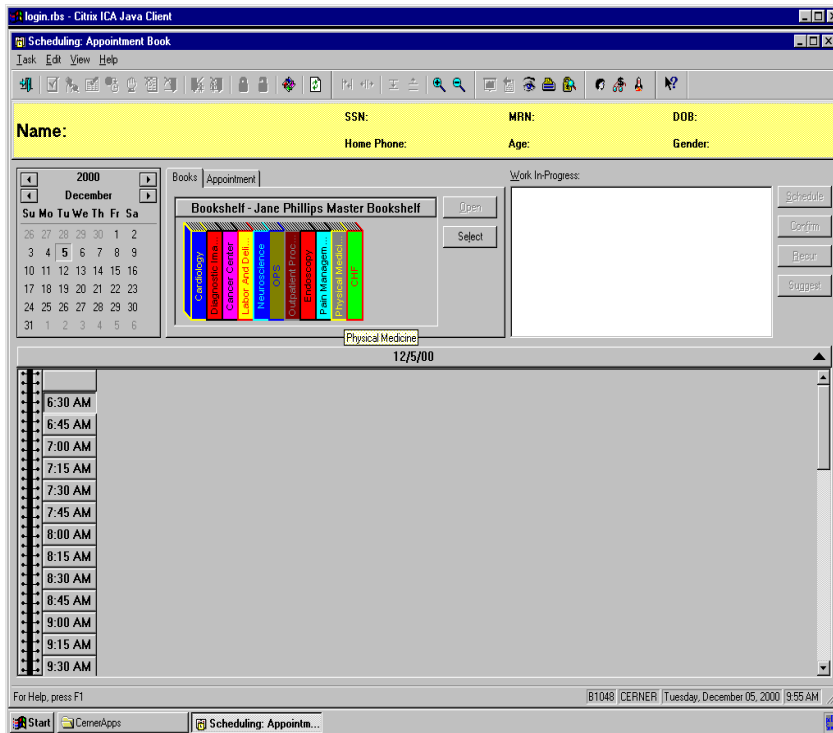


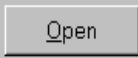
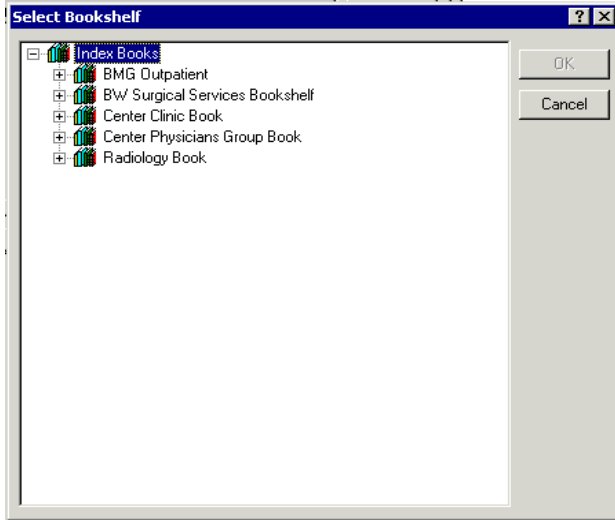
Appointment Scheduling

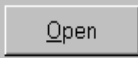
Drag and Drop Method

The drag and drop functionality is a quick and simple method when scheduling single appointments, especially when it is easy to locate available slots with minimal searching. This method works best when scheduling areas which are not booked out far into the future.

1. Open the Scheduling Appointment Book application (Schapptbook.exe).
2. Click the book you want to open (the book will be highlighted) and then click "OPEN" to open the book. (You may also double click the book to open it.) Or, click on the Bookshelf bar and select a new bookshelf.



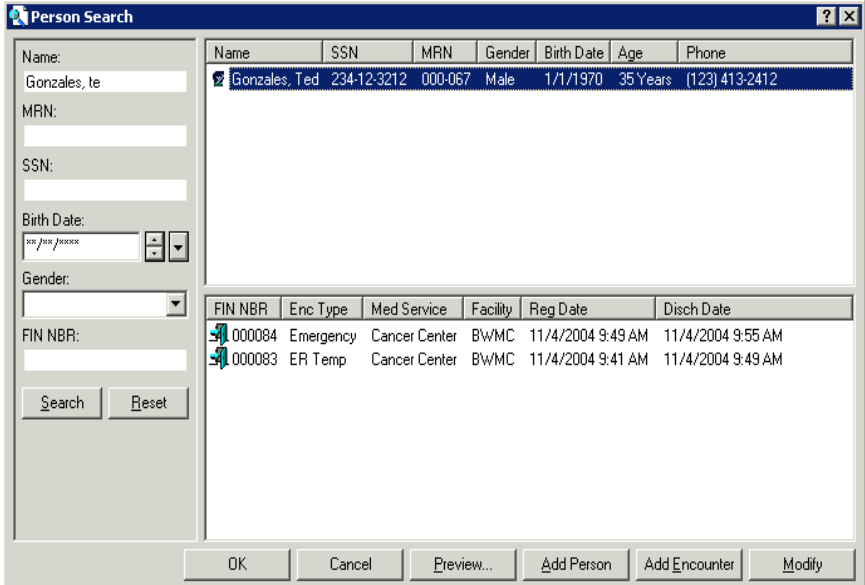


3. Click a specific book and then click  to open the Appointment Book. (You may also double click the Appointment Book to open it.) Please choose a date from the Calendar .
4. You can have the location field or Appt type field first or the Person Name field, this shows us using the person field first , but this is the scheduler's choice and this is done by setting your preference . This can be done by clicking on the view and picking options, under the user default tab and then go to the Appt detail fields which displays the three types and put this in the order of your choosing. The example shown here is with entering the person field first. Enter in the patients last name and first two letters of the first name.

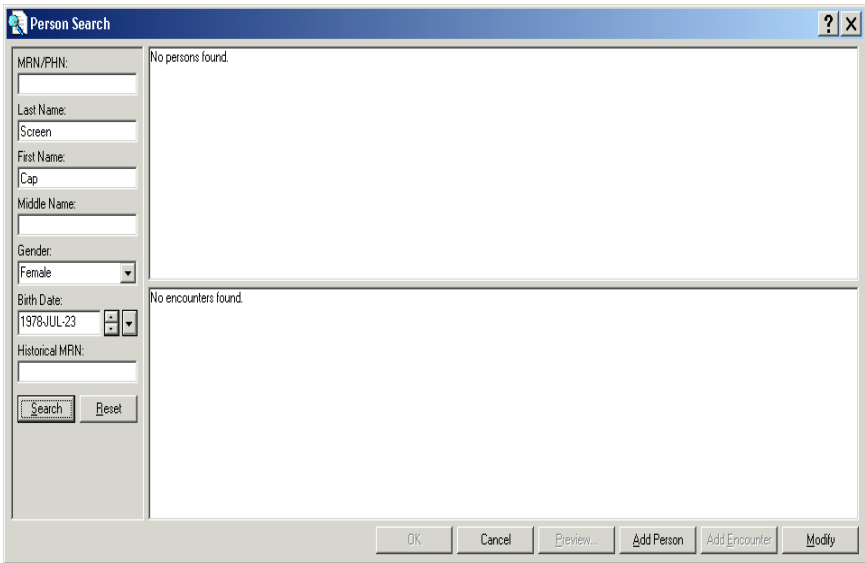


5. Press your Enter key or the ellipses button to search. The Person Search window will display showing all patients whose name matches the patient information you entered. Select the appropriate patient and press the OK button.

Please Note: This is set up with Person filed first in the Accept Format; It is recommended to have Appt. Type first (However it is the schedulers choice.)



- The patient's name will now display in the Person Name field. If no person is found Click the " Add Person tab". *(THESE NEXT STEPS ARE FOR ONLY ADDING A NEW PERSON FROM NUMBER 6 THROUGH 25) IF NOT ADDING A NEW PERSON PLEASE GO TO STEP NUMBER 26 AND CONTINUE UNTIL STEP 41 AND THESE WILL COMPLETE THE PROCESS FOR DROP AND DRAGGING AN APPOINTMENT.*



- If available, enter patients Last and first name, DOB and gender. Click on the Search button.
- No Persons found will show.
- Click on the Add Person button

The Add Person screen opens

10. Complete all required fields.
11. After Clicking OK, user returns to the Scheduling screen.
12. Continue the process of scheduling and you will come to the “Add Encounter Screen.

13. Click on the Add ENC Button.

PREADMIT SCREEN OPENS

(Ensure Patient's Last and First Name, DOB and Gender, fields are completed)

The screenshot shows the 'Pre Admit' window with the 'Search for Person' icon highlighted in yellow. The form contains the following fields:

- Search for Person:** Last Name (SCREEN), First Name (CAP), Middle Name, Nickname, Gender (Female), Maiden Name, Date of Birth (1978-Jul-23), Age (28Y).
- MRN:** Encounter Number, Marital Status, Primary Language, Interpreter Required, Religion, Church.
- Patient Information:** Encounter Information, Contacts, Insurance Primary, Insurance Secondary, Insurance Tertiary, Insurance Summary.
- Mailing Address:** Street Address, Street Address2, Country (Canada), City (Summerside), Province/State (Prince Edward Island), Postal/Zip Code (C1N 2N2), Home Phone Number (902) 436-2222, Cell/Pager Number.
- Business Phone Number:**, **Email Address:**
- Temporary Address:** Street Address, Street Address2, Country, City, Province/State, Postal/Zip Code, Temporary Phone Number.
- Person Comments:** New Person Comment, Previous Person Comments.

Buttons: OK, Cancel. Status: Ready. Footer: PROD REGCLERK 007-Jun-2 | 16:09

14. At the top left of the screen, click on the **Search for Person** Icon
15. A message will appear at the bottom of the screen **“Executing search for person narrow Transaction.”**
16. Another message will appear: **“You can review the response to inquiry now by clicking the transaction toolbar button”.**

The screenshot shows the 'Pre Admit' window with the 'Search for Person' icon now having a green checkmark next to it. The form contains the same patient information as the previous screenshot:

- Search for Person:** Last Name (SCREEN), First Name (CAP), Middle Name, Nickname, Gender (Female), Maiden Name, Date of Birth (1978-Jul-23), Age (28Y).
- MRN:** Encounter Number, Marital Status, Primary Language, Interpreter Required, Religion, Church.
- Patient Information:** Encounter Information, Contacts, Insurance Primary, Insurance Secondary, Insurance Tertiary, Insurance Summary.
- Mailing Address:** Street Address, Street Address2, Country (Canada), City (Summerside), Province/State (Prince Edward Island), Postal/Zip Code (C1N 2N2), Home Phone Number (902) 436-2222, Cell/Pager Number.
- Business Phone Number:**, **Email Address:**
- Temporary Address:** Street Address, Street Address2, Country, City, Province/State, Postal/Zip Code, Temporary Phone Number.
- Person Comments:** New Person Comment, Previous Person Comments.

Buttons: OK, Cancel. Status: Ready. Footer: PROD REGCLERK 007-Jun-2 | 16:13

17. The **“Search for Person”** Icon top left of the screen presents with a green checkmark.
18. Click on the Green checkmark (Search Person Icon)

Search for Person Box opens

Search for Person

Last Name First Name Middle Name Date of Birth Gender Provincial Health Number Street Address Street

OK Search Cancel

19. If your patient is found in this box, click the “Cancel” button.
20. Then click the Cancel button on your Registration screen and cancel the Transaction and **research** the Cerner System for your patient.
21. If Your patient is not found in the Search for person box Click OK

Preadmit Screen (Assigning PHN)

Pre Admit

Assign PHN

Last Name First Name Middle Name Nickname Gender Maiden Name Date of Birth Age
GREEN CAR Female 1970-04-23 37Y

MRN Encounter Number Marital Status Primary Language Interpreter Required Religion Church

Patient Information | Encounter Information | Contacts | Insurance Primary | Insurance Secondary | Insurance Tertiary | Insurance Summary

Mailing Address
Street Address Street Address 2 Country City Province/State Postal/Zip Code Home Phone Number Cell/Fax Number
Business Address
Business Phone Number Email Address

Temporary Address
Street Address Street Address 2 Country City Province/State Postal/Zip Code Temporary Phone Number

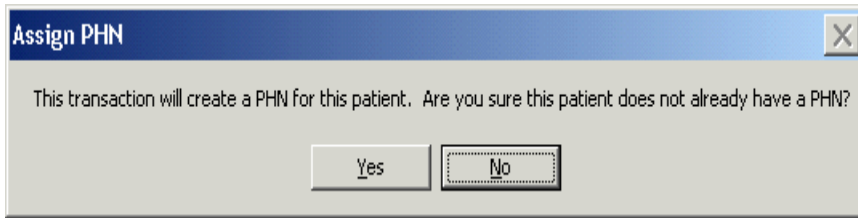
Person Comments
New Person Comment
Previous Person Comments

OK Cancel

Ready PROD REGCLERK 007/Jun/2 | 16:18

22. Click on the Assign PHN Icon top Left Hand screen.

Following Message will Appear.

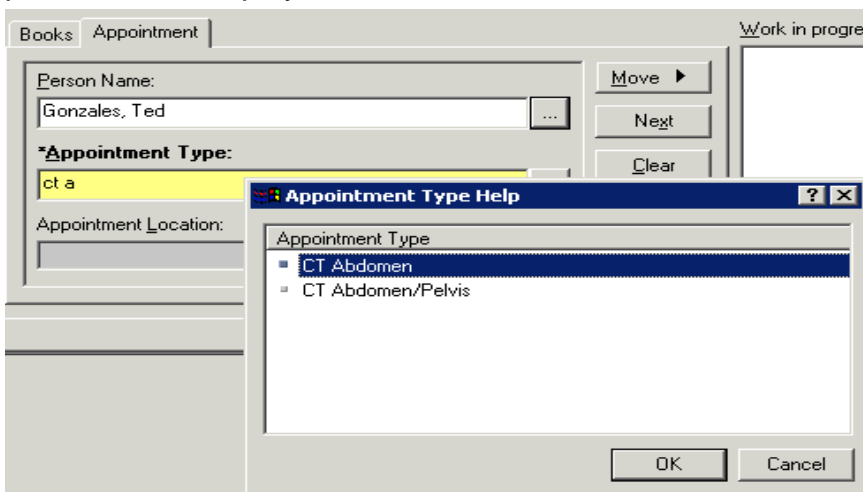


23. Click Yes

24. Execute Assign A PHN Transaction message will appear at the bottom of the screen and the MRN will populate the MRN field.

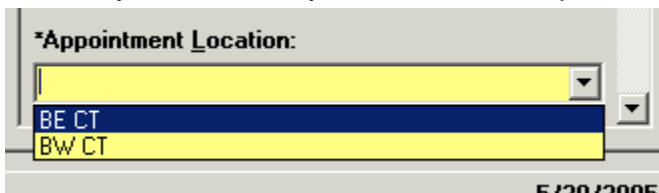
25. You have received a response to your inquiry will show as a message bottom of your screen.

26. In the Appointment Type field, type in the first few letters of your Appointment Type name and press your Enter key or the ellipses button. The Appointment Type Help window will display.



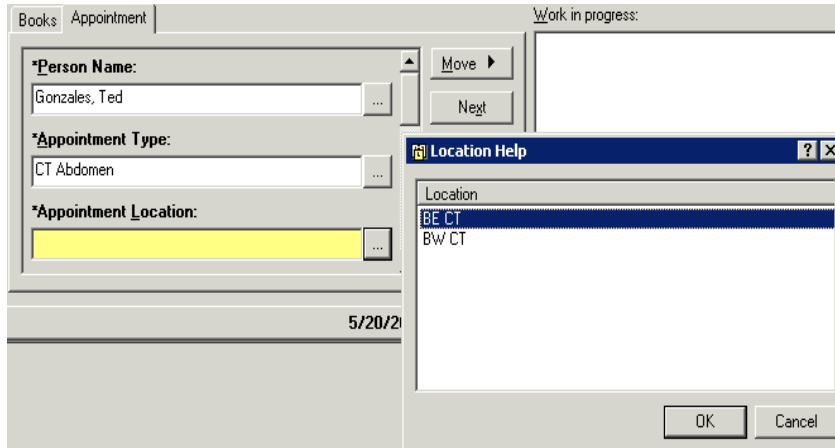
27. Select the appropriate Appointment Type name and press the OK button. The Appointment Type name will now display in the Appointment Type field.

28. In the Appointment Location field, press the dropdown to select the appropriate location for the appointment to be performed. **Note:** If there is only one valid location for the Appointment Type you selected, then the Appointment Location will automatically default and you will not be required to select one.



29. If your user preference is set to allow for multiple appointment locations, then you will see an ellipses button rather than a dropdown in the Appointment Location field. To select an appointment location with a multi-value field, press the ellipses button and the Location Help window will display.

30. Select the appropriate location and press the OK button.

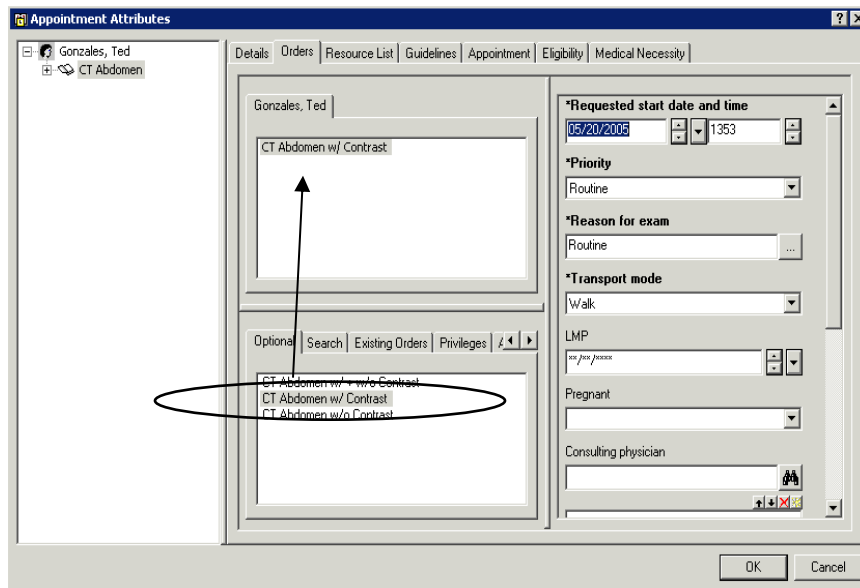


31. Most Appointment Types are built with additional questions to be asked during the scheduling process (Accept Format questions). Answer the remaining questions

for the Appointment Type and press the  button to place the event details in the WIP.

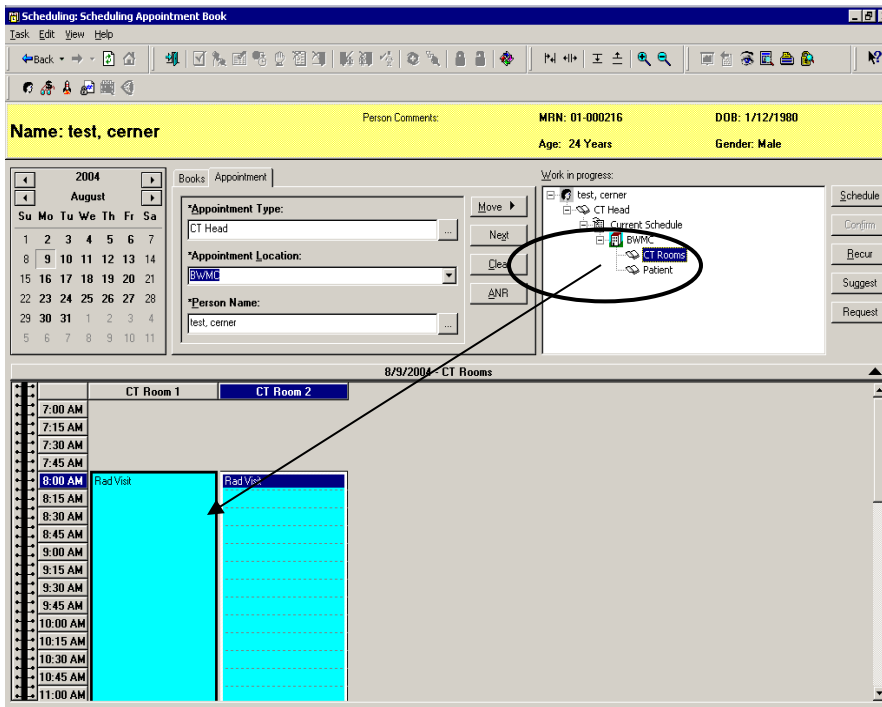
32. The order you selected by double clicking will move to the upper middle section of the window beneath the patient's name to show that it has been selected.

33. Press the OK button.

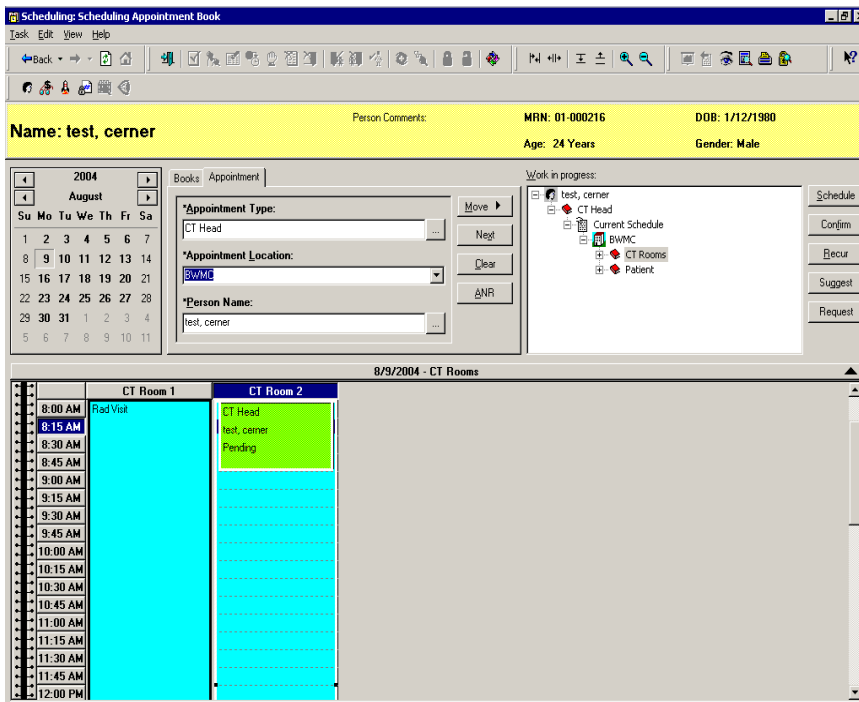


34. The appointment information will display in the WIP (Work in Progress) window.

35. Left click on the resource selected and drag the cursor to the slot that will be scheduled into.



36. Once the mouse button is released the appointment will show in the slot in a pending state, which will be denoted by the red books in the WIP.

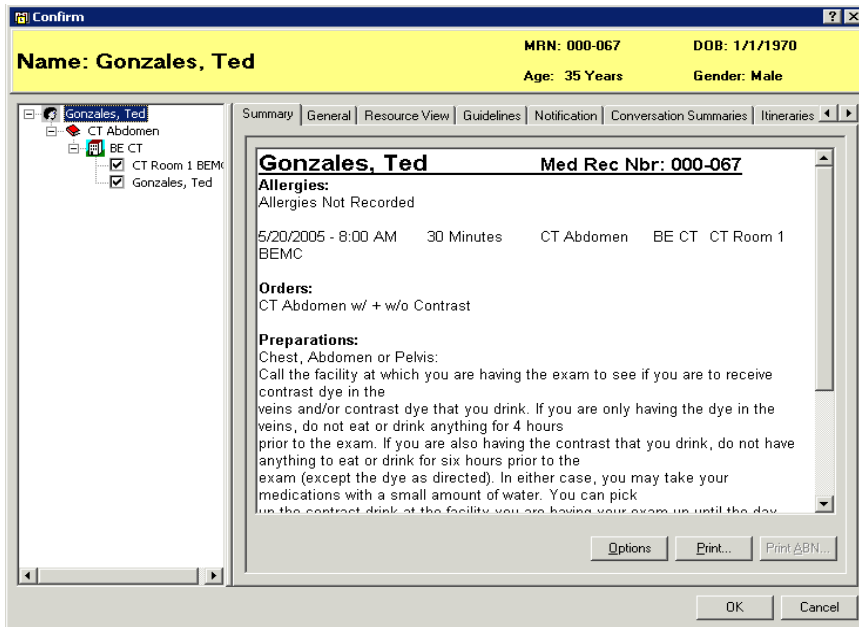


37. Click the **Confirm** button to confirm the appointment. The Confirmation window will display showing a summary of the appointment. You will also see any patient preps associated to this appointment.

38. Encounter Selection box defaults and click on add encounter. (we will be adding add encounter on every appointment that is scheduled.) .There will be an organization box populate, fill out the facility name in the field just enter a couple of letters of the facility and press ellipse and highlight the name and press OK .

39. The Pre Admit screen will populate and fill in all the required fields. (they are highlighted yellow) after the required fields are filled in go and click on Encounter Information Tab, fill in required fields and press OK .

40. Click  in the Summary Box.



41. The appointment will show in the template as confirmed.

	CT Room 1	CT Room 2
7:00 AM		
7:15 AM		
7:30 AM		
7:45 AM		
8:00 AM	Rad Visit	CT Head test, cerner Confirmed
8:15 AM		
8:30 AM		
8:45 AM		
9:00 AM		
9:15 AM		
9:30 AM		
9:45 AM		
10:00 AM		
10:15 AM		
10:30 AM		
10:45 AM		
11:00 AM		