do plan on using them.

**Dependencies** – None, this library can be built at any time.
• **Organization** – If the Provider Group already exists as an Organization in another library, it can be selected from this drop down list and any data previously entered for the organization will populate in the appropriate fields.

• **Group Name** – Enter a name to identify the group.

• **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.

• **Website** – If the group has a website, it can be entered for reference. This information is not visible in any other portion of the software.

• **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.

• **Block Color** – If the group is being used to schedule block time shared by its members, a color can be selected from this list to help visually identify the block when the schedule is being viewed.

• **Address** – If the group has a physical location, it can be entered here for reference.

• **Phone** – If the group has a phone number(s) they can be entered here for reference.
Providers Library

Providers are any individual who provides a professional service in the facility who is not (typically) directly employed by the Hospital. Examples of providers are Surgeons, Anesthesiologists, CRNAs, and Surgeon Assistants.

Dependencies – The Providers library does not rely on any other libraries to be able to save entries, however, the Specialties and Provider Groups Libraries are required to be able to attach those values to each Provider and take full advantage of the reporting features of Vision.

General Tab

- **Person** – If the provider has been entered as a person anywhere else in the Vision Libraries, their name must be searched for in and selected from this list. Any data already attached to the person from the previous entry is copied into the appropriate fields.
- **Last Name/First Name** – Enter the provider’s name in these fields. **Do Not** include their title in either field.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout
the system. However, they can be added back to the drop-down lists at any time by re-activating the item.

- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Title** – Enter the provider’s title.
- **MI** – Enter the provider’s middle initial
- **Specialty** – Select the provider’s Primary specialty from the list. The list is populated with entries from the Specialties library.
- **Federal/State License ID #** – Enter the provider’s License Numbers if needed for claim submission. All license information (numbers, expiry, etc.) is tracked through the Credentialing module independent of the information entered in these fields.
- **UPIN #** – Enter the provider’s UPIN # if needed for identification on claim submission.
- **NPI** – Enter the provider’s NPI for identification on claim submission.
- **Provider Group** – If the provider needs to be identified as being a member of a group for reporting or block sharing, select the appropriate entry from the list. This list is populated with entries from the Provider Group Library.
- **Type** – Select from the options “Physician”, “Nurse”, “CRNA”, “Therapist”, “Technician”, “Anesthesiologist” or “Surgeon” to identify what type of provider they are. **Note**: Nurses and Techs are not generally considered providers for the purpose of this library.
- **Appt. Color** – Select the color for this provider’s appointments as they appear on the Daily Schedule. **Note**: This color only applies if the setting: **Facility Settings → Schedule Manager → Viewing Settings → Grid Color Option to Launch the Schedule View With** is set to “Surgeon”. The default value for this setting is “Anesthesia Type”.
- **Block Color** – Select the color for this provider’s blocks as they appear on the daily schedule. **Note**: This color applies regardless of the selection made for the setting noted previously.
- **Alert when new results available** – Select yes to alert when new results are available.
- **Admitting Physician, Attending Provider, …** – Select Yes if this provider is one or more of these physicians.

The remaining fields on this tab are not generally utilized, but can be filled in for reference. If you wish to have a provider’s demographic and contact information accessible for reference within Vision and on credentialing reports, these items are provided to meet that need.

**Payer ID Numbers**

This tab displays a list of all insurances entered in the Payer Library. Default values for the boxes referenced on this tab are set up in the setting found in: **Facility → Financial Manager → Insurance Billing/Claim Settings**. Please refer to these settings before entering any data on this tab. Values should only be entered here if they must vary from the values assigned in the claim settings.
Case Types Library

The Case Types Library contains all Case and Visit types into which all patient visits and associated cases are categorized for reporting purposes.

Dependencies – None, this library can be built at any time.

Creating a Visit Type

Visit Types are broad categories such as “Inpatient”, “Outpatient”, and “Observation.” These are just examples, other visit types can be created to fit the needs of your facility.

- **Case Type Description** – Enter the name of the Visit Type as it will appear in the registration window and on reports.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop–down lists throughout the system. However, they can be added back to the drop–down lists at any time by re–activating the item.
- **UB Default Type of Bill** – If a specific UB Bill type code is associated with visits of this type, it can be entered here. If one is not entered, opportunities to assign it to specific visits are available within the software.
- **Patient Type** – Select whether this is an inpatient or outpatient visit type.
- **Include in Case Counts** – Leave unchecked as it only applies when creating a case type.
- **Use as visit type** – Check this check box to indicate that this entry is to be used as a visit type.
Creating a Case Type

Case Types are categories for specific scheduled procedures that take place during a patient visit. Examples of potential case types are “Pain Management”, “Imaging”, and “Surgery”. Each entry will be assigned a “Patient Type” (Inpatient or Outpatient); therefore, any case type that can be associated with either type will need to be created twice. It may be convenient to use the Key and Description to distinguish between the two items.

As an Example:

<table>
<thead>
<tr>
<th>Description</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP Surgery</td>
<td>Surgery IP</td>
</tr>
<tr>
<td>OP Surgery</td>
<td>Surgery OP</td>
</tr>
</tbody>
</table>

- **Case Type Description** – Enter the name of the Case Type as it will appear in the scheduling window and on reports.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **UB Default Type of Bill** – Does not apply as bills are processed at the visit, not the case level.
- **Patient Type** – Select whether this case is performed as part of an inpatient or outpatient visit.
- **Include in Case Counts** – Indicate whether this case should be included in report to determine the number of cases performed at the facility.
- **Use as visit type** – Leave this check box blank to indicate that this entry is to be used as a case type.
Procedures Library

The Procedure library is where all procedures performed at your facility are stored. Procedures must be created for coding and billing purposes and these codes can be used for scheduling as well. However, codes used strictly for scheduling purposes can also be maintained in this library.

Dependencies – The CPT Codes Library is required for coding, but is already populated upon install. Library entries can be saved without it, but the relevant CDM Library entries will need to be created before appropriate charge codes can be attached and the build completed.

General Tab

- **CPT®** – Select the code that this procedure is to be associated with for coding purposes. When selected, the CPT Description and Code will populate automatically to the Description and Key fields, respectively. When creating a scheduling procedure, this field can be left blank.
- **Procedure** – If your Vision install was set up to support multiple organization units, this menu contains the items created in the Procedure Master Library, and it will be necessary to select the proper code from this list to proceed. If Vision has not been set up this way, then it will not be necessary to make a selection here.
- **Description** – Enter the description for the procedure as it will appear throughout the system. If a description was populated when a CPT code was selected, it can be edited here.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Quality Data Code** – This field is not utilized with Vision Specialty Hospital.
- **Abbreviation** – This field is not utilized by the system and as such should be left blank.
- **Default Schedule** – This field applies only to facilities utilizing the Web Suite Add-on product.
- **Cost** – This field is not utilized by the system and as such should be left blank.
• **Charge Code** – Select the charge code from the CDM Library that is to be used to bill this procedure when it is coded on a visit. This is not necessary when creating a procedure that is only being used to schedule.

• **State Reporting** – If your state requires that this procedure be reported when it is performed, indicate this by selecting Yes and choosing the appropriate State Report Insurance Code.

• **Cleanup Required?** – If the procedure code is being used for scheduling, choosing Yes requires schedulers to block off additional room time following the procedure to allow for turnover between cases.

• **LRB?** – If the procedure code is being used for scheduling, choosing Yes allows schedulers to indicate the body side (Left, Right, Bilateral, or N/A) for the procedure.

• **Specialty** – Displays the list of specialties created in the Specialty Library. Selecting the appropriate entry allows reports to be filtered or grouped according to Procedure Specialty.

• **ICD Procedure Codes** – If particular ICD–9 Procedure Codes are routinely associated with this procedure, they can be selected here. Otherwise, opportunities are provided to coders to attach these codes at a later time.

### Anesthesia Billing Tab

The Anesthesia Billing Tab is only used by facilities that have purchased the Anesthesia Billing Unit Add–on product which attaches an additional business unit for billing professional anesthesia services. Training on the information attached in this tab is provided during the implementation period for that product.
Recommended

Anesthesia Types Library

The Anesthesia Types Library lists the anesthesia types used at the facility.

**Dependencies** – The Anesthesia Types Library is not directly dependant on any other library to be able to save entries. However, the CDM Library must be populated with relevant entries so that the appropriate charge codes can be associated with the various anesthesia types.

- **Description** – Enter the name for the anesthesia type. Keep in mind that if anesthesia types are paired under specific circumstances, an entry needs to be created for that pairing.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.
- **State Report ID** – If your state requires that this anesthesia type is reported when it is used, enter the appropriate reporting code in this box.
- **Charge Code** – Select the appropriate charge code from the CDM Library for this anesthesia type.
- **Schedule Color** – Choose the color that cases utilizing this anesthesia type will appear on the daily schedule view. This color will be used if the Facility Settings → Schedule Manager → Viewing Settings → Grid Color Option to Launch the Schedule With setting is set to “Anesthesia,” which is the default value for this setting.
Variances Library

The variances library is used to manage occurrence reasons for five main types of events. The events tracked on the schedule are schedule cancellations, schedule discontinuations, and block cancellations. Variances allow users to track and report frequency, time, place, and a variety of other options that will help document and monitor these events. The variances library comes with some basic entries, but additional entries need to be created to allow those events to be reported.

Dependencies – None, this library can be built at any time.

- **Variance Description** – Enter the description for the variance. Several reports can be organized by variances, so it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.
- **Variance Group** – Select the appropriate variance group from the drop-down menu. Scheduling variances fall into either the Schedule Cancellation or Discontinuation categories.
- **Quality Measure to answer ‘Yes’ if this Variance is recorded** – The function of this field is reserved for future use.

Payer Group, Payer, and Payer Claim Destinations Libraries

The payer related libraries are outlined in detail in the Financial Library Guide. They are mentioned here because their completion affects the patient registration process: In order to complete patient registration the payer libraries must be completed so that the appropriate insurance carriers can be attached to the patients’ accounts. Thus, it is recommended that these libraries be completed before training or testing is performed in your Vision Database.
As Needed

Patient Flow Manager Views Library

The Patient Flow Manager is a tool that displays real time information about a patient’s stay. Depending on the selections made in this library, certain information can be selectively hidden or protected based on which view is chosen.

Dependencies – None

- **Flow Manager View Description** – Enter a description for the view, such as “Front Desk View” or “OR view”.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.
• **Flow Manager Columns** – Select the information that will be viewable in this entry. If the information is to be seen and not modified, check the appropriate box in the Read only column.

**Employers Library**

If your facility tracks the companies that employ your patients routinely or for worker's compensation visits, entries need to be made in the Employers Library so they can be attached to patients in the Demographics window. These entries are typically created using the Ctrl + L shortcut as needed.

**Dependencies** – None

- **Organization** – If the employer has already been entered in another library as an organization, it will appear in this list and can be selected. Selecting an item from this list causes all relevant data already associated with the organization to be populated into the appropriate fields.
- **Employer Name** – Enter the name of the employer.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
• **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.

The remaining fields are optional, but can be filled in if such information is deemed useful to have on hand. The employer’s phone number can also be tracked in the Patient’s Demographic tab as a ‘Business’ type.

### Language Library

If your facility tracks the primary languages that your patients speak routinely or when translators are required, entries may need to be added to the **Languages** Library. This library is populated with a variety of languages upon installation, and may not need to be added to at all.

**Dependencies** – None

- **Language Description** – Enter the name of the language.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.