

If you get the following message...

You are using an old Version of Planetrehab.

You must update your version of Planetrehab to have access to the new features.

Please run Workstation_Setup9SP2.exe on this workstation to upgrade to the latest version of the Planetrehab starter. You will find the file in the Planetrehab directory on the clinic server. The new version contains features that will not work with the old version.

Please Note: you must be logged into this computer as an Administrator to install the upgrade.

To get more detailed instructions, enter the following line in your browser:

<http://www.planetrehab.com/software/support-and-updates.html>

and download 'Workstation Installation Instructions'.

If you choose to NOT install the new Planetrehab starter program, the old version will continue to run as it always did.

...it means that you do not have the latest version installed on your computer. You have to reinstall Planetrehab on your computer in order to use all the new features.

Reinstalling Planetrehab on a workstation is very easy. Here are the step by step instructions on how to do the reinstall.

PLANETREHAB WORKSTATION SET UP INSTRUCTIONS

Instructions for setting up workstations on your network for access to Planetrehab. The Planetrehab server is set up using “workgroup” as it’s peer-to-peer workgroup setting.

Notice: Laptop or Notebook setup requires that you never let the laptop go into “Standby” mode. When it does, SQLserver notices that the laptop is no longer on the network and closes the connection. When it “Wakes Up” you are no longer connected to Planetrehab.

1. Make sure the Planetrehab server is running and connected to your network.
2. Make sure your workstation is set to use “**workgroup**” as it’s normal workgroup. You can change the setting by right clicking on “**My Computer**” and clicking “**properties**” then go to the tab “**Computer Name**” on WinXP and “**Network Identification**” on Win2k. You can change the workgroup here.
3. Open your **Windows Explorer** (not Internet Explorer) on your computer and navigate to “**My Network Places**”, click on the (+) plus sign and then on the plus at “**Microsoft Windows Network**” and then the plus on “**Workgroup**”. You should see the name of the Planetrehab server in the list. Depending on the operating system, you should see either the name or the description of the server “**pr...**” or “**Planetrehab Clinic Server**”.
4. Navigate to the server and open the folder “**Planetrehab**”. In that folder you will find a program named “**Workstationsetup9sp2.exe**”. Double click on this program and the workstation environment will be installed on your computer. You must be using an account that has “Administrator” privileges on the workstation at the time.
5. The workstation install will place a Planetrehab **Icon** on your desktop, double click on the icon to start the Planetrehab clinic program.
6. **The first time you run the program it will need to know where the Planetrehab directory on the server is on your network. When you start Planetrehab for the first time, it will open a “Search Window”. In the search window, go to the bottom of the window to “...Network...” (it will be**

different in different versions of Windows” and navigate to “Workgroups/PR...(server name)\planetrehab” the “Planetrehab” directory on the server and then click ok. Planetrehab clinic will then be able to connect to the server.

7. **If the above doesn’t work**, navigate to the server in Windows Explorer and find the file “prclinic.ini” in the “Planetrehab” share and copy it to the c:\program files(or c:\users on Vista or Win7 Computers)\planetrehab\ directory on your workstation. It is set up to work with your server. (Windows Explorer can be accessed by right clicking on “My Computer” and choosing “Explore”)
8. If you are using Vista or Windows 7 you must right click on the desktop icon for Planetrehab Management and click “Properties” then click on the “Compatibility” tab. Check “Run in Compatibility Mode” and change the compatibility to “Windows XP service pack 2” or “...3” for Windows 7.

If you still cannot see the Planetrehab server using the above method, for instance your computer in a member of a domain, enter the following string in your Windows Explorer address field.

“\\<name of your server>\planetrehab” then hit enter and you should be transferred to the proper share. You may also enter the above string in the Start/Run command line to find the server.

If you still cannot find the server, either the Planetrehab server cannot see your network or the Planetrehab server received an incorrect IP address from your DHCP server. (you do have one) If so, you will have to contact a network knowledgeable person to make sure that the server can see the network.

Norton Antivirus and Norton Internet Security

There are so many ways for Norton to stop your workstation from working correctly; we really can’t list them all. Especially when running Vista. Some of them are: the firewall stops your access to SQLserver, worm protection stops you from seeing XP machines (so does the firewall)... Disable Norton’s blockage of Planetrehab.

NEW APPOINTMENT BOOK DOCUMENTATION

The new appointment book allows the user to color code multiple items; the appointment, the therapist, the patient.

Setting Your Color Codes

The Task Bar Colors Option allows you to create unlimited colors to color code appointments, providers and/or patients in Planetrehab.

Start by clicking the View Menu>Clinic Setup. With the Clinic Setup dialogue box open, click the Colors Button



Figure 1 – Colors Button

(see Figure 1). The Task Bar Color dialogue box opens. Click the Retrieve Colors Button to display all set colors (see Figure 2). To create a new colored item, click the New Button and a new empty record will be created. Type the name (description) of this color in the status field. In this example, we are creating a

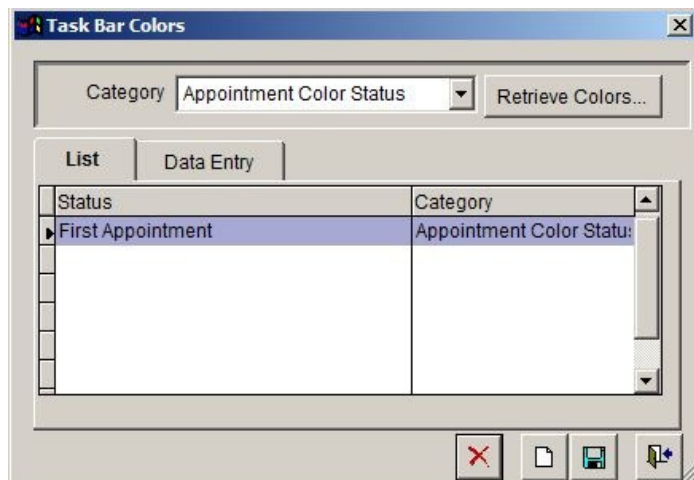


Figure 2 - Task Bar Colors Dialogue Box. Note that the names of the Buttons have been added to the picture but do not show up in Planetrehab unless you hover over the Button.

category called Pool (see Figure 3). We typed Pool in the Status field and now we are going to chose a color by clicking on the ... Button. The color picker will appear. You can choose one of the preset colors or create your own color by clicking on the Define Custom Colors Button. Once you have selected a color (in this example we chose the preset aqua color) click OK and then Save. This color is now set. You can create as many color labels as you need.

The first appointment status is already setup. Planetrehab will color the first visit for a patient with the color you choose. This makes it easy to spot all first visit patients in the appointment book. You will not be able to delete the first appointment color code. You can set the color to whatever you choose.

You can delete any color code by highlighting the code and then click on the Delete Button. If you want to change a color code, simply double click the code and chose another color.

When you are finished setup up your master code list, click the Close Button.

Setting a Color Code for a Patient

There may be instances when you want to specify a particular color for a patient. When you specify a color for a patient, their appointment block in the appointment book will be painted that color, with the exception of their first appointment, which will be painted the color you chose for the First Appointment color in the Clinic Setup (see section “**Setting Your Color Codes**”).

Click on the ... Button and select a color from the list (see Figure 4). If you want to create a new color, go to the View Menu, choose Clinic Setup and setup a new color (see section “**Setting Your Color Codes**”). When an appointment is scheduled for this patient, it will show up as the color your chose.

If you want to remove the color code for the patient, click on the ... Button and click the Eraser Button (see Figure 5).

Setting a Color Code for a Provider

There may be instances when you want to specify a particular color for a provider. When you specify a color for a provider, their column in the appointment book will be painted that color.

To set a color for a provider, click the View Menu>Providers and click the Color ... Button (between the Schedule Order and the Max Appts Options (see Figure 6). The default color is yellow, but you can change it to color of your choice. You can select a preset color or define a color. You can also set the max number of appointments that may be scheduled for a provider at one time. For example, if you set the max to 3, then the system will not allow more than 3 appointments to be scheduled at any one time.

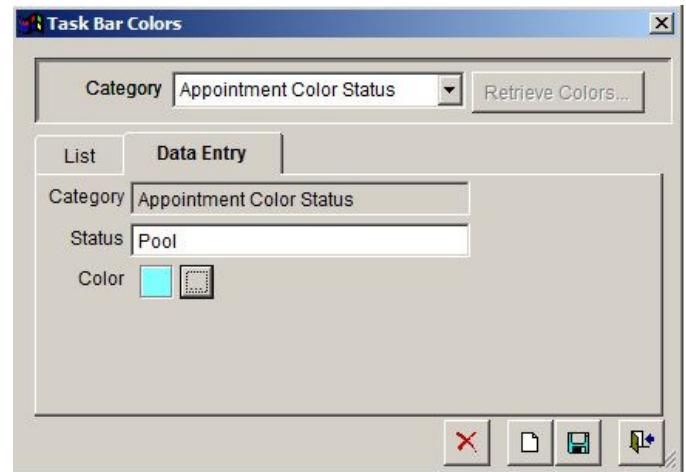


Figure 3 - Setting up a new Color Code Category. In this example we are setting up Pool category and using aqua blue.

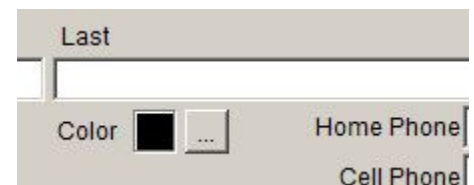


Figure 4 - The option on the Patient Screen that allows you to change their default color.



Figure 5 - The Eraser Button.

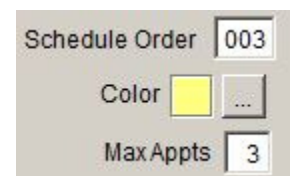


Figure 6 - Option to set the Provider Color Code.

Appointment Book

The Appointment Book interface has been completely redesigned. Although some aspects of the new interface resembles the old interface, there are some major changes.

You can now expand the Appointment Book Screen by putting your mouse over any corner of the screen. You will see your mouse change from an arrow to a double arrow. Once you have the double-arrow, click and hold down your mouse Button and drag outward to expand the screen or inward to decrease the size of the screen.

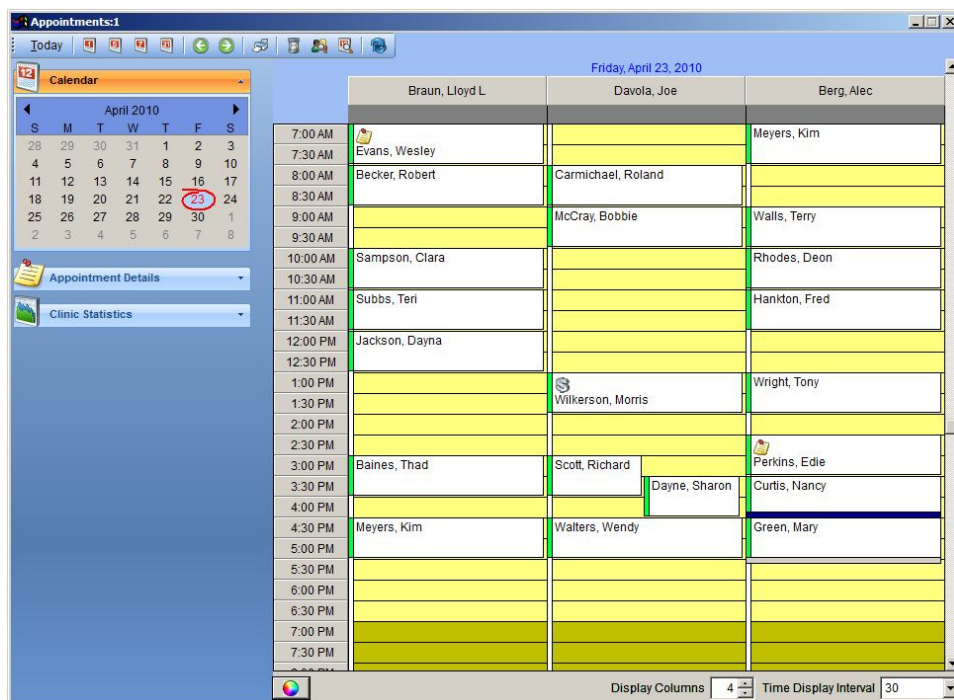


Figure 7 - The Appointment Book Screen.

If you are using colors, you can pull up the color legend that will explain what each color is. Click on the Color Button in the lower left hand corner and the legend will appear. To close the legend, click on the Door Button.

You are able to change the number of columns that is displayed on the screen and the time interval by setting each option found at the bottom of the screen.

The Toolbar has multiple options(see Figure 8).



Figure 8 - The Appointment Book Toolbar.

The Today Option displays today's appointments. The next series of buttons will display different views. The Day View (represented by the calendar with a 1), the Work Week View (represented by the calendar with a 5), the Week View (represented by the calendar with a 7) and the Month View (represented by the calendar with a 31).

Clicking either the forward or backward Arrow Button will move the view forward/backward one day when in the Day, Work Week, Week or Month View.

The Printer Button will print the selected day's schedule.

The Sand Timer Button displays the Vacant Appointment Needed List (see Figure 9). The Vacant Appointment Needed List displays all patients that have

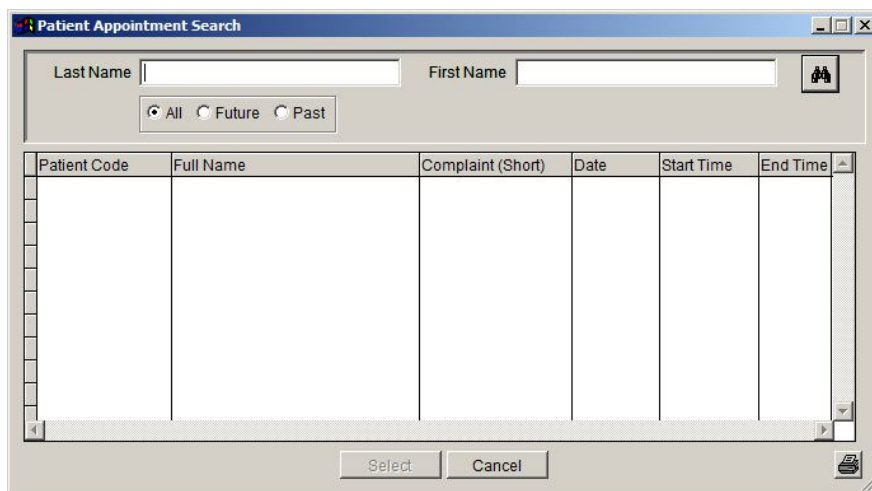


Figure 9 - The Vacant Appointment Needed List Dialogue Box.

requested they be notified if an appointment time becomes available. The other words, it is a waiting list if someone cancels their appointment. To add a patient to the Vacant Appointment Needed List, find the patient in the Patient File (View Menu>Patients>Patients or right-click on a patient in the Appointment Book and choose Edit Patient...) and check off the Vacant Check Box (next to the Student Status). To remove a patient from the Vacant Appointment Needed List, simply uncheck the Vacant Check Box.

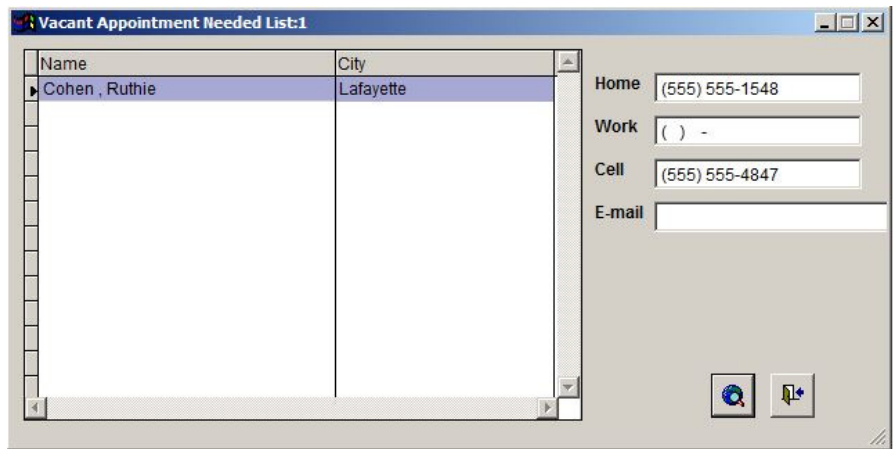


Figure 10 - The Patient Appointment Search Dialogue Box. Note the Printer Button in the lower right hand corner.

The next toolbar button is the Patient Appointment Search Button. It is represented by a magnifying glass over two people. When clicked, the Patient Appointment Search Dialogue Box appears (see Figure 10). This function allows you to search for an appointment(s) for a patient that occurred in the past, is scheduled (future) or all past and future appointments (all).

To use, enter the patient's last name and/or first name, choose the correct radio Button (all, future or past) and click the Binoculars Button. A list of the patient's appointments that match the search criteria will be listed. You are able to double click a search result to go directly to that appointment. You can also print the list by clicking on the Printer Button in the lower right hand corner. To close the screen, click the Cancel Button.

The final button is the Refresh Button and is represented by two circular arrows. The Refresh Button simply refreshes the screen when pressed. After a change is made to an appointment, you can click the Refresh Button to update the appointment screen.

Notice that there is a sidebar that is segmented into 3 or 4 sections, depending on the view (see Figure 11).

When in the day view (see Figure 7), the sidebar contains 3 sections, the monthly calendar, the appointment details and the clinic statics.

You can skip to a day by clicking on the date in the sidebar calendar. You can move forward or backward by month clicking on the arrows next to the name of the month and year. Today's date circled in red and the date of the appointments listed the appointment view is in blue.

The appointment details section displays information about the patient.

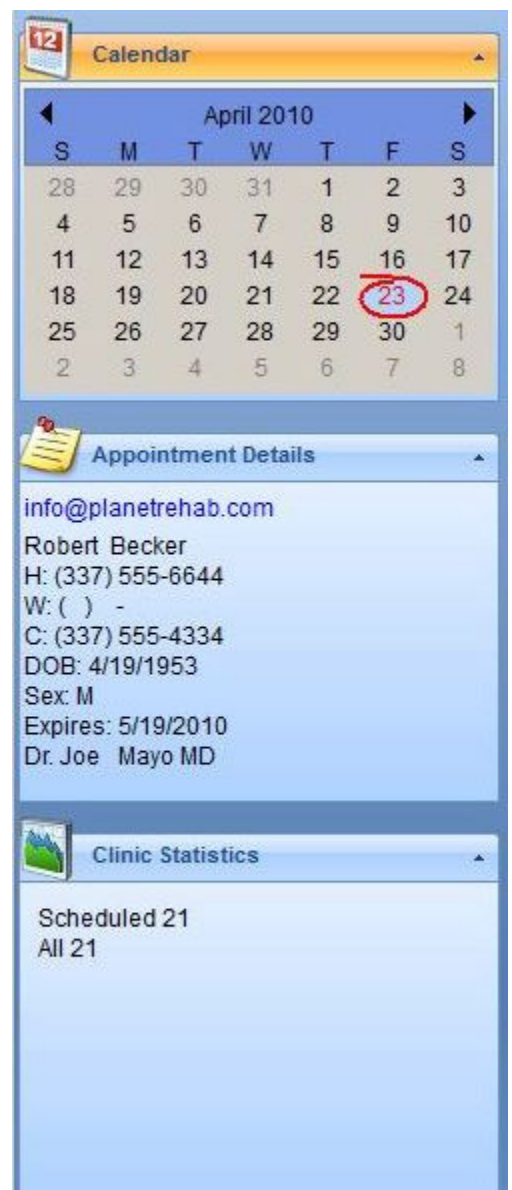


Figure 11 - The Sidebar.

To display patient information, click on a patient's appointment in appointment book. The appointment details section contains the patient's email address. You can click on the email address and a blank email will appear (if you have the ability to email from your computer) that can be sent to the patient. The appointment details section also contains the patient's name, home phone number, work phone number, cell phone number, date of birth, sex, when their prescription expires, the referring physician and the co-pay amount (if applicable).

The clinic statistics section contains a breakdown on the status of all the appointments for the day. The clinic statistics section will show the number of scheduled appointments, the number of appointments marked arrived, the number of appointments marked with provider, the number of appointments marked no show, the number of appointments marked canceled and the total of all appointments for at day.

Each section can be collapsed or expanded by clicking on the up arrow to the right of the section's name.

If you are in either the work week view or week view, a fourth section is added called providers. The appointment book view will display the work week or week schedule for the chosen provider. To choose a different provider, simply click on their name and their schedule will appear in the appointment book view. Also notice that the clinic statistics section changes to reflect the clinic statistics for the work week or week.

Right Click Menu

The Right Click Menu works essentially the same, but with two major additions—the Set Recurrence and the New General Provider Appointment Options.

The Set Recurrence Option is only available if you right-click on an appointment that is already scheduled for a patient. This option is used when you want to automatically schedule future appointments for the patient selected. The recurring appointment option will use the appointment you right-clicked on as the template for the settings.

When you choose Set Recurrence, the Appointment Recurrence Dialogue Screen appears (see Figure 12).

From this screen you have a myriad of options to choose from to automatically create future appointments.

You can set the start and end time of the appointment. The default will be the start and end time of the original appointment you chose to set the recurring template.

In the Pattern Option, you choose if you want to set this recurring appointment up daily, weekly, monthly or yearly. The Pattern Option works in conjunction with other settings on this screen, so we will proceed with the explanation and then give examples.

Note the Range Option below the Pattern Option. This is where you set either the number of recurring appointments you want to automatically setup or the date that you want the appointments to end.

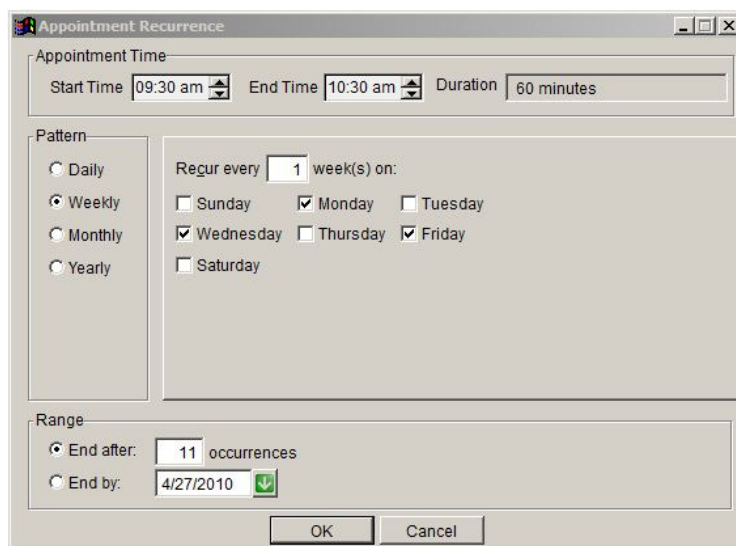


Figure 12 - Appointment Recurrence Dialogue Screen.

The middle section changes based on the Pattern Option you select.

If you choose the Daily Pattern Option, you will be able to set the number of days you want to create the appointment for or you can choose every weekday. An example for this setting is when the patient wants to attend therapy everyday for the next 10 days. In this example, you would choose the Daily Pattern Option, set the Every _ Days Option to 1 and set the End After _ Occurrences Option to 10. If the patient wants to attend every other day, then you would set the Every _ Days Option to 2.

If you choose the Weekly Pattern Option, you will be able to create appointments for certain days during the week. For example, if the patient wants to attend therapy every Monday, Wednesday and Friday for 12 visits, then you would check off the Weekly Pattern Option, set the Recur Every _ Weeks Option to 1 and set the End After _ Occurrences Option to 12. If you prefer to end by a date, click the End by: Range Option and enter the date that you want to stop setting the appointments (you can double click the date field and the calendar will pop up).

If you choose the Monthly Pattern Option, you will be able to create appointments for specific days in a month. For example, if the patient wants to attend therapy every month on the 21st for 6 months, then you would check off the Monthly Pattern Option, set the Day _ of Every _ Months Option to 21 and 1 and set the End After _ Occurrences Option to 6. If you prefer to end by a date, click the End by: Range Option and enter the date that you want to stop setting the appointments (you can double click the date field and the calendar will pop up). Using the same example, if you wanted to set the appointment up for the 21st of every other month, then you would set the Every _ Months Option to 2. You can also set the monthly pattern using second option, which allows you to set the day to the first, second, third, fourth or last Monday, Tuesday, Wednesday, Thursday, Friday, Saturday or Sunday of the month.

If you choose the Yearly Pattern Option, you will be able to create an appointment for one day during a year(s). For example, if a patient wants to come in for a yearly therapy checkup, you can set the date and the appointment will be created.

If you want to delete a recurring set of appointments, right click on the appointment and select Delete Appointment. You will be asked if you want to delete only one appointment or the entire series. All appointments will be deleted except for the original appointment, which was not created using the recurring appointments options.

General Appointments

We define general appointments as appointments that are not attached to a patient and used to block out a space of time. Usually, appointments can be used to block out a time for a therapist that needs to indicate he/she will not be in the office (i.e. doctor's appointment, continuing education, personal business, etc.) and wants to specify that in the appointment book so other appointments will not be scheduled at the same time for the therapist.

General appointments are handled differently in the new version. You no longer have to create a patient and use general in the patient code.

To create a general appointment, click on the View Menu>General Appointments and the General Appointments Screen appears (see Figure 13).

If you have created a general appointment(s), you can search for them from the General Appointments Screen by entering in a combination or one search term. You can search by the provider name, the start and end date, the reason or the day of the week. You can also delete a general appointment from this screen. Simply click on the general appointment you want to delete and click the red X from the toolbar.

Once you have inserted your search criteria, click the binoculars Button and the search will appear in the list. You can double click the general appointment from the results list.

To create a new general appointment, click the New Button. A blank General Appointments Entry Screen will appear (see Figure 14).

Enter the name of the provider in the provider name. If this general appointment will be for every provider, then leave the provider name blank. If you want to make this general appointment a special color, click the ... Button and choose a color.

Next set the start and end dates along with the start and end times. Enter the reason for the general appointment. By default, you will not be able to schedule another appointment in conjunction with the general appointment unless you override the default by checking off the Allow Scheduling checkbox.

Finally, check off the days of the week that you want to set the general appointment for and click the Save Button.

You can also create a general appointment in the appointment book. You create a general appointment the same way you create an appointment for a patient. Highlight the time frame for the general appointment and right-click. Choose the New General Provider Appointment Option and the General Appointments Entry Screen will appear (see Figure 14).

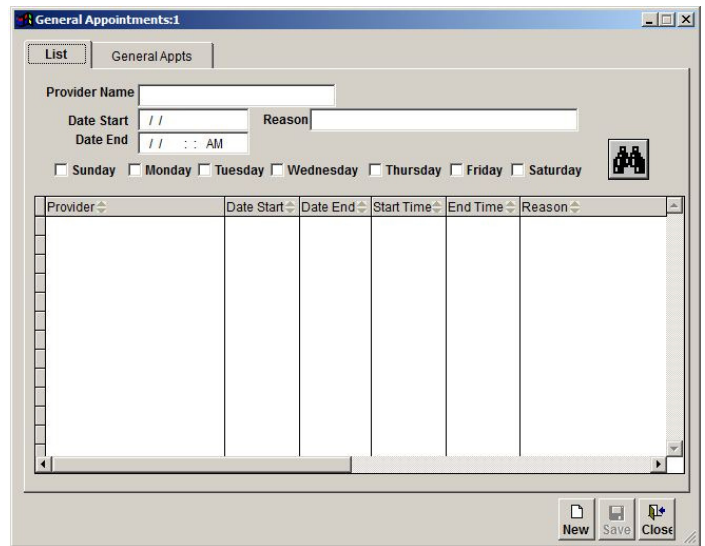


Figure 13 - The General Appointments Screen.

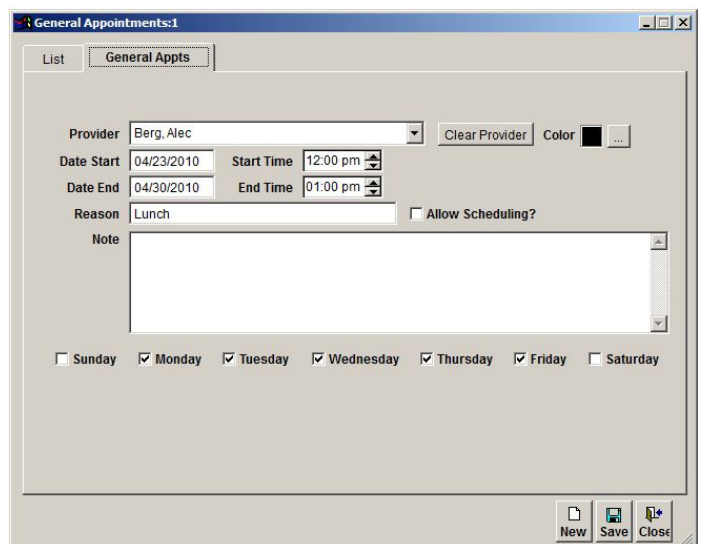


Figure 14 - General Appointments Entry Screen.