# Scheduling Training Guide

# Health PEI CLINICAL INFORMATION SYSTEMS

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### **Logging into Cerner Application**

1. For users with single sign-on: Click on the "2018 Cerner App" on your desktop. If you encounter any problems, call the Help Desk at 620-3600.



2. This is the window you will see. This screen will auto-populate with your username and password. "Click Log In".

	Messages	
3.	CernerWorks Logan Log on to access your applications. User name: Password Domain: ISLAND HEALTH V (2) Log On	Welcome to CernerWorks
		ERNER CernerWorks

3. The user will then have to input their ISLAND\_HEALTH domain username and password in the appropriate fields and click Log In.

They will then see the appropriate folder icons for the solutions they have access to.

Welcome to CernerW	Vorks! × +					
( i ciscitrixweb-non	prod/Citrix/NonprodWeb/					
🔊 Most Visited 🥘 Gettin	g Started 🔛 Province of	PEI SSL VP 😎 Health PE	I   🛞 Unicentre   🧧	PROD 🛛 😂 Non-PROD	🛞 Groupwise 🕜 https://	/eservice.ucern 📴 Moo
Health PEI						
🕨 Main 🕨 Build						
	۲					
AppBar 80129 PEIS_CD	Bedrock B0129 PEIS_CD	Cerner Program Files B0129 PEI	FirstNet B0129 PEIS_CD	IssueCollector B0129 PEIS_CD	PEISCDCTX12 B0129 Support Fo	PowerChart B0129 PEIS_CD

 Now Double Click on the shortcut for the appropriate Cerner solution you will be working on. (Double-click on the App Bar)

# **Scheduling Icons**

Scheduling Icons will assist in performing some of the scheduling actions.

Button	Action
<b>a</b>	<b>Appointment View</b> - Opens the Appointment View dialog box so you can view details associated with the appointment.
	<b>Appointment History View</b> - Opens the Appointment History View dialog box so you can view details associated with the appointment.
(6)	<b>Appointment Inquiry</b> - Opens the Schedule Inquiry window so you can launch a person, resource, or location inquiry.
	<b>Request List Inquiry</b> - Opens the Request List tab of the Schedule Inquiry window so you can launch a request list inquiry.
2	<b>Appointment Report</b> - Opens the Schedule Report window so you can print person, resource, or location schedule reports.
ß	<b>View Lock Status</b> - Opens the Locks Held By dialog box to display pending appointment information, which is locked in the system by you.
+≮	Decrease column width
+  +	Increase column width
Ŧ	Decrease slot size
<u></u>	Increase slot size
€,	Zoom in
€	Zoom out
6	<b>Person Management</b> - Opens the Person Management application to search for a person in the database or to add a person to the database.
æ	<b>Charge Review</b> - Opens the CS Charge Viewer window, from which you can view or add charges that have been submitted for the person.
۲	<b>PM Launch</b> - Opens the PMLaunch application. Select the conversation you want to launch from the list in the Available Conversations dialog box.
•	<b>Show Allergies</b> - Opens the Allergies dialog box, in which you can view, add, or modify allergies for a person.

Button	Action
<b>K</b>	<b>Check In</b> - Checks in the person scheduled for the appointment. When this option is selected, the Check In dialog box opens.
<b>Š</b> II	<b>Check Out</b> - Checks out the person scheduled for the appointment. When this option is selected, the Check Out dialog box opens.
٢	<b>Verify</b> - Launches an inquiry on insurance coverage for the person scheduled for the appointment to verify eligibility of the medical service to be provided. When this option is selected, the Verify dialog box opens.
	<b>Lock</b> - Locks the appointment so others cannot perform actions on it.
2	<b>Unlock</b> - Unlocks the appointment so others can perform actions on it.
*	<b>Shuffle</b> - Opens the Appointment Shuffle Criteria dialog box so you can shuffle scheduled appointments.
3	<b>Refresh</b> - Updates the displayed information to reflect changes in the database.
±l[L	Exit - Closes the Appointment Book.
Ì	<b>Confirm -</b> Opens the Confirm dialog box so you can confirm the appointment.
<sup>8</sup> ∕a	<b>Contact</b> - Records the date and time of any contact made with the person scheduled for the appointment, as well as allowing you a place to enter any applicable comments concerning the contact. For example, if you call the person to remind them of the upcoming appointment, you could document the contact in the Contact dialog box.
<b>E</b>	<b>Modify -</b> Opens the Modify dialog box so you can modify the details associated with the appointment type.
•2	<b>Reschedule -</b> Reschedules the appointment. When this option is chosen, the selected appointment is moved to the Work In-Progress box so it can be rescheduled to the appropriate time and resource.
٢	Hold - Changes the status of the appointment to hold.
1	<b>Cancel -</b> Cancels the appointment. When this option is selected, the Cancel dialog box opens so you can enter the reason the appointment was canceled.

Button	Action
<b>≥</b> 0	<b>No-show</b> - Indicates that the person scheduled for the appointment did not arrive. When this option is selected, the No-show dialog box opens so you can change the status of the appointment to "no show".

# **Appbar Customization**

If you are unsure of whose appbar is in use, place the cursor over the *cursor* icon. Doing so reveals the Appbar's Username.

1.Right-click on the Appbar to reveal options. The following menu appears:

	<u>S</u> uspend
	C <u>h</u> ange User
~	Auto Hide Always On Top Allow Floating Large Buttons
	<u>H</u> elp <u>A</u> bout Cerner AppBar

- **Suspend**: When you step away from the terminal for a period of time and do not want another user to open applications during your absence
- <u>Change User:</u> If the previous user has left and you want to log in under your own Username select this option
- <u>Auto Hide:</u> Selecting this option "hides" the Appbar when it is not actively used. Moving the cursor to the area of the screen where the Appbar resides will reveal the Appbar again. To "undo" this option, right-click on the Appbar and re-select the Auto Hide option
- <u>Always on Top:</u> Selecting this option causes any other application open to not cover the Appbar. Attempts to "Maximize" application screens will maximize around the Appbar, not cover it. To "undo" this option, right-click on the Appbar and re-select the Always on Top option
- <u>Allow Floating:</u> (I WOULD USE THIS ONE) Selecting this option allows you to move the Appbar to various locations on the screen. To "undo" this option, right-click on the Appbar and re-select the Allow Floating option. This "locks" the Appbar into one place on the screen.
- <u>Large Buttons:</u> Selecting this option increases the size of the icons on the Appbar. To "undo" this option, right-click on the Appbar and re-select the Large Buttons option.

-

2. Clicking on the **1** icon reveals more options, some of which are repeated from the steps mentioned above. The following menu appears:

	<u>S</u> uspend			
	C <u>h</u> ange User			
	Change Password			
	Applications C <u>u</u> stomize			
~	Auto Hide Always On Top Allow Floating Large Buttons			
	<u>H</u> elp <u>A</u> bout Cerner AppBar			
	E <u>x</u> it			

- <u>Change Password:</u> Should not be used unless otherwise specified. Changing passwords frequently increase the chance of not remembering it!
- <u>Applications:</u> Selecting this option allows you to view applications for which you currently have security to access.
  - Double-clicking on the icon reveals more information regarding applications you have access to.
  - Double-click on the icon to reveal all applications for which you have access.
  - Double-click on any one of the icons to open that particular application on-demand.
  - When finished, click "Cancel" or click on the "X" button in the upper-right corner of the screen.
- **Customize:** Selecting this option allows the user to choose Launch Bar States previously described in the above steps.
  - Click on the Buttons tab. This tab allows you to add/remove icons from your Appbar by clicking on the open box next to the application name.
  - Once you select the desired applications, you can arrange those applications in any order using the "Move" arrows.
  - The "Insert Space" option allows you to spatially separate icons on the Appbar according to how you choose to separate them. You can insert as many spaces as desired.
  - When finished, click "OK" to save changes. To exit without saving, click "Cancel."

#### App Bar



- 1. Click (single) on the Scheduling Book Appointment Icon
- 2. Scheduling Book Appointment opens, click on the Appointment tab or Bookshelf tab if you are choosing a book.

# **User Preference Setup**

Within the Scheduling Appointment Book solution there are several options which are set at the user level. This means that these options must be completed by every user under their user name. After completing this step one time, the information need not be entered again unless changes are made.

#### **Demographics Bar**

1. Click the View option in the tool bar and highlight demographics bar.



2. By selecting this option the demographics bar will appear and will display patient's name, MRN, age, DOB and gender. You can also Right Click on the demographic bar and properties will appear and you can choose what fields and color you would like the bar to be.

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INA	me.	•				_	Age		Gender:
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✓ Su 26 2 9 16 23 30	27 3 10 17	Jur Tu W 28 29 4 5 11 12 18 19 25 26 2 3	e Th 30 5 6 2 13	31 7 14 21	1 8	Appointment Type:	Move ► Next Qlear Aljergies		

#### **Availability Bar**

1. Click the View option in the tool bar and highlight availability bar.



2. The availability bar will show through color coding whether there are resources available for a particular day/week Yellow =available; Black=unavailable.

🔁 Scheduling: Scheduling Appointment Book				_ 8 ×
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<b>№</b> ?				
Name:		MRN: Age:	DOB: Gender:	
Su Mo         Tu         We         Th         Fr         Sa           26         27         28         29         30         31         1           2         3         4         5         6         7         8           9         10         11         12         13         14         15           16         17         18         19         20         21         22           23         24         25         26         27         28         29           30         1         2         3         4         5         6	Move → Negt Lear Alerges	Work in-progress:		Schedule Confirm Elecur Suggest Request
Thursday, June 27, 2002 Friday, June 28, 2002	Monday, July 01, 2002	Tuesday, July 02, 200	12 Wednesday, July (	13, 2002
	06/27/2002			  ▲
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<u>→→→→→</u> ) Ш 🤛 🤍 Ш 🖾 🖾 🖾 🖾	Jee EAE			0:00 MM

#### **Preference Options**

1. Click View in the tool bar and select options.

👩 Sc	hedu	ling: Scheduling Appointment Book
<u>T</u> ask	<u>E</u> dit	View Help
<b>₩</b>	<b>T</b>	Ioolbars ✓ Demographics Bar
₩?		✓ Availability Bar Status Bar
Na	me	✓ S <u>m</u> all Buttons Large Buttons
<ul> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	Mo	Cancels Cancels Reschedules On-Hold Appointments Empty Schedules
26	27	Refresh
2	3	Options Appointment Location:
9	10	Customize
16	17	Person Name:
23	24	25 26 <b>27</b> 28 29
30	1	2 3 4 5 6

2. This will bring up a series of tabs that will be reviewed one at a time.

Options	?>
User Defaults Appointment Navigation Details Allergies Confirm Check In Check 0	ut 🚺 🕨
Default location:	
Default Appointment Type	
🖵 Default Appointment Type Synonym	
💿 No Default Appointment Type Synonym	
C Default Appointment Type Synonym:	
Appointment scheduling range Appointment detail fields:	
Days in past: 0 Appointment Type Appointment Location	
Days in future:	
Allow multiple Appointment Location values	
Upon move to the Work in-progress, expand the tree to level (Default = Role):	
Role	
Amount of inactive time (in seconds) before automatically refreshing request lists and queries:	
OK C	ancel

#### **User Defaults**

Pptions User Defaults Appointment Navigation Details Allergies Confirm Check In Check Out ↓ ↓
Default location:     1.       Default Appointment Type     2.       Image: Default Appointment Type Synonym     3.       Image: Default Appointment Type Synonym     3.
Appointment scheduling range Days in past: Days in future: 4. Appointment Type Appointment Location Person Name 5. C Allow multiple Appointment Location values 6. Upon move to the Work in-progress, expand the tree to level (Default = Role): Role Amount of inactive time (in seconds) before automatically refreshing request lists and queries: 0 8.
OK Cancel

- 1. **Default Location** can be chosen from the drop down menu. This function would be used if a user schedules consistently for one location, i.e. the RAD department.
- 2. Default Appointment Type Synonym can be chosen by selecting the radio button
- 3. **Appointment Synonym** can be selected from searching in the box for the desired appointment type. This option could be used if a user consistently schedules one appointment type and would then default into the appointment type field.
- 4. **Appointment scheduling range** refers to the time frame that the system will allow the user to schedule. By setting at 0 and 0, there is no restriction.
- 5. **Appointment Detail Fields** are the 3 set fields that will always appear at the top of the appointment tab. This option allows you to determine what order these will appear in. For example, if you select the Appointment Location first, only the Appointment Types that can be scheduled for that location are listed for selection.
- 6. Work in-progress, Expand the Tree will determine the levels that are displayed in the Work In-progress window. Default is Role.
- 7. Allow multiple Appointment Location Values will allow multiple location values in one booking conversation. This also allows for the Suggest option to return all available appointments across multiple locations.
- 8. **Request List Update time** is set here in seconds and will determine the amount of time between updates of the queue.

#### Appointment Tab

Options ? ×
User Defaults Appointment Navigation Details Allergies Confirm Check In Check Out
Mark qualifying days on calendar
🗖 Health plan check
☑ Display future requests/appointments
Display extended conflict details
Maintain focus on pending appointment during reschedule
Person/Encounter preferences
Display person search encounter window
Use best encounter filters
Add person and encounter
Allow add encounter
Always display PM Organization dialog when adding encounter
Always display Schedule dialog when scheduling into
Discrete slots
Contiguous slots
Elex Form Defaults
OK Cancel

- 1. **Mark qualifying days** on calendar: When selected this will result in days on the calendar that are open for an appointment to be scheduled to be bolded.
- 2. **Health plan check**: Checks to determine whether a patient has a health plan, does not specify what health plan it is.
- 3. **Display future requests/appointments**: If checked this will populate a box that displays the future appointments for a patient.
- 4. **Display Extended Conflict Details box** If checked the Conflicts dialog box should be opened when booking conflicts occur to expand the ability to resolve conflicts. If not selected, the Booking Conflicts dialog box is displayed.
- 5. **Maintain Focus on Pending Appointment** If checked this option will return focus to the pending appointment, once you select a resource or role in the Work in Progress box, after you have moved away from the pending appointment. In the absence of a pending appointment the focus returns to the previously confirmed appointment.
- 6. **Display person search encounter window**: If checked, this will bring up the encounters that a person has when a person search is done.
- 7. Always display PM Organization dialog when adding an encounter: If checked this will bring up a box in which you can select the organization from which to launch a conversation.
- 8. Always display Schedule dialog when scheduling into discrete/contiguous: If checked, this will cause the schedule box to come up and populate if you are scheduling an appointment into a discrete or contiguous slot (depending on which you select).

 Flex Form Defaults: Once this button is selected, a box comes up in which you can select the Flex Forms (PM conversations that you wish to occur when you complete actions of View Person, Modify Person, Add Person, View Encounter, Modify Encounter, Add Encounter, and Cancel Encounter. THIS IS DONE BY THE SYSTEM

#### **Navigation Tab**

ptions					3	×
User Defaults Appointment	Navigation Details	Allergies	Confirm	Check In	Check Out 🔼	Þ
Default bookshelf:						
Radiology Bookshelf	•					
Default book:						
Nuclear Medicine	<b>_</b>					
Toolbar preferences Number of items to retain in r 15 Home button returns to c Back/Forward buttons ret	current date	d list:				
				OK	Cancel	

- 1. **Default Bookshelf list -** Enter the name of the resource bookshelf to be displayed as your default bookshelf. There is a list available to assist you in selecting a predefined bookshelf.
- 2. **Default Book list -** Enter the name of the resource book to be displayed on the bookshelf as your default book. There is a list available to assist you in selecting a predefined book.
- 3. Number of Items to Retain in Most ... spin box Select the number of items you want to be retained in the Back list.
- 4. **Back/Forward Buttons Retain Date Context option -** Select this option if you want the Back and Forward toolbar buttons to dates as you navigate with the calendar.
- 5. Home Button Returns to Current Date option Select this option if you want the Home toolbar button to return you to the current date.

#### Details



1. Number of visible rows in multiple value accept list: If you have a field with multiple selections, this lets you set how many are viewable. The default is three. Please leave at 3.

#### Allergies

Options ?X	¢
User Defaults Appointment Details Allergies Confirm Check In Check Out PM ToolBar 💶 🕨	ļ
Display Allergies button in Appointment tab	
Auto display Allergies dialog for status of	l
Allergies Not Recorded	l
No Known Allergies	
	l
	l
	l

1. Display Allergies button in Appointment Tab



2. If they do not have allergies recorded, the button will be gray with "ANR" on it.

Books Appointment	Work in-progress:
Fr Sa 3 4 Person Name:	
10         11         Jolley, Erin Lea           17         18            24         25         *Diagnosis from presc	iption
) 🛗 Allergies	? ×
Display: All Reactions	Perform Reverse     Allergy Check     Mark <u>All Shown</u> Mark <u>Selected as</u> Reviewed     Reviewed
D Substance Category	Reactions Severity Type C Est. Onset Reaction S Updated By Source Re
	Add New ► Modify View Vrew History of Cancel Mark As <u>B</u> eviewed
•	Display
	Check Interaction OK Cancel
	Preferences

3. By selecting options under **Auto Display Allergies** the allergies box will automatically display if the checked options are met, i.e. if the patient has allergies recorded, allergies not recorded and/or no known allergies.

#### Confirm

Options ?X
User Defaults Appointment Navigation Details Allergies Confirm Check In Check Out
Always create new encounter when required
Always display Confirm dialog when confirming appointments
Following appointment confirmation
Return to previous appointment book display
C Return to current date and default appointment book
Maintain focus on last confirmed appointment
OK Cancel

- 1. Always create new encounter when required: This allows you to force an encounter to be created when an appointment is scheduled.
- 2. Always display Confirm dialog when confirming appointments: With this option checked, you can view the confirm box, which displays the preps and appointment information.
- 3. Following appointment confirmation:
  - a. **Return to previous appointment book display.** Select this option if you want to return to the previous appointment book after confirmation.
  - b. Return to current date and default appointment book . Select this option if you want to return to the current date in the Scheduling Appointment Book calendar after confirmation.
  - c. Maintain focus on last confirmed appointment. Select this option if you want to remain on the currently confirmed appointment. This when check gives good information on the appointment. Please check this

#### **Check In Tab**

Options	? X
User Defaults Appointment Details Allergies Confirm Check In Check Out	PM ToolBar 🔸 🕨
Always create new encounter when required	
Check In warning range (in mins.):	
1440	
Elex Fo	3 Im Deraults
OK	Cancel

- 1. Always create new encounter when required: By checking this option the scheduler must add an encounter upon check in. DO NOT CHECK
- 2. **Check in warning range**: This option identifies the time frame that the system will allow you to check in a patient without giving a warning. The system automatically defaults it to 24 hours (1440 min). Cerner recommends this to be set at 1440.

#### **Request Criteria**

Cheduling: Schedul	ing Appoir	itment Book	(			_ & X
	Options	6. – <b>8. 6</b> . – A.	no ne lez	se a Las	? X	 ₩. # <sup>#</sup> # <sup>#</sup>
Petson Comments:     Business       Quot     Image: Comment in the image: C	Navigation   Details Pequest date rang C Number of day C Infinite days in Default time range: Defaulted days of we	s in date range] date range: 0730 •	30 ÷	Request Criteria	K F	Schedule Confirm Beour Suggest Request Inset
07:30 07:45 08:00 08:15 08:30 08:45				OK	Cancel	
For Help, press F1						▼ )X 2007-Jun-06 15:09
start 6 0 0	😵 N 🤅	21 - 21.	2( -	Desktop »	🙀 🖪 🛇 🖗 i	 0 2007-Jun-08 15:09

- Set the numbers of day in date range at 30
- Default time range at what time you would like an appt to start for suggest scheduling. Example Endoscopic day starts at 0730 set the time for 0730 to 1500 when the last appointment is scheduled for.
- Default the days of the week for a five day work Monday thru Friday

# **Book Settings**

Book settings determine the view of the appointment book. They can be accessed by right clicking in the appointment book and selecting "Book Settings."

#### View



**Proportional View:** Allow the user to see all of the breaks in the day; the times are at the left hand side of the book.



**Non-Proportional Single-Day:** Appointments line up next to each other regardless of time, view is symmetrical. Times are seen when user clicks on slot.

	eduling: Scheduling Appo	intment Book							_ 8 ×
	dit ⊻iew <u>H</u> elp								
- आ	7 % El % © "B ×	K3  Q入  B	🔒   🚸   🖻	*↓ +  + ] 王 :	≜   �, �,	🗏 1 🗟 🖻 🔒 🚱	ଟ 🖑 🌡 🛃	③ №	
Nam	·••:					MRN:	DOB:		
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	2002	Books Appointment				Work in-progress:			
	May ♪ Io Tu ₩e Th Fr Sa	Booksh	elf - Crittent	on	<u>O</u> pen				<u>S</u> chedule
	9 30 1 2 3 4				Seject			1	Confirm
5	6 7 8 9 10 11		2 2 8 6					II	Becur
12 1		<ul> <li>EPACKS</li> <li>CT</li> <li>CT</li> <li>MRI</li> <li>Mammo</li> <li>Fluroscop</li> <li>IVP</li> </ul>	Nuc Med Prostate Auburn						Sarfies.
	7 28 29 30 31 1		<sup>5</sup> z ° `						Request
2	3 4 5 6 7 8					]			Treques:
	Wednesday, May 08, 200	2 Thursday, May 09	, 2002	Friday, May 1	0, 2002	Monday, May 13, 200	12 Tue	day, May 14, 2002	
				05/08/2002 - N	lammo				
	Mammo Room 1	ABBI Room		05/08/2002 - N	lammo				
E	Mammo Room 1 7.30 AM Mammo IP/0P	ABBI Room 8:00 AM ABBI		05/08/2002 - N	lammo				
				05/08/2002 - N	1 ammo				
				05/08/2002 - N	łammo				
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				05/08/2002 - N	łammo				
				05/08/2002 - N	lammo				

#### **Book Properties**

These are accessed by right clicking on the book, selecting book settings then properties.



#### **General Tab**

Appointment Book Properties
General Icons   Fonts   View - Proportional, Single-day   Visible day range
Begin time:         End time:           0700         *         2000         *
Tooltips 1 2
10 seconds
<ul> <li>Person</li> <li>Appointment type scheduled as</li> <li>Appointment tocation</li> <li>Reason for appointment</li> <li>Appointment state</li> <li>Primay order</li> <li>Appointment duration</li> <li>Person age</li> <li>Person bithdate</li> </ul>
OK Cancel

- 1. **Begin Time**: In military time this determines the time that the appointment book will start, this crosses all books and bookshelves.
- 2. End Time: In military time, this determines the time that the appointment book will end, this crosses all books and bookshelves
- NOTE: If there are any slots beyond the time designated, these will not be visible on the books. However, by using suggest, you can still schedule into them.
- 3. **Display fields**: These are the fields that will show in a scheduled appointment on the books. By clicking the up or down arrows, you can change the order in which they are displayed.

#### lcons

By selecting any of the icons listed, a symbol will appear if the criteria is met. Ex. Slot Icon-if Comments is checked a bubble will appear on the slot if comments are entered. Ex. Appointment Icon- if allergies is checked, an icon will appear on the appointment scheduled if the person it is for has allergies.



#### Fonts Tab

Fonts as they appear in the appointment book can be changed using this tab.

Appointment Boo	k Properties
General Icons	Fonts View - Proportional, Single-day
General Icons	Ports View - Proportional, Single-day
	OK Cancel

#### View Non-proportional Single-day

This tab is available if the Non-proportional Single Day view has been selected

Appointment Book Properties
Appointment Book Properties     ? ×       General Icons Fonts View - Non-proportional, Single-day       Display binder       1       Time interval:       5       2       Column width (in press)       © Qustom width:       © Size to fit all, with minimum width:
OK Cancel

- 1. **Display binder**: By checking or un-checking this option, the binder on the left side of the appointment book will be visible or not.
- 2. **Time interval**: This option determines the increments of time in the slots and is shown in minutes.
- 3. Custom width: This option determines the width of the slots under the resources.

#### **View Proportional Single-day**

Appointment Book Properties
General Icons Fonts View - Proportional, Single-day
Column width (in pl,
Start display at:
OK Cancel

- 1. Same as View non-proportional single day.
- 2. Same as View non-proportional single day.
- 3. Same as View non-proportional single day.
- 4. You can set the time and day that you wish to display when you first log on to the application.

# **Appointment Scheduling**

There several different methods for scheduling an appointment within the Scheduling Appointment Book application. This section will discuss each of those methods and situations where one method is recommended vs the others.

#### 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 <sup>Qpen</sup> 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.

Books	Appointment
Perso	on Name:
Gon	zales, te
-	nointment Tune:

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.)

								?
Name:	Name	SSN	MBN	Gender	Birth Date	Age	Phone	
Gonzales, te	🙎 Gonzales, Teo	234-12-3212	000-067	Male	1/1/1970	35 Yea	rs (123) 413-2412	
MRN:								
SSN:								
Birth Date:								
** /** /***								
Gender:								
<u> </u>		Type Med S	ervice Fa	acility   R	eg Date		Disch Date	
FIN NBR:		igency Cance	r Center 🛛 B'	WMC 11	1/4/2004 9:4	49 AM	11/4/2004 9:55 AM	
	🗐 000083 ER 1	'emp Cance	r Center B <sup>1</sup>	WMC 11	1/4/2004 9:4	11 AM	11/4/2004 9:49 AM	
Search Reset								
<u>S</u> earch <u>R</u> eset								
	, ок (	Cancel	Preview	1	Add Person		d <u>E</u> ncounter Mod	17

6. 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.

							? ×
MFN/FHN: Last Name: Screen First Name: Cap Middle Name: Gender: Female	No persons found.						
Bith Date: 1978-JUL-23	No encounters found.	ny	Church	Provinces	Add Demon	hild Georgeter	Madiu
		OK	Cancel	Preview	Add Person	Add Encounter	<u>M</u> odify

7. If available, enter patients Last and first name, DOB and gender. Click on the Search button.

- 8. No Persons found will show.
- 9. Click on the Add Person button

#### The Add Person screen opens

Name	First Name	Middle Name	Nickname	Maiden Name	Gender	Date of Birth	Age	
en	First Name Cap				Gender Female	Date of Bith 1978Jul-23	▲ge 28Y	
ient Information Insura	near Doman I							
ien information j Insura	ince Mimay							
reet Address	Street Address2	Country	City Summerside	Province/State Prince Edward Island	Postal/Zip Code c1N 2n2	Home Phone Number (902) 436-2222	Cell/Pager Number	
		Canada	Summerside	Prince Edward Island 💌	o1N 2h2	(902) 436-2222		
usiness Phone Number	Email Address							
) -								
emporary Address treet Address	Street Address2	Country			Postal/Zip Code			
lieet Address	Stieet Address2	Country	City	Province/State	Postal/2ip Code	Temporary Phone Number	Cell/Pager Number	
hysician Information							- Pr - 2	
mily Physician								
	24							
aer ID								
EGCLERK								
rson Comments								
w Person Comment								
evious Person Commen	ita							
								4
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								_
								-
								2
								2
								2
								2
								2
								1

- 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.

ļ	🕂 Encou	nter Sele	ction								? ×
	FIN NBR	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name	Reg Date	Arrive Date	
								<u>M</u> odify <u>A</u> o	ld Enc	OK	Cancel

13. Click on the Add ENC Button.

#### PREADMIT SCREEN OPENS

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

CREEN RN	CAP						
IN			-	Female	<u> </u>	1978-Jul-23	Age 28Y
	Encounter Number	Marital Status	Primary Language	Interpreter Required	Religion	Church	•
atient Information Encours	er Information   Contacts   In	nsurance Primary   Insurance S	econdary   Insurance Tertiary   Ins	mance Summary			
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
Jusiness Phone Number	Email Address	_					
emporary Address							
Street Address	Street Address2	Country	City	Province/State	Postal/Zip Code	Temporary Phone Numbe	<u>-</u>
Person Comments			201		201		
lew Person Comment							
ew reison connieri	-						
revious Person Comments							
							*
							<u>~</u>

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".

st Name CREEN	First Name CAP	Middle Name	Nickname	Gender Female	Maiden Name	Date of Bith Age 1978-Jul-23 T	,
N	Encounter Number	Marital Status	Primary Language	Interpreter Required	Religion	Church	
bient Information Encours	iter Information   Contacts   In	nsurance Primary   Insurance	Secondary   Insurance Tertiary   I	insurance Summary			
failing Address							
Street Address	Street Address2	Country Canada	City Summerside	Province/State Prince Edward Island	Postal/Zip Code     C1N 2N2	Home Phone Number Cell/P. (902) 436-2222 (	sger Number
usiness Phone Number	Email Address	_					
emporary Address Treet Address	Street Address2	Country	City	Province/State	Postal/Zip Code	Temporary Phone Number	
					•		
erson Comments							
lew Person Comment	_						
evisus Person Comments							
							2
							0K [ Caro

17. The "**Search for Person**" lcon 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 Perso	n						<u> </u>
Last Name	First Name	Middle Name	Date of Birth	Gender	Provincial Health	Number	Street Add	ress Street
•								•
					OK	Sea	arch	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)

<b>11</b>										
Assign PHN										
st Name CREEN	First Name CAP	Middle Name		Nickname	Gender Female	Maiden Name		Date of Birth 1978-Jul-23	Age 28Y	
N	Encounter Number	Marital Status	•	Primary Language	Interpreter Required	Religion		Church	*	
			_							
atient Information Enc	counter Information   Contacts   In	surance Primary   Insurance	e Secondary	Insurance Tertiary Insurance	e Summary					
Address										
Street Address	Street Address2	Country		City	Province/State	Postal/Zip Cod		Home Phone Number	Cell/Pager Numbe	
		Canada		Summerside	Prince Edward Island	C1N 2N2		(902) 436-2222		
Jusiness Phone Numbr	er Email Address									
Support Priorie Name	Citian Address	_								
emporary Address										
treet Address	Street Address2	Country		City	Province/State	Postal/Zip Codi	e	Temporary Phone Numb	ber	
				· · · · · · · · · · · · · · · · · · ·						
erson Comments										
lew Person Comment										
lew Person Comment										
revious Person Comm	under .									
	41 TF									
	3.17									
									95 - 1	Can
										Ca

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.

Books Appointment			Work in progree
Person Name: Gonzales, Ted *Appointment Type:		Move ► Ne <u>x</u> t Clear	
Appointment Location:	Appointment Type Help Appointment Type CT Abdomen CT Abdomen/Pelvis		? ×
		OK	Cancel

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.

*Appointment Location:	
BE CT BW CT	
	5/20/2005

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.

Books Appointment	Work in progress:
Person Name:     Gonzales, Ted     Appointment Type:     CT Abdomen     Appointment Location:	Location Help ?X
5/20	1/2
	OK Cancel

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.

👸 Appointment Attributes	4 9
Conzeles, Ted	Detaits Orders Resource List Guidelines Appointment Eligibility Medical Necessity
	OK Cancel

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.

sk <u>E</u> dit <u>V</u> iew <u>H</u> elp						
←Back • → - 👔 🖆	44   17 % m * 0 12	3   6   6   6   6   6   6   6   6   6	8 🚸 📗	™ ଶ⊮ ± ± Q Q	🗐 🗇 🛞 🖪 🖨 🚯	N N
o 🐣 🌡 🖉 🕮 🌖						
		Person Comments:		MRN: 01-000216	DOB: 1/12/1980	
lame: test, cerne	ir 🛛			Age: 24 Years	Gender: Male	
				-	uchuci. Maic	
= =	Books Appointment			Work in progress:		
∢ August Su Mo Tu We Th Fr S	Appointment Type:		<u>M</u> ove ►	E 🕼 test, cerner		Schedule
	CT Head		Nest	日 說 Current Sched	ule	Confirm
1 2 3 4 5 6 8 9 10 11 12 13 1			-7			<u>R</u> ecur
5 16 17 18 19 20 2		•		Patien		Sugges
2 23 24 25 26 27 2	8 *Person Name:		ANR	$\succ$		
9 30 31 1 2 3				1		Reques
5 6 7 8 9 10 1	t   P					
		8/9/2004 CT R	ooms	•		
СТ П	oom 1 CT Room					
		_/				
7:00 AM						
7:15 AM						
7:15 AM 7:30 AM 7:45 AM 8:00 AM Rad Visit	RadVex					
7:15 AM 7:30 AM 7:45 AM 8:00 AM 8:15 AM	Red Viet					
7:15 AM 7:30 AM 7:45 AM 8:00 AM 8:15 AM 8:30 AM	Rad Ver					·
7:15 AM 7:30 AM 7:45 AM 8:00 AM 8:15 AM	Rad Ver					
7:15 AM 7:30 AM 7:45 AM 8:15 AM 8:30 AM 8:45 AM 9:00 AM 9:15 AM	Rad Ve*					
7:15 AM 7:30 AM 7:30 AM 7:45 AM 8:00 AM 8:30 AM 8:30 AM 8:45 AM 9:00 AM 9:15 AM 9:30 AM	B51V6*					
7:15 AM 7:30 AM 7:45 AM 8:15 AM 8:15 AM 8:45 AM 9:00 AM 9:15 AM 9:30 AM 9:30 AM 9:33 AM 9:33 AM	RELIVE:					
7:15 AM 7:30 AM 7:30 AM 7:45 AM 8:00 AM 8:30 AM 8:30 AM 8:45 AM 9:00 AM 9:15 AM 9:30 AM	RestVer					
7:15 AM 7:30 AM 7:45 AM 8:00 AX 8:30 AM 8:30 AM 8:45 AM 9:00 AM 9:15 AM 9:30 AM 9:30 AM 9:345 AM	Beilve					

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.

👸 Scheduling: Scheduling Appointment Book				_ 8 ×
Task Edit View Help				
- +Back • → • 🗿 🖓 📙 🗐 🦌 🖬 🗞 💬 🗃 🏹 🗍	Kai 4   o 🔪   8 8   🔶	№ +⊮   王 ≛   �, Q,	🗏 1 🛞 🗒 🖨 🚱	₩?
o 🅭 🛦 🔊 🏛 🌖				
N	Person Comments:	MRN: 01-000216	DOB: 1/12/1980	
Name: test, cerner		Age: 24 Years	Gender: Male	
Books Appointment		Work in progress:		
August	Move ►	E 👩 test, cerner		<u>S</u> chedule
Su Mo Tu We Th Fr Sa	<u>Move</u> ,	E- 🗣 CT Head		Confirm
1 2 3 4 5 6 7	Negt	🖻 📶 BWMC		
8 9 10 11 12 13 14 *Appointment Location:	Clear	E- S CT Rooms		<u>R</u> ecur
15 16 17 18 19 20 21 BWMC		H- V Patienc		Suggest
22 23 24 25 26 27 28 *Person Name:	ANR			Bassad
29 30 31 1 2 3 4 test, cerner				Request
5 6 7 8 9 10 11 <b>1</b> '				
	8/9/2004 - CT Rooms			
CT Room 1 CT Room 2				<u>ـ</u>
8:00 AM Rad Visit CT Head				
test, cerner				Π
8:45 AM + → 9:00 AM				
+ → 9:15 AM				
• → 9:30 AM				
€				_
10:00 AM				
10:15 AM				
10:30 AM 10:45 AM				
• • 11:00 AM				
+ → 11:00 SM + → 11:15 AM				
• • • 11:30 AM				
• • 11:45 AM				
12:00 PM				•

37. Click the <u>Confirm</u> 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.

New Constant		MRN: 000-067	DOB: 1/1/1970
Name: Gonzales, To	ea	Age: 35 Years	Gender: Male
E- 🕼 Gonzales, Ted	Summary General Resource View Guide	elines   Notification   Convers	ation Summaries   Itinerar
BE CT	Gonzales, Ted	Med Rec Nbr	: 000-067
Gonzales, Ted	Allergies: Allergies Not Recorded		
	5/20/2005 - 8:00 AM 30 Minute BEMC	es CT Abdomen I	BE CT CT Room 1
	<b>Orders:</b> CT Abdomen w/ + w/o Contrast		
	Preparations: Chest, Abdomen or Pelvis: Call the facility at which you are ha	aving the exam to see if :	you are to receive
	contrast dye in the veins and/or contrast dye that you veins, do not eat or drink anything prior to the exam. If you are also h	for 4 hours	· ·
	anything to eat or drink for six hour exam (except the dye as directed) medications with a small amount o	rs prior to the . In either case, you may of water. You can pick	y take your
	Jun the contract drink at the facility	you are having your exa	m un until the day

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
÷	8:15 AM		test, cerner
	8:30 AM		Confirmed
•	8:45 AM		I
: :	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		
## **Suggested Scheduling Method**

The system can suggest available times at which an appointment can be scheduled based on date and time parameters that you enter. This provides you with date and time options from which you can select without requiring you to locate available slots manually. This method is recommended for those areas where available appointment times are limited and also for more complicated appointments.

Follow the steps from above to fill out the appropriate fields and move your information to the WIP.

To have an appointment booked to a certain resource (which is usually a physician, Therapist, or other health care professional. First pick the order from the Appointment Attribute then go to the TAB RESOURCE LIST in the top of the screen next to orders tab and a list of the resources will populate and then UN check all the resources except the one you are booking for, this will only pick appointments that are opened to that resource.

With your appointment in the Work In-Progress box, click the Suggest button to open the Suggested Schedules dialog box.



If you want to specify the date range to be considered when the system suggests schedules, select the Date Range option. You then must enter the Begin date and End date to be considered. If you have defined a date range in the Preferences tab, the dates to reflect that preference will default each time you enter this dialog box.

👸 Suggeste	d Schedules						? ×
	Patient	Appointment Type	Appointment Location	Primary Order	Scheduled Date/Tim	ne	
- <i>Q</i>	Throckmorton, Rachael R	Head - X-Ray	Radiology				
Suggest Crite	eria Preferences		Ap	pt Date/Time	Person Appt Type	Resource	Appt Loc
Appointme	•						
Date R     Date R     Mon 1			Exceptions				
_ Appointme	nt Time						
● Time R	ange: 0800	2355	— <u>-</u>				
O Time R							
🗖 Scheduk	e as visit within 1	Days 💌	]				
		Clear	Suggest				
			<u>N</u> ext Next Da	<u>C</u> lear	<u>S</u> elect	OK.	Cancel

Note: The first time you log on with a new user account, the number of suggestion to return is defaulted to 1. You may want to change this to 10 or 15 to get more than one suggestion.

If you do not want to specify a date range, but you do want to restrict the search for available dates, select the Date Restrictions option. After that option is chosen, you can select restrictions such as "Next 2 Days".

Structure Str	Head - X-Ray	Radiology			
Suggest Criteria       Preferences         Appointment Date       Preferences         Date Range:       12/05/00         Date Restrictions:       Next 2 Day         Mon       Tue         Next 2 Day         Next 2 Day         Next 3 Day         Next 5 Day         Next 7 Day         Time Range:       0800         Time Restrictions:       AM Only         Schedule as visit within       1	s 8 5 5	Suggest	Date Range Date Restrie	pe Resource	Appt Loc

Select the days of the week to be considered when searching for a date to schedule the appointment by clicking the appropriate day of the week buttons. To exclude specific dates, click the Exceptions button to open the Date Exceptions dialog box. If you have defined preferred days of the week in the Preferences tab, the days to reflect that preference will default each time you enter this dialog box.

If you want to specify the time range to be considered when the system suggests schedules, select the Time Range option. You then must enter the Begin time and End time to be considered. If you have defined a time range in the Preferences tab, the times to reflect that preference will default each time you enter this dialog box.

If you do not want to specify a time range, but you do want to restrict the search for available times, select the Time Restrictions option. After that option is chosen, you can select restrictions such as "AM Only".



Click *Clear* to clear the information displayed and default back to the preferred settings (except for the visit range) or click Suggest for the system to display suggested times that the appointment could be scheduled. If you previously selected the Schedule as visit within option, the Suggested Sequence dialog box is displayed so you can specify the order in which you want the appointment types to be scheduled.

If the date and time suggested is not wanted, click Next to display the next available time.

If the day suggested is not wanted, click Next Day to display the first available time at which the appointment could be scheduled on the next valid day.

Once you have found a suggested date and time to use, click Select. Click OK to close the Suggested Schedules dialog box and schedule the appointment or click Cancel to close the dialog box without scheduling the appointment.

### **Book Request Method**

Scheduling with Book Request is helpful for those users who prefer to fill out the appointment information first and then search for an applicable slot.

- 1. Begin in the Appointment tab as seen in the previous methods. Click the Appointment tab button Appointment.
- 2. Choose an appointment type and fill out the rest of the fields in the accept format.

Click the move button to place the event details in the WIP. (Depending on the appointment selected, an order may have to be chosen as was shown in the previous example).

3. Scroll through the template to find the applicable slot. When the desired time is found, right click on the slot to display the menu.



4. Select *Book Request* from the menu. The appointment will then be in a pending state, denoted by the red books in the WIP.

🕅 Scheduling: Scheduling Appointment Book				_ 8 ×
Iask Edit View Help				
	K到☆ OX 83 参	│ ᆘ┥ +⊪+ │ 王 ≛ │ <b>@, Q</b> ,	🗉 ta 🛠 🗖 🖴 🚱	<b>₩</b> ?
● # & £ ∰ @ <				
Name: test, cerner	Person Comments:	MRN: 01-000216 Age: 24 Years	DOB: 1/12/1980 Gender: Male	
4         2004         Books         Appointment           4         August         H         H         H		Work in progress:		
	▲ Move ▶	E- 🕼 test, cerner E- 🚸 Barium Enema		Schedule
Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7	··· Next			Confirm
8 9 10 11 12 13 14 *Appointment Location:		😥 🚸 Fluoro Ro	oms	<u>R</u> ecur
15 16 17 18 19 20 21 BWMD		🗄 🔶 Patient		Suggest
22         23         24         25         26         27         28           29         30         31         1         2         3         4         Instrument				Request
29 30 31 1 2 3 4 5 6 7 8 9 10 11				
	8/9/2004 - Fluoro Rooms	] I		• 1
Flouro Room 1 Flouro Room 2				
11:00 AM Flouro Barium Enema	1			_
• • 11:15 AM test, cerner				
Barium Enema 11:45 AM				
Pending				
→ 12:15 PM     → 12:30 PM				
→ → 12:45 PM				
1:00 PM				
1:15 PM				
1:15 PM 1:30 PM				
1:15 PM 1:30 PM 1:45 PM				
1:15 PM 1:30 PM	- - - - - -			
1:15 PM           1:30 PM           1:45 PM           2:00 PM	- - - - - - - - - -			
1:15 PM           1:30 PM           2:00 PM           2:00 PM           2:15 PM				

5. Click the <u>Confirm</u> button to confirm the appointment and click <u>OK</u> in Confirmation window. This will place the appointment in a confirmed state.

:::		Flouro Room 1	Flouro Room 2
<b>:</b> : 9:3	30 AM	Flouro	Flouro
9:4	40 AM		
• • 9:	50 AM		
• • 10:	00 AM		
• • 10:	10 AM		
• • 10:	20 AM		
10:	30 AM		
10:	40 AM		
10:	50 AM		
11:	00 AM		Colon Barium Enema
11:	10 AM		test, cerner
11:	20 AM		Confirmed
• • 11:	30 AM		
• • 11:	40 AM		
• • 11:	50 AM		
• 12:	00 PM		
• • 12:	10 PM		

## Add New Appointment Method

The Add New Appointment method is convenient for users who prefer to locate an available slot and then fill out the appointment information. Once a slot is selected the cursor automatically moves to the appointment type field.

6. Begin by opening the appropriate Appointment Book similar to what was explained in the previous example.

Scroll through the slots and right click on the desired time to display the menu. Click on Add New Appointment (the cursor will prompt in the Appointment Type field).

👸 Scheduling: Scheduling Appointment Book				_ 8 ×
Task Edit View Help				
- +Back + → + 😰 🖓 🚽 🗐 🎠 🖻	1 % © 12 M   16 M / 4   © 🔪   8 B	* 표 배 배 포 🍝	। ९ ९ 🗍 🗰 🖆 🛞 🛛	₩?
o 🚓 🛦 🔬 🎬 🍕				
NJ	Person Comments:	MBN:	DOB:	
Name:		Age:	Gender:	
Appoi	ntment	Work in progress:		
August	Bookshelf - Radiology Book	Dpen		Schedule
Su Mo Tu We Th Fr Sa				Confirm
		ieject		Recur
8 9 10 11 12 13 14				
	V BOOK MRI BOOK Mror Room			Suggest
8         9         10         11         12         13         14         0 <th></th> <th></th> <th></th> <th>Request</th>				Request
5 6 7 8 9 10 11				
	8/6/2004 - Nuclear Medicine	e Book		
Add New Appointment Book Request	Scan Room	C DOOK		
7:00 AM Confirm Request				Π
7:10 AM Remove Request Recur Appointment				
7:20 AM 7:30 AM Navigation →				
T:40 AM Inguiry				
	clear Medicine Slot			
Applications				
8:20 AM Person				
8:30 AM Slots + 8:40 AM Resources +				
8:50 AM Book Settings				
9:00 AM				
• • • 9:30 AM				
9:40 AM				•

Choose an appointment type and fill out the rest of the fields in the accept format.

Then click the move button to place the event details in the WIP. (Depending on the appointment selected, an order may have to be chosen as was shown in the previous example). The appointment will appear in a pending state.

🔀 Scheduling: Scheduling Appointment Book		- 8 ×
Iask Edit View Help		
│ ←Back → → ▼ 2 ☆ │ 44   ♥ № 副 15 ② 祖 31   解 鋼 14   ◎ №	,   음 읍      비   비 王 스   역 역 🌖 🎟 🗇 🐼 🔜 🔒 🕼	₩?
n 🚓 🖗 📾 🕮 🌖		
Name: test, cerner	MRN: 01-000216 DDB: 1/12/1980 Age: 24 Years Gender: Male	
4         2004         >           4         August         >           5         Mor Tu We Th Fr Sa         3           1         2         34         5         6           8         9         10         11         12         13           15         16         17         18         19         20         21           22         23         24         25         26         27         28           23         03         1         1         2         4           5         6         7         8         9         10         11	Move     Image: Steady and S	hedule onfirm ecur uggest equest
8/6/2004 - Nucle	ar Medicine Book	
Big 20 AM     So AM	ar Medicine idook	

Click the <u>Confirm</u> button to confirm the appointment and click <u>OK</u> in the Summary Box. This will place the appointment in a confirmed state.

		Injection Room
::::[	7:40 AM	
::::[	7:50 AM	
	8:00 AM	Nuclear Medicine Slot
	8:10 AM	
	8:20 AM	
	8:30 AM	
	8:40 AM	
	8:50 AM	
a 🗖 a E		
. <b>.</b> . P	9:00 AM	test, cerner
::::	9:10 AM	test, cerner <u>Confirmed</u>
	9:10 AM 9:20 AM	
	9:10 AM 9:20 AM 9:30 AM	
	9:10 AM 9:20 AM 9:30 AM 9:40 AM	
	9:10 AM 9:20 AM 9:30 AM 9:40 AM 9:50 AM	
	9:10 AM 9:20 AM 9:30 AM 9:40 AM 9:50 AM 10:00 AM	
	9:10 AM 9:20 AM 9:30 AM 9:40 AM 9:50 AM	

#### **Schedule Button Method**

As you will see, the schedule button allows the user to view the default selections such as duration and slot. Within one window, the user can verify or change the resource, duration, slot, and time using the drop down boxes that display available options. This option is recommended for booking outside the slot (overbooking) only. It is the least recommended method for booking regular appointments as users can accidentally book appointments outside the slot and allow for potential double booking.

- Appointment and fill out all the appropriate accept format 1. Click the Appointment tab fields in the same manner as the previous examples.
- 2. Press the MOVE button to move the information to the WIP.
- <u>S</u>chedule 3. Click the appointment and then click the button. The Schedule Box will open and prompt for the Resource and Default Slot that you wish to schedule the appointment to.

Schedule - CT Abdomen ? 🗙
Resource: OK
CT Room 1 BEMC
Default slot:
CT (8:00 AM - 5:00 PM)
Time:
Duration: Hour(s) 15 Minutes Day Distinguish Setup and Cleanup durations
OK

4. Select a Resource and a Default Slot and click to schedule the appointment. Note the appointment now appears under the resource and in the time slot previously selected in the Schedule window in a Pending status.

B Scheduling: Scheduling Appointment Book	
<u>T</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp	
←Back * → * ② △ ] ᅫ ☑ ‰ 副 ७ ② 집 긔 [ 條 刹	佐 @ 🔌 🔒 🔒 🚸 👬 🗊 驅 🦑 🖉 🔰 🙌 👐 🗉 포 :
🎟 🖆 🕉 🖪 🚔 🥼 🖉 📗 🕫 🎄 🍰 🕮 🍕 🔇 🖻	
Books Appointment	Work in progress:
May     Person Name:	Gonzales, Ted Move ▶ ↓ ↓ □ → ◆ CT Abdomen
Su Molu Welh Fr Sa	Cr Abdomen
1 2 3 4 5 6 7 Gonzales, Ted	
8 9 10 11 12 13 14 * <u>A</u> ppointment Type:	🕀 🕞 👘 😓 CT Rooms - BEMC
15 16 17 18 19 20 21 CT Abdomen	Liear Dim & Patient
22 23 24 25 26 27 28 Appointment Location:	
,	
5/20	/2005 - CT Rooms - BEMC
CT Room 1 BEMC [2]	
8:30 AM CT	
8:40 AM	
* * * 8:50 AM	
9:00 AM Gonzales, Ted	
9:10 AM CT Abdomen	
• 9:20 AM	
	Confirm

- 5. To confirm the appointment click and the Confirmation window will display.
- 6. Click OK to close the Confirmation window. The appointment will now display in a Confirmed status. If you need to go back and change the appointment date or time you can click cancel and still go back and make the changes.

# Multiple Appointment Type Scheduling

You can schedule more than one appointment for a patient without entering in all of the same information twice.

Enter in appropriate information into the accept format fields and press the MOVE button to move the information to the Work-In-Progress. (WIP)



Once you have entered in all of the information for the first appointment, press the NEXT button. Your cursor will move back to the fields within the Appointment tab.

In the Appointment Type field, replace the first Appointment Type name with the next appointment type that you are scheduling and press enter or the ellipses button to search. Select the appropriate Appointment Type from the search window.

Select the appropriate Appointment Location.

Scroll down through the rest of the accept format questions. You will notice that the information you entered on the first appointment is still in the fields. Change any appropriate information and press the MOVE button. REMEMBER WHEN IN THE APPOINTMENT ATTRIBUTES SCREEN TO UNCHECK THE RESOURCES YOU DO NOT WHAT RETURNS ON TIMES FOR. GO TO THE RESOURSE TAB AND UNCHECK WHO EVER YOU ARE NOT BOOKING FOR.

Both appointments will now display within the WIP.



Press the Suggest button to allow Suggested Scheduling functionality to help you find an available appointment time. The Suggested Schedules window will display. Press your Shift key and highlight both appointments.

ſ	Suggest	ed Schedules						?
		Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration	
	. 🤿	Wilkey, Vicki	BE MRI	MRI Spine	MRI Spine Lumbar w/ Contrast		1 Hour(s)	
	= 🗇	Wilkey, Vicki	BE Card Clinic	New Visit			0 Minutes	

In the lower left portion of your screen, click the checkbox next to Schedule as a Visit Within. Leave the timeframe defaulted to 1 day. This will allow you to find an available appointment time for both appointments within a one day timeframe.

Suggest Criteria Preferences
Appointment Date
C Date range: 05/19/2005 → ▼ 06/18/2005 → ▼
Date restrictions: Next 2 Days
Mon Tue Wed Thu Fri Sat Sun Exceptions
Appointment Time
C Time restrictions: AM Only
Schedule as visit within 1 day(s)
 Uverride suggested date and time
5 Schedule multiple persons to mixed Group Sessions
Clear Suggest

Press the Suggest button.

The Suggested Sequence window will display. This allows you to indicate to the system which appointment you would like to schedule first. Leave the appointments in the order they default and press the OK button.

9	juggested Sequence		? ×
	Appt Type	Location	
	New Visit	BE Card Clinic	
	MRI Spine	BE MRI	
	•	•	I

In the lower right portion of the screen, you will see times which are available for booking both appointments.

	Patient	Appointment Location	Appointment Type	Primary Order		Scheduled Da	ate/Time	Patient Duration		
	Wilkey, Vicki	BE MRI	MRI Spine	MRI Spine Lumbar	w/ Contrast	Friday, 5/20/2	2005 - 8:00 AM	1 Hour(s)		
	Wilkey, Vicki	BE Card Clinic	New Visit			Friday, 5/20/2	2005 - 7:15 AM	45 Minutes		
uggest C	riteria Preferenc	ces			A	ppt Type   Pat [	Dur	Pat Date/Time	Person	Appt
		ces		[		ppt Type   Pat [ ew Visit 2 Ho		Pat Date/Time Fiiday, 5/20/2005 - 7:00 AM	Person Wilkey, Vicki	Frida
	ment Date		06/18/2005						Wilkey, Vicki	Frida

Highlight one of the available times and press the SELECT button.

Press the OK button and both appointments will display in the WIP in a pending status. Highlight the patient's name, press the CONFIRM button, and the Confirmation window will display showing a summary of both appointments.



Press the OK button. The appointment is now in a Confirmed status and no longer displays within the WIP

# **Appointment Cancellation**

There are multiple methods for canceling appointments. The most commonly used are to perform the action from an Inquiry, from right-clicking on the appointment within the grid area or using the Cancel icon on your toolbar.

To cancel an appointment through an Inquiry, first open the appropriate Inquiry. You may search by the patient's name using the Person Inquiry, search for the appointment by the Resource name using the Resource Inquiry, or search by the appointment's scheduled location using the Location Inquiry.

Select the Inquiry type of your choice, fill out the appropriate search criteria and press the FIND button.

Highlight the appointment you wish to cancel, right click and choose Cancel.



The Cancellation window will display. Select an appropriate reason in the Cancel Reason dropdown and press the OK button.

Name: Wilkey, Vicki		MRN: 000-023 Age: 63 Years	DOB: 12/7/1941 Gender: Female
⊡– 🕼 Wilkey, Vicki ≆– 🛠 New Visit	General Summary Details Orders Guidelin  Cancel Beason:  Patient Requested  Comments:  Person Name FIN NBR Gender  Wilkey, Vicki 000024 Female	es Notification Conver	eation Summaries   Itineraries

The appointment is now in a cancelled status. If there are orders associated to the appointment you are canceling, you may also be prompted to enter a cancel reason for the order.

You may also cancel appointments directly within the grid area. To accomplish this, right click, go to Actions, then Cancel.

The Cancellation window will display and the same steps as above are followed.

Appointment	Actions •	Confirm
Bookshelf Huo BE Hact - BEW	Add <u>N</u> ew Appointment <u>B</u> ook Request Confirm Request Remove Request Recur Appointment	Contact Modify Reschedule Hold <u>Cancel</u> No Sho <u>w</u>
Ortho - B Ortho - B amily Pract -	Navigation •	Check In
E E	Inguiry <u>R</u> eport	Check <u>O</u> ut Patient Seen Batch Reschedule
	Applications	
Harris, Sara BEMC	Actions     Confightm       Add New Appointment     Confightm       Book Request     Modify       Confightm     Modify       Regrove Request     Reschedule       Hold     Gancel       Navigation     Check In       Inguiry     Check Qut       Report     Batch Reschedule       Person     Yerify       Book Settings     Lock       Unlocks     Unlocks       Stuffle     Stuffle	
		-
New Visit BE Card Clini	8	Shuffle Swap Resources Reorder

Another method for canceling appointments is to use the Cancel icon.  $\overline{\ensuremath{\mathbb{C}}}$ 

Again, highlight the appointment you want to cancel, and then click the cancel icon at the top of your screen.

The Cancellation window will display the same as in the previous methods of appointment cancellation.

The Cancellation window will display the same as in the previous methods of appointment cancellation.

After Cancelling the Scheduled encounter, you must go into PM Launch Icon encounter.

Pick Discharge on drop down, chose proper encounter, and then for Discharge disposition:



CANCELLED ENCOUNTER and Discharge Location: CANCEL

#### **Appointment Reschedule**

There are multiple methods for rescheduling appointments. The most commonly used are to perform the action from an Inquiry, from right-clicking on the appointment within the grid area or using the Reschedule icon on your toolbar.

- 1. To reschedule an appointment through an Inquiry, first open the appropriate Inquiry. You may search by the patient's name using the Person Inquiry, search for the appointment by the Resource name using the Resource Inquiry, or search by the appointment's scheduled location using the Location Inquiry.
- 2. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the FIND button.
- 3. Highlight the appointment you wish to reschedule right click and choose Reschedule.



4. The Existing Encounter warning may display if your appointment currently has an active encounter associated. Press the YES button to retain the encounter association.



- 5. If there is an order associated to your appointment, the Appointment Attributes window will display. Press the OK button within this window.
- 6. The appointment information will now display within the WIP.

Work in progress:
Wilkey, Vicki Wilkey, Vicki Wilkey, Vicki Wilkey, Vicki Reschedule Wilkey, Vicki Reschedule Power MRI Rms BEMC Wilkey, Patient

- From the point, you will find a new available appointment time using one of the methods previously described. Find a new appointment time and press the Confirm button. The Confirmation window will display. Press the OK button.
- 8. The Reason for Reschedule window will display. Select a reason from the dropdown and press the OK button.

🕅 Reschedule	? ×
Reason Patient Requested	<b>•</b>
C <u>o</u> mments:	
	OK Cancel

- 9. Your appointment will now appear in a Confirmed status in the new appointment time.
- 10. You may also reschedule appointments directly within the grid area. To accomplish this, right click, go to Actions, then Reschedule.

5 6 7 12 13 14 19 <b>20</b> 21 26 27 28 2 3 4 9 10 11	Add New Appointment Book Request Confirm Request Remove Request Recur Appointment	Confirm Contact Modify Reschedule Hold Cancel No Show
	Navigation	Check In
MRI Room 1 BEMC MRI	Inguiry Report	Check <u>O</u> ut Patient Seen
	Applications	Batch Reschedule
	Person Slo <u>t</u> s R <u>e</u> sources	Request
Uwilkey, Vicki MRI Spine	Book Settings	<b>Lock</b> Unloc <u>k</u>
BE MRI Pain Confirmed		Shu <u>f</u> fle Swap Resources Reorder
		Group Session

- 11. The same steps as the inquiry method will be followed from this point.
- 12. Another method for Rescheduling appointments is to use the Reschedule icon.
- 13. Again, highlight the appointment you want to reschedule, and then click the Reschedule icon at the top of your screen.
- 14. The appointment will follow the same process as in the previous methods of appointment reschedule.

# **Appointment Shuffle**

The shuffling feature is used to move around appointments on the same day, without having to go through all of the rescheduling steps. For example, if appointments are scheduled for a particular examination room, and that room is no longer available, you can display the Appointment Shuffle dialog box and drag the appointments from the unavailable resource to available resource.

Select the Shuffle option in the Appointment Book <sup>\*</sup> to open the Appointment Shuffle Criteria dialog box. You may also highlight an appointment within the grid area, right click, choose Actions and Shuffle from the menu. (Proportional Single Days in book settings.)

The Appointment Shuffle Criteria window will display. Press the OK button.

Appointment Shuffle Criteria		? ×
<u>R</u> esources:		ок
CT Room 1 BWMC;CT Room 2 BWMC		Cancel
Date:	_	
05/23/2005		
Begin time: End time:		
0800	÷	

The Appointment Shuffle window will display.

🔁 Appointment Shuffle - [Monday, I	May 23, 2005, 8:00 AM - 6:00	PM]	? ×
B:00 AM         Gonzales, Ted           B:10 AM         Gonzales, Ted           B:20 AM         CT Abdomen           B:20 AM         CT Abdomen           B:30 AM         Gonzales, Ted           B:20 AM         Gonzales, ANNE           B:20 AM         Gonzales, ANNE	C [2] CT Room 2 BWMC	: <u>[0]</u>	OK     Cancel
Conflict	First Resource	Appointment	<u>Check</u> <u>Find</u> Qverride

To move appointments to a different time or Resource, highlight the appointment you would like to shuffle. You are only able to shuffle appointments from the primary resource to which they are scheduled. It is also important to note that appointments can only be shuffled to a new slot or resource on the same day the original appointment was scheduled.

Left click and drag to the appropriate time and Resource. You will see a blue bar display before you release your left mouse click.

🛅 App	pointment	Shuffle - [Monday, May 23	, 2005, 8:00 AM - 6:00 PM]
		CT Room 1 BWMC [2]	CT Room 2 BWMC [0]
	8:00 AM	Gonzales, Ted	CT
	8:10 AM	CT Abdomen	
1	8:20 AM		

Release your mouse click and the appointment will now display in the new time timeframe in a Pending status.

🛅 Ap	pointment	Shuffle - [Monday, May 23	, 2005, 8:00 AM - 6:00 PM]
		CT Room 1 BWMC [1]	CT Room 2 BWMC [0]
	8:00 AM	CT	Gonzales, Ted
	8:10 AM		CT Abdomen

Press the OK button. The Reason for Shuffle window will display. Select a reason form the dropdown and press the OK button.

The Shuffle window will close and the appointment will now appear in a Confirmed status in the new timeframe/Resource.

## **Recurring Appointments**

Recurring appointment functionality is designed to help in situations where an appointment needs to be scheduled multiple times over a specified time period. This type of appointment is most commonly used in the Rehab area where a patient needs to come for therapy multiple times.

#### **Scheduling a Recurring Appointment**

Open the Scheduling Appointment Book application, click the Appointment tab, and fill out the accept formats fields the same as in previous examples. Press the MOVE button to move the information to the WIP. Remember to Uncheck the resources in the" Attributes Window" go to resource tab after choosing the orders.

Click the <u>Becur</u> button. The Recurring Frequencies window will display.

Within the Recurrence pattern area, you have many different options to choose from when selecting the frequency of the appointment. You many choose to pick every Monday and Wednesday, every other week, ect. You also have the option to select which day of the week the patient should be scheduled.

In the Range of Recurrence area, select the date which you would like the appointments to begin and how many instances of the appointment needs to be scheduled.

The Allow Multiple Recurring Frequencies option allows you to select different types of frequencies for different days of the week. For example, you might choose to schedule the appointment for every Monday, but only want to schedule the appointment for every other Wednesday.

Р	T Treatment -	- Recurring Frequencies	? ×
	-Time pattern — ┌── E <u>v</u> ery │	1 hour(s) Begin time: 0000 😴 © Instances: 🛒 Ĉ End time: 2355 😴	
İ	- Recurrence pa	ittern	
:	⊙ <u>D</u> aily	Every 1 week(s)	
1		🔽 Sunday 🔽 Monday 🔽 Tuesday 🔽 Wednesday	
	C Monthly	🔽 Thursday 🔽 Friday 🔲 Saturday	
	C Yearly	All days Weekdays	
	-Range of recur <u>S</u> tart Date:	rrence 15/23/2005 🛃 🖵 💿 End after: 🖉 🚞 instances	
		C End date: 05/25/2005 ₽ -	
I	Allow multiple	e recurring frequencies	
		ОК С	ancel

Once you have made your selections, press the OK button.

The information for all instances of the recurring appointment will display in the WIP.



Suggested Scheduling is the best method for finding available appointment times for multiple appointments at once. Press the Suggest button.

All appointments will display in the top portion of the Suggested Schedules window. Press the Suggest button.

Available appointment options will display on the right portion of the screen. Notice that the response included available appointment times for all appointments within the recurring series.

Highlight one of the options and press the SELECT button. A red check mark will display next to the select appointment times.

	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled	Date/Time	Pati	ent Duration		
تو 🔶	SPANISH, JO	BE PT	PT Treatment							
٠	SPANISH, JO	BE PT	PT Treatment			23/2005 - 8:00/		dinutes		
٠	SPANISH, JO	BE PT	PT Treatment		Wednesday	, 5/25/2005 · 8	:00 AM 30 M	dinutes		
٠	SPANISH, JO		PT Treatment			30/2005 - 8:00/		dinutes		
٠	SPANISH, JO	BE PT	PT Treatment		Wednesday	), 6/1/2005 - 8:0	00 AM 30 N	dinutes		
uggest Crit	eria Preferenc	es				Appt Type	Pat Dur	Pat Date/Time	Person	Ap
Appointme	ent Date					PT Treatment	30 Minutes	Monday, 5/23/2005 - 8:00 AM	SPANISH, JO	
		Start date End date		Aburthan after		PT Treatment	30 Minutes	Wednesday, 5/25/2005 - 8:00 AM	SPANISH, JO	
Weekly			Recurrence pattern Every week on M			PT Treatment	30 Minutes	Monday, 5/30/2005 - 8:00 AM	SPANISH, JO	
Weeky		5/23/2	Every week on M	7	II	PT Treatment	30 Minutes	Wednesday, 6/1/2005 - 8:00 AM	SPANISH, JO	
					Ξ <sup>τ</sup> τ.,	PT Treatment		Monday, 5/23/2005 - 8:30 AM	SPANISH, JO	
•						PT Treatment		Wednesday, 5/25/2005 - 8:30 AM	SPANISH, JO	
•				<b></b> ▶		PT Treatment PT Treatment		Monday, 5/30/2005 - 8:30 AM Wednesday, 6/1/2005 - 8:30 AM	SPANISH, JO SPANISH, JO	
Appointme	ent Time				112	PT Treatment		Monday, 5/23/2005 - 9:00 AM	SPANISH, JO	Mo
	_				<b></b> .	PT Treatment	30 Minutes	Wednesday, 5/25/2005 - 9:00 AM	SPANISH, JO	
Time ratio	ange: 0	800	2355	÷		PT Treatment		Monday, 5/30/2005 - 9:00 AM	SPANISH, JO	Mo
C Time r	estrictions:	AM Only		-		PT Treatment		Wednesday, 6/1/2005 - 9:00 AM	SPANISH, JO	
- Allo R	000000000	print why			三 3.	PT Treatment		Monday, 5/23/2005 - 9:30 AM	SPANISH, JO	
						PT Treatment	30 Minutes	Wednesday, 5/25/2005 - 9:30 AM	SPANISH, JO	
Schedu	le as visit within	1 🚊	day(s) 💌			PT Treatment	30 Minutes	Monday, 5/30/2005 - 9:30 AM	SPANISH, JO	Mo
						PT Treatment	30 Minutes	Wednesday, 6/1/2005 - 9:30 AM	SPANISH, JO	W
	e suggested date	and time			Ξ <sup>1</sup> 2,	PT Treatment	30 Minutes	Monday, 5/23/2005 - 10:00 AM	SPANISH, JO	Mo
1 Calcalu	le multiple perso	ns to mixed Group Sessia				PT Treatment	30 Minutes	Wednesday, 5/25/2005 - 10:00 AM		
	no monaple perso	re termines anoup o coolo				PT Treatment		Monday, 5/30/2005 - 10:00 AM	SPANISH, JO	
schedu			~	0		PT Treatment	30 Minutes	Wednesday, 6/1/2005 - 10:00 AM	SPANISH, JO	W
_ ocnedu			Clear	Suggest	1					l di

The system will typically return an option which has all appointments within the recurring series occurring at the same time of day for each of the appointment dates. In the example above, the suggestion was 8:00 am. You have the option to search for an alternative time for one or multiple components within the recurring series.

In the upper section of the Suggested Schedules window, select one component of the recurring series.

	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration
ئى 🔶	SPANISH, JO	BE PT	PT Treatment			
	SPANISH, JO	BE PT	PT Treatment		Monday, 5/23/2005 - 8:00 AM	30 Minutes
- 🌩 Î	SPANISH, JO	BE PT	PT Treatment		Wednesday, 5/25/2005 - 8:00 AM	30 Minutes
٠	SPANISH, JO	BE PT	PT Treatment		Monday, 5/30/2005 - 8:00 AM	30 Minutes
٠	SPANISH, JO	BE PT	PT Treatment		Wednesday, 6/1/2005 - 8:00 AM	30 Minutes

Press the SUGGEST button again. This time the system will return appointment suggestions only for the highlighted appointment. Highlight a different time option and press the SELECT button.

	Appt Type	Pat Dur	Pat Date/Time	Person	Appt Date
E t <sub>t</sub>	PT Treatment	30 Minutes	Monday, 5/23/2005 - 8:00 AM	SPANISH, JO	Monday, 5
E <sup>z</sup> z,	PT Treatment	30 Minutes	Monday, 5/23/2005 - 8:30 AM	SPANISH, JO	Monday, 5
E 🏹	PT Treatment	30 Minutes	Monday, 5/23/2005 - 9:00 AM	SPANISH, JO	Monday, 5
El <sup>2</sup> t.	PT Treatment	30 Minutes	Monday, 5/23/2005 - 9:30 AM	SPANISH, JO	Monday, 5
E R.	PT Treatment	30 Minutes	Monday, 5/23/2005 - 10:00 AM	SPANISH, JO	Monday, 5
E te.	PT Treatment	30 Minutes	Monday, 5/23/2005 - 10:30 AM	SPANISH, JO	Monday, 5
E te.	PT Treatment	30 Minutes	Monday, 5/23/2005 - 11:00 AM	SPANISH, JO	Monday, 5
E t <sub>t</sub> .	PT Treatment	30 Minutes	Monday, 5/23/2005 - 11:30 AM	SPANISH, JO	Monday, 5
E tr.	PT Treatment	30 Minutes	Monday, 5/23/2005 - 12:00 PM	SPANISH, JO	Monday, 5
E tr.	PT Treatment	30 Minutes	Monday, 5/23/2005 - 12:30 PM	SPANISH, JO	Monday, 5

You will notice that the appointment time has now changed for just that particular component of the recurring series.

	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration
تى 🔶	SPANISH, JO	BE PT	PT Treatment			
	SPANISH, JO	BE PT	PT Treatment		Monday, 5/23/2005 - 9:00 AM	30 Minutes
-	SPANISH, JO	BE PT	PT Treatment		Wednesday, 5/25/2005 - 8:00 AM	30 Minutes
٠	SPANISH, JO	BE PT	PT Treatment		Monday, 5/30/2005 - 8:00 AM	30 Minutes
٠	SPANISH, JO	BE PT	PT Treatment		Wednesday, 6/1/2005 - 8:00 AM	30 Minutes

Press the OK button. All appointments will appear in a Pending status within the WIP.



Press the CONFIRM button and the Confirmation window will display with all appointment's information. Press the OK button to close the Confirm window.

## **Modify a Recurring Appointment**

When a recurring appointment is scheduled, the system will always recognize that these appointments are tied to together. If you are to perform any action on any one of those appointments, the system will always ask if you intend to perform the action on just one component or all components within the recurring series.

A message similar to the following will display when performing an action on an appointment scheduled within a recurring series:

🕅 Reschedule Recurring Appointment Type 🔋 💈
This is a recurring appointment. Do you want to open this occurrence, multiple occurrences, or all occurrences?
Open one or more occurrences
O Open all occurrences
<ul> <li>PT Treatment (Monday, 5/23/2005, CONFIRMED)</li> <li>PT Treatment (Wednesday, 5/25/2005, CONFIRMED)</li> <li>PT Treatment (Monday, 5/30/2005, CONFIRMED)</li> <li>PT Treatment (Wednesday, 6/1/2005, CONFIRMED)</li> </ul>
OK Cancel

If you choose to Open one or more occurrences, then the action will only affect those appointments that have a checkmark. If you choose Open all Occurences, then the action will affect all appointments within the recurring series.

# **Appointment Check In**

Checking-in appointments is a good way to keep track of which patient have shown up for their appointments and which have not. It's also an easy way for a tech, nurse or someone else in the department to know which patients have arrived. There a multiple methods for checking in appointments. The most commonly used are to perform the action from an Inquiry, from right-clicking on the appointment within the grid area or using the Check In icon on your toolbar.

- 1. To Check In an appointment through an Inquiry, first open the appropriate Inquiry. You may search by the patient's name using the Person Inquiry, search for the appointment by the Resource name using the Resource Inquiry, or search by the appointment's scheduled location using the Location Inquiry.
- 2. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the FIND button.
- 3. Once you have located within the Inquiry the appointment you would like to check in, highlight that appointment, right click and choose Check IN



4. The Check In window will display.

General Summary Details Orders Guidelines Notification Conversation Summaries Itineraries         Date:       Ime:         (D5/23/2005       Ime:         Tracking Location:         (None>         Comments:         Person Name FIN NBR Gender         Wilkey, Vicki         Wilkey, Vicki         Output         Person Name FIN NBR Gender         Wilkey, Vicki         View         Modify         Set Enc         Charges         Request Information         Medical Record Requested:       No         Status of Medical Record Request:	<sup>∰Checkin</sup> Name: Wilkey, Vicki	MRN: 000-023     DOB: 12/7/1941       Age: 63 Years     Gender: Female
		05/23/2005       Image: Contract of the second

- 5. Press the OK button to complete the Check In process. The appointment is now in a Checked In status.
- 6. You may also Check In appointments directly within the grid area. To accomplish this, right click, go to Actions, then Check Inl.
- 7. The Check In window will display and the same steps as above are followed.



- 8. You can also highlight the appointment in the grid area, then click the Check-in icon icon at the top of your screen.
- 9. The Check In window will display and you will follow the same steps as in the above methods of Check In.

## **Group Appointments**

Group appointment functionality allows you to schedule multiple patients to the same resource all at the same time. This functionality is commonly used in areas that are conducting classes or group therapy.

#### **Group Appointment Scheduling**

- 1. To schedule a group appointment, click on the Appointment Tab and enter the patient's name in the Person field. Press Enter.
- 2. Enter the name of your appointment in the Appointment Type field. Press Enter. The Future Requests/Appointments may display. Click OK to that window.
- 3. Scroll back up to the Person Name field. Notice that the field changes to allow for multiple patients. This is because group appointment types allow for booking multiple patients to the same resource at the same time.

Books Appointment	
*Person Name:	<u>▲</u> <u>M</u> o
Davis, Connor	
Davis, Connor	
1	
* <u>Appointment Type:</u>	
Diabetic Group Education	<u> </u>
0 101 1000F F	

3/31/2005 - Family Pract -

- 4. In the Person Name field, clear out the first patient's name and type in the name of your second patient. The Person search window will display. Select the appropriate patient from the list and press the OK button.
- 5. Both patients should now display.



- 6. Scroll down and fill out the remaining accept format fields.
- 7. Press the Move button and the information for both patients will display in the WIP.

Work in progress:	
Davis, Connor     Diabetic Group Education     Current Schedule     Diabetic Group Education     Diabetic Group Education	

- 8. Use Suggested Scheduling to help find an available appointment time. Press the Suggest button.
- 9. From within the Suggested Schedules window, press the Suggest button.
- 10. An available time will display. Press the select button and then press OK.

	/ /			1				
	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration		
$\varphi$	Davis, Connor	BW Diab Clinic	Diabetic Group Education			0 Minutes		
	Jones, Brandon	BW Diab Clinic	Diabetic Group Education			0 Minutes		
	1							1
uggest Cril	teria Preferences	]			Appt Type	Pat Dur	Pat Date/Time	Persor
		1			Appt Type		Pat Date/Time Friday, 4/1/2005 - 8:30 AM	_
uggest Crit Appointm	ient Date				🔡 Diabetic Group Edu	cation 30 Minutes		Davis,
	ient Date	/31/2005	• 04/30/2005		🔡 Diabetic Group Edu	cation 30 Minutes	Friday, 4/1/2005 - 8:30 AM	Davis,
Appointm Tate r	ient Date range: 03/	'31/2005	• 04/30/2005		🔡 Diabetic Group Edu	cation 30 Minutes	Friday, 4/1/2005 - 8:30 AM	Davis,
Appointm Tate r	ient Date		• 04/30/2005	30	🔡 Diabetic Group Edu	cation 30 Minutes	Friday, 4/1/2005 - 8:30 AM	

- 11. Press the Confirm button.
- 12. You may see a message asking if you would like to confirm all patients in the group. Press the Yes button.

Appointm	nent Book 🛛 🕅 🕅
?	Do you want to confirm the rest of the patients in the group?
	<u>Y</u> es <u>N</u> o

13. The Confirmation window will display. You should see information for both patients contained within the window. Press the OK button.

0 14



- 14. If your appointment is built to require an encounter be added at the time of booking, the Encounter selection window will display for both patients. Either select and existing encounter, or press the Add Enc button to generate a new encounter.
- 15. Click on the Bookshelf bar. Select the bookshelf for the department which schedules the group appointments from the list of Bookshelves and press the OK button.

Books Appointment	Work in progress:
Select Bookshelf  Select Books	If

16. Double click on the appropriate book. You should see the resource which performs the group appointments and the available sessions for the day.

17. Press the Group Session icon within the session that you just booked. The Group Session information window will display.

:	Diabetic Ed Nurse [1]
• • • • • • •	
8:30 AM	E Dizbetic Group Educ
8:45 AM	🕵 🖬 :BW Diab Clinic
9:00 AM	
•	

Group Session Information		? ×	
Group Session Type:	Diabetic Group Educ	ation	
Description:	Diabetes Ed		
Location:	BW Diab Clinic		
Capacity:	10		
Number Scheduled:	2		
Shared:	No		
Open:	Yes		
Patients:			
Name		Status	
Davis, Connor		Confirmed	
Jones, Brandon		Confirmed	
-			
Resources:			
Resource		Role	
Diabetic Ed Nurse		Diabetic Ed Nurse	
1			

## **Group Appointment Cancellation and Group Session Inquiries**

- 1. Open Appointment Inquiries by clicking on the icon at the top of the screen. The Appointment Inquiries window displays.
- 2. Use the arrow buttons to navigate to the Location tab and click on that tab.
- 3. Choose Group Session Standard Inquiry from the Inquiry dropdown.
- 4. Choose Ambulatory from the Location Type dropdown and the appointment location from the Location dropdown.
- 5. Ensure that your date range is set to include the appropriate timeframe and press the Find button.
- 6. Highlight the appropriate group session, right click and choose Cancel. The Group Session Patients window will display asking which patients you would like to choose. Select one of the patients you scheduled above and press the OK button.



- 7. The Cancel window will display. Select Patient Requested from the Cancel Reason dropdown and press the OK button.
- 8. You will now see the Capacity number decrease for the session which your patient was originally booked.

# **Appointment Link**

Appointment link functionality allows you to manually tie two unrelated appointments together for a particular patient situation. Like with Protocols or Recurring appointments, the system will recognize these appointments are linked and warn the user if any action is performed on one of the linked appointments. You have two options for linking appointments: 1) Link to an existing (previously confirmed) appointment or 2) Link to a new appointment.

- 1. Schedule two different appointments for any patient using one of the previously described methods from above.
- 2. Find one appointment which you have just scheduled, highlight, right click, go to Actions, then Link. At this point you will see your two options for linking appointments.
- 3. Choose to link to an existing appointment.



- 4. The Link window will display. You will notice the Future Patient Appointments section. This section should list the other appointment that you scheduled for this patient. Highlight this appointment and press the Select button. A red checkmark will display.
- 5. In the Link Reason dropdown, select one of the reasons and press the OK button.

🛅 Link				? ×
Name: Test, Jo	Age: 28 Yea	ars MRN: 000 Person Commen	_	DOB: 12/24/1976 Gender: Female
Existing appointment or request     New appointment     Appointments and Requests     Event Details	Orders			
Future patient requests:		ders CAbdomen w/o Contr Resource C Harris, Sarah MD		Surgeon 1 Earli
*Link reason: Patient Requested Comments:				×
				)K Cancel

- 6. The two appointments are now linked.
- 7. Highlight the first appointment again, right click, choose Action, Link. This time choose New Appointment.



8. The Link window will display. In the Link Reason dropdown, select one of the options and press the OK button.

🛅 Link			? ×
Name: Test, Jo	Age: 28 Years	MRN: 000-106;0	DOB: 12/24/1976
		Person Comments: Y	Gender: Female
${f C}$ Existing appointment or request			
New appointment			
Appointments and Requests Event Details	Orders		
*Link <u>r</u> eason:			
Patient Requested			
C <u>o</u> mments:			
			<u> </u>
			<u></u>
			OK Cancel

- 9. You will be brought back to the Appointment tab to select a new appointment type. The Person name is already defaulted with your patient's name. Select an Appointment Type, Appointment Location and fill out the remaining accept format fields.
- 10. Press the MOVE button and finish scheduling the appointment just as if you would any other appointment.

Books Appointment	
Person Name:	Move 🕨
Test, Jo	Ne <u>x</u> t
*Appointment Location:	<u>C</u> lear
Appointment Type:	ANR

- 11. The appointments are now linked.
- 12. If you perform an action on any of the linked appointment types, you will receive a warning.

🛅 Linked Appointments	? ×
This is a linked appointment. Do you want to open this occurrence occurrences?	e, multiple occurrences, or all
Dpen one or more occurrences	
C Open all occurrences	
<ul> <li>□ CT Pelvis (Tuesday, 5/31/2005, CONFIRMED)</li> <li>☑ MRI Knees (Tuesday, 5/31/2005, CONFIRMED)</li> </ul>	
	OK Cancel

13. This warning serves as a reminder that the appointment you are performing an action on is linked to other appointments. You can choose to perform the action only on the appointment you currently have selected, or to perform the action on all the linked appointments.
## **Viewing Appointment Details**

In order to view specific details associated with an appointment, click the appointment inside the Appointment Book. Once that appointment is selected, select Inquiry, Appointment View from the menu. This will open the Appointment View dialog box that displays specific information associated with the appointment.

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🗃 Scheduling: Appointment Book					<u> </u>
<u>I</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp					
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News		SSN:	MRN:	DOB:	
Name:		Home Phone:	Age:	Gender	
Image: Constraint of the second se	intment		Work In-Progress:		
✓         December         ▶           Su Mo Tu We Th Fr Sa         Appointmen	t Tuner	Move	▶		<u>S</u> chedule
26 27 28 29 30 1 2					Confirm
3 4 5 6 7 8 9 Appointmen	t Location:				Recur
10 11 12 13 14 15 16			ar		
17 18 19 20 21 22 23 24 25 26 27 28 29 30	e:				Suggest
<b>31</b> 1 2 3 4 5 6		🔽			
,, _,, _		12/5/00 - Cath Lab	/		
Cath Lab Room	Holdin	ng Area			
6:30 AM 99 690 Minute Slot	690 Minute Slot	-			
6:45 AM					
7:00 AM					
• • 7:15 AM	Actions +				
7:30 AM 7:45 AM	Add New Appointment				
• • • 8:00 AM	Book Request				
• → 8:15 AM	Confirm Request Remove Request				
8:30 AM Throckmorton, Rach	Recur Appointment				
titication to the second seco	İnguiy 🔸	Appointment <u>V</u> iew			
9:00 AM JPMC MAIN	Report +	Appointment <u>H</u> istory View Appointment Inguiry			
9:15 AM cath lab	Applications +	Appointment inguly			
\$.30 AM	Person				<b>_</b>
	Slo <u>t</u> s + R <u>e</u> sources +		ĺ	81048 CERNER Tuesday, December 05,	2000 2:46 PM //
😭 Start 🔄 CernerApps 🕅 Sc	Book <u>S</u> ettings 🔹 🕨	Scheduling: Appointm			

### All Appointment Tab Views

#### **General Tab View**

Appointme	nt View							?
eneral Eve	ent Details	Resources	Instructio	ns Guidelines	Scheduling	Comments 0r	ders Reports F	Protocol Compon
Appointme	ot Informatic	n						
Appointmen								
Scheduled		ath Lab						
Location:	JF	MC MAIN						
Person Na	ne	Encoun	ter Type	Encounter Stati	us Gender	Home Phone	Business Phone	DOB
Throckmort	on, Rachae	IR			Female	(5-7) 487896		12/12/70 - 12:00
•								
✓ Current Sta	ite Informati	on						
<ul> <li>✓</li> <li>Current State:</li> </ul>	ite Informati Resche							

### **Details Tab View**

👸 Appoint	ment View							? >	×
General	Event Details	Resources	Instructions	Guidelines	Scheduling Comments	Orders Report	s   Protocol C	Compon <mark> ( )</mark>	
Date of ABN					Field Value cath lab 405-748-7896 29 Throckmorton, R. R				
								Close	

### **Resources Tab View**

pointment View				?
General Event Details	Resources Instruction	s 🛛 Guidelines 🗍 Acti	ion Comments   Sched	lulin <u>.</u>
Resource	Begin D	ate/Time	End Date/Time	
MMC CT 1 Test, Beatrice V	7/13/9: 7/13/9:	3 8:00 AM 3 8:00 AM	7/13/99 9:00 AM 7/13/99 9:00 AM	
				Close

### **Instructions Tab View**

👸 Appointment View 🔹 👔	ĸ
General Event Details Resources Instructions Guidelines Scheduling Comments Orders Reports Protocol Compon	
Instruction Types:	
Preparations	
Instructions:	
NPO After Midnight No Glucophage Someone To Drive Patient Home Okay To Take Medications Except Glucophage	
Close	

# **Viewing Appointment History**

In order to view specific details associated with the history of an appointment, click that appointment in the Appointment Book.

Once that appointment is selected, right click the appointment, and select Inquiry, then Appointment History View from the menu. This opens the Appointment History View Box that displays specific information associated with the states that have been associated with the appointment.

loginitos citili torto ara cilott								
🐻 Scheduling: Appointment Book								_ 0
<u>Iask E</u> dit ⊻iew <u>H</u> elp								
44   🗹 🏊 📧 🤁 🔮 🎦 🔙	🕷 🕷 🔒 🕯	l 🚸 🗈 🕨	ਅ ਆ   표 ≛   0	र् ् 🗷 🕇	51 🐼 🖴 🚯	🕫 🖑 🌡	<b>K</b> ?	
			SSN:		MBN:		DOB:	
Name:			Home Phone:		Age:		Gender:	
	ooks Appointment				Work In-Progress:			Schedoli
Su Mo Tu We Th Fr Sa	Bookshelf - Ja	ane Phillips Mas	ster Bookshelf	<u>Open</u>				
26 27 28 29 30 <b>1 2</b>				Seject				Confirm
3 4 5 6 7 8 9	A 8 0 10 10	월 월 출						Record
10 11 12 13 14 15 16 17 18 19 20 21 22 23	BLC BLC	ac b tic						Suggest
24 25 26 27 28 29 30		Mar Salar						
31 1 2 3 4 5 6								
			12/5/00 - Cat	h Lab				
Cath Lab	Room	Holding						
6:30 AM 690 Minute Slot		690 Minute Slot						
6:45 AM								
7:00 AM								
7:15 AM								
7:30 AM	Actions	•						
7:45 AM								
8:00 AM	Confirm Bequ	est						
8:15 AM Throckmorton, F	Reput Appair							
8:30 AM Coth Lob 8:45 AM JPMC MAIN	Inquiry		pintment View	1				
3:45 AM JPMC MAIN	Beport	Appe	intment History View					
9:15 AM	Applications	Appo	pintment Inguity					
9:30 AM	Person	•						
	Slots	•						05.0000 (4.47.594
	Resources	•				BT048 CERNER	1   Tuesday, Decemb	er 05, 2000 1:47 PM
🛱 Start CernerApps	[ Book Setting:	; <b>•</b> ,						

The History View Dialog Box will display.

🔀 Appointment History View				? ×
Cath Lab	General Event Details Re Appointment Information Appointment Type: Cath Scheduled as: Cath Location: JPMC Person Name Throckmorton, Rachael R	Lab Lab CMAIN Encounter Type	ons Guidelines	Commer () Home Phoi (5-7) 4875
				Close

## **Modifying Appointment Information**

There are two different types of modifications that can be made. You can modify Appointment information, which includes, ordering physician, procedure, comments, etc. You can also modify Patient information, their birth date, last name, home phone, etc.

You can modify appointment information two ways.

First, you can right click, go to Actions, and then slide your cursor down to Modify.

🚯 159.140.228.153 - Citrix ICA Java Clier	nt				_ 🗆 X
🔀 Scheduling: Appointment Book					
<u>I</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp					
M 🗹 🗞 🛍 🐮 🔮 🗃 🖄 隊	🏭   🔒 🚆   🗇   🖸	ř4 +  +   王 ≛	९ ९ 🗉 🕯 🗟 🔒	ø 🅭 🌡 🧏	
NI		SSN:	MRN:	DOB:	
Name:		Home Phone:	Age:	Gender:	
	Appointment		Work In-Progress:		
November	Bookshelf - Diagno	stic Imaning	Dpen		<u>S</u> chedule
Su Mo Tu We Th Fr Sa 29 30 31 1 2 3 4					Confirm
E C 7 0 0 10 11	entt ogr ici v sed		Seject		Recur
12         13         14         15         16         17         18           19         20         21         22         23         24         25	Angio-Interventi Cet Scan UP Mammogra, Nuclear Medici DLL Ar Red Nursing Proced MetiMR A	Dexa Scan bile Ultraso			
19 20 21 22 23 24 25	gio-In Cat C Ma Marr Marr Clear Clear Catag MB1	Dexa bile L			Suggest
<b>26 27 28 29 30</b> 1 2 3 4 5 6 7 8 9	An Nu Nu	ž			
3 4 3 6 7 6 3					
		11/20/00 - Ultı	asound		<u> </u>
US Room 1 US R 6:30 AM 6:45 AM 7:00 AM 7:15 AM	oom 2 US Room 3				<u> </u>
7,15 AM 7,30 AM 7,45 AM 8,10 AM 8,15 AM 8,30 AM 480 M	LEMON, J.,	Ictions	Cogfim Contact Moofly Reschedule Hold Qancel		Ī
8:45 AM		nguiry + -	Nosho <u>w</u>		
• • • • 9:00 AM	48	leport +	Check In Check Out		
• → 9:15 AM	01010101010101	pplications			
9:30 AM	F	Person +	Lock Unlock		<b>.</b>
or Help, press F1		ilo <u>t</u> s	Ch. 40-	B1048 CERNER Tuesday, December	
		lesources		provo joennen jruesuay, December	00, 2000 JTT.02 AM
🕂 Start 🔄 CernerApps 👘	Scheduling: Appoints B	look <u>S</u> ettings 🔹 🕨			Sener

You can also highlight the appointment, and then click the Modify button at the top of your screen.

🕅 Modify	? 🗴
Name: LEMON, J K	SSN: 345-68-6554 MRN: 000000022 DOB: 12/12/50 Home Phone: (09 Age: 49 Years Gender: Male
EEMON, J K	General Summary Details Orders Guidelines Notification Conversation
	OK Cancel

The modify box will pop up allowing you to make any changes.

Click the Details tab to make changes to the appointment information.

🕅 Modify	SSN: 345-68-6554 MRN: 000000022 DDB: 12/12/50
Name: LEMON, J K	
E- ♥ LEMON, J K B- ♥ Ultrasound	General       Summary       Details       Orders       Guidelines       Notification       Conversatior. ✓       >         Procedure       bone scan       Telephone Number       (090)990-9990       Social Security Number          Social Security Number
	0K Cancel

You can type in any additions you need or delete information, then click OK to save.

To modify patient information, you will need to highlight that person's appointment, right click, go to Person, and then slide your cursor over to Modify Person.



On your screen you will see the system loading patient information, and opening the modify conversation. When the Add Person window opens, you can make any changes you need.

8 159.140.228.153 - Citrix IC/ Add Person	A Java Client				
Last Name LEMON	First Name J	Middle Name K	Social Security Number 345-68-6554	Medical Record Number	
Patient Demographics Birth Date	Age 49Y	Sex	Street Address	Street Address2	<u>City</u>
12/12/1950	49Y Zipcode	Male 💌	3245 N. Riverview	Home Phone	bartlesville Business Phone
	70111-	Washington 👻		(090) 990-9990	
Primary Care Physician	User ID LEMON				
					0K Cancel
🛱 Start 🔄 CernerApps	🕞 Scheduling: App	ointm			

After you have made your changes, click OK to save.

### **Inquiring Person and Resource Schedules**

Schedule Inquiry window allows you to enter the parameters required to view the schedule associated with a specific person or resource. There are two available options for using the Schedule Inquiry window: the Person tab and the Resource tab. Each of these is described below, along with the elements that are available under each heading.

1. You can access the person and resource information two different ways. The first is to click the Inquiry button (eyeball) located at the top of your screen.



2. Another way to access the person and resource schedule is to right click somewhere on the slots, scroll down to Inquiry, and then Appointment Inquiry.

Actions •	
Add <u>N</u> ew Appointment <u>B</u> ook Request Confirm Request Re <u>m</u> ove Request Recur Appointment	
Inguiry ► <u>R</u> eport ►	Appointment <u>V</u> iew Appointment <u>H</u> istory View
Applications	Appointment Inguiry
Person  Slo <u>t</u> s  R <u>e</u> sources	View Appointment Information

3. The Appointment Inquiry box appears on your screen.

Schedule Inquiry		
<u>I</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp		
▲ 第 ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●		
Name:	MBN:	DOB:
Name.	Age:	Gender:
Person Resource	Name:	
Inquiry Type:		
Person Schedule Inquiry		
Person:		
Start Date: Start Time:		
10/24/00 🕂 🗸 0000		
End Date: End Time:		
**/**/** 📮 🗸 2355		
I		
For Help, press F1	CERT JACRAWLEY Tue:	sday, October 24, 2000   2:37 PM - //,

- 4. To search for a person schedule, click the Person Tab.
- Note: If you are not able to see the Person Tab, click the arrows located next to the tabs.
- 5. In the Person box, enter the name of the person whose schedule is to be displayed.

6. After typing in all, or part of the person's name, press the ellipse button \_\_\_\_\_ to bring up the Person Search window. You can also hit Enter on your keyboard. The Person Search box appears on your screen.

lame:	Name	SSN	MRN	Gend
test	😨 Test, Admitting			Male
/BN:	😰 TEST, AMANDA	234-22-7639	MMC-315563	Fema
	😰 Test, Angie	541-22-1254	MMC-315584	Fema
	😰 Test, Annie A			
SN:	😰 Test, Beth	845-12-4565		Fema
	😰 Test, Billing			Fema
irth Date:	😰 Test, Buddie	845-12-4511		Fema
	😰 Test, Buyer			
ender:	😰 TEST, CDM 697		MMC-000123	Fema
	😰 TEST, CDMDLL I	000-00-0337	MMC-315534	Male
	😰 test, chad	098-23-3482	MMC-304740; MMC-315553	Male
IN NBR:	😰 Test, Charge			
	😰 Test, Clerical			Male
	😰 Test, Customer			
<u>S</u> earch <u>R</u> eset	😰 Test, Cvm			
	😰 TEST, DISCERN IRH			Fema
	😰 TEST, DISCERN IRH			Fema ,
				Ē₽Ē

- 7. Find the person's name on the right, highlight it, and click OK. If you do not see the person's name, scroll up and down using the scroll arrows on the top and bottom right of the box. If the person's name still does not appear, clear the name field, type the person's social security number in the SSN field and click the Search button. You can also search by Medical Record Number, Birth date, Gender, or Fin Number.
- 8. After you have found your person and clicked OK, the person's name will appear in the name field. (Note: You must find the person's name through the Person Search, or the system will not be able to find the person's information.)

9. The Start Date field defaults to the date that was selected in the appointment book. If you would like to change the date on which the inquiry should begin, highlight and type over the current date or use the arrow buttons advance or go back one day at a time. You can also click the larger arrow button to bring up the calendar, and then choose your day from there. After you choose the begin time, choose an end date, or leave it blank. Begin and end times can also be chosen.

9	Start D	ate:	]	, ↓	Sta	rt Tim	ie:	
Į	10/24	/00	Ī	$\mathbf{I}$	00	00		l
E	┛			2000 ctobe	er	]	•	
	Su	Mo	_	We		Fr	Sa	
	1	2	3	4	5	6	7	
	8	9	10	11	12	13	14	
	15	16	17	18	19	20	21	L
l	22	23	24	25	26	27	28	
-	29	30	31	1	2	3	4	F
Н	5	6	-7	8	9	10	11	

10. Once you have found the person and have chosen the begin and end times, click the Find button to bring up the person's information.

Schedule Inquiry				_ 🗆 ×
<u>I</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp				
◎ ※ 戰 %   ② 猶 凶   除 利   8		8   <b>N?</b>		
Name: Test, Jo		MRN: OI	PR-100074	DOB: 12/24/76
Name. Test, Ju		Age: 23	Years	Gender: Female
10/2		DURATION 30 30	STATE Rescheduled Rescheduled	APPT TYPE US ABD/Pelvis US ABD/Pelvis
Person Schedule Inquiry 10/2	24/00 - 8:00 AM	30 265	Confirmed Confirmed	US ABD/Pelvis RT Sleep Study Split Nic
Person: Test, Jo				
Start Date:         Start Time:           10/24/00         ↓         00000         ↓				
End Date: End Time:				
Eind Clear Close				F
For Help, press F1	CERT	JACRAWLEY	Tuesday, Octo	ber 24, 2000 3:21 PM //

11. All appointment information for the person that falls within the parameter chosen will appear in the right hand box.

- 12. When you are finished with the information, click the Close button to return to the appointment book
- 13. To look up a Resource's information, follow the same steps as the person search to bring up the Scheduling Inquiry box and click the Resource Tab.

Schedule Inquiry Iask Edit View Help		
Name:	MRN:	DOB:
Ivane.	Age:	Gender:
Person Resource		
Inquiry Type:		
Resource Schedule Inquiry - Standard		
Resource:		
Start Date: Start Time:		
End Date: End Time:		
<u> </u>		
<u>Find</u> Clea <u>r</u> <u>C</u> lose		
For Help, press F1	CERT JACRAWLEY Tue	sday, October 24, 2000 4:44 PM

- 14. Type in the Resource you are searching for in the Resource field and click Enter on your keyboard. Choose the your resource from the list, then set your parameters for searching (start date, end date, etc)
- 15. Click the Find button and the system will bring up all appointments scheduled to that resource that falls within your search parameters.

# **Patient Information Chart Requests (PIR)**

#### **Overview**

Use Patient Information Request to process internal requests for patient charts. Provided that your system manager has set up your system to permit batch request, you can enter requests for a set of one or more patients' charts to be sent to a common requester at a common location. For multi-patient requests, enter the requests individually to add them to a list of charts that are processed and sent in batch. You can remove a chart from the list before sending the batch request. Sending a request creates a log that reflects the name of the requester, the date of the request, and the reason for the request.

#### Learning Objectives

In this section you will learn how to:

- Send a Request
- Modify and Get a Request

#### Send a Request

- 1. Click the Patient Information Request (PIR)
- 2. Select a facility from the **Facilities** field.

🗏 ProFile: Patient Information Request				_ 🗆 ×
<u>T</u> ask <u>V</u> iew <u>R</u> equest <u>H</u> elp				
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Request number	*Facilities	Baseline West Medi	cal Center	-
Request date	Requester		<u>đ</u> ů,	Inquire On <u>R</u> equester
Last updated by	*Patient name		<u>İ</u> q	Inquire On <u>P</u> atient
Date required 10/11/2004	*Requesting location		<u></u>	Inquire On Location
Time required 1234	Request status	Initial	✓ *Request type	•
Maintain request information	Rejected reasons	Already complete Harmful to individ		<b>_</b>
		Invalid Authorizat		-
Visit lookup				
Tracking ID 💌				
Patient: A	dmit date:	MBN:	Birthda	ite:
Patient type: D	ischarge date:	Status:	Sex	
Admit Date Discharge D	ate Patient Type	Attending Physician	Chart Location	FIN NBR
Ready		Last request: BD	S82 CERNER 10/	11/2004 12:34 PM

- 3. Type the requester's name (last name, first name) in the **Requester** field then click the **Requester Search** icon.
- 4. Select the requester's name.

#### 5. Click OK.

Reprovider Selection			_ 🗆 >
Last <u>N</u> ame: test	<u>F</u> irst Name:	Suffig:	<u>Search</u>
Title:	Alias:	Alias Type:	New <u>Provider</u> Previe <u>w</u> <u>C</u> lear
<ul> <li>Search All</li> <li>Limit by Group:</li> </ul>		JFT LISU»	
	Organizations rse Baseline East Medi		Aliases
Test , Critical Care Nu Test , Critical Care Nu	rs Baseline East Medi rs Baseline East Medi rs Baseline West Med rs Baseline West Med	cal ical	_
Test , Critical Care Nu Test , Critical Care Nu Test , Critical Care Nu	rs Baseline West Mec rs Baseline West Mec rs Baseline West Mec rs Baseline West Mec	ical ical ical	
Test , Critical Care Nu	rs Baseline West Mec rs Baseline West Mec	ical	<b>•</b>
More Matches Exist	4	\$	Þ
		OK	Cancel

6. Type the patient's name (last name, first name) then click the **Patient Search** icon.

# Note: Visit lookup provides a way to look up a patient by scanning or entering a tracking ID.

7. Click the appropriate patient and encounter(s).

# Note: If all encounters are requested, click the box at the bottom of the screen that says All Encounters.

8. Click **OK**.

Person Search						?
Name:	Name	SSN	MRN	Gender	Birth Date	Age
test, profile	🖉 test, ProFile	565-65-6565			9/9/1972	32 Years
IBN:	😰 test, profile E D	415-28-4068	0000-02; 000-109	Female	1/9/1971	33 Years
SN:						
lirth Date:						
**/**/****						
iender:						
IN NBR:	FIN NBR Enc T	vpe Med Se	rvice Faci	lity Reg D	) ate Disch	n Date
	3 000057 Emerg		ncy Medicine BWI			
<u>S</u> earch <u>R</u> eset						
	,	OK	Cancel	<u>P</u> revie	w A	II Encoun <u>t</u> er

9. Click the **Requesting Location** button.

ask <u>V</u> iew <u>R</u> equest <u>H</u> elp					_	
🖴 🔍   🖳 🍬 🏹 🕷	1	Send Request	Modify Request	Get Request		
Request number		*Facili	ties	Baseline West Medical	Center	
Request date		Reques	ster	Test , ED Physician	ĝiĝi	Inquire On <u>R</u> equeste
.ast updated by		*Patie	nt name	test, profile E D	<u>ia</u>	Inquire On Patient
Date required 10/11/200	4 🕂 🗸	*Requ	esting location			Inquire On Location
Fime required 1234	•	Reques	st status	Initial	Request type	
<ul> <li>Maintain request information</li> </ul>	n	Rejecte	ed reasons	Already complete or	accurate	
Maintain request information	n	Rejecte	ed reasons	Already complete or Harmful to individual	accurate	
✓ Maintain request information	n	Rejecte	ed reasons	<ul> <li>Harmful to individual</li> </ul>	accurate	
/isit lookup	n	Rejecte	ed reasons	<ul> <li>Harmful to individual</li> </ul>	accurate	
<b>Visit lookup</b> Tracking ID		Rejecte	ed reasons	<ul> <li>Harmful to individual</li> </ul>	accurate Birthdate	
<b>∕isit lookup</b> Tracking ID ▼ Patient: test, profile B		1		Harmful to individual Harmful Authorization		
<b>fisit lookup</b> Tracking ID ▼ Patient: <b>test, profile E</b> Patient type:		Admit date:		Harmful to individual Invalid Authorization	Birthdate Sex:	- 1/9/1971
Visit lookup Tracking ID ⊻ Palient: test, profile E Palient type:	E D	Admit date: Discharge da	te:	Harmful to individual Newlid Authorization MRN: 000-109 Status:	Birthdate Sex:	: 1/9/1971 Female
fisit lookup fracking ID  fracking ID fra	E <b>D</b> Admit Date	Admit date: Discharge da Discharge Date	te: Patient Type	Hamful to individual     Invalid Authorization     MRN: 000-109     Status:     Attending Physician	Birthdate Sex: 1 Chart Location BW Perm File BW Perm File	<ul> <li>1/9/1971</li> <li>Female</li> <li>FIN NBR</li> <li>1</li> <li>2</li> </ul>
isit lookup racking ID ▼ atient: test, profile E atient type: statest, profile E D SW-UR-0000028 SW-UR-0000048 SW-UR-0000048	E D	Admit date: Discharge da	te:	Harmful to individual Newlid Authorization MRN: 000-109 Status:	Birthdate Sex: Chart Location BW Perm File BW Perm File BW-UR-00000280	<ul> <li>1/9/1971</li> <li>Female</li> <li>FIN NBR</li> <li>1</li> <li>2</li> <li></li></ul>
fisit lookup fracking ID  fracking ID fra	E <b>D</b> Admit Date	Admit date: Discharge da Discharge Date	te: Patient Type	Hamful to individual     Invalid Authorization     MRN: 000-109     Status:     Attending Physician	Birthdate Sex: 1 Chart Location BW Perm File BW Perm File	1/9/1971 Female       FIN NBR       1       2       000121

10. Click the appropriate location.

### Note: To save this location as your default click in the Set As Default View Box

11. Click **OK**.

Locations 🔀
BW Internal
Baseline West Medical Center Base West Hospital BW Analysis Area BW Coding Dept BW MD Workroom BW Perm File BW ROI Dept
Set As Default View OK Cancel

- 12. Select a Request Status.
- 13. Select a **Request Type**.
- 14. Select date/time required.
- Note: If you are entering multiple requests, you can check the Maintain Request Information box which will hold the requesting location and requester for you.

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Request number	*Faciliti	es	Baseline West Medical C	Center	
Request date	Requeste	91	Test , ED Physician		Inquire On <u>R</u> equester
Last updated by	*Patient	name	test, profile E D	<u>iم</u>	Inquire On <u>P</u> atient
Date required 10/11/2004 🗮 💌	*Reque	sting location	BW Coding Dept	•	Inquire On Location
Time required 1234	Request	status	Initial 💌	*Request type	Patient Care
Maintain request information	Rejected	reasons	Already complete or an Harmful to individual Invalid Authorization	ccurate	
Visit lookup Tracking ID					
	Admit date:		MBN: 000-109	Birthda	ate: 1/9/1971
Patient: test, profile E D	Admit date: Discharge date	:	MRN: 000-109 Status:	Birthda Sex:	ate: 1/9/1971 Female
Patient: test, profile E D Patient type: Admit Date		Patient Type			
Patient: test, profile E D Patient type:	Discharge date		Status:	Sex:	Female FIN NBR 1 2 80 000121 80 1
Patient:         test, profile E D           Patient type:         Admit Date           ■         Ewt-UR-0000028           ■         BW-UR-0000028           ■         BW-UR-0000028           ■         BW-UR-0000028           ■         BW-UR-0000028           ■         BW-UR-0000028           ■         BW-UR-0000028           ■         BW-UR-0000028	Discharge date Discharge Date	Patient Type	Status: Attending Physician Armstrong, Thomas	Sex: Chart Location BW Perm File BW Perm File BW-UR-000002 BW-UR-000002	Female FIN NBR 2 80 000121 80 1 om 2

#### **Retrieve and Modify a Request**

- 1. Click the Get Request 🔊 icon.
- 2. Type a **request number.**

Note: The last request number can be found on the bottom of the screen.

Patient Information Request	×
Enter a request number	OK
	Cancel
799764	

- 3. Make necessary changes.
- 4. Click **Modify Request** to save the changes.

🔀 ProFile: Patient Information Request			
Iask View Request Help	end Request	Get Request	a
Request number 799764	*Facilities	Baseline West Medical C	
Request date 10/11/2004, 12:57 PM	Requester	Test , ED Physician	AA Inquire On Requester
Last updated by CERNER , CERNER	*Patient name	test, profile E D	Inquire On Patient
Date required 10/11/2004	*Requesting location	BW Coding Dept	Inquire On Location
Time required 1234	Request status	Initial	Request type Patient Care
Maintain request information	Rejected reasons	Already complete or a	ccurate
		Invalid Authorization	
Tracking ID			
,,			
Patient: test, profile E D Patient type:	Admit date: Discharge date:	MRN: <b>000-109</b> Status:	Birthdate: 1/9/1971 Sex: Female
	-		
Admit Date	Discharge Date Patient Type	Attending Physician	Chart Location FIN NBR
- → BW-UR-0000028 - → BW-UR-0000048 - → BW-UR-0000048 - → BW-UR-0000048	<u>9/20/2004 Emergency</u>	Armstrong, Thomas	BW Perm File 1 BW Perm File 2 BW-UR-00000280 000121
Ready	Last	Request: 799764 BDS82	CERNER 10/11/2004 1:03 PM

5. The note form opens, enter a note or click Exit  $\overline{\mathfrak{M}}$ 

### Locks

Sometimes a slot will become locked when a user has tried to schedule an appointment to the slot, but for whatever reason it did not finish booking. The slot may appear open, but it will not allow you to book an appointment. If you get a warning that a slot is locked, look to see whom it was created by, then have that person unlock the slot.

Conflict	Conflicting appt.	Created By	Appt. Type	Location	Role	Date/Time	Booking
Person	8:45 AM - 9:15	Throckmorton,	Cardiac Ultraso	JPMC M	Patient	1/12/01 11:5	WRITTEN
1							

1. Locate the lock by clicking the View Locks icon . A window will display listing all locks created by the username you are signed onto the application with.

Lock(s) held by SCHEDDBC							? ×
🖃 🔒 All Locks	Lock Type	Person/Resource	Begin Date	Duration	Appt Type	Location	Role
Booking (4)	Person	GREEN, ALICIA	3/31/2005 12:00 PM	30	CT Abdomen	BW CT	Patient
🗌 🛄 In-Process Appointment	Slot	CT Room 1 BWMC	3/31/2005 12:00 PM	15	CT Abdomen	BW CT	CT Rooms BV
	Slot	CT Room 1 BEMC	5/20/2005 8:00 AM	15	CT Abdomen	BE CT	CT Rooms BE
	Person	Gonzales, Ted	5/20/2005 8:00 AM	30	CT Abdomen	BE CT	Patient
4	•						Þ
Show verified locks						<u>R</u> emove	Close

- 2. Click Booking to see if the slot was a booking lock. If there are locks which you would like to remove, highlight them and press the REMOVE button.
- 3. If you don't see a lock in Booking, click In-Progress Appointments to see if there is a lock in there. Highlight any In Progress locks and press the REMOVE button.
- 4. You may also need to release any verified locks. To Accomplish this, click the checkbox next to Show Verified Locks in the bottom left corner of the window.

### **Blocking Schedules**

There are times when you will need to block off a schedule so that appointments are not scheduled. There are two ways to block schedules.

To block just a few slots, you can use the appointment type Block appointments. You can schedule this just like regular appointments. When you have confirmed it, the slot will be RED and cannot be scheduled to. To cancel a blocked appointment you can just R click on the appointment and go to actions and then cancel and this will cancel the blocked appointment if needed.

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🕅 Scheduling: Appointment Book		_ 8	x
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Name:	MRN:	DOB:	
	Age:	Gender:	
Books Appointment	Work In-		
January     Su Mo Tu We Th Fr Sa	<u>▲</u> Move ▶	Schedule	1
31 1 2 3 4 5 6	Ne <u>x</u> t	Conțim	
7 8 9 10 11 12 13 Appointment Location:		Elecun	
21 22 23 24 25 26 27 Person Name:		Suggest	
	<b>_</b>		
4 5 6 7 8 9 10			
	1/12/01 - Ultrasound	<b></b>	4
US Room 1 US Room 2	US Room 3	ŕ	4
• • 0.30 AM			
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12:00 PM			
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1-20 DM		<u>•</u>	1
For Help, press F1		B1048 RTHROCK Friday, January 12, 2001 11:18 A	_
😹 Start 🔄 CernerApps 😨 Scheduling: Scheduling D 🕅 S	Scheduling: Appointm		60

If you need an entire day or more blocked, the Block Out appointment type may be too cumbersome. Instead you can delete the slots that you want blocked, and add in blocked slots.

To delete a slot, right click the slot, move your cursor to Slots, then Remove Slots.

Note: To remove more than one slot at a time, left click each while holding down your CTRL key, then right click to remove.

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H Scheduling: Appointment Book				
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		MRN:	DOB:	
Name:		Age:	Gender:	
2001 Books Appointment	1	Work In-Pro		
2001  Books Appointment January			g	Schedule
Su Mo Tu We Th Fr Sa Appointment Type:		▲ <u>M</u> ove ▶		20102010
31 1 2 3 4 5 6		Next		Confirm
7 8 9 10 11 12 13 Appointment Location	n:			Recur
14 15 16 17 18 19 20	•	<u>Clear</u>		
21 22 23 24 25 26 27 Person Name:				Suggest
28 29 30 31 1 2 3		-		
4 5 6 7 8 9 10				
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US Room 1 US	Room 2 US Room 3			-
	Hoom 2 US Room 3			Ē
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US Hoom 1 US 6:30 AM 7:700 AM 7:30 AM 7:30 AM 5:00 AM 5:00 AM 5:00 AM				
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6:30 AM           7:00 AM           7:30 AM           8:00 AM           8:30 AM           9:00 AM           9:00 AM           10:00 AM           10:00 AM	Actions Add New Appointment Book Request			
6:30 AM           7:00 AM           7:30 AM           8:00 AM           540 Mmute Slot           8:30 AM           9:00 AM           9:00 AM           9:00 AM           9:00 AM           10:00 AM           10:00 AM           11:00 AM	Actions Add New Appointment Book Request Confirm Request Regove Request Regove Request Resur Appaintment			
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6:30 AM           7:00 AM           7:30 AM           8:00 AM           9:00 AM           9:00 AM           9:00 AM           9:00 AM           9:30 AM           10:00 AM           10:30 AM           11:30 AM           12:00 PM	Actions → Add New Appointment Bock Request Contim Request Recur Appointment Inguity → Beport →			
6:30 AM           7:00 AM           7:30 AM           8:00 AM           540 Minute Slot           8:30 AM           9:30 AM           9:30 AM           10:00 AM           11:30 AM           12:00 PM           12:30 PM	Actions  Add New Appointment Book Frequest Continn Frequest Frequest Frequest Frequest Report Beport Applications			
6:30 AM           7:00 AM           7:30 AM           8:00 AM           9:00 AM           9:00 AM           9:00 AM           9:00 AM           9:30 AM           10:00 AM           10:30 AM           11:30 AM           12:00 PM	Actions > Add New Appointment in Book Percent Confim Request Regove Request Regove Request Regove Request Regove Appointment Inguity → Bepont → Applications → Person →			1
6:30 AM           7:00 AM           7:30 AM           8:00 AM           5:00 AM           9:00 AM           10:00 AM           11:00 AM           11:30 AM           12:00 PM           12:00 PM           10:00 PM	≜ctions       > obtiments         Add New Appointment       in         Bock Frequest       -         Configm Request       -         Regove Request       -         Regove Request       -         Bock Texposit       -         Regove Request       -         Report       -         Applications       -         Person       -		B1048  RTHROCK  Fnday	January 12, 2001 11:18AM

The system will ask you if you're sure you want to remove them. Click Yes.



Once you have removed all the slots that you want to replace, click the resource whose slots you are adding to, then right click. Move your cursor to Slots, then Add Slots.

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🕅 Scheduling: Appointment Book				_ 8 ×
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2001 Books Appointment January	]	Work In Progress:		
	Move >	1		Schedule
Su Mo Tu We Th Fr Sa				Confirm
7 8 9 10 11 12 13 Appointment Locati		J		Repur
14 15 16 17 18 19 20				<u>TTesa</u>
21 22 23 24 25 26 27 Person Name:				Suggest
28 29 30 31 1 2 3				
4 5 6 7 8 9 10				
	1/12/01 - Ultrasound			
	S Room 2 US Room 3			<u> </u>
540 Minute Slot				
10:30 AM				
• • • 11:30 AM	Actions			-
	Add New Appointment			
12:30 PM	Book Request			
• → 1:00 PM	Confirm Request			
+ → 1:30 PM				
1:30 PM 2:00 PM	Confirm Request Remove Request Recur Appointment			
1:30 PM 2:00 PM 2:30 PM	Confirm Request Remove Request			
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1:30 PM 2:00 PM 2:300 PM 3:300 PM 4:300 PM 4:30 PM	Continn Request Reprove Request Recar Approximent Inguity Report			
1:30 PM 2:200 PM 2:30 PM 3:30 PM 4:00 PM 4:00 PM 5:00 PM	Contirm Request Recar Apportment Inguity Apportment Report Applications Person			_
1:30 PM           2:00 PM           2:30 PM           3:30 PM           3:30 PM           4:00 PM           4:00 PM           For no put	Contirm Request Report Persuest Recurr Appointment Inguity Beport Applications Person Slog Add Slots		B1048  RTHROCK  Friday,	

You will need to put in the time that you want the slots to start, and end. The time interval defaults to 30 min, you can change it by using the drop down box.

Then you will need to select the slot you want to use. Click the plus + sign next to All Slot Types.

Add Slots - US Room 2	? 🗙
Day <u>B</u> egin: Day E <u>n</u> d:	S <u>c</u> hedule:
0845	
Time Interval:	8:45 AM
-	9:15 AM
30	9:45 AM
Display slot properties when adding a new slot	10:15 AM
Clat Course and Turney	10:45 AM
Slot <u>G</u> roups and Types:	11:15 AM
45 Minute Slot     450 Minute Slot	11:45 AM
= 450 Minute Slot	12:15 PM
= 510 Minute Slot	12:45 PM
= 525 Minute Slot	1:15 PM
- = 540 Minute Slot	1:45 PM
= 570 Minute Slot	
= 60 Minute Slot	
- = 600 Minute Slot	
= 660 Minute Slot	
690 Minute Slot	
= 90 Minute Block	
= Block	
Block Appointment	
<ul> <li>Block Out - 30 Minutes</li> </ul>	
= Block Out - Holiday	
Dpen	
	0K Cancel
	UN Cancer

Click the Block slot you want to use, (try to use either Block Appointments or Block Out -30 Minutes), then drag it over to the time of the right side of the window.

Add Slots - US Room 2	? ×
Day <u>B</u> egin: Day E <u>n</u> d:	Schedule:
0845	
Time Interval:	8:45 AM
30	9:15 AM
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Display slot properties when adding a new slot	10:15 AM
	10:45 AM
Slot <u>G</u> roups and Types:	11:15 AM
= 45 Minute Slot	▲ 11:45 AM
- 450 Minute Slot	12:15 PM
= 480 Minute Slot	12:45 PM
= 510 Minute Slot = 525 Minute Slot	1:15 PM
= 540 Minute Slot	1:45 PM
= 570 Minute Slot	1.401 M
- = 60 Minute Slot	
= 600 Minute Slot	
= 660 Minute Slot	
- 690 Minute Slot	
- 90 Minute Block	
= 90 Minute Slot	
- Block Appointment	
Block Out - Holiday	
Block Out - No 30 Minute Appointments	
I Open	
	OK Cancel

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<ul> <li>● 嬰</li> </ul>								
								_ 8 ×
Mission         Scheduling: Appointment Book           Task         Edit         View         Help								
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Click OK and the slot has been added.

# Request List(Wait List)

When an order is placed in Powerchart, and a Request List Queue has been set-up, the scheduler will be able to look at the Request List to see what appointments need to be scheduled.

- 1. From Powerchart, select a patient using the person seach icon. Select the correct in-patient encounter.
- 2. From the Order Tab in Powerchart, place an order.
- 3. Sign the order, using the *icon* . Click the *to refresh the screen*. Ensure that the order is now in "ordered" status.
- In the Scheduling Appointment Book application, select the Request List Inquiry icon
   This will open the Queue window.
  - Select Queue only from the first drop down how and
- 5. Select Queue only from the first drop down box, and the appropriate queue from the second drop down box on the left side of the window.

Schedule Inquiry - Queue Only Iask Edit View Help		
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For Help, press F1	B1126 JALLEN Wednesday,	May 22, 2002 5:07 AM 🥢

6. Click "Find". This will bring up a listing on the right side of all the orders that have been placed in Powerchart that need to be scheduled that meet the requirements set in the request list.

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Request List	C OC Iso Stat		Action		Age:	Gender:		
Inquiry:	C OC Iso Stat		Action					
		Yes		Person Name	Appointment Type	Earliest Date	Time	Orders
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Find Clear Close	•					ALLEN Wednesday, May		<u>)</u>

7. Select the Person that will be scheduled, then right-click to bring up the option menu.

Yes Bool	
Y Yes Confirm Contact Modify <u>H</u> eschedule <u>H</u> old <u>C</u> ancel	, chris duling, Mir duling, Tw julie s, Cindy s, Joan s, Nona s, Lynn
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8. To schedule to requested appointment, click Schedule. This will bring up Appointment Attributes Window. Complete any required fields from the Scheduling Accept Format. Click Ok.

Appointment Attributes		? ×
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	OK	Cancel

9. This will place the appointment information into the Work in-progress box. Complete the appointment as normal.

Books Appointment	Work in-progress:
*Appointment Type:     Move       CT Spine W/Contrast        *Appointment Location:	Ivson, chris

#### **Requests and Inserts**

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Request button to the side of the WIP is for putting a patient on the wait list or the no show list or checking on a queue coming over from power chart.

Go to appointment tab and fill out the information in the accept format the appointment type, location, person and all required fields. Move this information over to the Work In Progress. Click on "REQUEST TAB" information box will populate you can choose date, time, day range. Tab to Request list box and choose from the field the department and pick wait list or no show from the field and double click and move or use arrows and this will populate in the "Selected request list. Click OK

When time comes available go to the "Schedule inquiry eye" or "Request list Queue" choose the department and the wait list or no show list click find , highlight the person in the box where the information populates and R click and go to Complete request or Schedule and complete information of date and time.

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Fill out required information in the accept format and move to WIP this will be used if an appointment for example is booked at 0730 and you want to put another appointment at that time you can Click the tab INSERT and the Insert box will populate put in the time required and click ok and the appointment will either appear beside or move the previous appointment down. Click confirm and fill out the required information.

## **Printing Reports**

To Print Reports from the Scheduling Appointment Book, follow the steps below:

- 1. Click on the Appointment Reports Icon in the tool bar:
- 2. The Screen Below will appear:



- 3. Select the appropriate tab (Person, Resource and Location are most often used)
- 4. Select the desired report from the drop down box.
- 5. Set filters of resource, person or location.
- 6. If appropriate, set start and end date of report.
- 7. Select the number of copies to print
- 8. Select printer from drop down box.

#### Hint: To default printer in all screens, right click on printer in box and click "Set as Default." This will stick for the time that the user is logged onto the application.

# **Adding Comments**

### **Slot Comments:**

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Highlight the slot you wish to put the comment on. R click and highlight slots and pick slot comments and the slot comments box populates. Fill in required information in the comment field , click OK .

To check on the comment in the slot if you have the icon checked in the book settings under properties and in the icon tab there will be a blue bubble on the top of the slot, click on the icon and the information about the slot will open. Or you can R click slot and slot comments.

#### **Resource Comments**

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Click on the resource in the appointment book or R click resource and highlight resource and click "Add Resource Comment, In the comment box put in the information in the description (what I do after I enter the info in the description field I just copy and paste in the resource comments box) Click add and Click apply and then close. Putting in the information concerning that resource the icon (blue bubble) will appear on the resource in the appointment book.

To check on the resource comment that was made, just click on the icon and the information box will populate with comment. Or you can R click go to Resource and view resource comments and comments will populate.

#### **Person Comments:**

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Click on appointment in appointment book R click go to person and then person comments and click "ADD" fill in comment box in comment description and copy and paste and put in Person Comment field click apply and close.

To see a comment for the person, click appointment, R click and go to person comments it will show what was said. If the name of person is in the demographic bar the bubble will appear and you can click on the icon and the information that was put in will populate. (you have to have the icon checked in the book settings.)

#### **Contact Comments:**

84	<b>Contact -</b> Records the date and time of any contact made with the person scheduled for the appointment, as well as allowing you a place to enter any applicable comments concerning the contact. For example, if you call the person to remind them of the upcoming appointment, you could document the contact in the Contact dialog box.
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Name: Person Comments: 2007	Contact  Contact  Name: PYKE, MIKE  Person Comments:	용 쇼 윤 🕮 4 5 🖻	Home Phone: (302) 566-2233	MRN: 00002172 Gender: Male Age: 26 Years	? X
June         June           Su Mo Tu We Th         7           27         28         29         30         31           3         4         5         6         7           10         11         12         13         14           17         18         19         20         21           24         25         26         27         28           1         2         3         4         5           08:05         SCHED         GEH         08:05           09:00         09:15         09:30         09:30           09:30         09:45         10:00         5	B- Ø PYKE, MIKE b- ♦ Asthma Cl QEH	General Summary Guidelines N Date: 2007.Jun-23 Comments:	Iotification   Conversation Summaries   Itine Ime:       	raries   Locks   Booking Notes	Chedule Contron Becur Suggest Request Insert
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Click the icon "Contact" in the toolbar or R click on the appointment and highlight Contact, the Contact box populates you can just put the date which default in or put a message in the comment field. Click OK

To view this you go to the Icon "Appointment View" or R click on the Appointment and go to "Inquiry" and Appointment View and click on the Tab "Action History" or "Action Details" it will show the date of contact. Or the same as above but go to Appointment History View and to the Tab" Action History" and it will show time of contact.

### **CR is Down**

#### **Process when CR is Down:**

When the CR is Down -

If you click YES, the following message appears.

Register	Patient 🔀
-	You must manually insert a downtime number.
	OK

- 1. Click OK, The Cursor will return to the MRN field (White in color see below).
- 2. Hold down on the CTRL key and hit the Insert Key A number will populate the MRN field from the alias pool

3.	Click OK	

🔆 Register Patient					_ 8 ×
🕷   🐮					
Last Name PAD	First Name ALICE	Middle Name	Nickname	Maiden Name	Gender Female
Date of Birth <mark>1978-Jul-23 → ▼</mark>	Age 28Y	MRN	Encounter Number	Disease Alert	Marital Status Married
Primary Language English	Interpreter Required	Religion	Church		
Patient Information Encounter In	nformation Contacts Insurance F	rimary Insurance Secondary Ins	surance Tertiary   Insurance Summa	ay	
Subscriber's Relationship to Pat	ient				
Last Name PAD	First Name ALICE	Date of Bith 1978-Jul-23	Gender Female	Street Address sdsdf	Street Address2
Country Canada 💌	City SSS	Province/State Prince Edward Island	Postal/Zip Code C1N 2N2		
-Plan Information Search for Health Plan					
Health Plan Financial Class PEIHI	Health Plan Type PEIHI	Health Plan Name PEIHI	Policy Number 1234557	Version Code	Expiry Date
-Subscriber Employer Info					
					OK Cancel
You can view the response to inquiru	now hu clicking the transaction for	lhar hutton		PBOD B	EGCLERK 007-Jun-2 11:27

#### Process when a number is mistakenly not Assigned:

User, clicks on the "Add Person " button, to carry out a Registration but mistakenly does not use the "Search for Person Icon to obtain a new MRN/PHN.

1. The following message will appear when you click OK to complete your registration.



2. IF you Click NO (Twice) a message presents below:

Register Patient	
¥	You must request a MRN from the CR. Please submit the query.
	OK

- 3. When You click OK, the message closes.
- 4. Carry out the process of getting a number from the CR by clicking on the " Search for Person Icon (with the green checkmark) top left hand corner.
- 5. Continue steps of assigning new number.
- 6. Complete the registration.