Appointment Scheduling

Drag and Drop Method

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

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





- 3. Click a specific book and then click (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
Pers	on Name:
Gon	zales, te
-	

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.)

🎗 Person Search							?	? ×
Name:	Name	SSN	MRN	Gender	Birth Date	Age	Phone	
Gonzales, te	😰 Gonzales, Ted	234-12-3212	000-067	Male	1/1/1970	35 Years	(123) 413-2412	
MBN:								
SSN:								
Birth Date:								
Gender:								
•	FIN NBR Enc 1	ſype ∣ Med S	ervice F	acility F	leg Date	0	lisch Date	
FIN NBR:	📲 000084 Emer	gency Cance	r Center E	WMC 1	1/4/2004 9:	49 AM 1	1/4/2004 9:55 AM	_
	🗐 000083 ER T	emp Cance	r Center E	WMC 1	1/4/2004 9:	41 AM 1	1/4/2004 9:49 AM	
<u>S</u> earch <u>R</u> eset								
	ок (Cancel	Preview	v	Add Person	Add	Encounter Modify	

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.

🔨 Person Search							? ×
MRN/PHN: Last Name: Screen First Name: Cap Middle Name: Gender: Female	No persons found.						
Birth Date: 1978-JUL 23	No encounters found.	OK	Cancel	Preview	<u>Á</u> dd Person	Add Encounter	Modíy

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

preen	First Name Cap	Middle Name	Nickname	Maiden Name	Gender Female	Date of Bith 1978-Jul-23	
IN	-			,			- Jacob
abent Information Insuran	ice Primary						
Street 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
Business Phone Number	Email Address	_					
Temporary Address Street Address	Street Address2	Country	~	Province/State	Postal/Zip Code	Tanana Pitana Manhari	Cell/Pager Number
	Steet Address2	Country	City	Movince/state	Postal/20p Code	Temporary Phone Number	Cel/Pager Number
Physician Information Family Physician	M						
Jser ID REGCLERK	_						
Person Comments New Person Comment	_						
Previous Person Comments							

- 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.

Encou	nter Selec	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> a	id 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)

Interfact First fram Midde Name Nickname Good Matter Name Out of Bits April 100 Carl Bits April 100 April 100 <t< th=""><th></th></t<>	
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Intern Addensity Exercit Country City Perinter/Filtate Perint/City Code House Thome Number Call Page N universe Prove Number Email Addensity Email Adde	
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OK	

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".

Pre Admit							_ 5
t Name REEN	First Name CAP	Middle Name	Nickname	Gender Female	Maiden Name	Date of Bith	Age 28Y
N	Encounter Number	Marital Status	Phimary Language	Interpreter Required	Religion	Church	2
atient Information Encount	er Information Contacts Insu	rance Primary Insurance	Secondary Insurance Tettiary Ins	urance Summary			
Mailing Address Street Address	Street Address2	Country Canada	City Summerside	Province/State Prince Edward Island	Postal/Zip Code	Home Phone Number	Cell/Pager Number
Business Phone Number	Email Address	_					
emporary Address Treet Address	Street Address2	Country	City	Province/State	Postal/Zip Code	Temporary Phone Number	-
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							OK Canc

17. The "**Search for Person**" Icon top left of the screen presents with a green checkmark.

18. Click on the Green checkmark (Search Person Icon)

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Search for Person Box opens

Last Name First Name Middle Name Date of Birth Gender Provincial Health Number Street Address St	🦻 Search	for Perso	n					_	
4	_ast Name	First Name	Middle Name	Date of Birth	Gender	Provincial Health N	lumber	Street Add	ress Stree
									•
OK Search Cance									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)

C2										
Assign PHN										
t Name REEN	First Name CAP	Middle Name	Nic	name	Gender Female	= h	Maiden Name	Date of Bith 1978Jul-23	Age 28Y	
									• J201	
N	Encounter Number	Marital Status	Prin	ary Language	Interpreter Required	- 5	Religion	Church	-	
	1		-	-		•	•		•	
atient Information Enco	ounter Information Contacts Insur	rance Primary Insurance S	econdary Ir	surance Tertiary Insuranc	e Summary					
failing Address										
treet Address	Street Address2	Country		e anmerside	Province/State Prince Edward Island		Postal/Zip Code C1N 2N2	Home Phone Number (902) 436-2222	Cell/Pager Number	
		Jeanada	- 1º	2111012120	prince consideration		o in ene	lignet againerer	IO -	
lusiness Phone Number	Email Address	_								
emporary Address										
treet Address	Street Address2	Country		2	Province/State	пË	Postal/Zip Code	Temporary Phone Number		
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lew Person Comment										
Trevious Person Comme	nts									
									OK	Care

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 progres
Person Name: Gonzales, Ted *Appointment Type: Ct a Appointment Location:	 Appointment Type Help CT Abdomen CT Abdomen/Pelvis	Move ► Ne <u>x</u> t Clear	? ×
		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:	
	<u> </u>
BE CT BW CT	<u> </u>
	572072005

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:	Move Next Next Location Help Location BE CT BW CT			? X
			ОК	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.

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.

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e 🏕 🕯 📾 🕷 🍕							
			Person Comments:		MRN: 01-000216	DOB: 1/12/1980	
ame: test, cerne	r				Age: 24 Years	Gender: Male	
▲ 2004	Books App	ointment			₩ork in progress:		
	*Annoint	ment Type:		<u>M</u> ove ▶	E 👩 test, cerner		<u>S</u> chedul
u Mo Tu ₩e Th Fr S	a CT Head	ment Type.			白 爺 Current Sched	lule	Confirm
1 2 3 4 5 6 8 9 10 11 12 13 1		ment Location:		Ne <u>s</u> t		ms	<u>R</u> ecur
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	oom 1	CT Room 2					-
7:00 AM			/				
7:00 AM 7:15 AM 7:30 AM		/					
7:15 AM 7:30 AM 7:45 AM							
7:15 AM 7:30 AM 7:45 AM 8:00 AM Rad Visit	 @	ad Viet					
7:15 AM 7:30 AM 7:45 AM 8:00 AM 8:15 AM		ad Vex	- 				-
7:15 AM 7:30 AM 7:45 AM 8:00 AM RadVisit		iad Viek					-
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7:15 AM 7:30 AM 7:45 AM B:15 AM B:30 AM B:30 AM B:30 AM B:30 AM B:45 AM B:30 AM B:45 AM B:30 AM		51 Mot					

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 Appointr	ment Book					_ 8 >
<u>T</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp						
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🕫 🚓 🌡 🔊 🎘 🌖						
N		Person Comments:		MRN: 01-000216	DOB: 1/12/1980	
Name: test, cerner				Age: 24 Years	Gender: Male	
2004	Books Appointment			Work in progress:		
	*Appointment Type:		Move ►	E- 👩 test, cerner		Schedule
Su Mo Tu ₩e Th Fr Sa	CT Head			E- Schedule		Confirm
1 2 3 4 5 6 7	P	. التنا	Ne <u>s</u> t	E BWMC		
8 9 10 11 12 13 14	*Appointment Location:		<u>C</u> lear	E- S CT Rooms E- Patient		<u>R</u> ecur
15 16 17 18 19 20 21	BWMC		ANR			Suggest
22 23 24 25 26 27 28 29 30 31 1 2 3 4	*Person Name:					Request
5 6 7 8 9 10 11	test, cerner					
	, 					
		8/9/2004 - CT Ro	oms			
CT Room						<u> </u>
8:00 AM Rad Visit	CT Head					
+ → 8:30 AM	test, cerner Pending					
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9:00 AM						
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10:00 AM						
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11:15 AM						
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12.00 mill						-

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.

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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.

Name: Gonzales, T	ed	MRN: 000-067	DOB: 1/1/1970
		Age: 35 Years	Gender: Male
Gonzales, Ted	Summary General Resource View Guid	elines Notification Convers	sation Summaries Itinera
E CT	Gonzales, Ted	Med Rec Nbi	r: 000-067
Gonzales, Ted	Allergies: Allergies Not Recorded		
	5/20/2005 - 8:00 AM 30 Minute	es CT Abdomen	BE CT CT Room 1
	BEMC		
	Orders: CT Abdomen w/ + w/o Contrast		
	Preparations:		
	Chest, Abdomen or Pelvis: Call the facility at which you are h	aving the exam to see if	you are to receive
	contrast dye in the veins and/or contrast dye that you	drink. If you are only hav	ving the dye in the
	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 hou exam (except the dye as directed)	rs prior to the	
	medications with a small amount	ofwater. You can pick	
	Jun the contract drink at the facility	you are having your ava	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		
	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		