SELF-GUIDED PRACTICE WORKBOOK [N81]
CST Transformational Learning

WORKBOOK TITLE:

RadNet- Clerk
(MI Clerk / MI Supervisor)

Sechelt

Last update: October 12, 2018 (v.2.3)

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SELF-GUIDED PRACTICE WORKBOOK

Duration	8 hours
Before getting started	Sign the attendance roster (this will ensure you get paid to attend the session). Put your cell phones on silent mode.
Session Expectations	This is an instructor led learning session. The workbook provides different scenarios that are applicable to your daily workflow. Each scenario will allow you to work through different learning activities at your own pace.
Key Learning Review	At the end of the session, you will be required to complete a Key Learning Review. This will involve completion of specific activities that you will have had the opportunity to practice through in the scenarios.

Introduction

Welcome to the Medical Imaging classroom session. This workbook contains scenarios meant to mimic the functionalities used in your daily practice. This workbook is designed to introduce you to a variety of Cerner system functionalities. While working through this workbook, you may find yourself completing tasks that are not be specific to your role, however all tasks are designed to cover key functionalities of the system that you can apply to your own work.

Using Train Domain

You will be using the train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

- Scenarios and activities are designed to demonstrate CIS functionality and **may not reflect exact workflows.**
- Some **clinical scenario details have been simplified** for training purposes.
- Some **screenshots may not be identical** to what is seen on your screen and should be used for reference purposes only.
- **Follow all of the steps outlined** to be able to complete activities.
- If you have any trouble, please **raise your hand for assistance** immediately in order to use classroom time effectively.

PATIENT SCENARIO 1

Learning Objectives

At the end of this Scenario, you will be able to:

- Access the patient and encounter details in PowerChart
- Register patients using Department Order Entry (DOE)
- Use DOE to create an order and activate future orders
- Modify, replace and cancel orders at Radiologist's request in RadNet
- Check allergies and add notes to an order

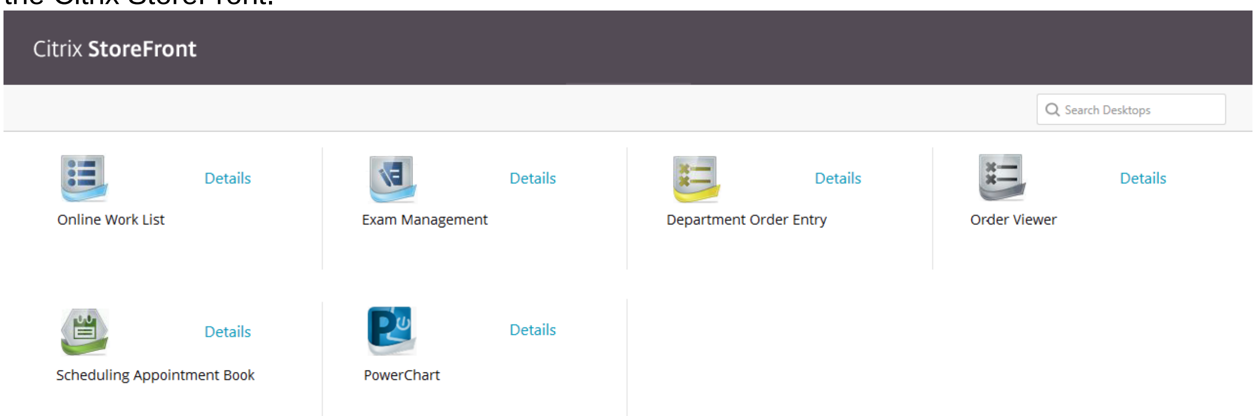
SCENARIO

This first part of the course is a step by step guided introduction to PowerChart and RadNet. You will be asked to accomplish a variety of tasks that are part of your daily workflow, and you will be guided through them. Follow the guidelines included to move through the scenario.

Activity 1.0 – Logging onto Citrix

1 When you start your shift, you will be using a device to log onto the computer called **Tap n' Go**. This will either look like a black device resting near your keyboard or it will be plugged in to a USB on the side of the Workstation on Wheels (WOW). You must log into your workstation at the beginning of your shift using your password; the rest of the day you will be able to tap using your Photo ID card to log in and log out.

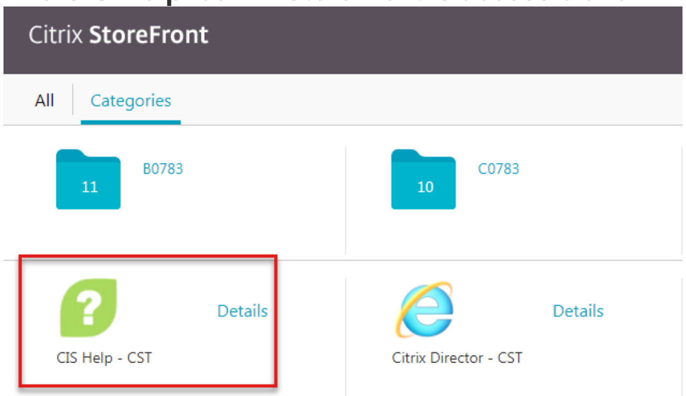
After you log in, your name will be located at the top right hand corner of your screen. This is important to note as you **must not** use anyone else's log in for Privacy and Security reasons. In the top left corner of your screen you will see the Launchpad and a variety of apps you will be using in your day to document your patient care. You can also click into the Launchpad where you will see the Citrix StoreFront.



This is where you will access the same RadNet areas in your top toolbar such as the patient chart called PowerChart, the Online Work List, and Department Order Entry etc. where you will be doing the majority of your work. You should only have one of each application open at a time. Having more may cause errors in your work.

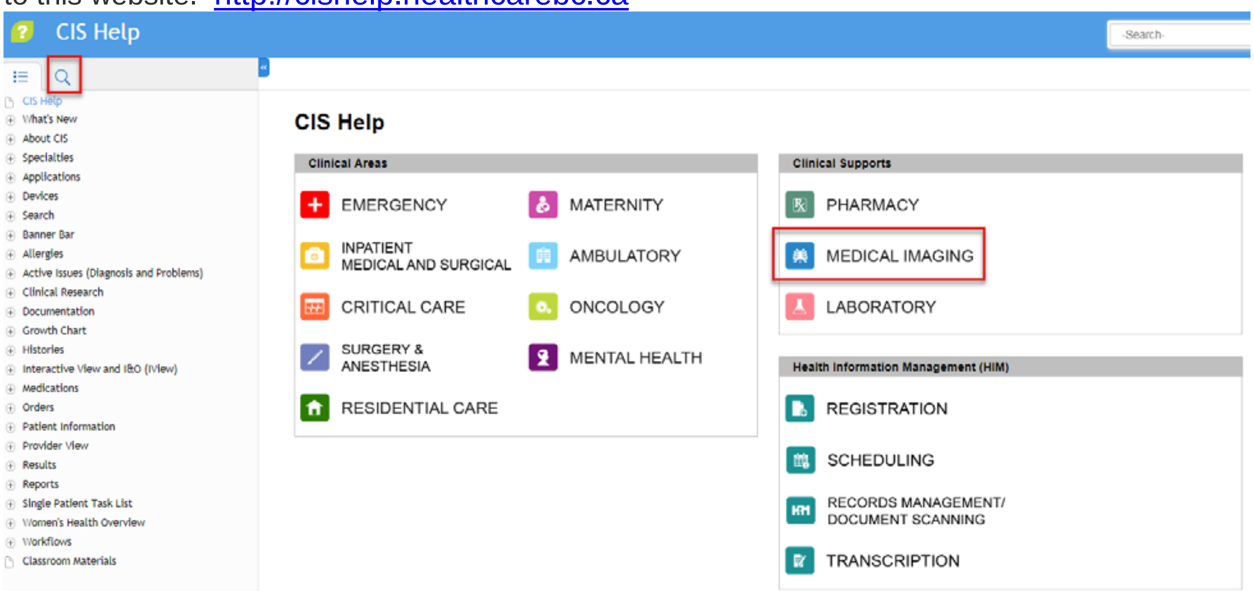
2 **PowerChart** is the main patient record where all clinical information is stored. You will continue to access patient information as previously done. When the whole hospital uses the Clinical Information System (CIS) you will be able to use PowerChart.

3 The **CIS Help** icon in StoreFront is accessible for when you need help.



You can access all the Medical Imaging and Registration workbooks as well as Help Topics that go over education that may not be in the workbooks. If you have any questions about the CIS, access this area first.

It is also available as an external website and can be accessed at home or from work by connecting to this website. http://cishelp.healthcarebc.ca



Activity 1.1 – Register a Patient in PM Office

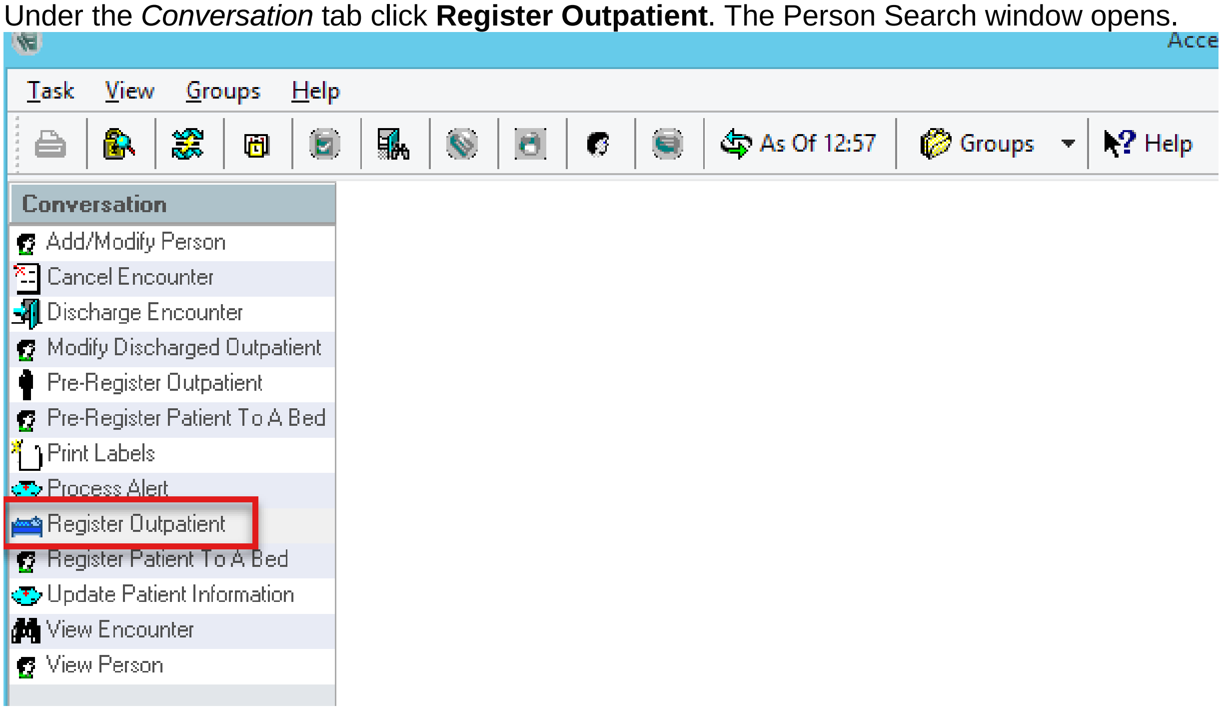
A patient needs to be registered in the Clinical Information System in order to have clinical procedures performed. Each order or clinical procedure needs to be attached to an encounter (formally known as the account number), either as a Current Encounter or a New Encounter. A patient can have more than one encounter open at a time; this is why it is important to choose the correct encounter when you work with a patient. You can place multiple orders on the same encounter.

In this scenario, your outpatient arrives with a requisition from their GP for an ankle X-ray. You will **Register** the patient and create a **New Encounter** in **PM Office** then place an order for **XR Ankle Right** in **Department Order Entry (DOE)**.

1 Access PM office

1. Click the **PM Office** 

icon from StoreFront to launch the application.
2. Under the *Conversation* tab click **Register Outpatient**. The Person Search window opens.



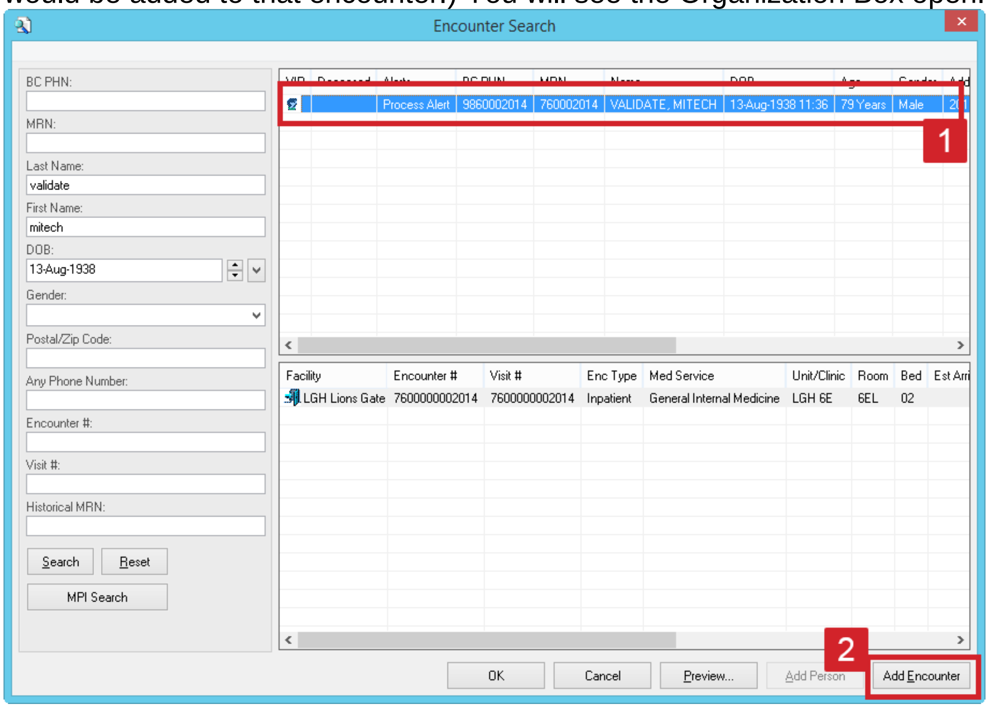
3. **Search** for your patient using their PHN, Last Name and First Name. (Use your login card).

NOTE: In your work, you will search for patient using their MRN or PHN first. If you do not find your patient, you can search by their Last Name, First Name and Date of Birth. For more information on this and how to create a New Registration, please refer to your Registration classroom training.

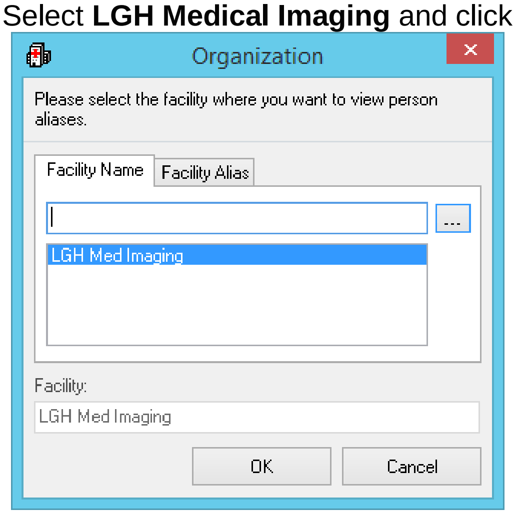
2 Add an Encounter

After clicking *Search*, your patient will be viewable in the top box.

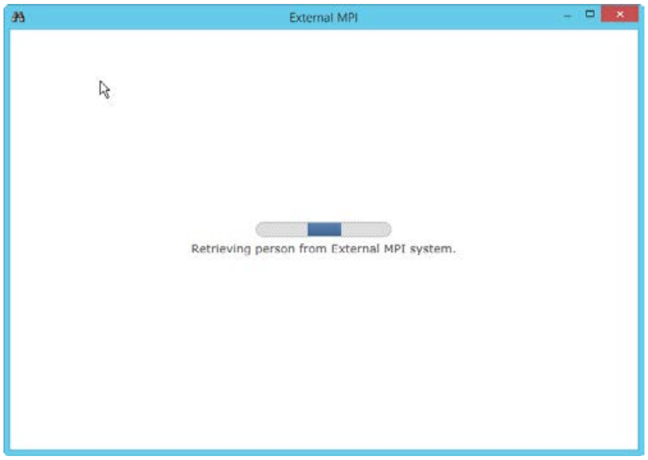
1. Select your **patient** to highlight it in blue. Their list of the patient's encounters will open in the box below.
2. Click **Add Encounter**. (If you clicked on an encounter the patient already has, the order would be added to that encounter.) You will see the Organization Box open.



3. Select **LGH Medical Imaging** and click **OK.**



4. The EMPI Search window will open. Click **Close**. (Note that the EMPI is not set up in the train environment so no information will display).



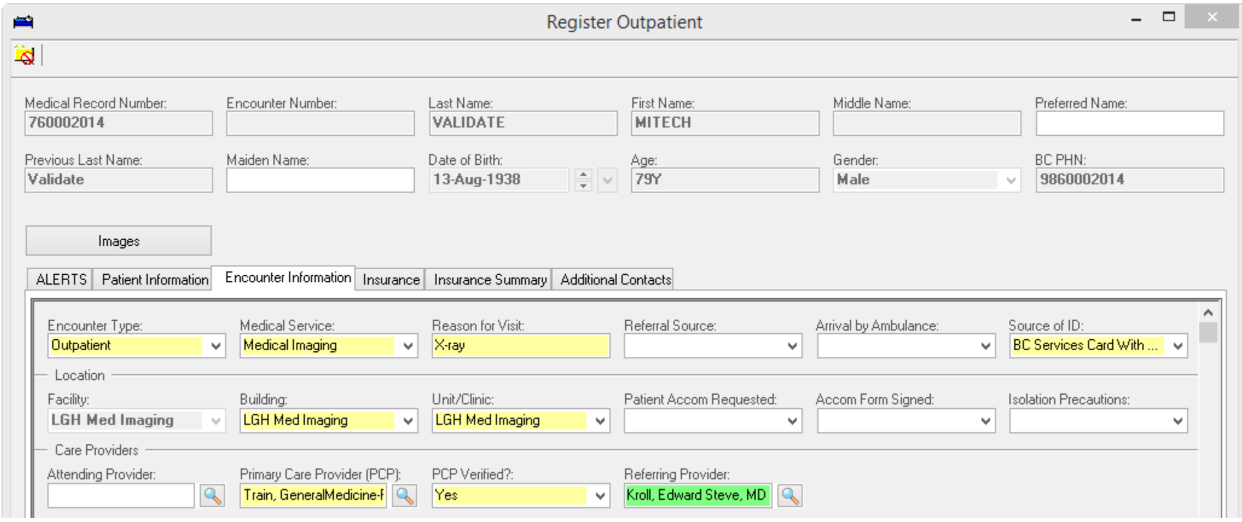
NOTE: Warning pop-ups may alert you that your patient has an active encounter. Because DOE is primarily for walk-in patients, you likely will be creating a new encounter for their exam.

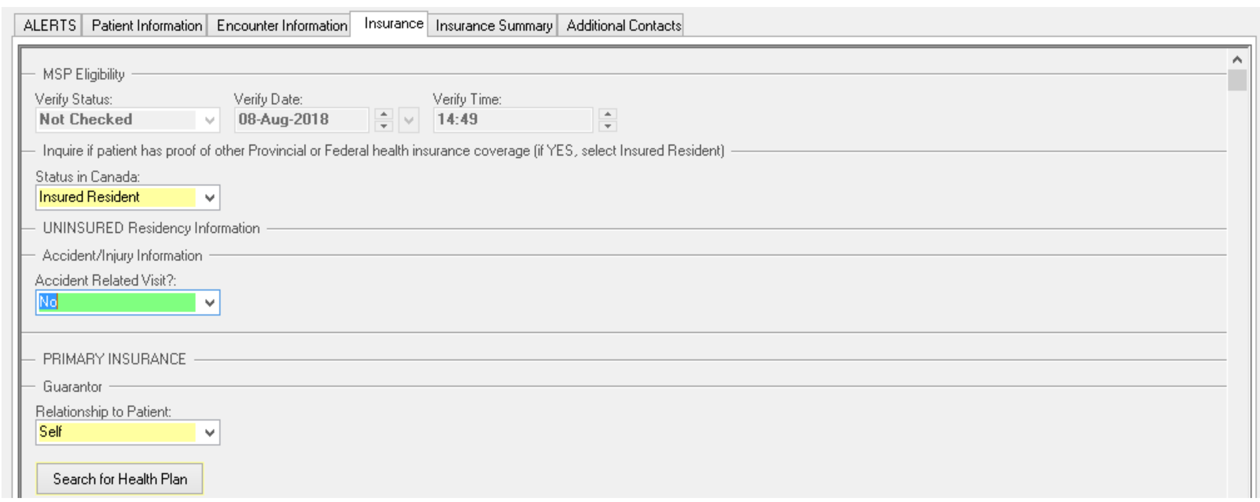
3 The **Register Outpatient** box will open. You will see various tabs to review and input information.

All mandatory fields are highlighted in yellow.

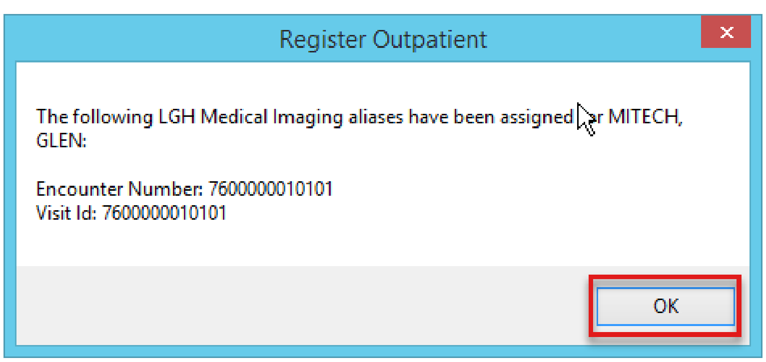
Complete all yellow fields with the following patient information:

1. Ensure **Patient Information** tab information is correct.
2. Under the **Encounter Information** tab
   - g) Encounter Type: *Outpatient*
   - h) Medical Service: *Medical Imaging*
   - i) Reason for Visit: *X-Ray*
   - j) Source of ID: *BC Services Card with Photo*
   - k) PCP Verified?: *Yes*
   - l) Referring Provider*: Kroll, Edward Steve*
3. Under the **Insurance** tab
   - d) Status in Canada*: Insured Resident*
   - e) Accident Related Visit?: *No*
   - f) Search for Health Plan button, type: *MSP …* Then select*: see card British Columbia*
4. Click **Complete,** once the information is entered**.** If there are any required fields not complete, it will move your curser to what is missing. You are required to complete any missing information before moving to the next step.





4 A pop-up window with the Encounter number and visit identification number will appear. Note the number and click **OK**.

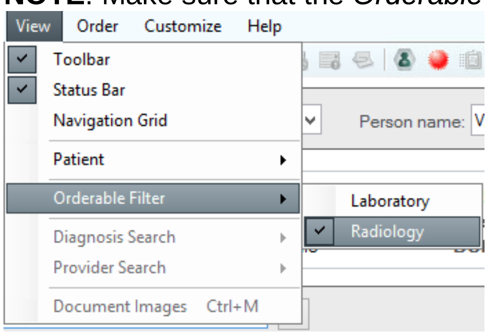


Activity 1.2 –Place an Order Using Department Order Entry (DOE)

RadNet is where you will spend most of your working hours. The applications will allow you to complete the daily tasks in your department. For further education regarding RadNet, please complete the Learning Hub e-learning module. This will review the main functionalities of RadNet including: **Department Order Entry (DOE)**, **Online Work List**, **Exam Management**, and **Order Viewer**.

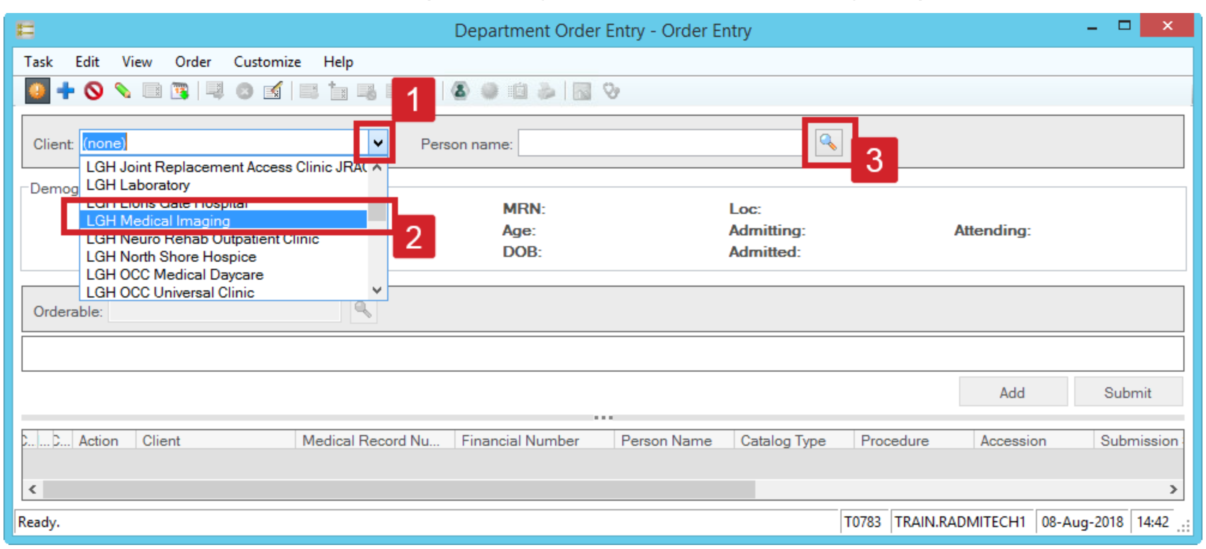
Department Order Entry (DOE) will primarily be where you create orders for an outpatient who requires an exam.

NOTE: Make sure that the *Orderable Filter* in DOE is set to **Radiology** under view in the toolbar.



1 Open **DOE**  from Storefront by clicking on the icon. Once in the application:

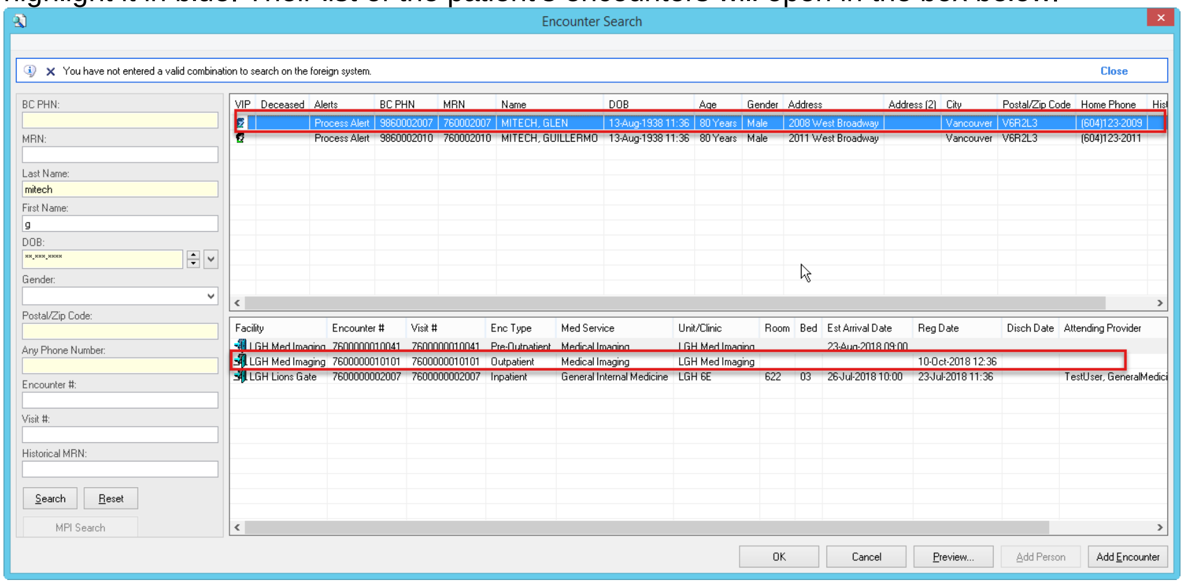
1. First select the **Client** which you will select from the drop-down menu.
2. Select **LGH Medical Imaging**. Note* this will be your site's Medical Imaging area.
3. Click on the **Magnifying Glass** to select the **Person Name.** It is a registration best practice to open your patient via the Person Search.
4. The Person Search will open and you can now search for your patient.



2 Select an Encounter

The Encounter Search window will open. Search for your patient using their PHN, Last Name and First Name.

1. After clicking **Search**, your patient will be viewable in the top box. Select your **patient** to highlight it in blue. Their list of the patient's encounters will open in the box below.



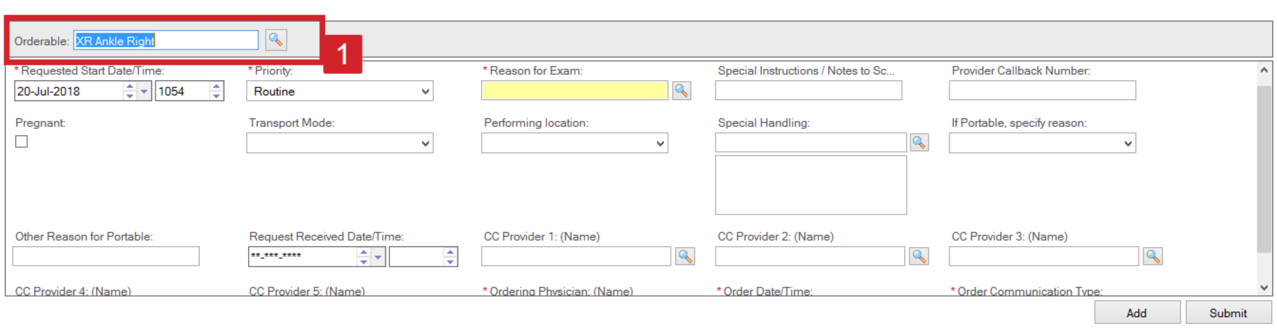
2. Double-click the **Encounter** you just created. Look at the *Reg Date* and ensure there is no *Discharge Date* to make sure you are selecting the correct encounter.

3 Create an Order

The Department Entry – Order Entry which remained opened in the background is now populated with your patient information.

1. Identify the **Orderable** section and type in the order you want to place: ***XR Ankle Right*** and press the **Enter** button on your keyboard. After your selection, the information for this order will populate below.

NOTE: If the search cannot find your order or you want to explore other orders, you can also click the **Magnifying Glass** to see all order options available. For example, if you type *XR* and click the **magnifying glass**, all XR orders will populate.

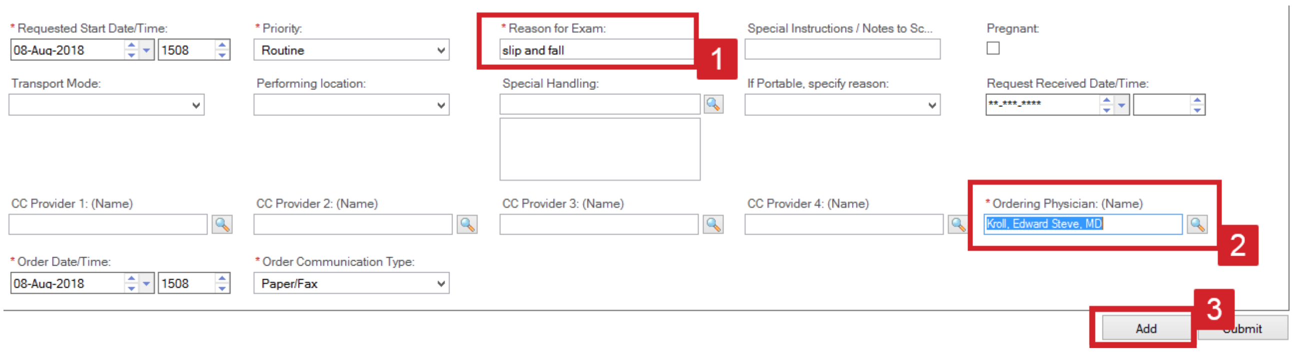


NOTE: If the order doesn't move into the working space, double-click the order.

4 Complete the mandatory information shown in yellow.

1. Reason for Exam: *slip and fall*.
2. Ordering Physician (Name): *Kroll, Ed*.
3. Click **Add**.

NOTE: If a patient requires multiple orders, keep entering the subsequent exams into the orderable and click Add. Once all orders are in the Ordered area, you can move to the next step.



5 You are now ready to submit your order. Review the information in the box below and then click **Submit**. The Order Status changed to *Submitted*. The Accession Number is assigned at this time.

Anything submitted that is in an ordered status, will also show up on the **Online Work List.**

6 To see your Order in the Online Work List, click on the **Online Work List** icon  from **Storefront**. This is another application in RadNet and is used to show orders and order statuses. This is the main area technologists will add allergies, cc other providers, as well as Start and Complete exams in **Exam Management**.

NOTE: An Options pop-up will occur if this is the first time you opened the Online Worklist. Click OK to pass through.

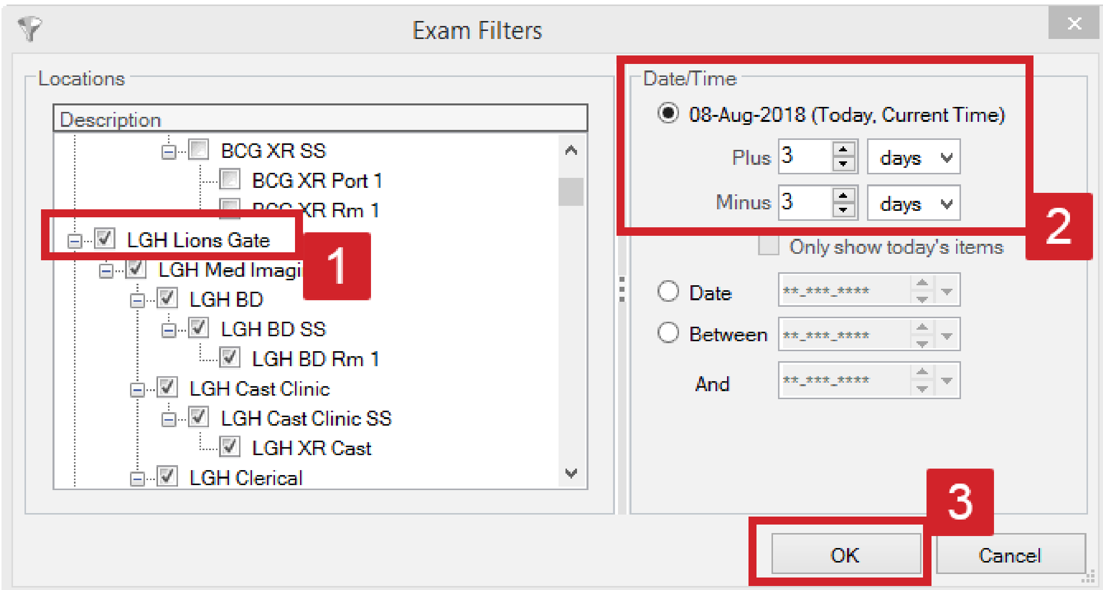
Set Filters for the Online Work List

When you first open the **Online Work List**, you will need to set your filters appropriately to view your order. When you have your own log in you can set it up to your specific location and modality. You will likely select the current date plus or minus 12 hours.

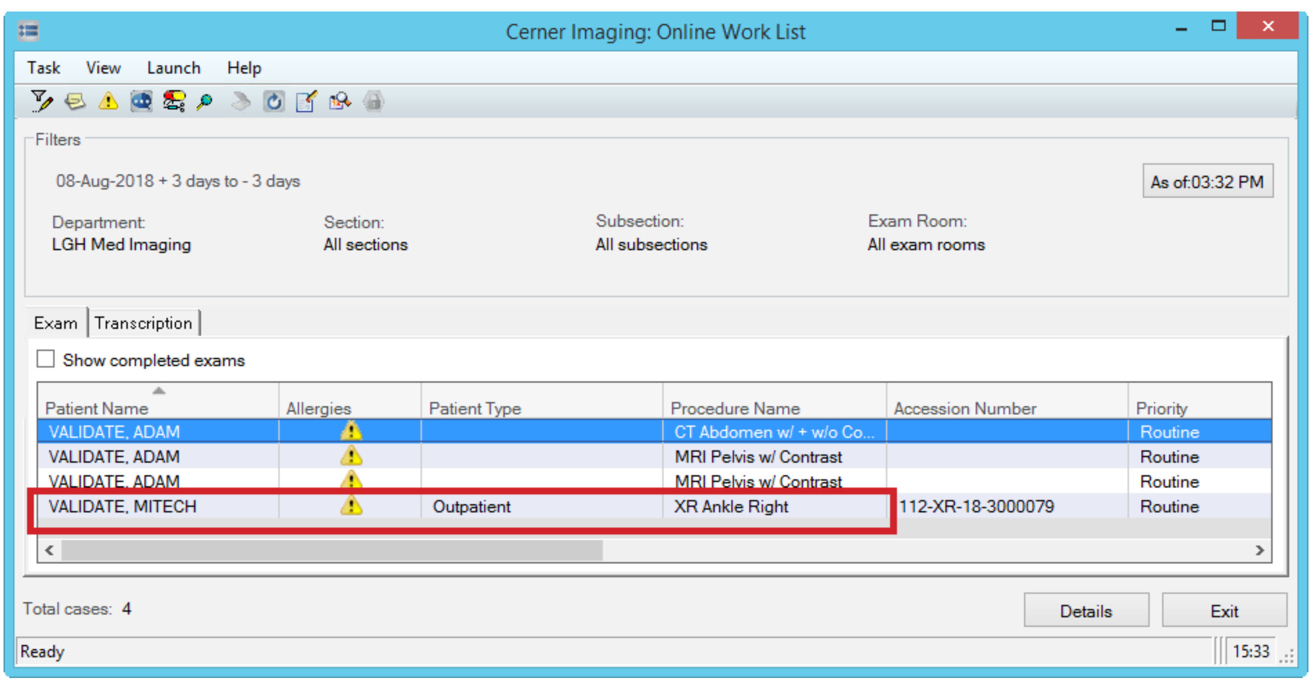
For this activity, In the Exam Filters window,

1. Select your **Location:** *LGH Lions Gate* 

2. Select the **Date/Time** interval for your current date, plus/minus 3 days
3. Click **OK**.



7 You should now see your order in the **Online Work List**.



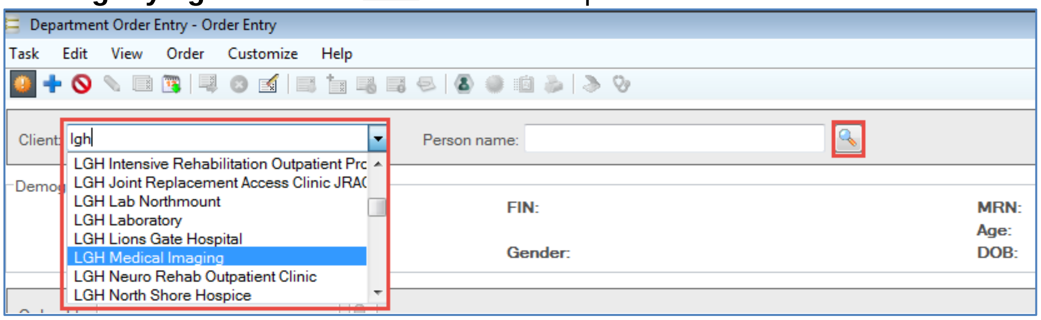
NOTE: You can set colour preferences from the View button to identify order types such as STAT, portable etc. once you have your own account to set personal preferences.

Activity 1.3 – Create a Duplication Order using DOE

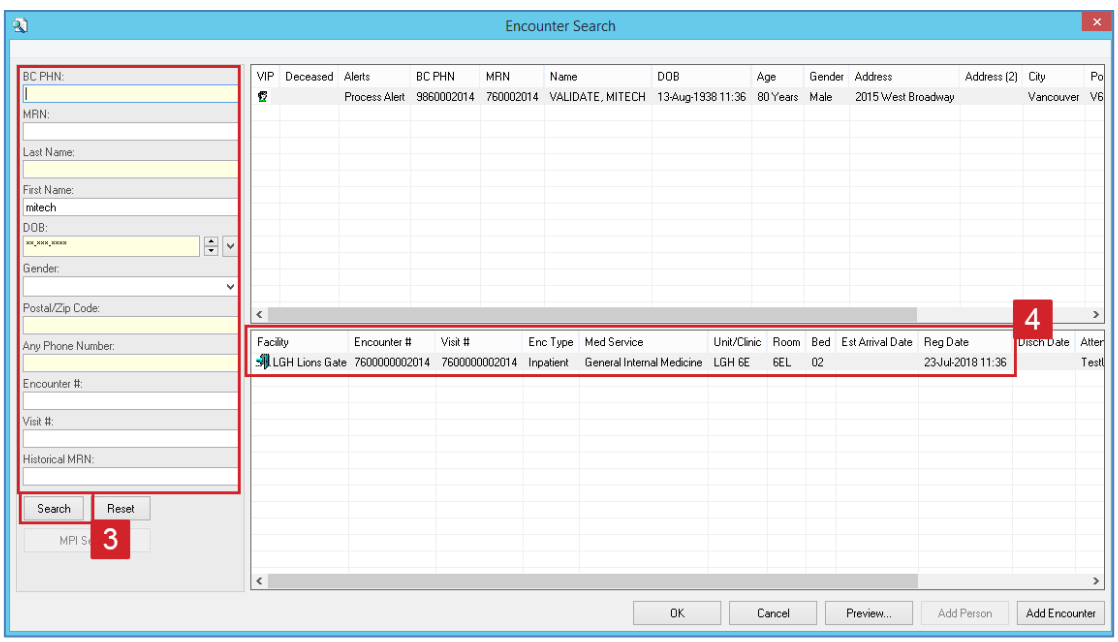
You may get a request from a patient, Health Records, or another health care provider to supply a copy of the patient records. To do this, it is required to create a Duplication Order in the CIS.

1

1. Open **Department Order Entry (DOE)** by clicking on its icon.
2. Choose the Client from the drop-down list. Then, search for the patient name by clicking on the **Magnifying Glass** icon which will open the **Encounter Search** window.

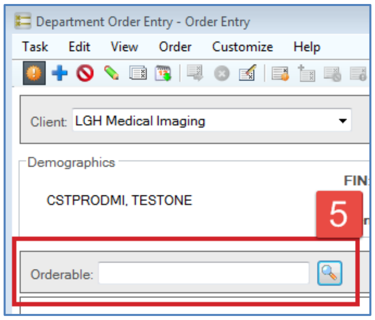


3. Search for your Patient.
4. Select your Patient and the encounter you want to create the Duplication Order against.



You will now see your patient populated in the banner bar in DOE.

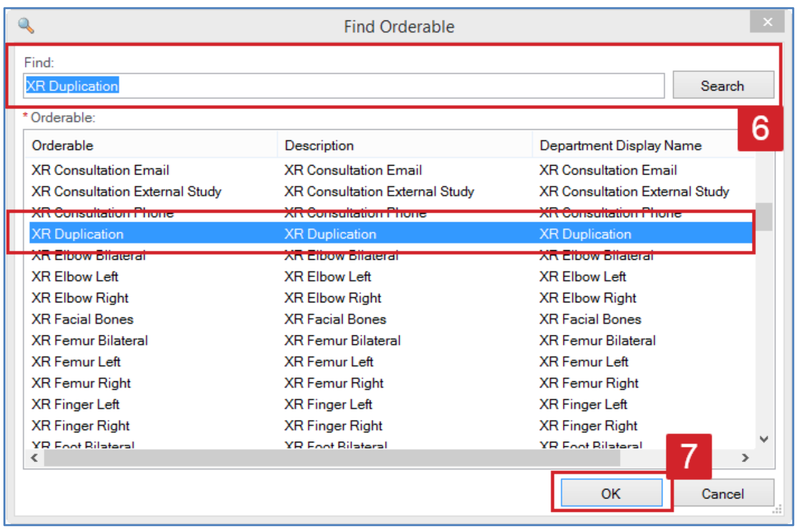
5. Click **Magnifying Glass** icon beside Orderable.



The **Find Orderable** window will open.

6. Search for the modality followed by Duplication. Using our previous example of **XR Chest,** select **XR Duplication**.

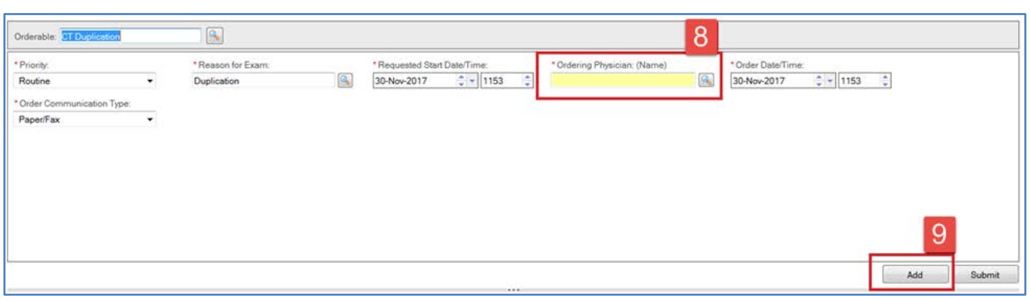
7. Click **OK**



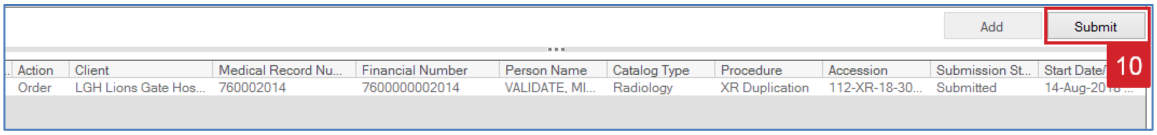
The Order will now populate into the DOE window.

8. Fill out the **Ordering Physician** mandatory field using **Test, Alex.**

9. Select **Add**

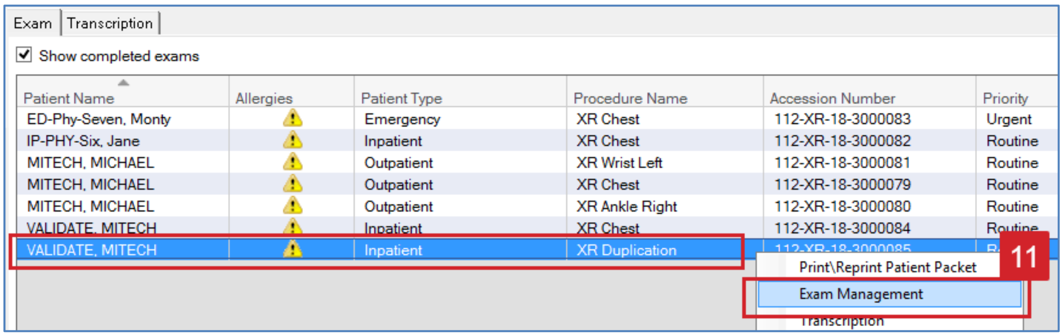


10. The Order will now move to the bottom window. Click **Submit**.



You can now find the Duplication Order in the **Online Work List**.

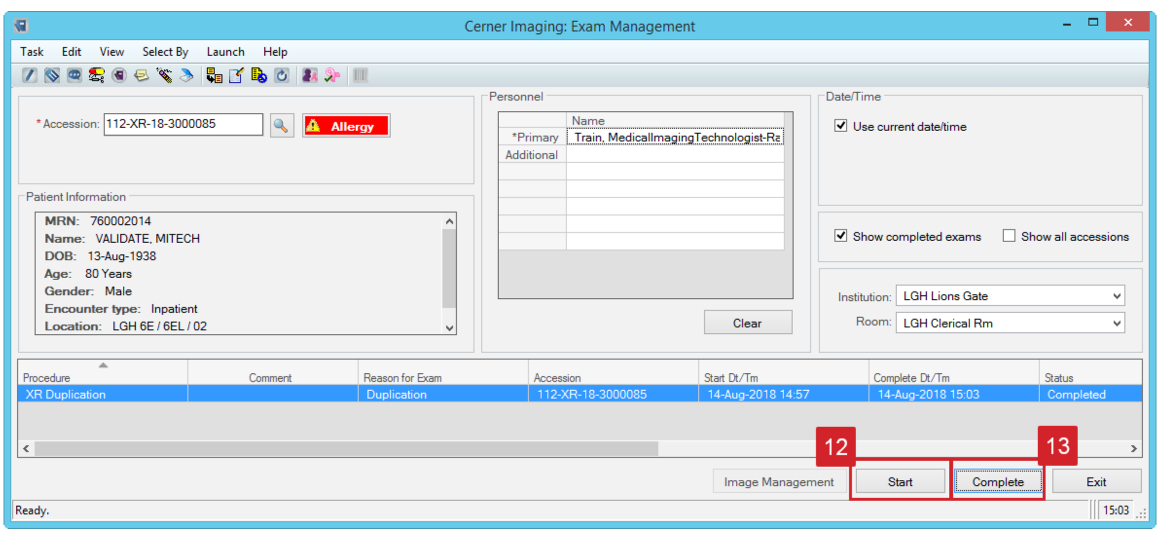
11. Right-click the Order in the **Online Work List** and select **Exam Management**.



The **Exam Management** window opens. By default, your name will display in the Personnel List.

12. Click **Start** changing the status to Started.

13. Click **Complete**.

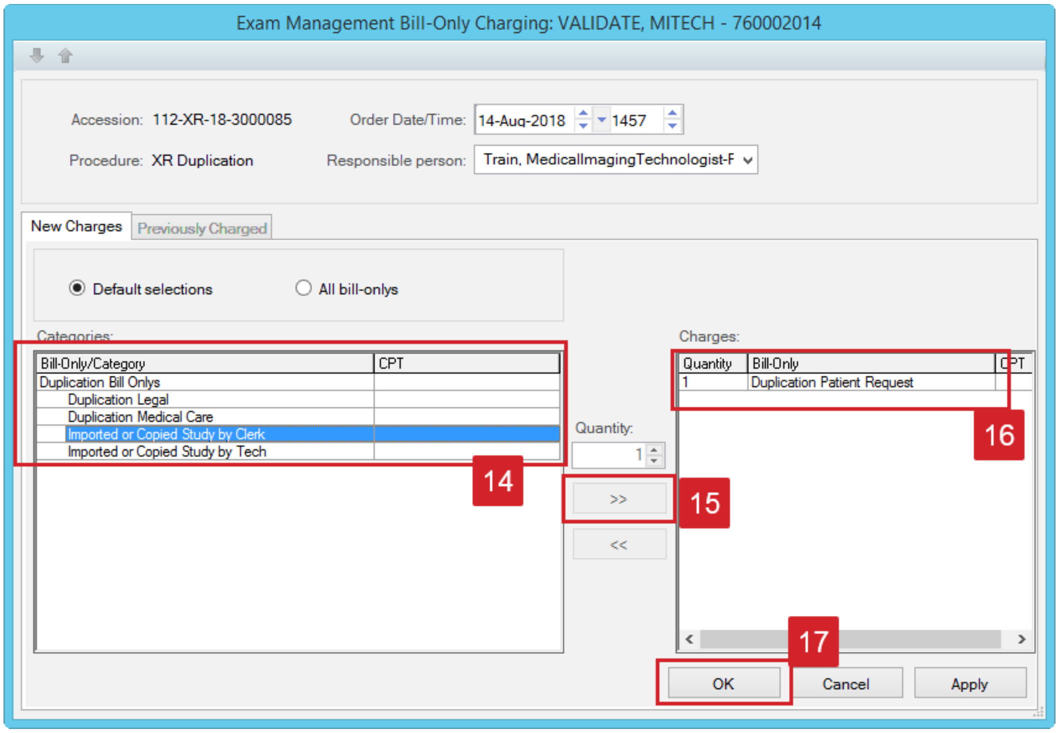


The **Exam Management Bill- Only Charging** window opens.

14. Select the **Bill-Only/Category** to bill to.

15. Use the right-facing arrow to move it to the **Charges** window.

16. Click **OK**. You can now exit out of the Exam Management Screen.


Exam Management Bill-Only Charging: VALIDATE, MITECH - 760002014
Accession: 112-XR-18-3000085
Order Date/Time: 14-Aug-2018 1457
Procedure: XR Duplication
Responsible person: Train, MedicalImagingTechnologist-F
New Charges
Previously Charged
Default selections
All bill-onlys
Categories:
Bill-Only/Category
CPT
Duplication Bill Onlys
Duplication Legal
Duplication Medical Care
Imported or Copied Study by Clerk
Imported or Copied Study by Tech
Quantity:
1
>>
<<
Charges:
Quantity
Bill-Only
CPT
1
Duplication Patient Request
14
15
16
17
OK
Cancel
Apply

Activity 1.4 – Exploring the RadNet Online Work List: Modify Order Details, Replace and Cancel Orders

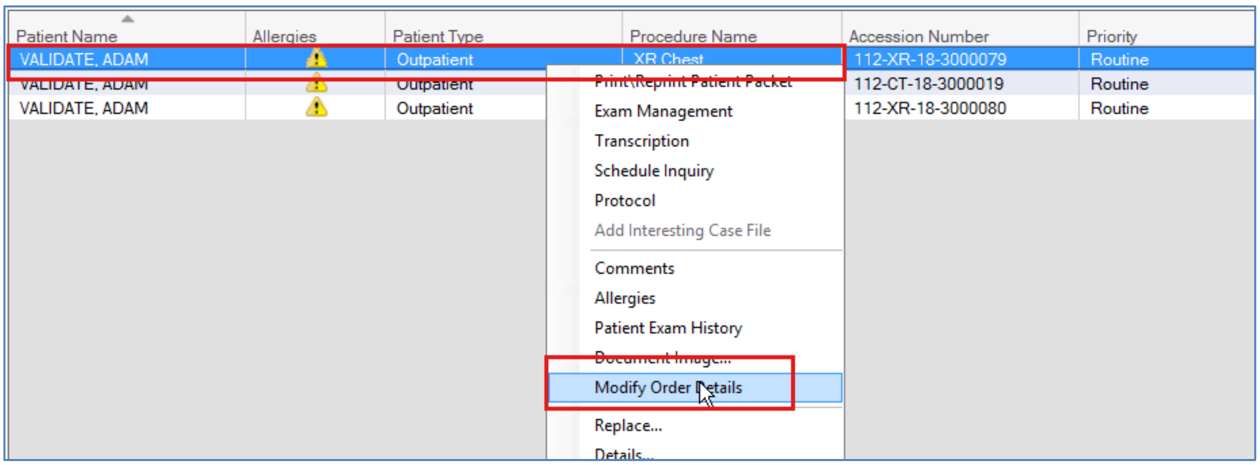
Actions on the order such as modify, replace or cancel, can be accessed from the **Online Work List**. Prior to choosing the action, click on the order to highlight it in blue.

NOTE: Most of the actions available in the menu bar at the top are also available to you by selecting the patient/exam and right-clicking.

1 Modify an Exam

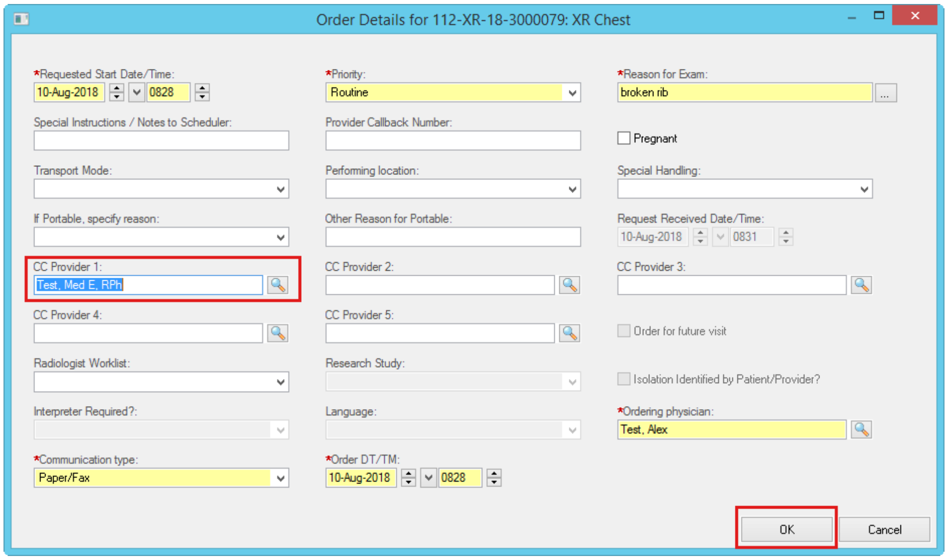
Use the same patient from the previous activity and modify the **XR Chest**.

1. Select the order you would like to modify by highlighting it in blue.
2. Right-click on the order and select **Modify Order Details**.



The Order Details pop-up window opens. You can modify the order details here as required such as adding their transport mode, whether an interpreter is required or cc'ing another provider so they can get a copy of the patient's results. Explore all the fields and ensure all yellow mandatory fields are complete.

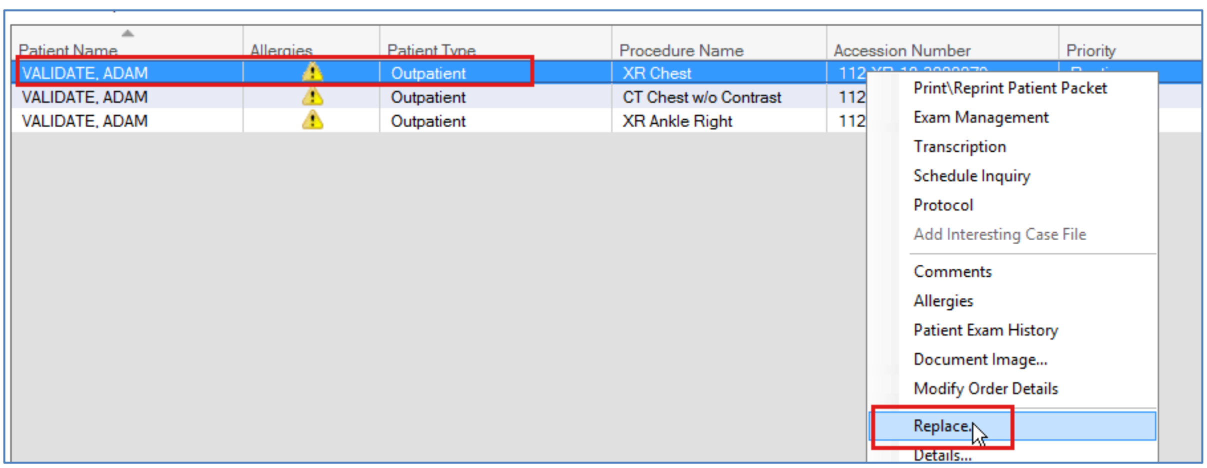
1. Add a new **CC: Provider**: *Test, Med E.*
2. Click **OK**



2 Replace an Exam

The Radiologist comes to you and says that they'd like to change the **XR Chest** to an **XR Chest/Abdomen Single Exposure**.

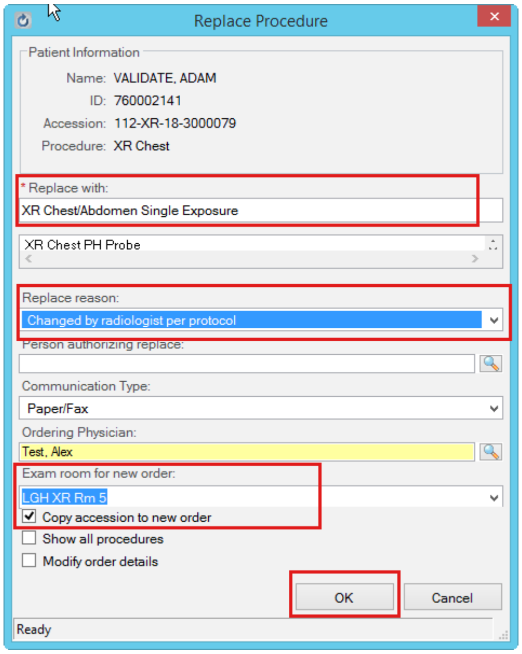
1. Select **XR Chest** so it is highlighted
2. Right-click and select **Replace**.



The Replace Procedure window pops up. Explore this window. You can scroll and choose from a list of most usual exams used to replace the initial order. If the requested replacement exam is not in the list, type it in the *Replace with* in the textbox.

NOTE: Click the Show all procedures box to see more procedures.

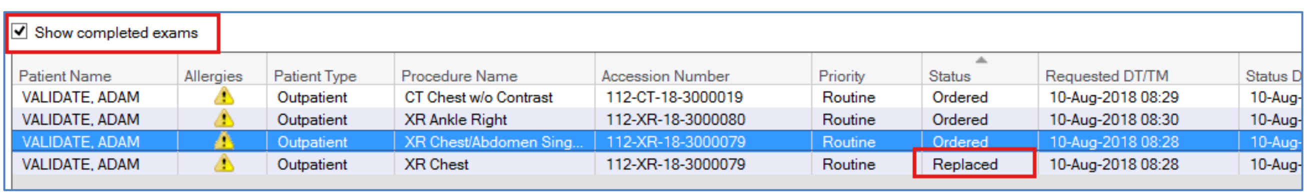
1. Choose the replace with **XR Chest/Abdomen Single Exposure** from the drop-down menu.
2. Select the Replace Reason of **Changed by Radiologist as per Protocol**.
3. Ensure that the **Copy accession to new order** box is checked.
4. Click **OK**.



NOTE: You can only replace within the same modality. If you are changing modalities, you **must cancel and reorder**.

Click the Modify order details box to change the details in one step.

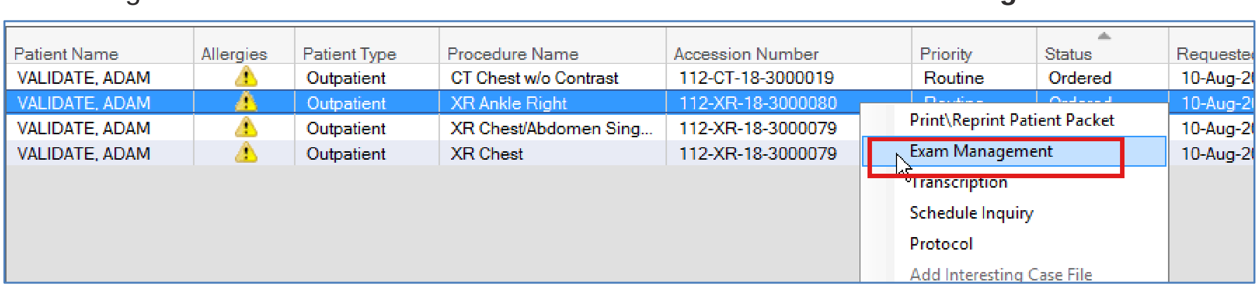
In the Online Work List both orders are displayed with the same accession number.
The old order, XR Chest, has the status changed to *Replaced*, while the new order's status is *Ordered*, as long as the **Show completed exams** box is checked.



3 Cancel an Exam

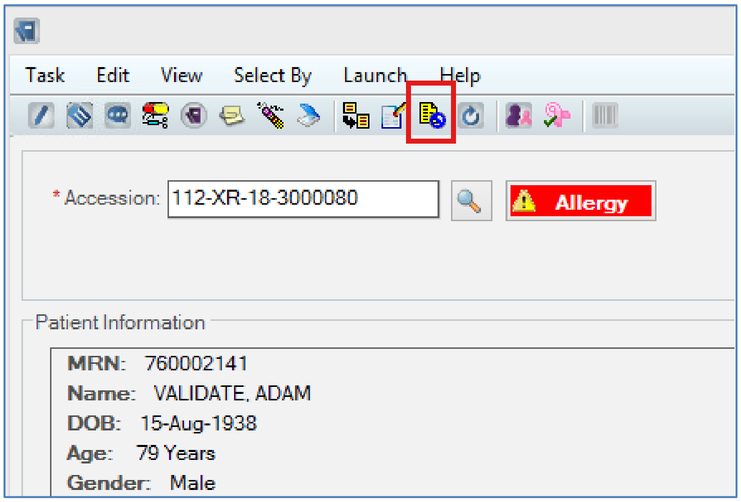
You will now learn how to cancel an exam. Your patient's Primary Care Provider calls and asks for the **XR Ankle Right** to be **cancelled**.

1. Right-click on the exam in the Online Worklist and select **Exam Management**.



The Exam Management window will open.

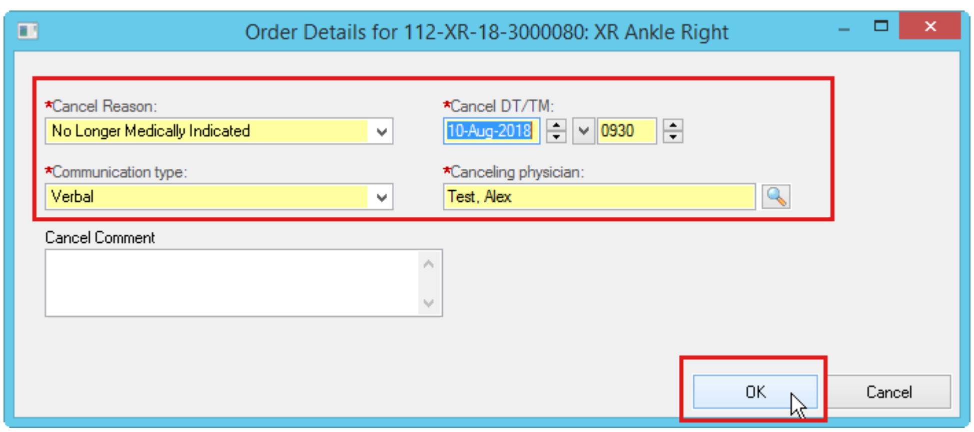
1. Identify the **Cancel exam** icon in the menu bar and click it.

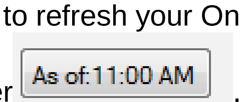


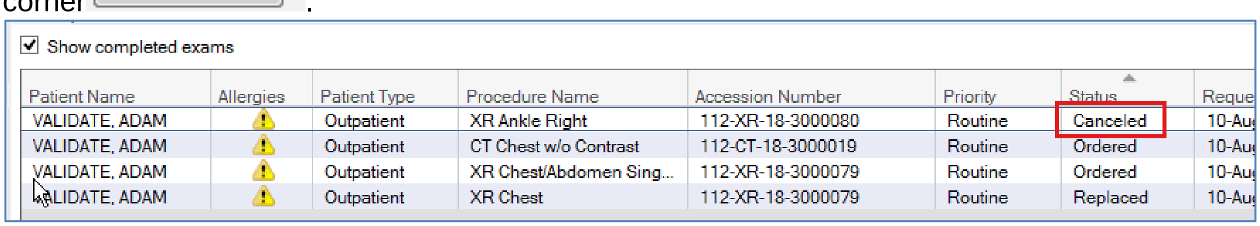
The Order Details window opens.

1. Choose the **Cancel Reason =** *No Longer Medically Indicated*
2. Enter the **Communication Type =** *Verbal*
3. Enter the *date and time* of cancellation.
4. Click **OK**

NOTE: By entering “t” in the Date and “n” in the Time section (3), the system automatically populates it with the current date and time



You can click **Exit**. Within the Online Work List**,** the order’s status changes to **Canceled.** You may need to refresh your Online Work List. You can do this by clicking the **As of:** ***TIME*** in the top right corner .

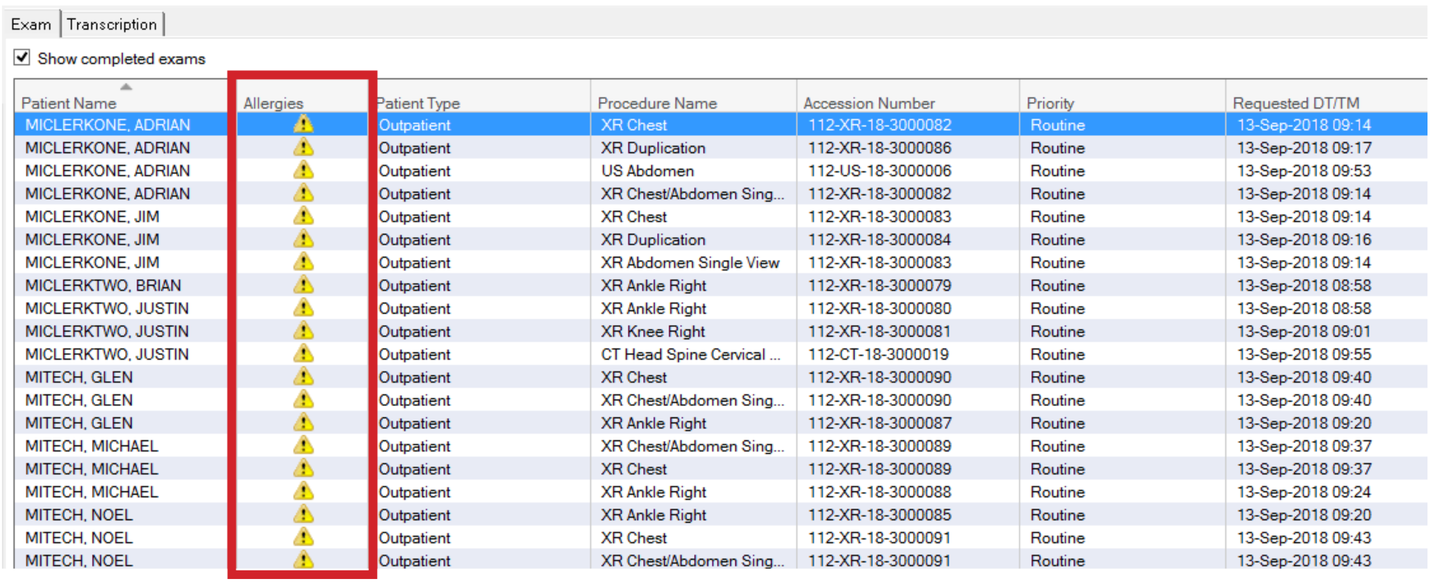


Activity 1.5 – Exploring the RadNet Online Work List

1 Review Allergies

In the Online Work List, identify the Allergies column (1). There are four types of notifications:

1. ANR = Allergies Not Recorded
2. NKA = No Known Allergies,
3. NKMA = No Known Medication Allergies
4. = represents the presence of allergies.



Exam | Transcription

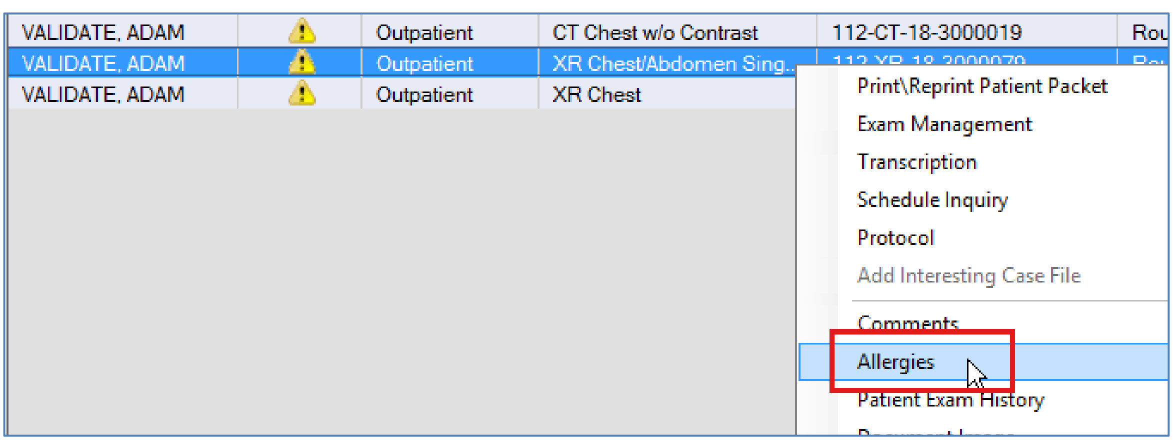
☑ Show completed exams

Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority	Requested DT/TM
MICLERKONE, ADRIAN	⚠	Outpatient	XR Chest	112-XR-18-3000082	Routine	13-Sep-2018 09:14
MICLERKONE, ADRIAN	⚠	Outpatient	XR Duplication	112-XR-18-3000086	Routine	13-Sep-2018 09:17
MICLERKONE, ADRIAN	⚠	Outpatient	US Abdomen	112-US-18-3000006	Routine	13-Sep-2018 09:53
MICLERKONE, ADRIAN	⚠	Outpatient	XR Chest/Abdomen Sing...	112-XR-18-3000082	Routine	13-Sep-2018 09:14
MICLERKONE, JIM	⚠	Outpatient	XR Chest	112-XR-18-3000083	Routine	13-Sep-2018 09:14
MICLERKONE, JIM	⚠	Outpatient	XR Duplication	112-XR-18-3000084	Routine	13-Sep-2018 09:16
MICLERKONE, JIM	⚠	Outpatient	XR Abdomen Single View	112-XR-18-3000083	Routine	13-Sep-2018 09:14
MICLERKTWO, BRIAN	⚠	Outpatient	XR Ankle Right	112-XR-18-3000079	Routine	13-Sep-2018 08:58
MICLERKTWO, JUSTIN	⚠	Outpatient	XR Ankle Right	112-XR-18-3000080	Routine	13-Sep-2018 08:58
MICLERKTWO, JUSTIN	⚠	Outpatient	XR Knee Right	112-XR-18-3000081	Routine	13-Sep-2018 09:01
MICLERKTWO, JUSTIN	⚠	Outpatient	CT Head Spine Cervical ...	112-CT-18-3000019	Routine	13-Sep-2018 09:55
MITECH, GLEN	⚠	Outpatient	XR Chest	112-XR-18-3000090	Routine	13-Sep-2018 09:40
MITECH, GLEN	⚠	Outpatient	XR Chest/Abdomen Sing...	112-XR-18-3000090	Routine	13-Sep-2018 09:40
MITECH, GLEN	⚠	Outpatient	XR Ankle Right	112-XR-18-3000087	Routine	13-Sep-2018 09:20
MITECH, MICHAEL	⚠	Outpatient	XR Chest/Abdomen Sing...	112-XR-18-3000089	Routine	13-Sep-2018 09:37
MITECH, MICHAEL	⚠	Outpatient	XR Chest	112-XR-18-3000089	Routine	13-Sep-2018 09:37
MITECH, MICHAEL	⚠	Outpatient	XR Ankle Right	112-XR-18-3000088	Routine	13-Sep-2018 09:24
MITECH, NOEL	⚠	Outpatient	XR Ankle Right	112-XR-18-3000085	Routine	13-Sep-2018 09:20
MITECH, NOEL	⚠	Outpatient	XR Chest	112-XR-18-3000091	Routine	13-Sep-2018 09:43
MITECH, NOEL	⚠	Outpatient	XR Chest/Abdomen Sing...	112-XR-18-3000091	Routine	13-Sep-2018 09:43

2 Mark Allergies as Reviewed

Allergies must be reviewed for a patient on every encounter. Check the allergies on your patient with the XR Chest/Abdomen Single Exposure:

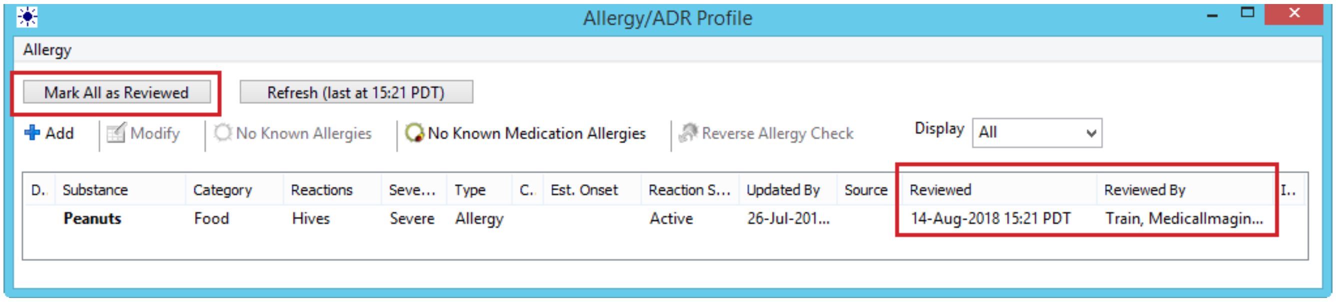
1. Right-click your patient and select **Allergies**.



The patient's allergy profile opens. After reviewing the allergies:

1. Click **Mark All as Reviewed**.
2. You will note that the *Reviewed* and *Reviewed By* columns have changed to the current time

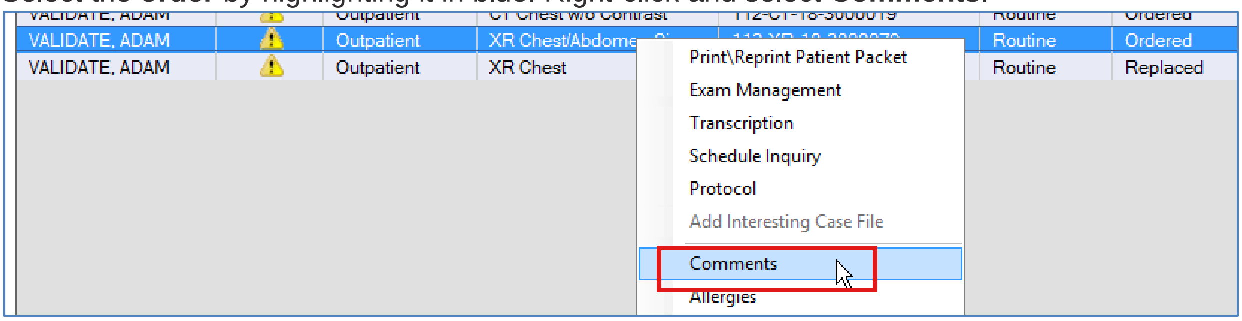
and your name will populate.



3 Add a Comment

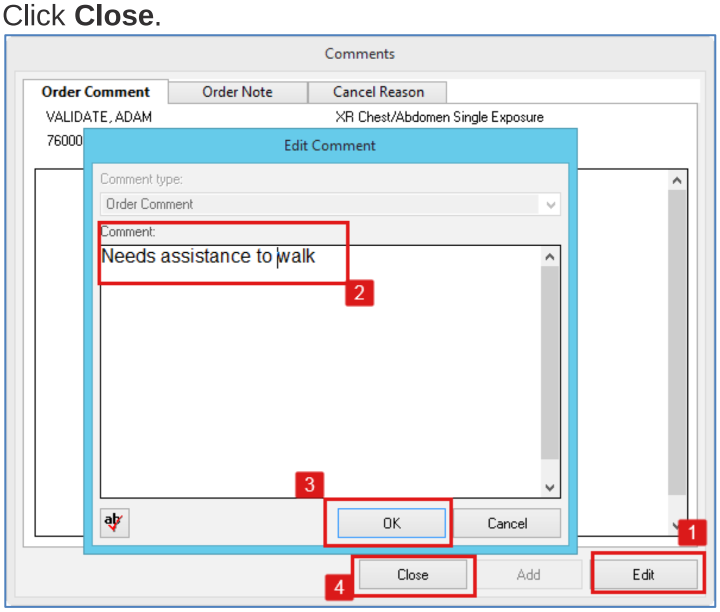
Comments can be added to a patient for various reasons. For example, one of the patients coming today for an exam needs assistance to walk. You need to add a note to the order.

1. Select the **order** by highlighting it in blue. Right-click and select **Comments**.

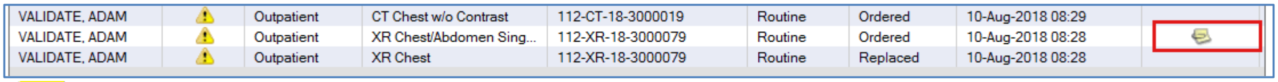


The Comments window will open. Choose the appropriate tab (**Order Comment, Order Note or Cancel Reason**).

2. Click **Edit** and type in the free text box = *needs assistance to walk*.
3. Click **OK.**
4. Click **Close**.



Your comment can be viewed if you right-click the patient name and select **Comments**. The comments column will now have the **Comments icon** present; you may have to scroll to the right.

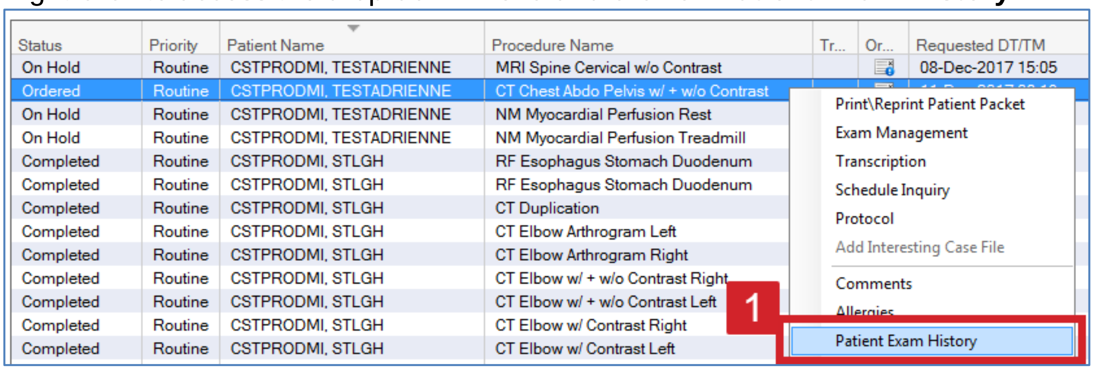


NOTE: Order Comments will be displayed both in the RadNet Online Work list as well as other areas where the Order is visible, such as PowerChart. Order Notes are displayed only within the RadNet system and should only be used for departmental documentation.

4 Review Patient Exam History

Check your patient's exam history in order to see what other orders were placed and completed on this patient. From any of the orders placed on the patient,

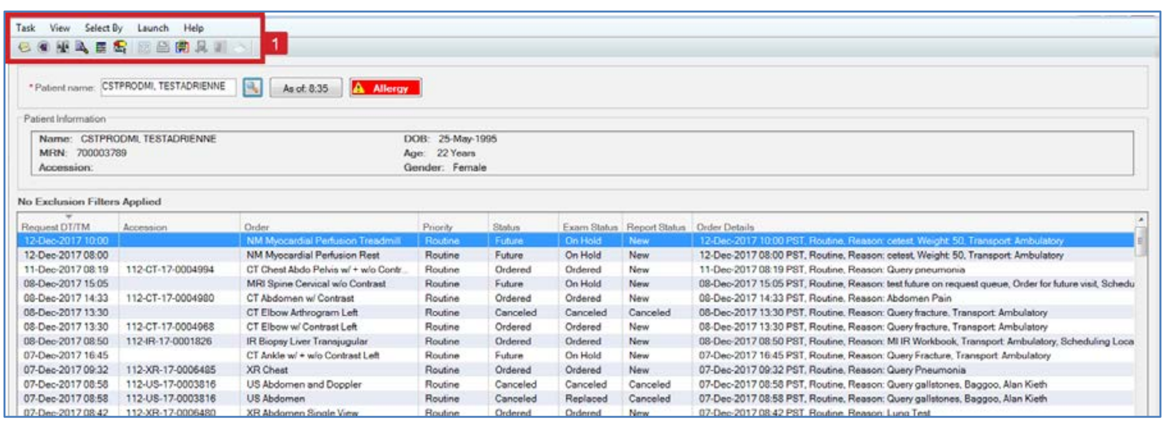
1. Right-click to access the drop-down menu and click on **Patient Exam History**.



NOTE: Only exams that have been ordered/ completed since the CIS went live at your site will be visible.

The **Order Viewer** will open. Here you can see displayed the entire list of orders placed on the patient, and the status.

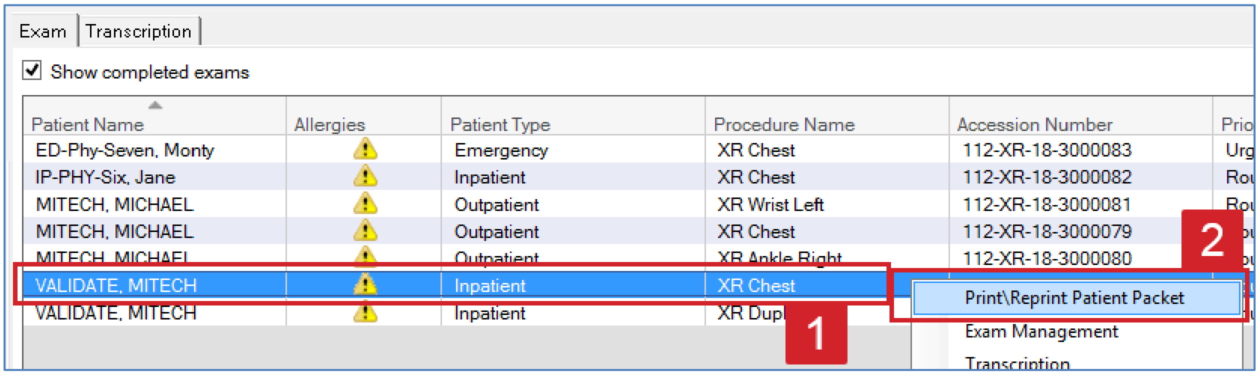
1. The **menu bar** allows you to see what other functions you are able to do from here. Click to explore.



5 Print\Reprint Patient Packet

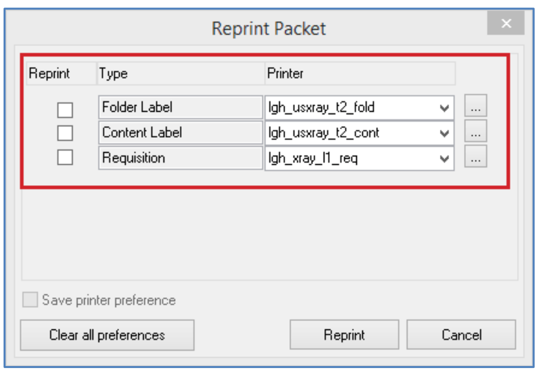
If you need to re-print the patient packet (requisition and labels) from the **XR Chest**

1. Select the exam
2. Right-click on the exam and select **Print\Reprint Patient Packet**

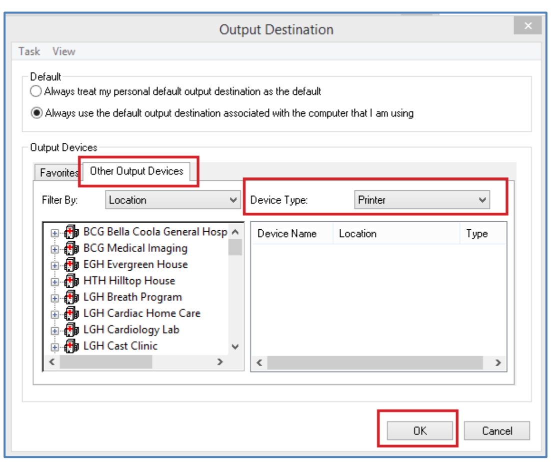


The **Reprint Packet** window opens.

1. Click on checkboxes to choose the document you want to print
2. The type of document can be selected
3. Select the printer
4. Click on the **ellipsis** button (to choose the printer and the location. It will automatically default to the pre-selected printer



To change the printer location, from the **Output Destination** pop-up window choose new output device, the **location**, and the **type**. Click **OK** to print.



The packet consists of three components: the **Requisition**, the **Content label** and a **Folder label**.

The **Folder** label does not contain a barcode and can be used to give to a porter or on other forms.

BEBE, TINY
MRN: 740002057
DOB: 10–AUG–1970 Age: 48 Years
Gender: Female
Exam: XR Abdomen 2 Views
Location: LGH ED ACWR
Isolation:
Alert
Disease:
Alert

The **Content** label is placed on the back side of the requisition and the accession number on the label can be scanned.

BEBE, TINY
BCPHN: 9876098253 Fin Class:
MRN: 740002057 Gender: Female
DOB: 10–AUG–1970 Age: 48 Years
Enc: 7400000003725
XR Abdomen 2 Views
Exam Date: 10–AUG–2018
Ordering MD: Pliska, Benjamin Tobias, DEN
Accession:
112–XR–18–1000101

The **Requisition** will print and three fields need to be completed by the technologist:

112–XR–18–1000101

REPRINT

LGH Lions Gate Hospital

BEBE, TINY

Exam: XR Abdomen 2 Views
Accession: 112–XR–18–1000101
Research Study:
Isolation:
Process Alert:
Disease Alert:
Fall Risk Score:
Patient Type: Emergency
Patient Loc: LGH ED
Room: ACWR

BCPHN: 9876098253
MRN: 740002057
DOB: 10–AUG–1970
Age: 48 Years
Gender: Female
Dosing Wt: Ht:
Enc #: 7400000003725
Primary Health Plan

Requested Date/Time: 10–AUG–2018 10:20
Priority: Routine
Transport Mode: Not specified
Reason for Portable:

Ordering Phys: Pliska, Benjamin Tobias, DEN 55197
Physician Phone: 6047326333
Ordered By: Young, Gil
Provider Callback Number:
Ordered Date/Time: 10–AUG–2018 10:21

Additional Copies To:

Reason for Exam: test

Special Instructions / Notes to Scheduler:

Relevant Labs:
Creatinine:
eGFR:
INR:
PTT:
PLT:
Allergies:

Tech Comments:

Fluoro Time:
Images:

Imaging Protocol and Priority (Radiologist's Use Only)
Radiologist's Initials
☐ P1 ☐ P2 ☐ P3 ☐ P4 ☐ Specified Date:

RADPACKETREQM
This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited. D_B0783

1. **Technical comments** including: Anticoagulant stoppage time, patient supplied medications, medications, patient history, LMP, Pregnancy status, contrast/radiopharmaceuticals, and if shielding was used.

2. The **Fluoro time** in HH:MM:SS format

3. The number of **Images** archived to PACS.

If additional comments are needed, use the reverse side of the requisition.

Practice

- Practice registering your patient in PM Office adding a new outpatient encounter and then adding an order, for example: US abdomen.

Key Learning Points

- You can insert today's date and time using the shortcuts T and N.
- There are usually at least two ways to access functionality within RadNet ("to do things in the system") from the icons in the menu bar at the top of the window, or by right-clicking on the item you are interested in, and choosing the action from the pop-up menu.
- If you replace an order in the same modality, the new order will retain the accession number as long as you have the Copy Accession Number to new Order box checked.
- By modifying order details you can add additional CCs for distribution of the final report.

PATIENT SCENARIO 2

Learning Objectives

At the end of this Scenario, you will be able to:

- Access the Scheduling Appointment Book (SchApptBook)
- Set personal preferences for optimal use
- Use Appointment Inquiry
- Book appointments
- Use the Request Queue
- Schedule Outpatients and Inpatients
- Block and Unblock Schedule slots

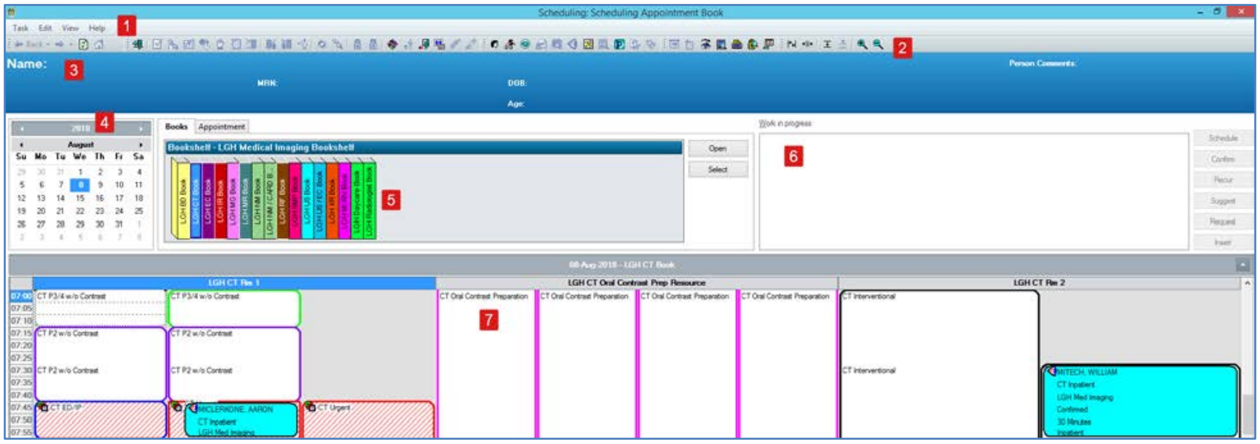
SCENARIO

This is a step by step guided introduction to the Scheduling Appointment Book. You will be guided through a variety of tasks that are part of your daily workflow and shown how to book appointments. Follow the guidelines included to move through the scenario. Afterwards you will practice what you have learned by booking your own appointments.

Activity 2.1 – Overview of Scheduling Appointment Book

This first activity will guide you through the Scheduling Appointment Book (SchApptBook) application. This is where you will book all of the appointments for your department. Appointments can be booked from paper requisitions that will print in your department or from request queues.

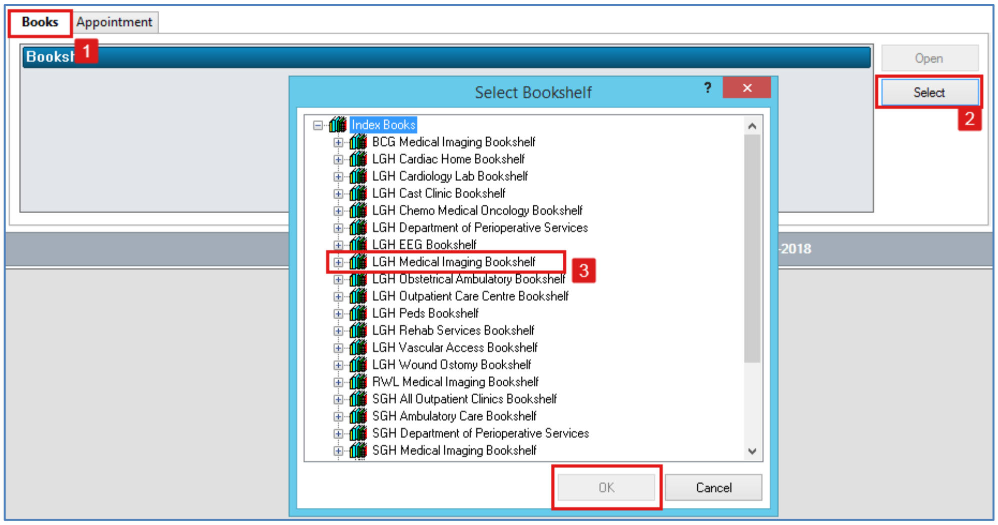
1 From StoreFront, select the SchApptBook icon  .



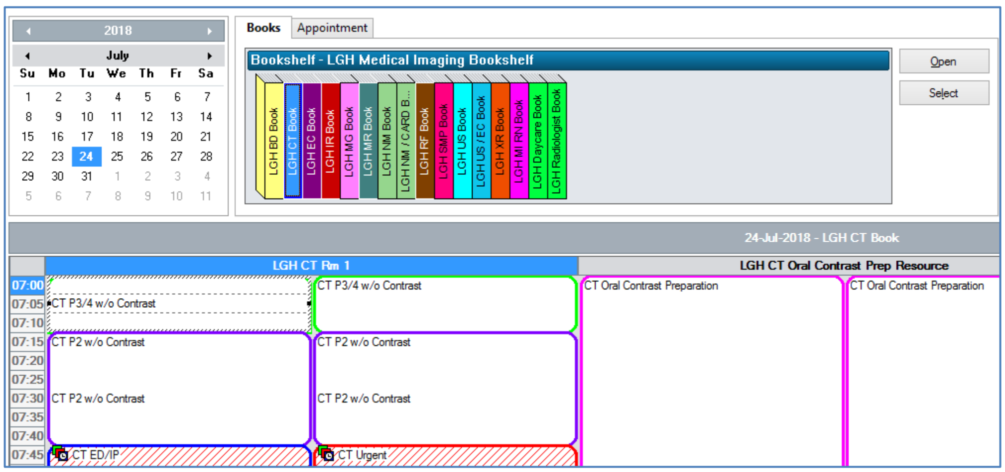
1. **Menu Bar**- Includes Task, Edit, View and Help options.
2. **Toolbar**- Includes icons of additional app elements (e.g. Person Management, Request List Inquiry, Modify, Cancel, Reschedule, Print, Shuffle, Create Group Session, Swap Resources, and Exit) to facilitate accomplishing a task.
3. **Demographics Bar**- Displays Patient's Name, Age, Date of Birth, Gender and MRN.
4. **Calendar**- Assists in booking appointments by the days, weeks and months of a particular year.
5. **Bookshelf**- Contains the Scheduling Appointment Books that are used to schedule and manage appointments.
6. **Work in Progress (WIP)**- An area where a partially completed appointment resides until you are ready to book and confirm it.
7. **Scheduling Grid**- Contains appointment slots with Resources (e.g. person, equipment, location) schedules. This is where appointments are scheduled and managed.

2 **Opening a Bookshelf/Book:**

1. Select the **Books** tab, click the **Select** button.
2. Select the **LGH Medical Imaging Bookshelf** and click **OK**.



3. Double-click on the modality **Book** where you typically work.

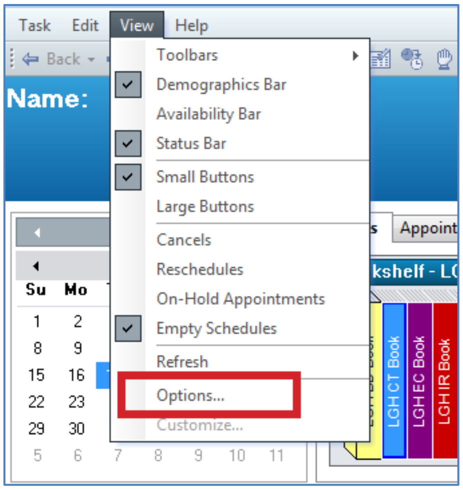


3 User Preferences: (Review Only)

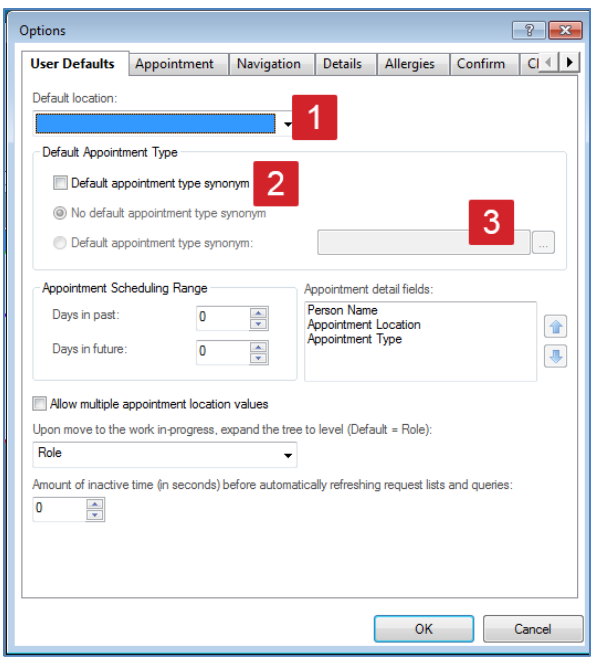
Within the Scheduling Appointment Book application, there are several options which are set at the user preference level. Once these preferences are applied, the information will not need to be entered or edited in the future unless different preferences are required.

Setting Default Location/Book

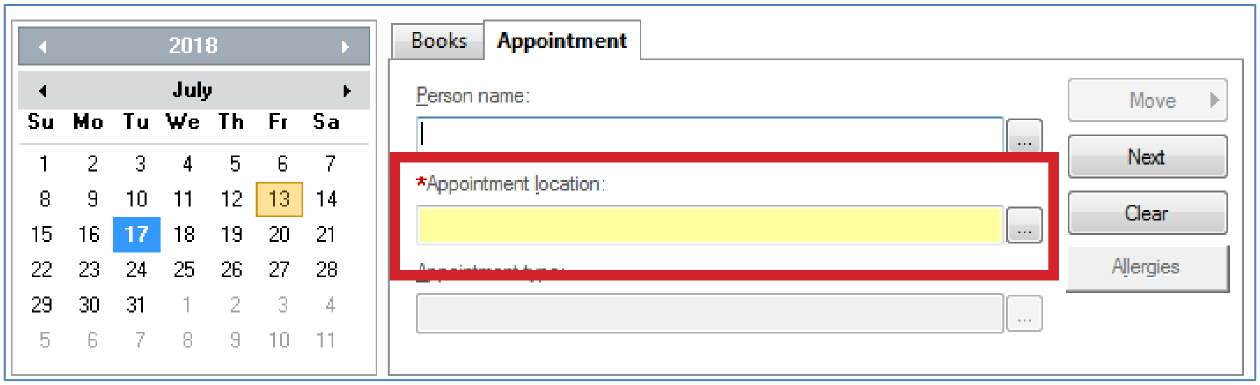
1. Click **View** in the Toolbar and select **Options**.



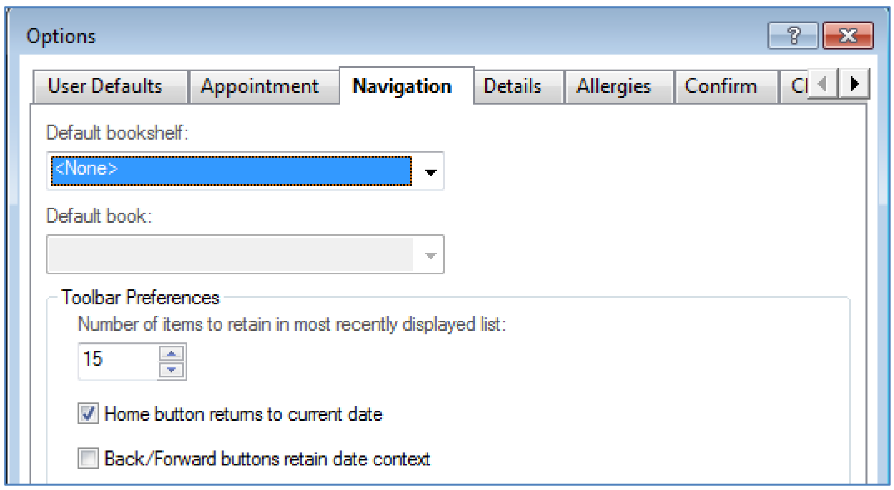
The Options window opens which has a number of tabs. **User Defaults** is the first tab and it allows you to set a default location (refer to screenshot below). The location entered in this field will always appear in the **Appointment Location** field when scheduling an appointment. It is only appropriate to enter a default location if you schedule appointments for one location.



1. **Default Location** can be chosen from the drop-down menu. This function would be used if a user schedules consistently for one location, e.g. LGH Medical Imaging. Once this is set, it will automatically populate within the Appointment Location.
2. **Default Appointment Type Synonym** can be activated by selecting the associated check box.
3. **Appointment Synonym** can be selected from searching in the box for the desired appointment type. This option can be used if a user consistently schedules one appointment type because it will automatically default into the appointment type field.

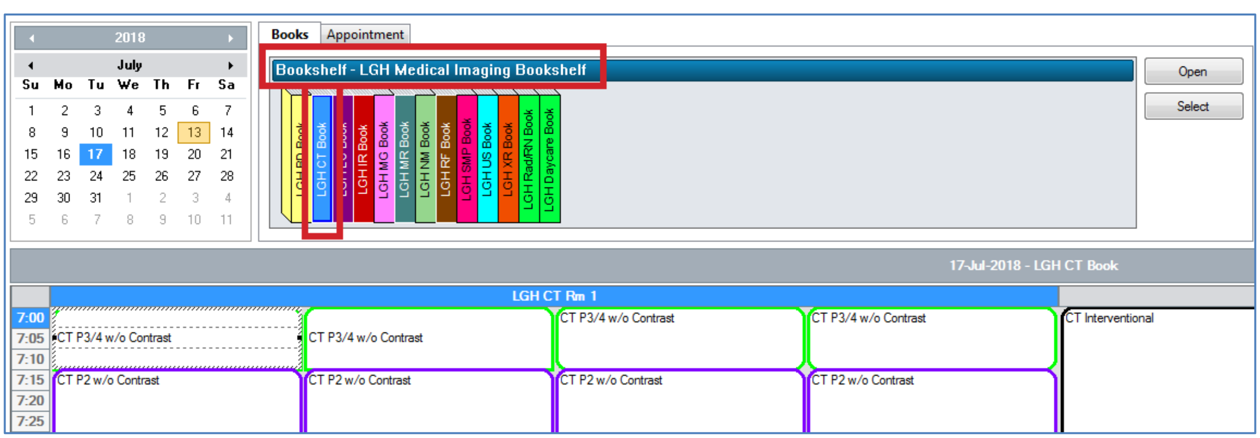


4. Click on the **Navigation Tab**. This is where you can set a default Bookshelf and Book.



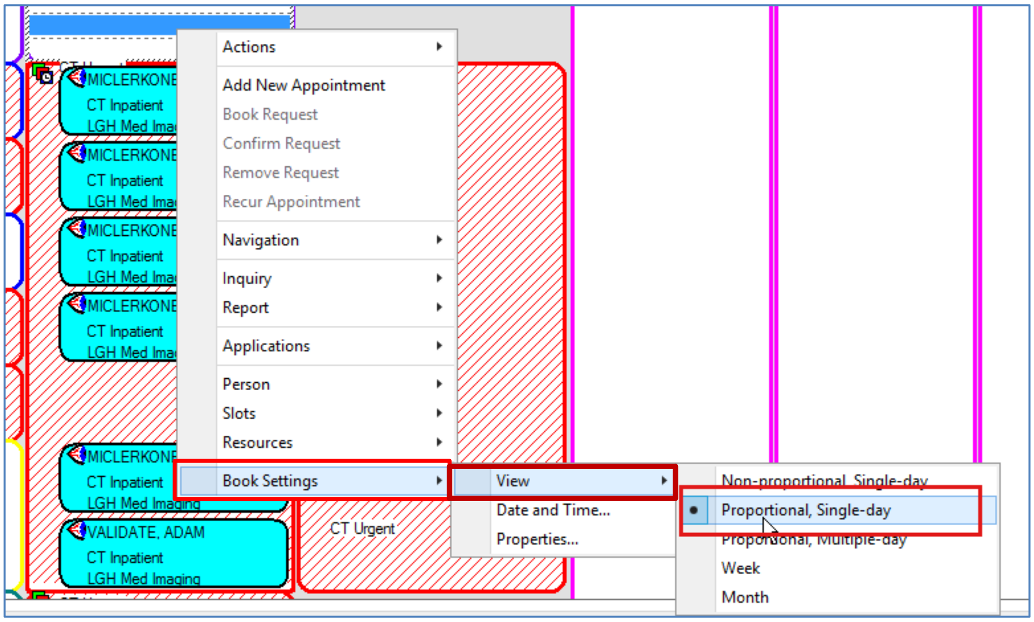
Default Bookshelf - Enter the name of the **Bookshelf** that you would like to default open when you log into the SchApptBook application. There is a list available to assist you in selecting a predefined bookshelf.

Default Book- Enter the name of the **Book** that you would like to default open when you log into the SchApptBook application. There is a list available to assist you in selecting a predefined book.In the example below, the default Bookshelf is the **LGH Medical Imaging Bookshelf** and the default Book is the **LGH CT Book.**



4 **Book Settings**:

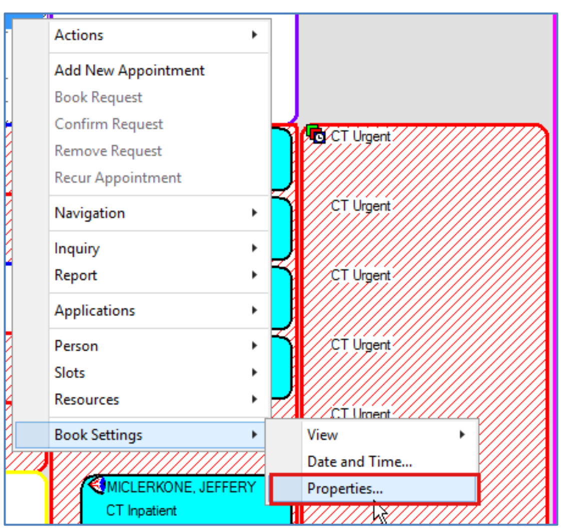
Book settings determine the view of the appointment book. These can be accessed by right-clicking in the scheduling grid and selecting **Book Settings** and then **View.**



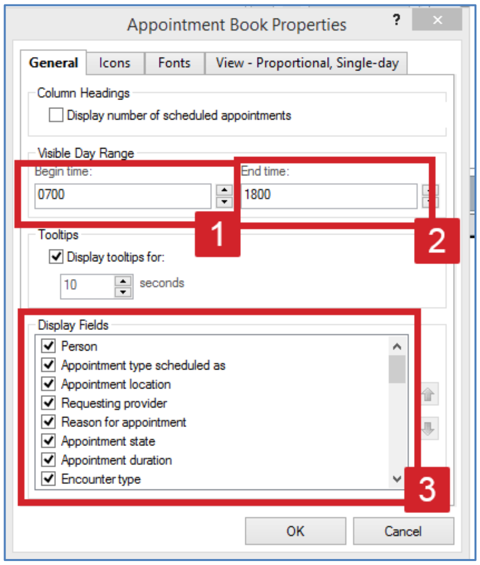
Proportional, Single-day View- This is the default and recommended view that allows the user to see all of the breaks in the day. The times are at the left-hand side of the book.

Appointment Book Properties:

Appointment book properties include settings such as the Begin and End time of the scheduling grid, the data that displays in a scheduled appointment and the time interval of the scheduling grid. Appointment book properties can be accessed by right-clicking on the scheduling grid, selecting **Book Settings** then selecting **Properties.**



General Tab



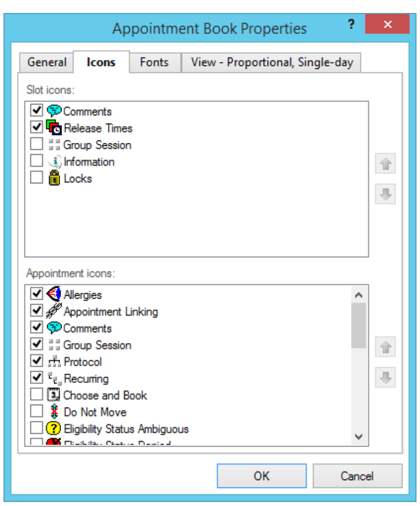
1. **Begin Time**- In military time, this determines the time that the appointment book will start; this crosses all books and bookshelves.
2. **End Time**- In military time, this determines the time that the appointment book will end; this crosses all books and bookshelves

NOTE: If there are any slots beyond the designated time, they will not be visible on the books. However, by using suggest, you can still schedule into these.

3. **Display fields**- These are the fields that will show in a scheduled appointment on the scheduling grid. By clicking the up or down arrows, you can change the order in which they are displayed.

Icons Tab

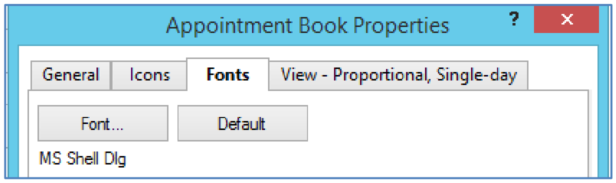
By selecting any of the icons listed, a symbol will appear if the criteria are met. Example: if the Slot Icon **Comments** is checked a bubble will appear on the slot if any comments are entered.



NOTE: Making changes to the default settings for this is not recommended.

Fonts Tab

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



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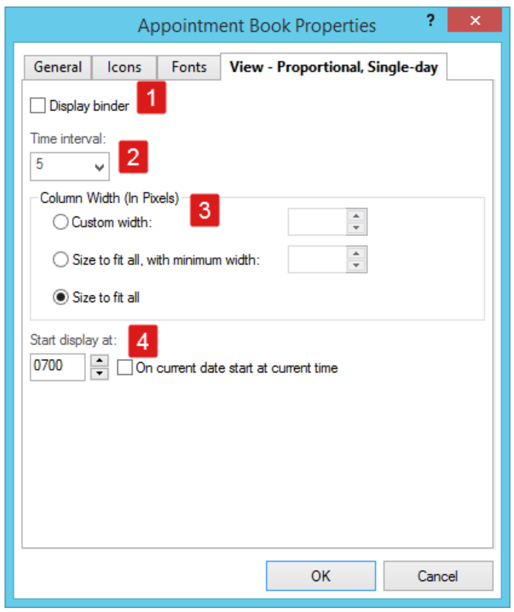
View Proportional Single-day



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 minutes) for the slots.
3. **Custom width**- This option determines the width of the slots under the resources.
4. **Start Display at** - You can set the time and day that you wish to display when you first log on to the application.

5

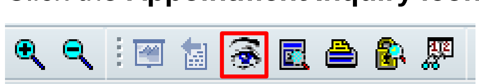
Appointment Inquiry (Schedule Inquiry)

Appointment Inquiry allows the users to view appointments in a list format. Schedule Inquiry allows you to enter the parameters required to view the schedule associated with a specific person or resource.

There are four available options for using Schedule Inquiry: *Person tab, Resource tab, Location tab and Request List tab*. Each of these is described below, along with the available elements for each tab.

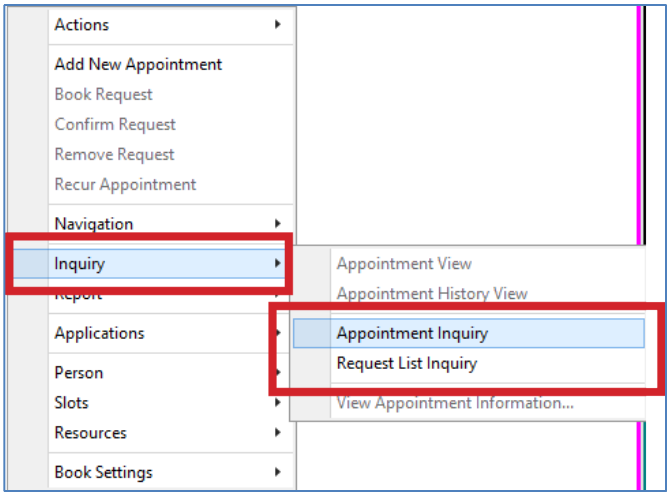
The Appointment Inquiry can be accessed in two different ways.

1. Click the **Appointment Inquiry icon** (eye icon) located at the top of your screen.

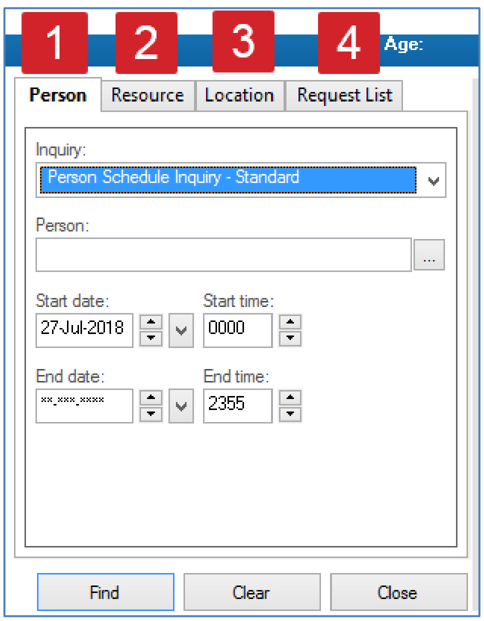


OR

2. Right-click anywhere on the scheduling grid, select **Inquiry**, and then select **Appointment Inquiry**.



3. The Appointment Inquiry window appears on your screen.



1. **Person Inquiry Tab**- Use this inquiry to view information (such as confirmed appointments, no-show, inquiry with orders) associated with a specific patient in the SchApptBook.
2. **Resource Inquiry Tab**- Use this inquiry to view information (such as displaced appointments, open slots available, booked outside of slot) associated with a specific resource in the SchApptBook.
3. **Location Inquiry Tab**- Use this inquiry to view information (such as location with person name, check-in) associated with a specific location in the SchApptBook.
4. **Request List Inquiry Tab**- Use this inquiry to view information (such as request list by location, cancellation list, and request queues) associated with a specific request list in the SchApptBook.

Select the appropriate parameters to run any of the above inquiries to view results.

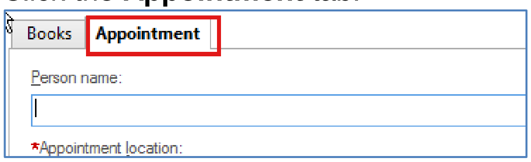
Activity 2.2 – Appointment Scheduling

There are several different methods for scheduling an appointment within the Scheduling Appointment Book application. This section will discuss each of these methods and explain when one method should be used over the others. Use the outpatient on your training card to follow along.

1 Pre-requisite Steps for Booking an Appointment

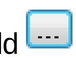
These are the pre-requisite steps for booking an appointment prior to selecting one of the three methods.

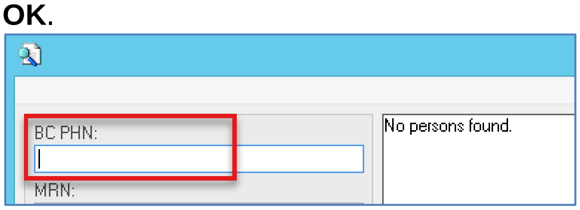
1. Click the **Appointment** tab.



2. The first few fields for the required information appear in the window. You may begin to schedule the appointment.

NOTE: Mandatory fields are marked with red asterisks (*) and highlighted in yellow meaning you will need to complete these fields in order to move to the next step in scheduling an appointment.

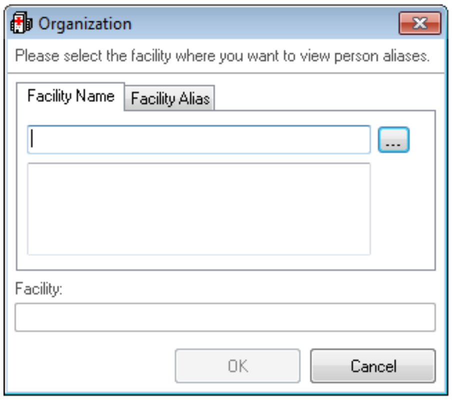
3. Click the **Ellipsis** button beside the Person name field  .
4. Search for the patient, by entering the **PHN**, then click **OK** (if you do not have a PHN, search by partial last name and first name or date of birth and gender).
If you have found the correct patient, click only ONCE on their name to select, then click **OK**.



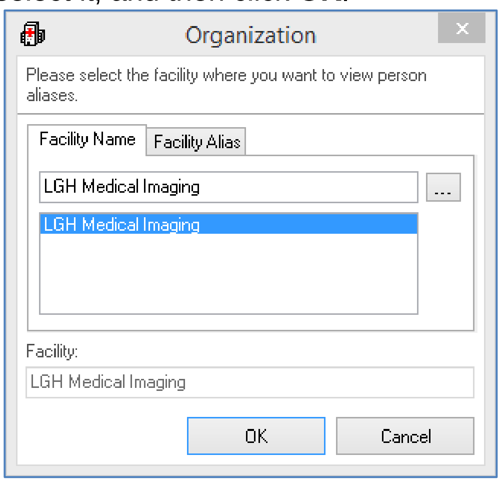
NOTE: If Yes is entered into the Interpreter Required? An interpreter must be scheduled. Interpreters are not scheduled in the CIS.

NOTE: Refer to Registration's EMPI Reference material to learn about requesting a new PHN for a brand new patient. Approximately 99% of all **BC** Residents are registered in the EMPI.

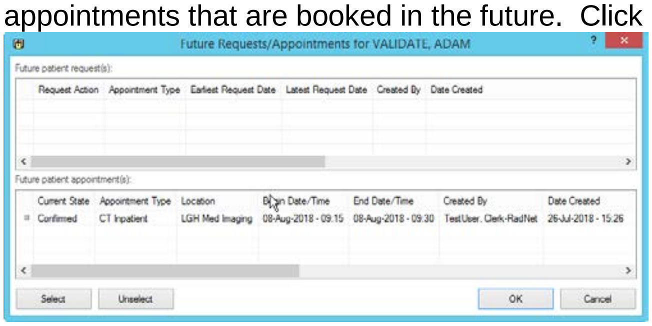
5. The Organization window appears. Click on the **Ellipsis** button.



6. Scroll down through the list of the clinics/departments until you see **LGH Med Imaging**, select it, and then click **OK**.



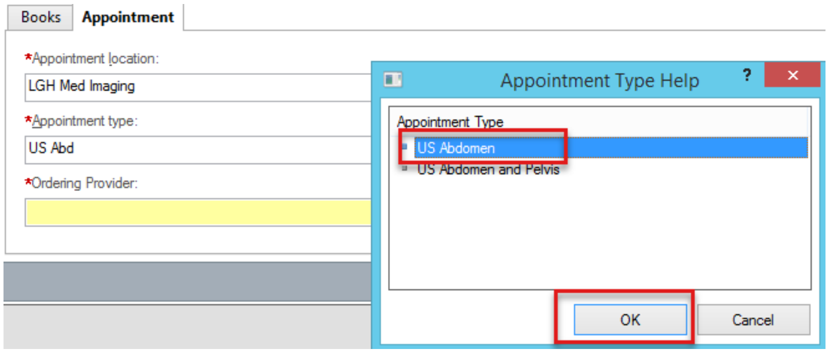
7. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
8. The Future Requests/Appointments window will appear for the patient if they have appointments that are booked in the future. Click **OK** to close the window.



9. The patient's name will now display in the **Person Name** field.
10. Click the **Ellipsis** button beside the *Appointment Location* field and double-click **LGH Medical Imaging** to select.

NOTE: The Appointment Location may be defaulted based on user preferences.

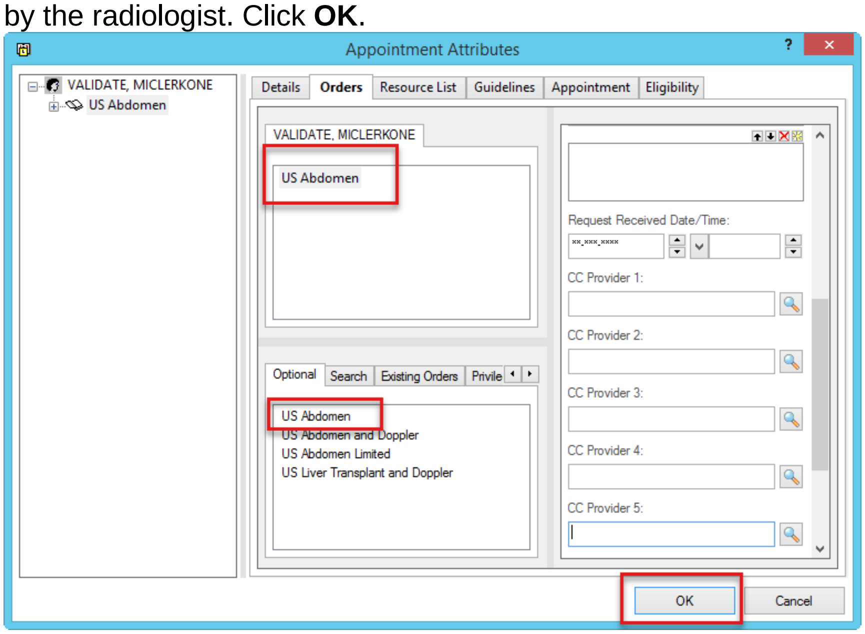
11. Select the **Ellipsis** beside the **Appointment Type** field and double-click on an appointment type to select or start typing the appointment type and press enter. Select **US Abdomen**.



12. Once an Appointment Type is selected, additional fields will appear.

NOTE: This list of fields is referred to as Accept Format Fields.

13. Complete any mandatory fields then click the **Move** button to move the appointment into the **Work In Progress (WIP)**. The appointment guidelines open, read and click **OK**.
14. The Appointment Attributes window opens. Click the correct order from the *Optional* tab, so it displays in the top box.
15. Add a *Reason For Exam,* check the *priority* and select a *MI Assigned Priority* if protocolled by the radiologist. Click **OK**.



2 Two Methods of Booking an Appointment

Once the appointment information is in the WIP, use any of the following two methods (Drag & Drop and Suggest) to move the request into a Pending status on the scheduling grid.

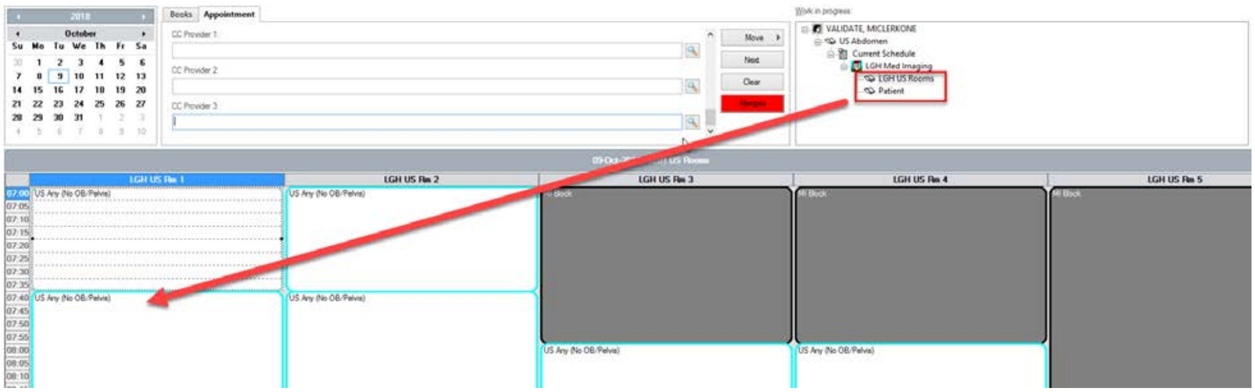
Drag and Drop Method

The drag and drop functionality is a quick and simple method for scheduling single appointments. It should be used when you need to schedule an appointment in a pre-determined date and time. This method works best for departments that do not book appointments too far into future.

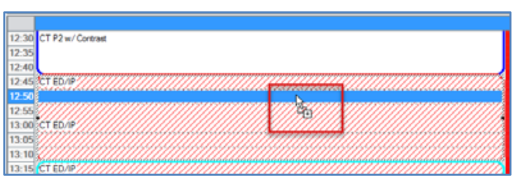
Highlights:

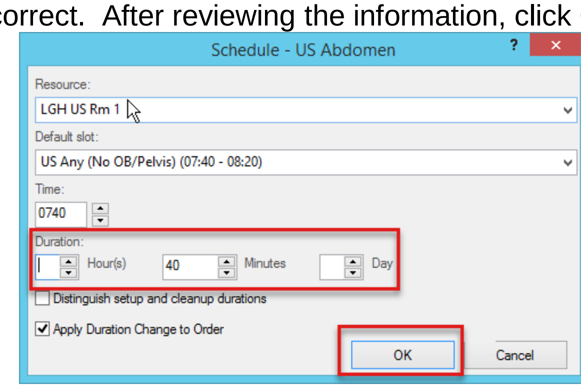
- Quick method for booking a single appointment.
- Allows you to schedule an appointment to a pre-determined date and time.
- Works well for clinics that do not book appointments far in advance.

1. Left-click on the selected resource (the resource directly below the clinic name) and **drag the cursor** to the appropriate resource and start time.



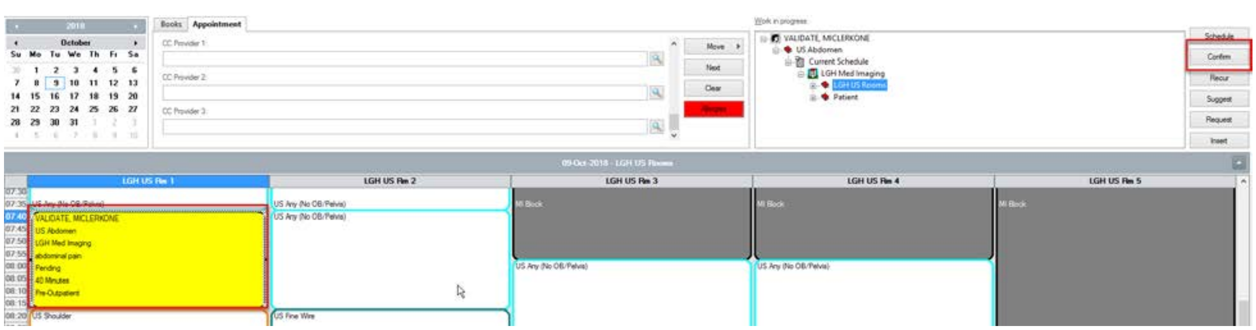
2. Release the mouse button, the Schedule window will display on the screen. Verify that the Resource and the time slot fields are correct. After reviewing the information, click **OK**.





NOTE: You can change the duration of the exam at this time.

3. The appointment will show in the slot in a pending state, which will be denoted by the red books in the **WIP** and yellow background.



4. The appointment will appear in the scheduling grid in a Pending state.

NOTE: If you attempt to Drag your appointment to a room that is not set up for that type of exam (i.e. w/ Contrast, w/o Contrast etc.), you may have Slot not Valid pop-up occur. Please see overriding a timeslot below for information on this.

Suggest Method

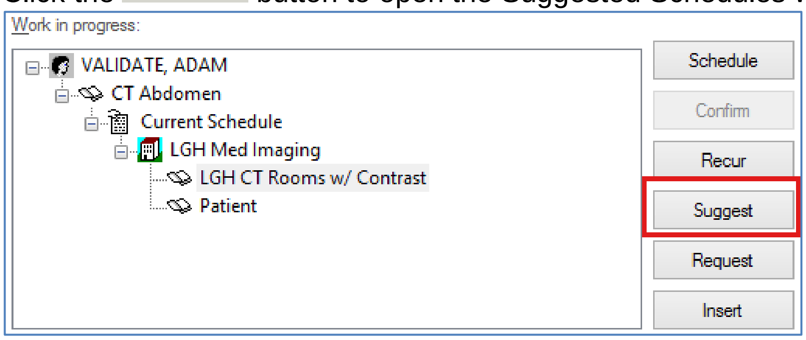
The system can suggest available times at which an appointment can be scheduled based on date and time parameters that are set. This provides available date and time options without having to search through the scheduling grid. This method is recommended for those areas where available appointment times are limited and also for more complicated appointments.

Highlights:

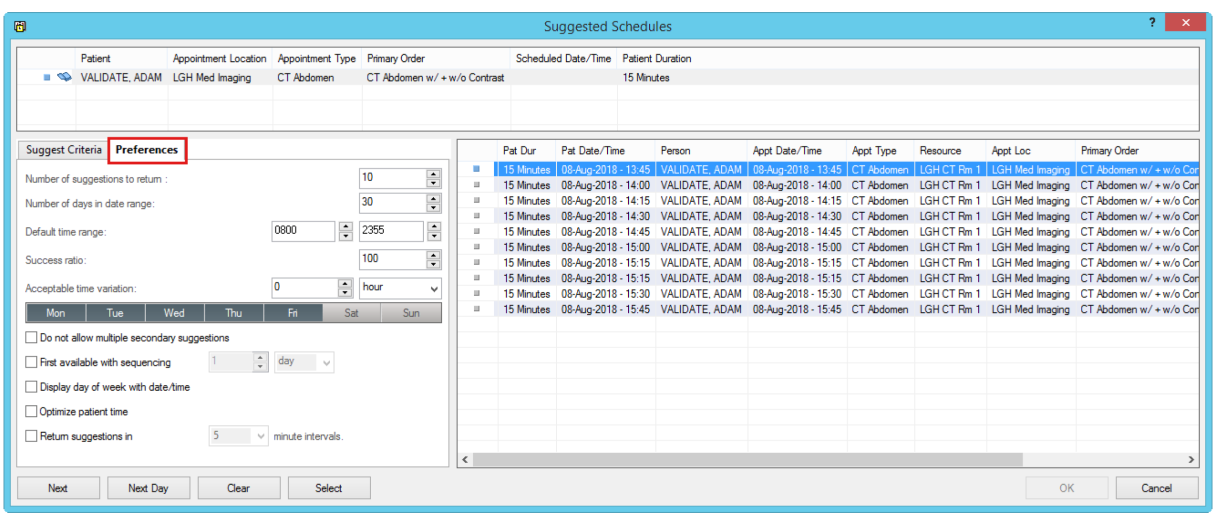
- Helps you to find the FIRST available appointment at the clinic.
- Allows you to set a date range for the appointment search.
- Avoids scheduling conflicts (resources/patients will never be double-booked).

With your appointment in the Work In-Progress area,

1. Click the Suggest button to open the Suggested Schedules window.

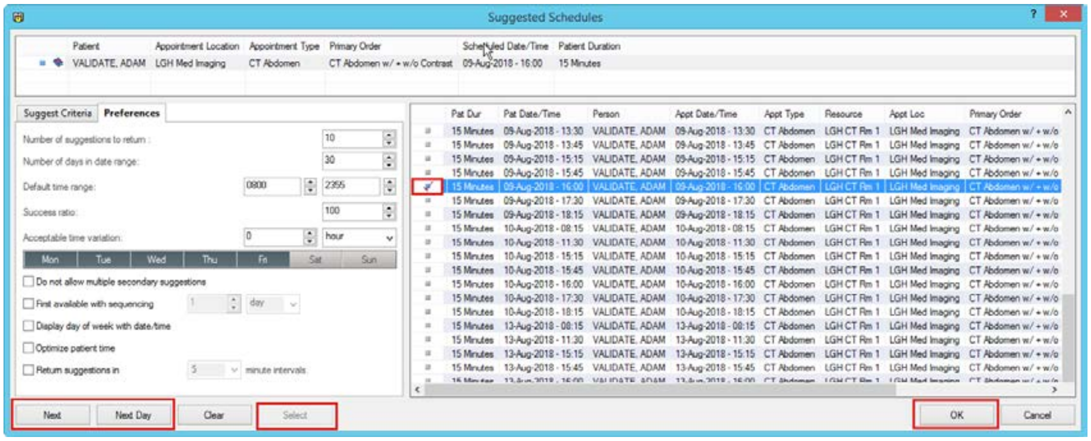


2. Check the set Preferences and modify if needed (for example: the number of options returned), click on the **Preferences** tab in the Suggested Schedules window.



3. Click Suggest for the system to display suggested times that the appointment could be scheduled.
4. If the suggested times do not work, click **Next** to display the next available times.

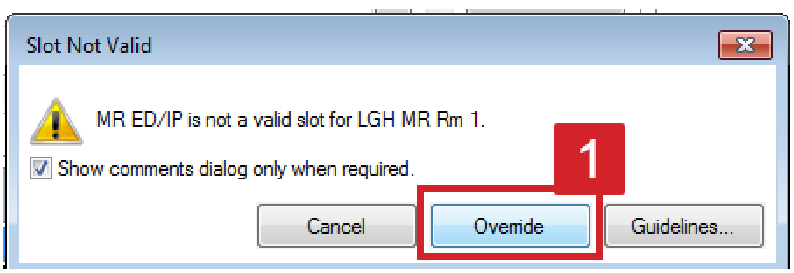
5. If the suggested dates do not work, click **Next Day** to display the available times for the next day.
6. Once you have found a suggested date and time to use, click **Select**. A red checkmark will appear next to the selected date and time.
7. Click **OK** to close the **Suggested Schedules** window and schedule the appointment.



NOTE: Please ensure you note the time/date of the appointment. Depending on your clinic, you might have available appointments outside of the work day. Your calendar may not be set up in a 24 time clock and you will not see the yellow unconfirmed appointment.

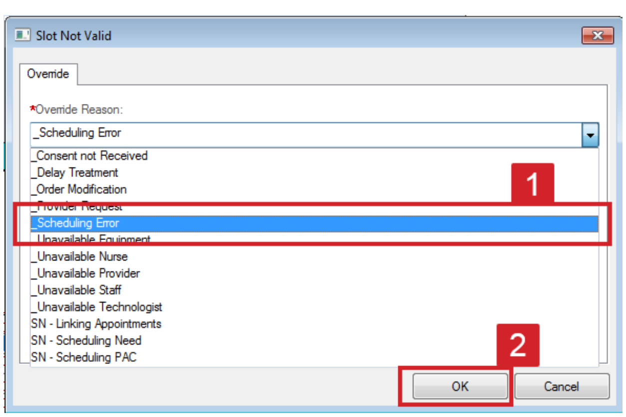
3 Overriding a Time Slot

If you use Drag and Drop the exam into an area that is prescheduled for a different type of procedure, A warning message, *Slot Not Valid* displays. Click **Override** if appropriate.



You are required to enter an Override reason.

1. Select an **Override Reason** from the drop-down list and
2. Select **OK**.

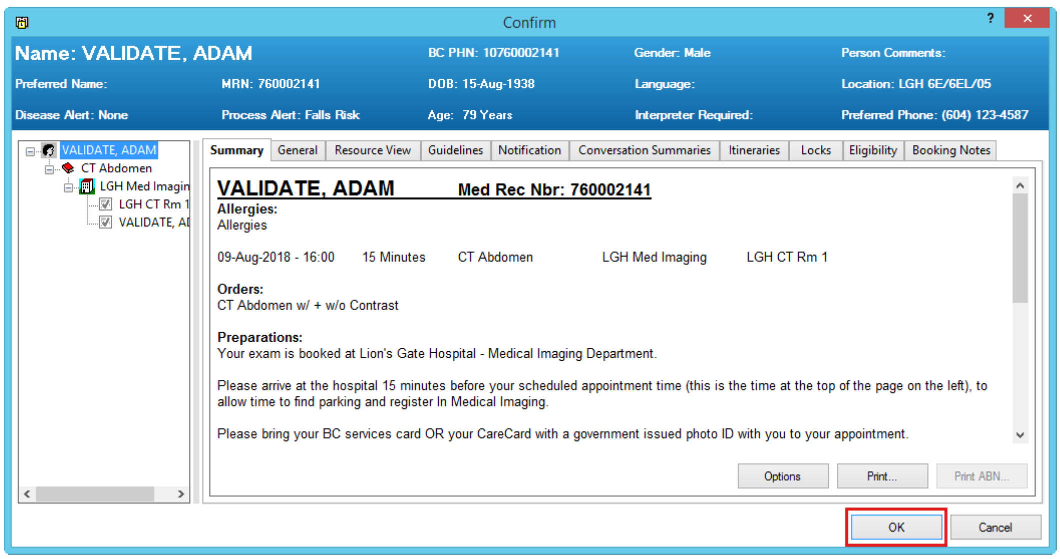


NOTE: If the duration of the exam is longer than the duration of the slot or if the offsets between multiple appointments don't fit into the slot you may receive more than one override message.

4 Confirming an Appointment

Once the appointment moves to Pending (yellow) status in the scheduling grid (using any of the above two methods), follow the below steps to **Confirm** and create a **Pre-outpatient Encounter** for the appointment.

1. Click the Confirm button beside the WIP to confirm the appointment. The Confirm window will display a summary of the appointment including any patient preparations/instructions.
2. Click **OK** in the Confirm window.



The Encounter Selection window will open with the patient's previous and current encounters.

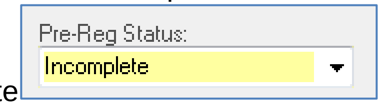
3. Click the Add Enc button to create a new encounter for this appointment.

   The Available Conversations window appears.

4. Select **Pre-Register Outpatient**. Then **OK**.

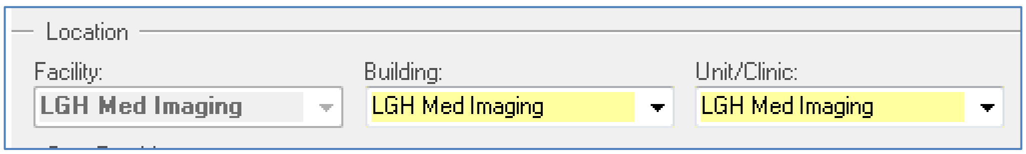
The External MPI window appears momentarily to ensure you have the most up-to-date demographics on the patient. It will not find your patient in the Train environment. A pop-up may occur telling you the patient already has an active encounter. Click OK.

The Pre-Register Outpatient window will appear for you to complete the pre- registration. Only the **Patient** and **Encounter Information** tabs are necessary to complete a pre-registration.

5. If you are not in contact with the patient to confirm the information, leave the *Pre-Reg Status* as Incomplete 

. If you are in contact with the patient to verify all the information, update the Pre-Reg Status to **Complete**.
6. Verify the demographic information in the *Patient Information* tab on every visit.

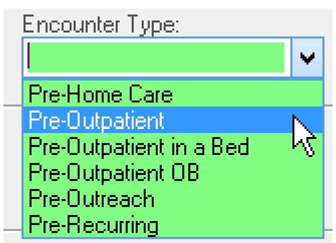
7. Click on the *Encounter Information* tab.
8. Verify that the Building and Unit/Clinic are correct. In the Location section, the Facility is auto-populated.



9. In the Current Encounter Information section, complete the mandatory fields as below:

    Encounter Type: Pre-Outpatient

    Medical Service: Medical Imaging

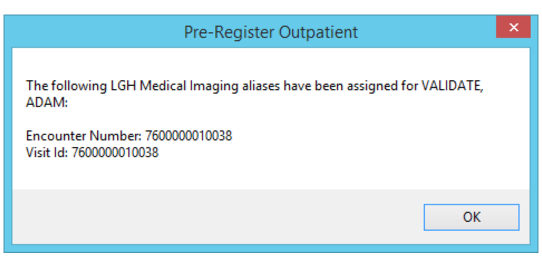


NOTE: The Reason for Visit carries over from the appointment.

The other fields are not mandatory on the Pre-outpatient Encounter.

NOTE: the Estimated Arrive Date and Time are auto-populated from appointment date and time.

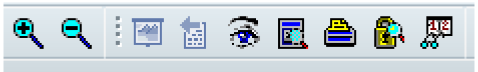
10. Click **Complete** to finish.
11. The Pre-Register Outpatient window displays. Verify and click **OK**.

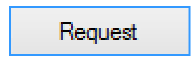


NOTE: Some exams will not require an encounter until check in. Refer to the help topic on CIS Help (sentinel nodes, fine wires).

5 Adding a Patient to a Request Queue

When a request for an exam requires protocolling and tracking it may need to be added to the request queue before the appointment can be scheduled. Each exam modality and priority has separate request queues. These are accessed from the **Appointment Inquiry icon** (eyeball) located at the top of your screen and when ready, they can be scheduled directly from this area.



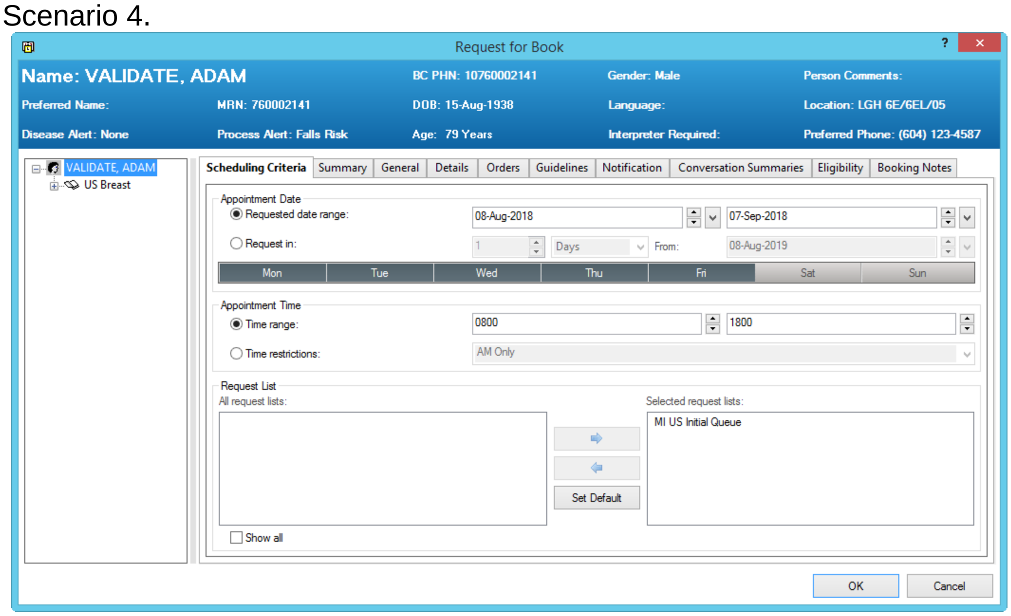
In order to place patients on the request queues, follow the steps to book an appointment 1-14 in section 1. Once your client is moved into the WIP you would normally schedule using Drag and Drop or Suggest, but instead we will click the **Request** button 

to add to the queue.

The Request to Book window opens and defaults to the Scheduling Criteria with the Request List Selection. The Selected Request Lists box will automatically default with the MI Modality Initial Queue defaulted.

If you want to change the request list, you can select the Show All button below and use the arrows to move your selection over. Find the list you want to default your patient to and click OK. The patient will be removed from the WIP and will now be on that Request Queue for scheduling at a later date.

We will learn more about Request Queues and how to schedule off of a request queue in Scenario 4.



Practice

Using your outpatient on your training card,

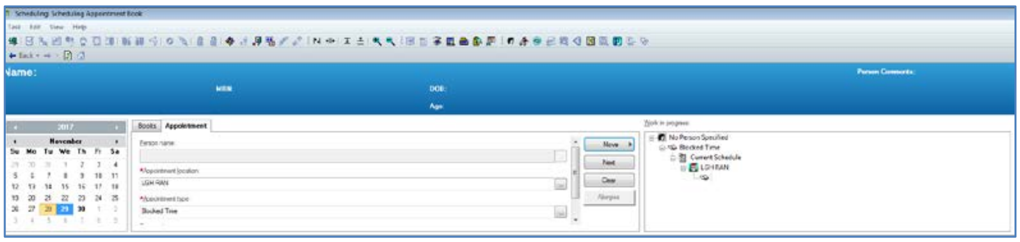
1. Please book 3 separate commonly used appointments in your respective modality (XR, CT, MR etc.). Use Drag and Drop to schedule one appointment. Then use the Suggest method to schedule the second appointment. Add the third appointment to the modality Initial queue.

6 Blocking Schedules

There are times when you will need to block off a schedule so that appointments are not booked into those times.

To block just a few slots, you can use the appointment type Blocked Time. When you have confirmed it, the slot will turn grey and cannot be scheduled into.

1. Follow the steps (1 to 4) from Step 1 to go to the Appointment tab.
2. Select an Appointment Location from the drop-down list (**NOTE**: Skip the Person Name field).
3. Select Blocked Time in the Appointment Type field.
4. Add any appropriate comments in the Comments field in the Accept Format Fields.
5. Click on the **Move** button to move the appointment to Work in Progress (WIP) area.



6. Use either Drag & Drop or the Schedule button option to block the time on calendar.
7. Click **Confirm** to complete booking the Blocked Time appointment.

NOTE: If you want to block multiple slots, click next to move another blocked slot into the WIP until you have the correct number of slots in the WIP. Confirm each blocked slot.

PATIENT SCENARIO 3

Learning Objectives
At the end of this Scenario, you will be able to: - Modify an Order within SchApptBook - Reschedule an appointment - Check In a patient - Cancel an Appointment

SCENARIO
This part of the course is a step by step guided introduction to making changes within SchApptBook. You will be asked to accomplish a variety of tasks that are part of your daily workflow, and you will be guided through them. Follow the guidelines included to move through the scenario.

Activity 3.1 – Modifying Appointment Information, Order Details and Patient Information

1 Modifying Information

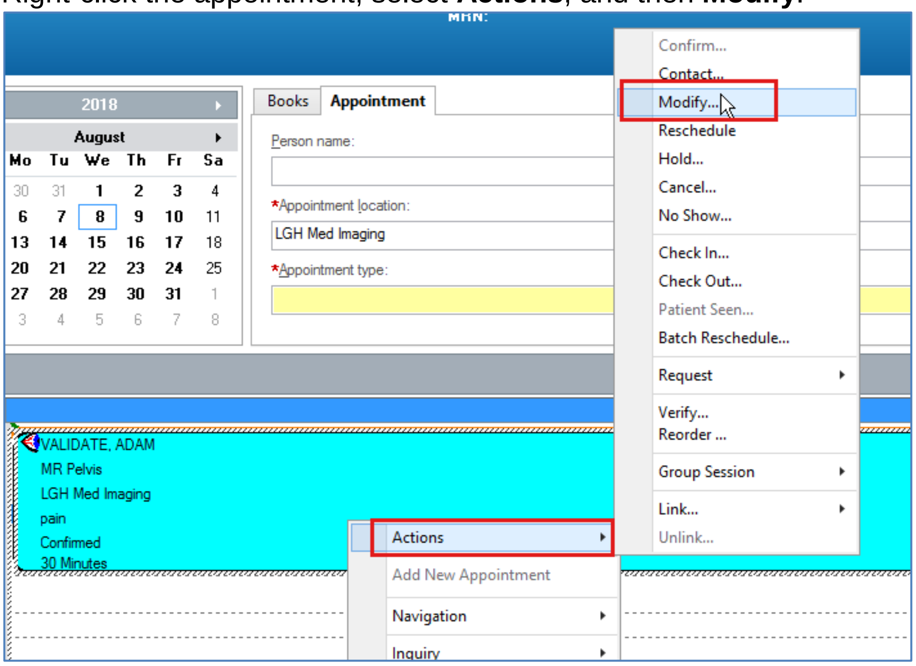
There are three different types of modifications that can be made. You can modify Appointment information such as the Referring Provider, Referral Received Date, Reason for Visit, and Special Instructions, etc.

You can also modify the Order as long as it stays within the same modality. As you learned in Activity 1.4, if you must change modalities, you will have to cancel the appointment or order in the Request Queue and reorder it either via DOE or SchApptBook.

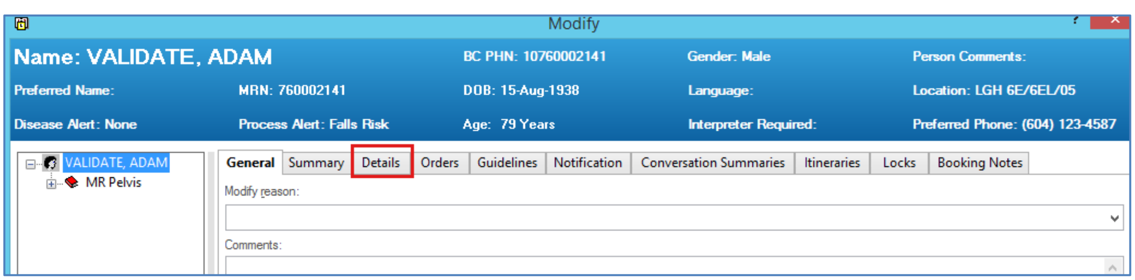
You can also modify Patient information such as their Date of Birth, Last Name, and Phone Number, etc.

Modifying the Appointment Information

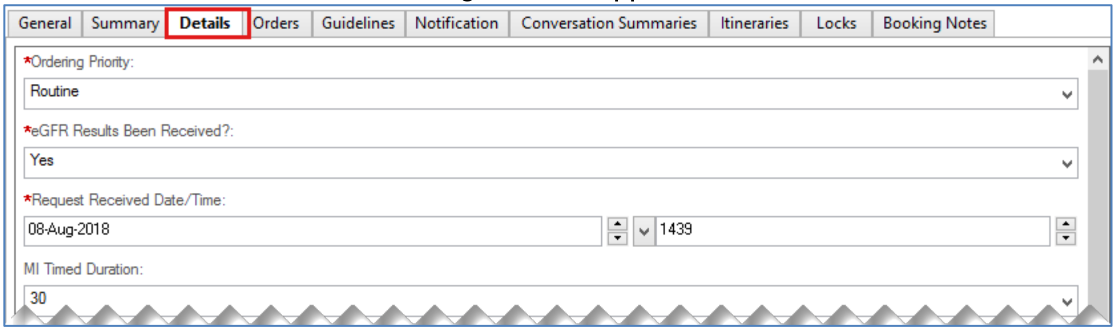
1. Right-click the appointment, select **Actions**, and then **Modify**.



2. The Modify window will pop up allowing you to make any changes.



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

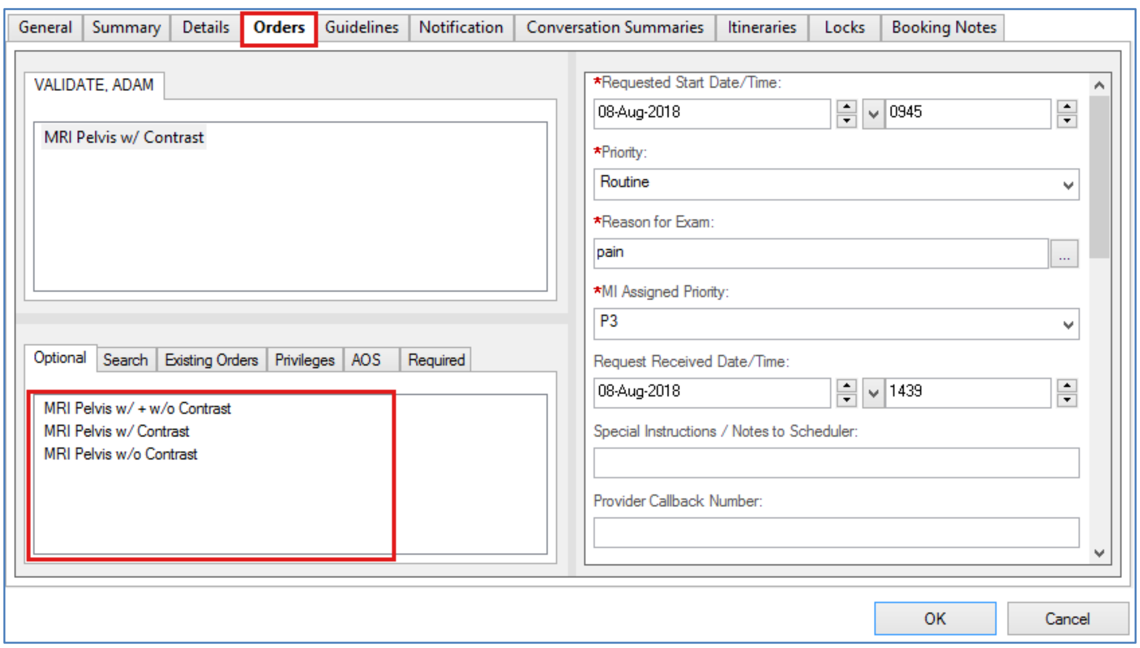


NOTE: It is not possible to modify the Appointment Type, Location, or Patient Name. These changes will require the apppointment to be rescheduled.

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

Modifying the Order

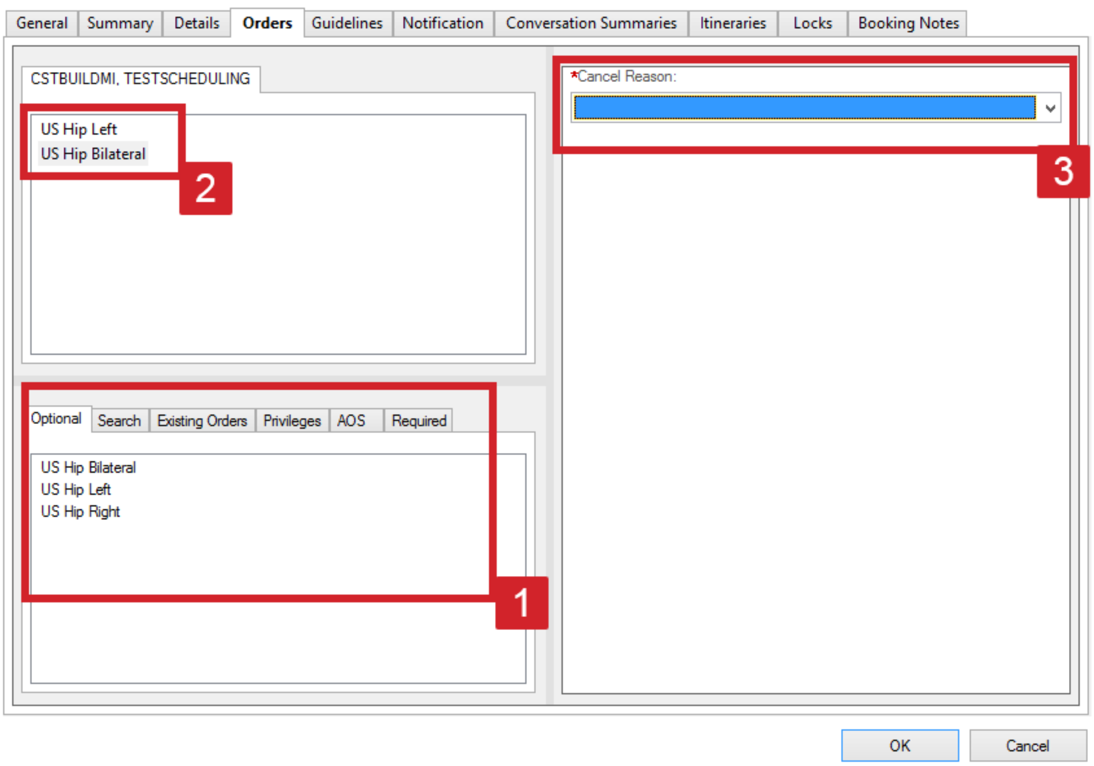
To modify the order (i.e., the Radiologist asked for the order to be changed to expand the view or select a more specific exam), click on the **Orders** tab.



1. You can see options in the *Optional* window below. You can find your new exam there and double-click to replace the exam. Once the exam moves to the working window. You must select a new MI Assigned Priority for the new exam.

NOTE: If you do not see the exam you need in the Optional tab, you can select Search and find your order within the same modality this way.

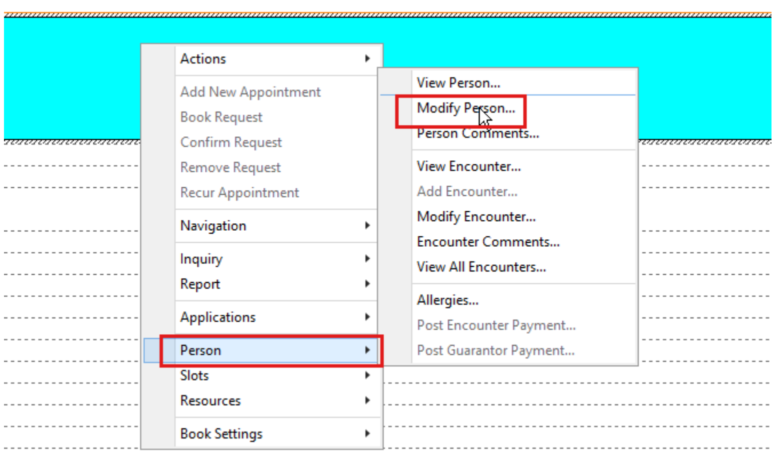
2. Right-click the old exam and select **Cancel** and add a **Cancel Reason** for the first exam.



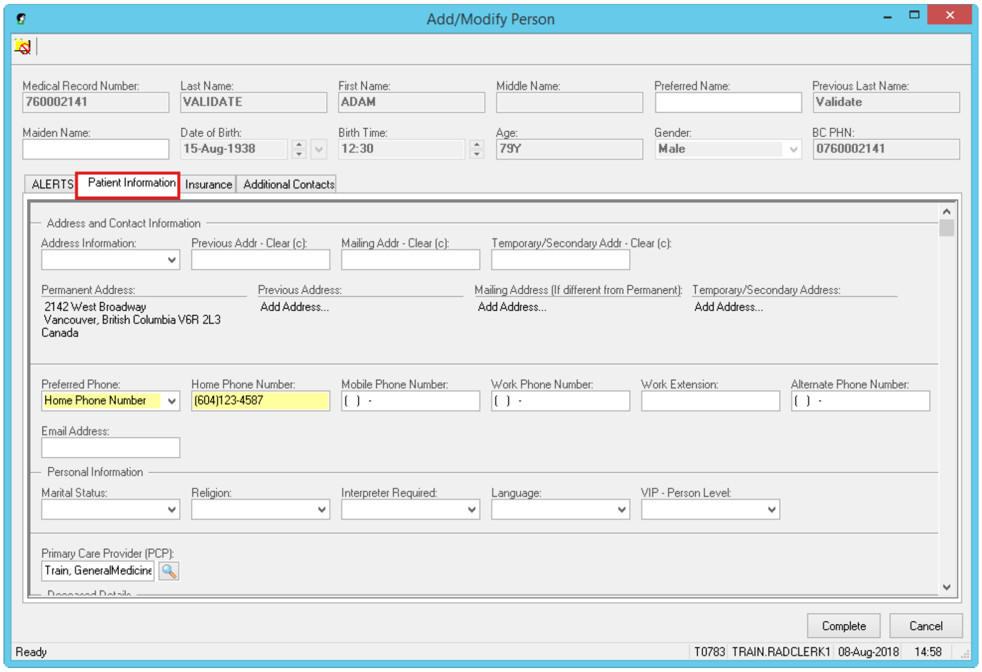
Modifying Patient Information

To modify patient information, you will need to highlight that person's appointment,

1. Right-click, go to **Person**, and select **Modify Person**.



2. Select **Facility Name** in the Organization window. The EMPI window briefly launches.
3. 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 that are required.



4. After you have made your changes, click **Complete** to save.

Activity 3.2 – Rescheduling a Patient’s Appointment

1

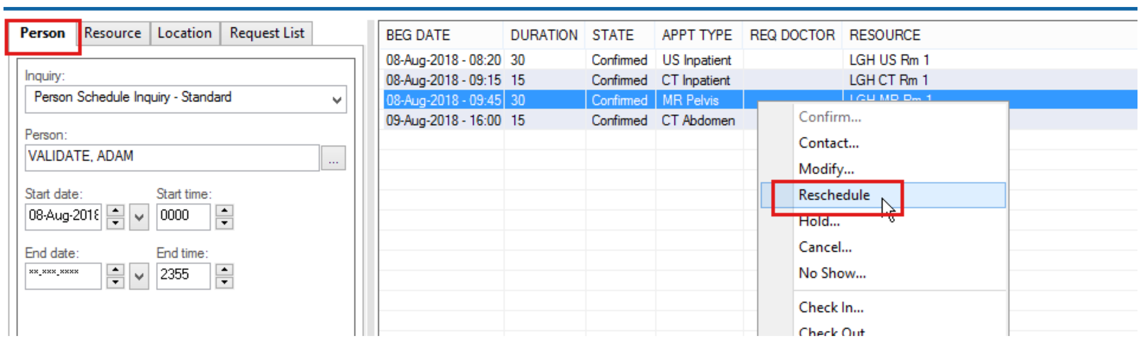
Rescheduling a Patient

There are multiple methods for rescheduling an appointment.

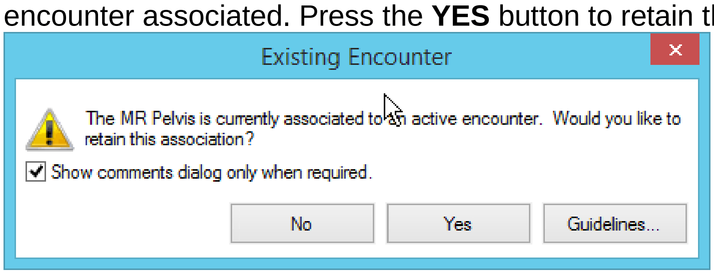
1. Right-click on the appointment within an Appointment Inquiry.
2. Drag-and-Drop into WIP.

Right-click on the appointment within an Appointment Inquiry

1. Open the **Schedule Inquiry** window by clicking on the eyeball icon in the Toolbar. 
2. Search by the patient name using a **Person Inquiry** - Person Schedule Inquiry – Standard
3. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the **FIND** button.
4. Highlight the appointment you wish to reschedule, right-click and choose **Reschedule**.

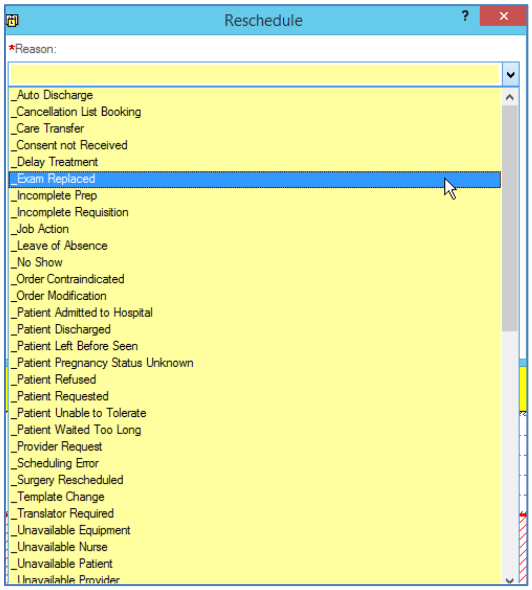


5. The Future Requests/Appointments window may display. Press **OK** to move to the next step.
6. The Existing Encounter warning may display if your appointment currently has an active encounter associated. Press the **YES** button to retain the encounter association.



7. The Appointment Attributes window will display. Press the **OK** button within this window. Make sure there is only one order in the top window.
8. The appointment information will now display within the WIP.

9. From this 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.
10. The Reschedule window will display. Select a reason from the dropdown and press the **OK** button.

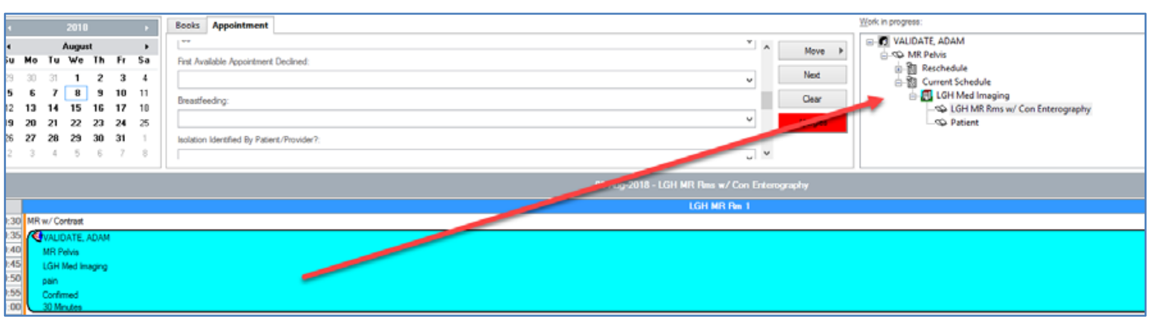


11. Your appointment will now appear in a Confirmed status in the new appointment time and the previous appointment time will be removed.

NOTE: The attached encounter will be updated with the new date and time.

Drag-and-Drop into WIP

1. To reschedule an appointment Drag & Drop into the appointment into the WIP.



2. From the WIP, continue to reschedule the appointment as previously shown.

NOTE: You can also use this function if you need to un-check in an appointment that was checked in incorrectly.

Activity 3.3 – Checking In a Patient

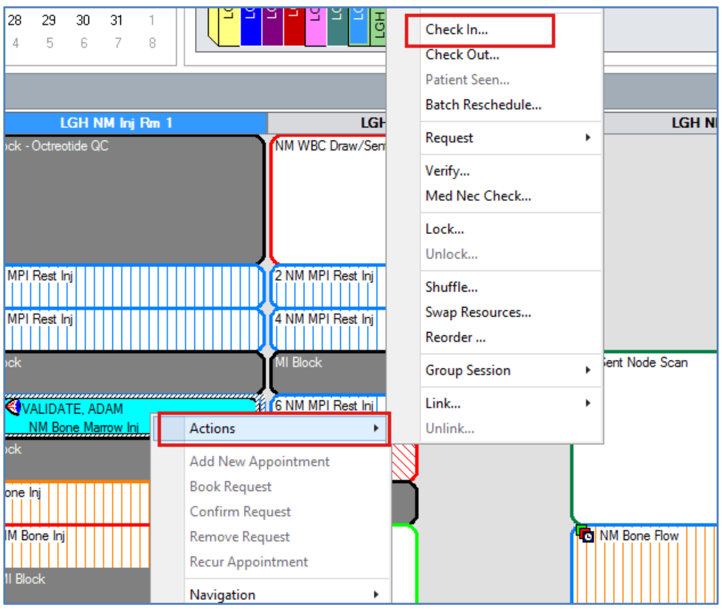
1 Checking in a Patient

Checking-in appointments activates the order and assigns an accession number so that the exam can be started in RadNet. This is also a good way to keep track of patients who have shown up for their appointments and those who have not.

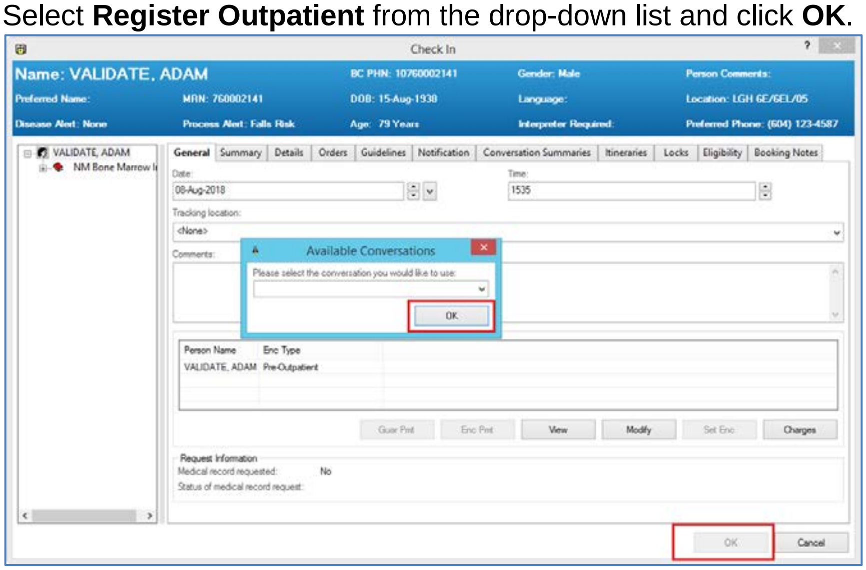
There are multiple options for Checking-In appointments, however the following is the one you will use most often:

Right-click on the appointment within the scheduling grid area

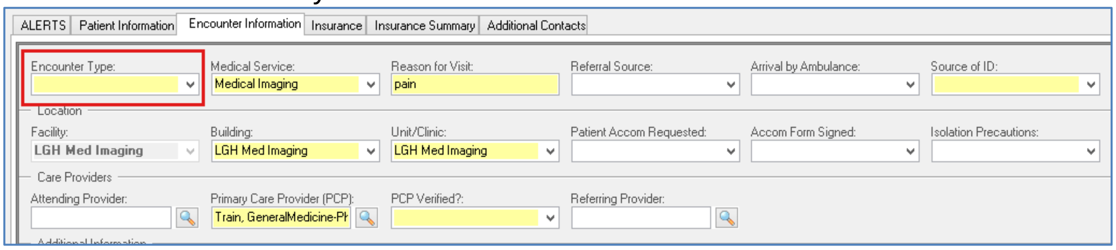
1. Right-click the appointment you want to check in, select **Actions** then **Check In**.



2. The Check In window will display, click **OK**.
3. Select **Register Outpatient** from the drop-down list and click **OK**.

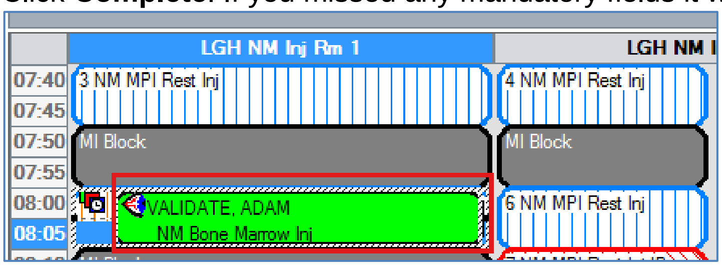


4. The EMPI will search for the patient. Click **OK.**
5. The Register Outpatient Conversation window opens.
6. All the available mandatory fields will display in yellow. In order to Check-In a patient for an appointment, a **full registration of the patient information is needed**.
7. In the *Encounter Information* tab select **Outpatient** for Encounter Type and complete the rest of the mandatory fields.



8. Complete the *Insurance* tab by adding an **Insured Resident**, **No** *Accident Related Visit* and **MSP** for *Health Plan, see card.*

9. Click **Complete**. If you missed any mandatory fields it will take you to the missed field.



The appointment is now in a *Checked In* status and the appointment will turn green in the Scheduling Appointment book.

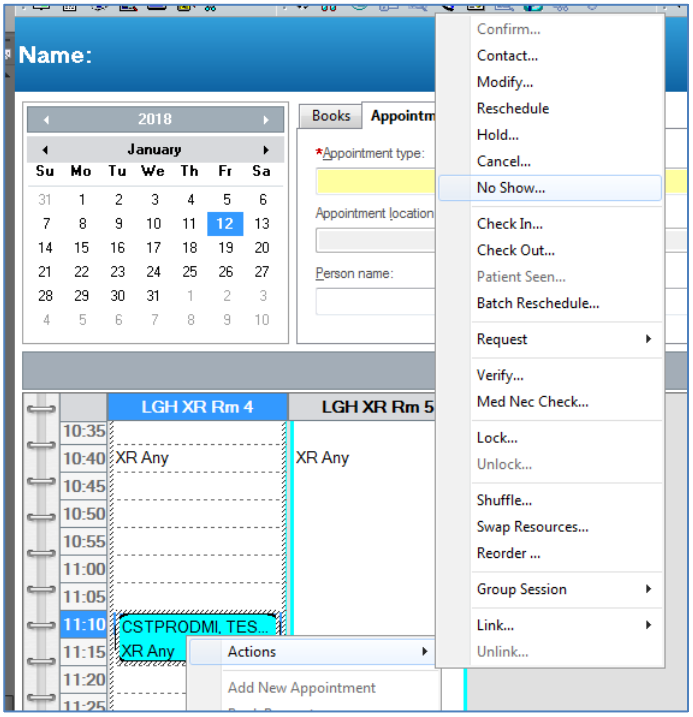
NOTE: The Outpatient Encounter Types will be automatically discharged (auto-discharged) by the system. The auto-discharge will occur one day after the registration date, and will be backdated to 23:59 on the registration date.

Activity 3.4 – Mark a No Show and Cancel an Appointment

1 Mark an Exam as a No Show

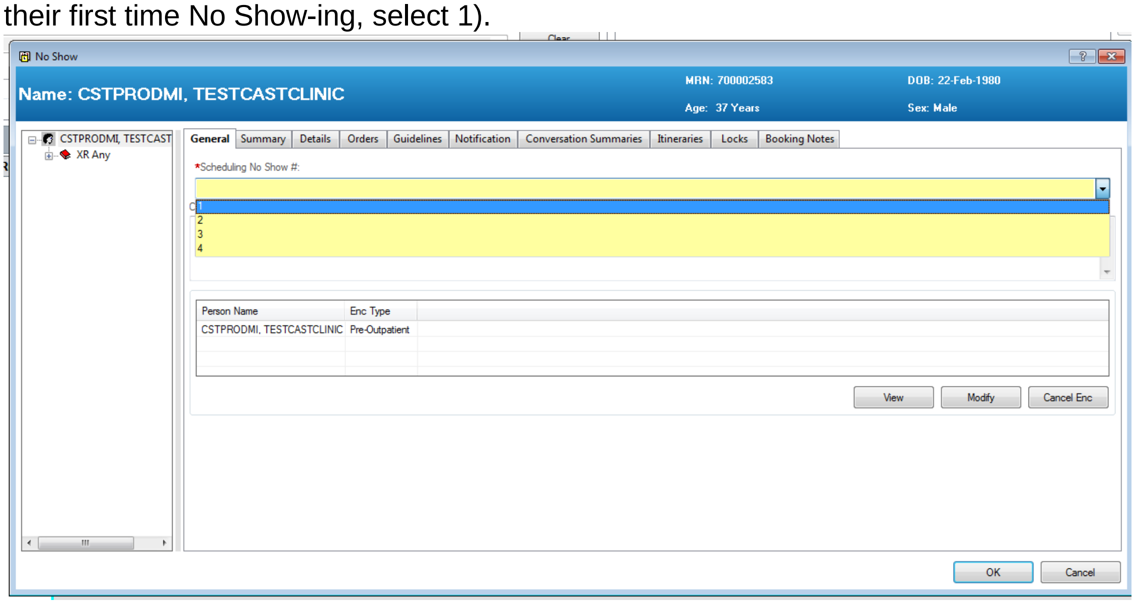
Mark a patient as No-Show if they do not show up for their appointment. This will put them back on the request queue and save you from having to re-enter all of the appointment and encounter information you have already created.

1. Right-click on the patient select **Actions** and then **No Show.**

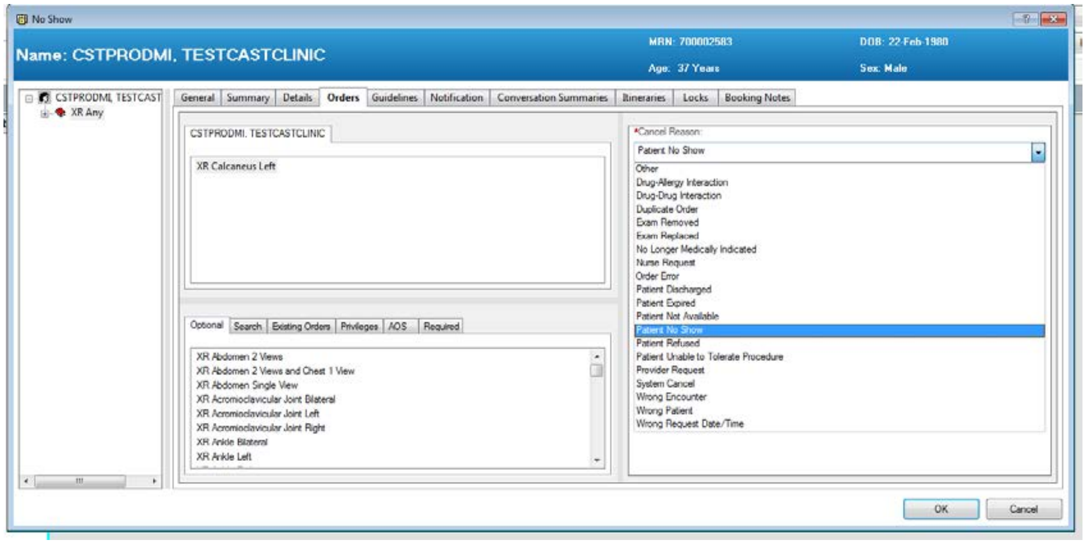


A **No-Show** window will appear.

2. Select the number of No Shows for the patient under **Scheduling No Show #** (e.g. If this is their first time No Show-ing, select 1).



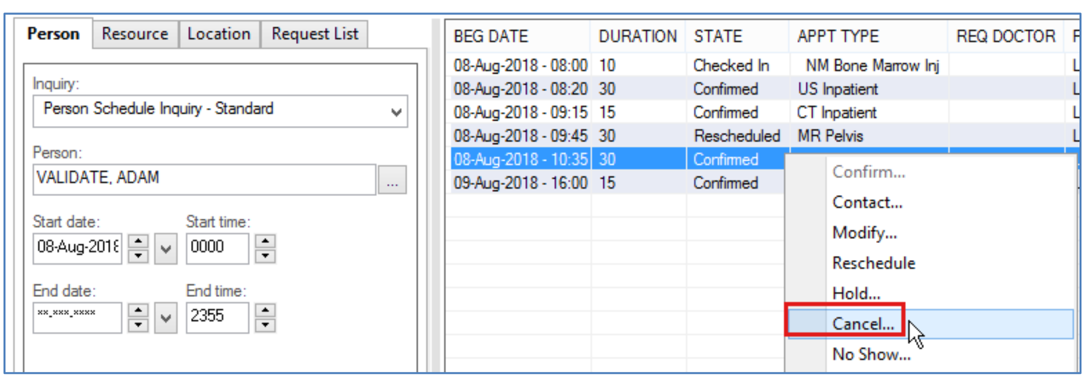
3. Click on the **Orders** tab and select the **Cancel Reason** as **Patient No Show**. Click **OK** and the patient's timeslot will appear in grey.



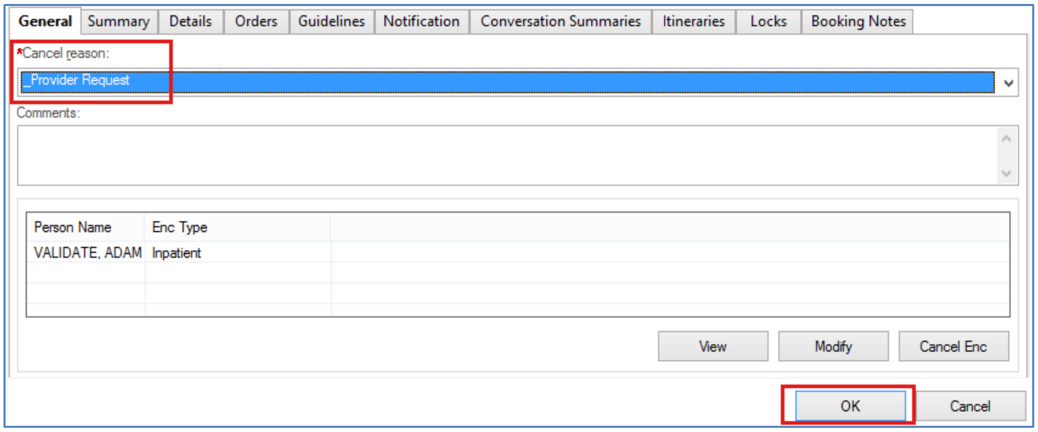
2 Cancelling an Appointment

Right-click on the appointment within the Appointment Inquiry

1. To cancel an appointment from an Inquiry, first open the **Schedule Inquiry** window by clicking on the eyeball icon in the Toolbar. 
2. Use one of the many available Inquiries to find the appointment:
   - Search by the patient name using a **Person Inquiry** - Person Schedule Inquiry – Standard
3. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the **Find** button.
4. Highlight the appointment you wish to cancel, right-click and choose **Cancel**.



5. The Cancellation window will display. Select an appropriate reason in the **Cancel Reason** drop-down and press **OK**.



The appointment is now in a cancelled state. If there is an order associated to the appointment, the order will get auto-cancelled.

Discharge the Encounter

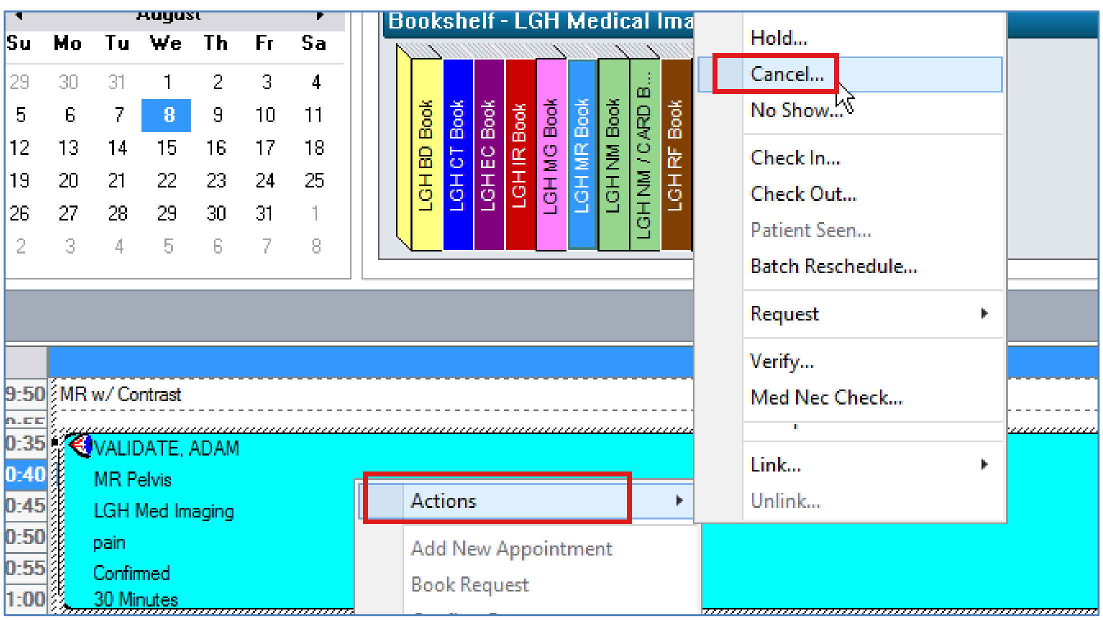
The next step is to Cancel or Discharge the encounter which is covered in Registration's Foundation training.

NOTE: Cancel the encounter if there are no orders/documents associated with it and discharge the encounter if there are orders /documents associated with it.

Right-click on the appointment within the scheduling grid area

You may also cancel appointments directly within the grid area. To accomplish this,

1. Right-click on the appointment; click **Actions**, then **Cancel**.



2. The Cancellation window will display. Follow the steps (4 to 6) from Appointment Cancellation Option 1 to complete cancelling an appointment.

Practice:

Please use your 3 pre-booked exams to practice the following:

1. Practice modifying your patient's appointment information and modifying the order itself.
2. Reschedule the patient for the next day.
3. Check-in the patient from the second appointment.
4. Cancel their appointment.

Key Learning Points

- When you want to modify an exam in the request queue list that changes the modality, it is mandatory to cancel the exam and schedule under the new appointment type.). When you move a request from one queue to another, it does not automatically remove it from the prior queue.
- The scheduling window using suggested timeslots has customizable preferences. You can attend to patient's scheduling needs by customizing the search for a slot based on the parameters the patient may have. The system will suggest timeslots that correspond to those parameters
- Required order/scheduling details must be filled in before you can place/ schedule an order.
- When you reschedule an appointment, keep the same encounter for the new date and time
- If you schedule an appointment incorrectly, please see the QRG on how to resolve this issue.

PATIENT SCENARIO 4

Learning Objectives

At the end of this Scenario, you will be able to:

- Modify appointments Request Queues location
- Scheduling appointments from the Request Queue

SCENARIO

This part of the course is a step by step guided introduction to Request Queue in SchApptBook. You will be asked to accomplish tasks that may be part of your daily workflow, and you will be guided through them. You check the queue as a part of your daily tasks and begin to schedule one of the appointments for your patient. Follow the guidelines included to move through the scenario.

Activity 4.1 – Request Queues

In Activity 2.1 box 5, we added a patient to a Request Queue. Now we will learn how to move patients between queues and schedule an appointment from the Request Queue.

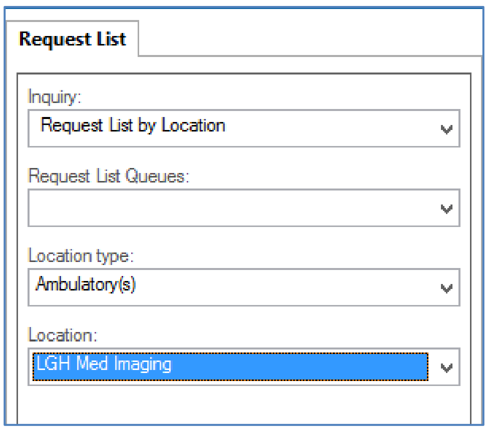
Orders that come in as a Future Order (excluding most of XR) land in the respective modality Initial Request Queue. Requests can either be scheduled directly from the Initial Queue or can be moved to another Request Queue.

1

Moving between Request Queues

To move the exam between Request Queues, from SchAppBook, select the **Request List Inquiry** Icon in the top toolbar.

This will take you into the Request List where you can select the appropriate Queue and location to work from.

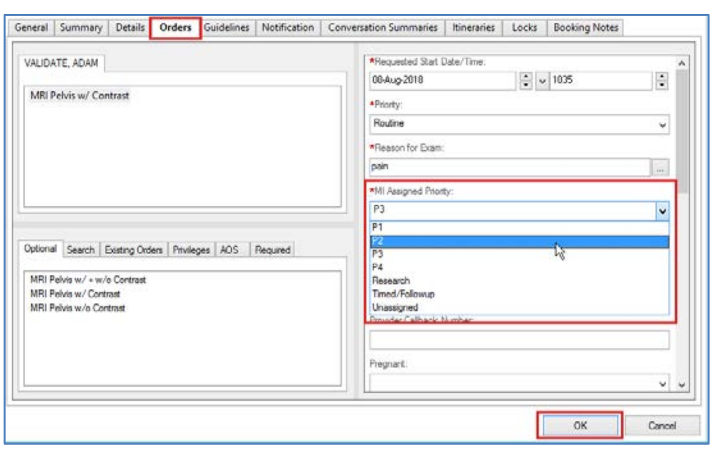


2

To move a patient between Queues after they have been assigned a priority, there are two tasks you must complete:

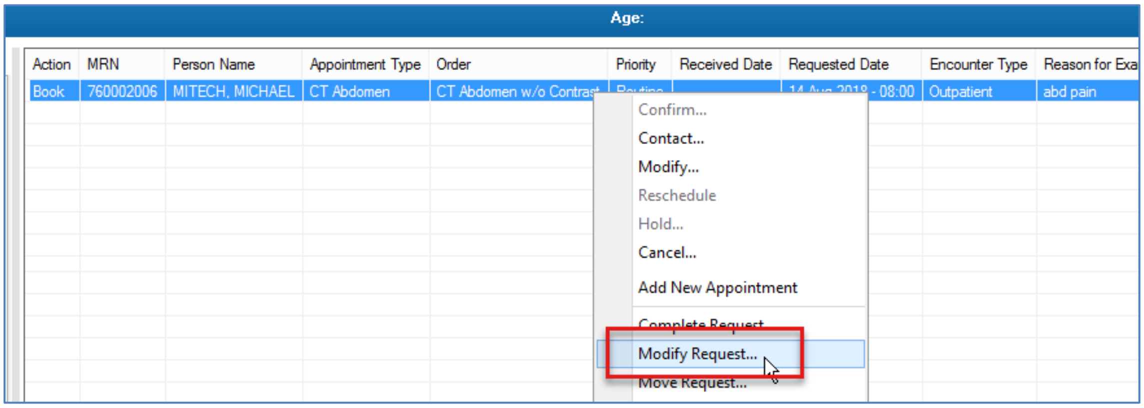
Use the outpatient that was added to the **Initial Queue** from Activity 2. Their new assigned Priority is **P2**. You need to move them to the Modality P2 Queue.

1. Right-click your patient and select **Modify**.
2. Open the **Orders** tab and change their MI Assigned Priority from Unassigned to **P2**.
3. Select **OK**.

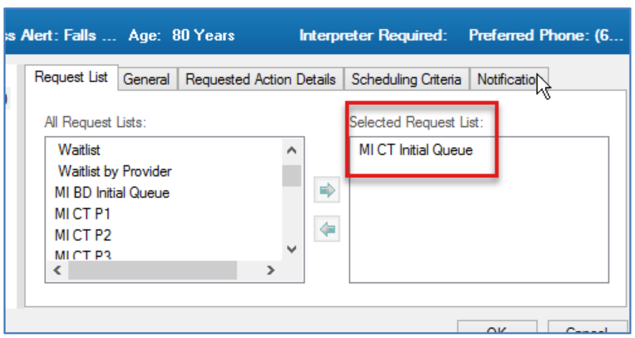


Modify the actual request to move them to a different queue.

1. Right-click the patient and select **Modify Request**.

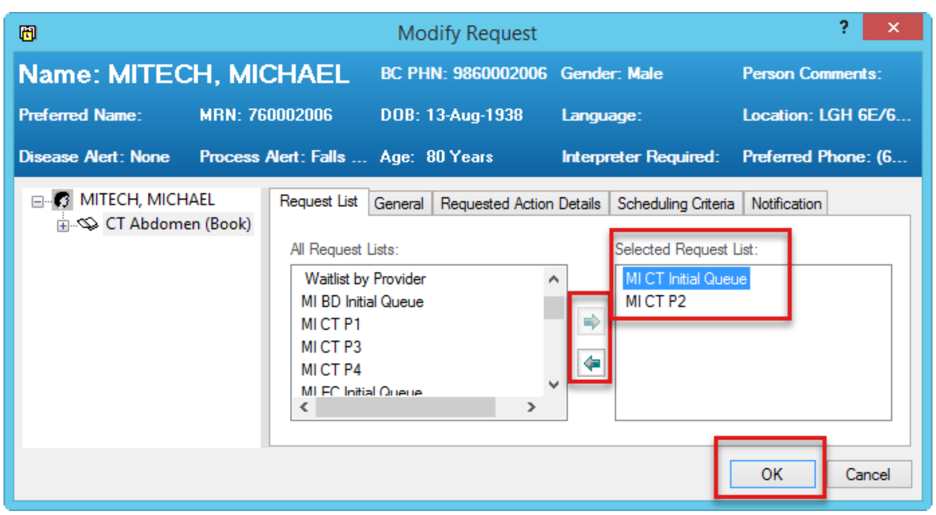


The Modify Request window opens into the Request List tab. You will see your patient on your modality's Initial Queue in the Selected Request List.



In the left box titled All Requests List are the other requests lists you are able to select from.

2. Move your patient to the new list by clicking and using the arrows to move it to the Selected Request List.
3. Move your patient off the current list by moving them off the Initial Queue using the arrow.
4. Click **OK** to save.



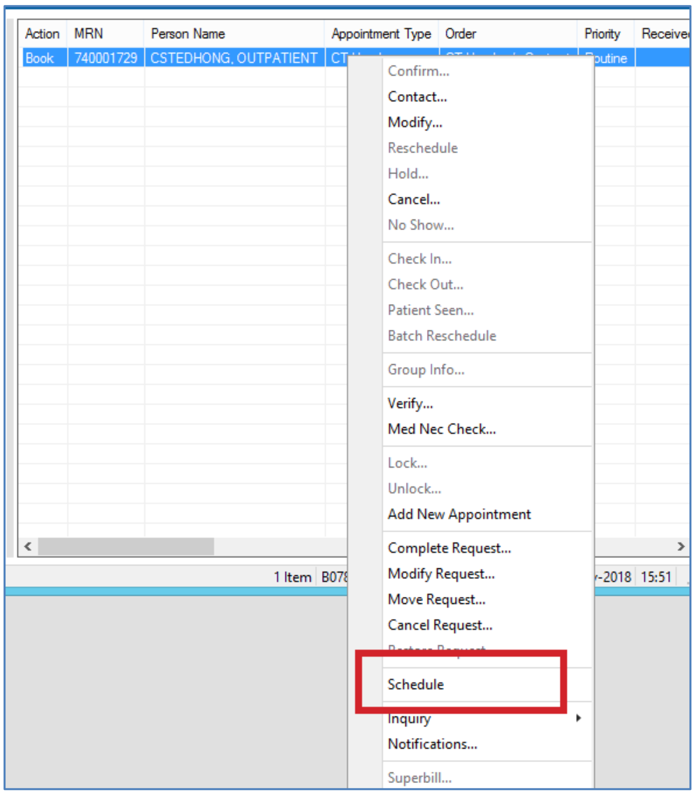
Your patient will now be moved off the Initial Queue and into the **P2 Request Queue.**

Activity 4.2 – Scheduling from a Request Queue

1 Schedule from a Request Queue

Now that the patient has been protocolled and put on the correct P2 Request Queue, the appointment can be scheduled.

1. Right-click on the patient's name in the Request Queue and select **Schedule**.



2. Appointment Guidelines will appear. Read through these and then click **OK**.
3. The Appointment Attributes window will appear with yellow mandatory fields. Complete these as per your modality.
4. SchApptBook will open and the patient will be in the WIP.
5. Schedule your patient using the **Suggest** and confirm their appointment.
6. Ensure you select **Add Enc** to create a Pre-Register Outpatient encounter.

Key Learning Points

- When you move a request from one queue to another, it does not automatically remove it from the prior queue.
- Right-click the order from the queue to schedule an appointment.

PATIENT SCENARIO 5

Learning Objectives
At the end of this Scenario, you will be able to: - Schedule a Multi-modality appointment - Schedule an appointment that crosses departments

SCENARIO
In the following two activities you will need to schedule a series of different types of Nuclear Medicine appointments. The appointments will be scheduled on the same patient, and you will be able to build on previously acquired knowledge in accomplishing the tasks.

Activity 5.1 – Schedule a MultiModality Appointment

1 **Book a Multimodality Appointment**

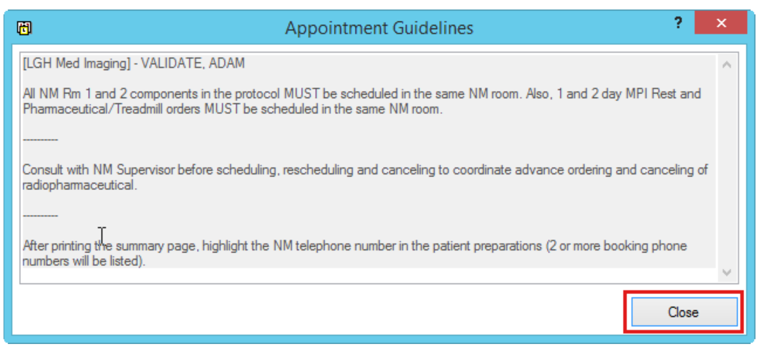
Use the same patient. Click the **Appointment** tab to start booking a **NM CSF Leak/IR Lumbar Puncture** at LGH Med Imaging department.

1. Complete the Appointment details with the information given.

2. **Move** your patient into the **WIP**.

The Appointment Guidelines window will open. This explains the procedure necessary to select the appropriate RF Injection order before scheduling.

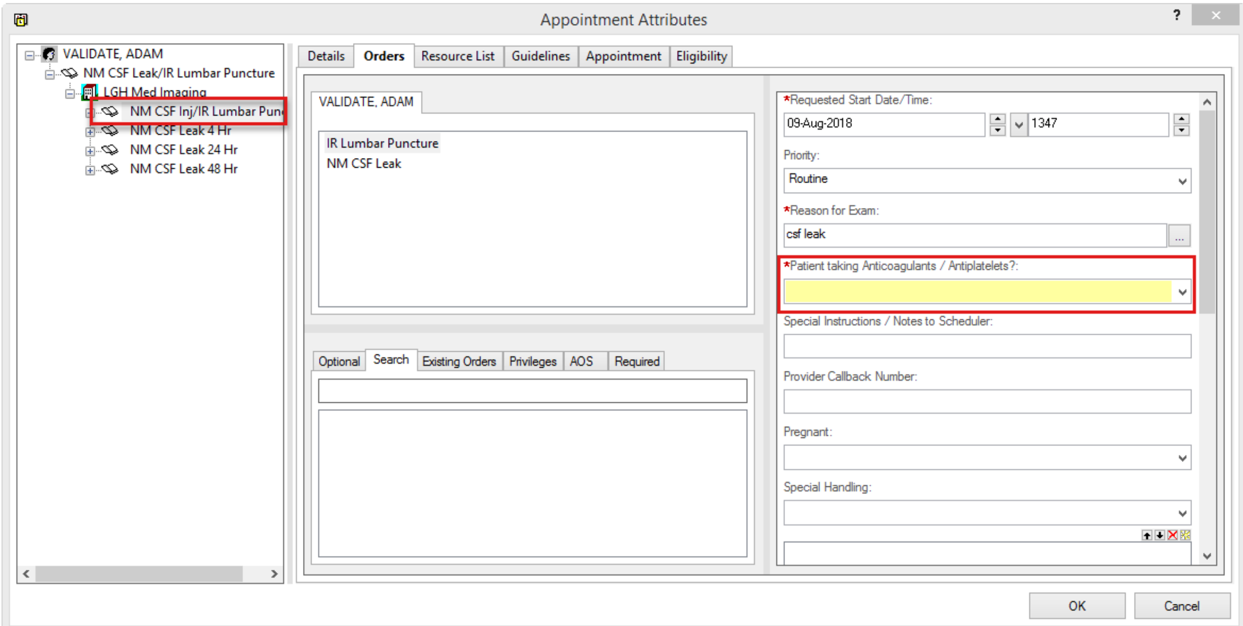
3. Click **Close**.



2 The Appointment Attributes window opens

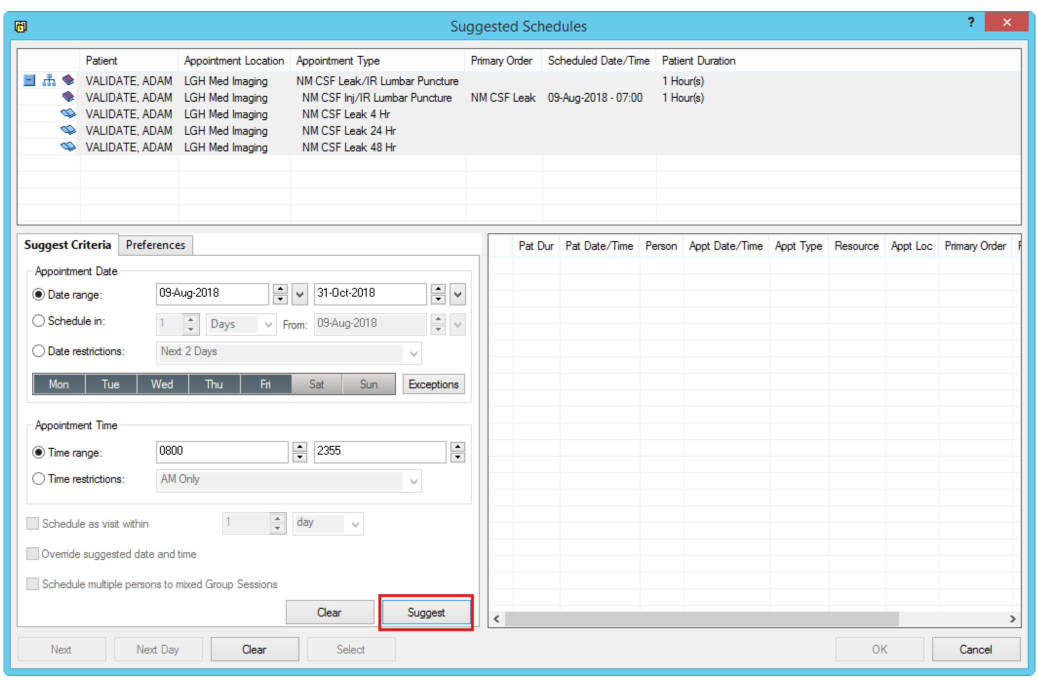
1. Highlight the **NM CSF Inj/IR Lumbar Puncture.**
2. Ensure you are open to the **Orders** tab.
3. Fill out any yellow mandatory fields.
4. Click **OK.**

NOTE: You may have to add more detailed orders from the Optional/Search window depending on the exam



3 Your patient is in the WIP area. The appointment appears with all the rooms listed and is ready to be scheduled.

1. Click the **Suggest** button to find an appointment for your patient.
2. The Suggested Schedules window opens with all the necessary components pre-selected.
3. Change your Suggest Criteria as necessary and click **Suggest** to populate potential appointments in both the **NM and RF** rooms.
4. Click **OK.**



5. You will return to the WIP window and **confirm** your appointments.

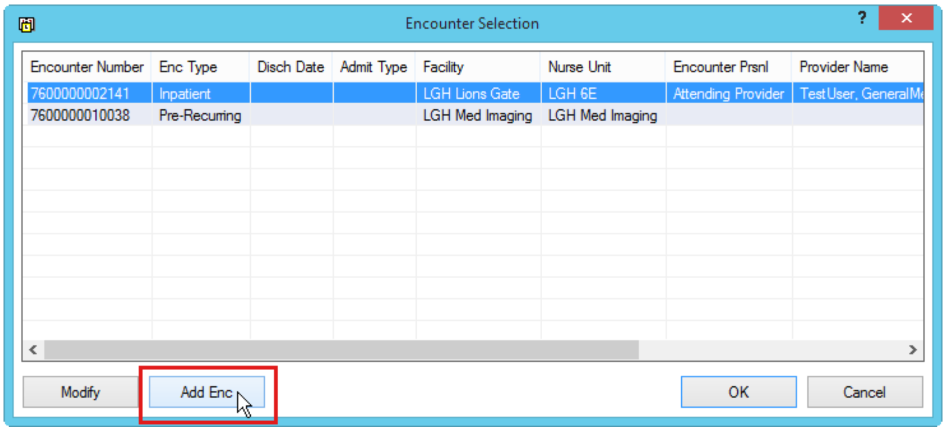
NOTE: To see the times and rooms make sure that the rooms are expanded by clicking the + sign.

6. The Summary of Appointments window will open. Once you have reviewed it, click **OK.**

   The Encounter Selection window opens.

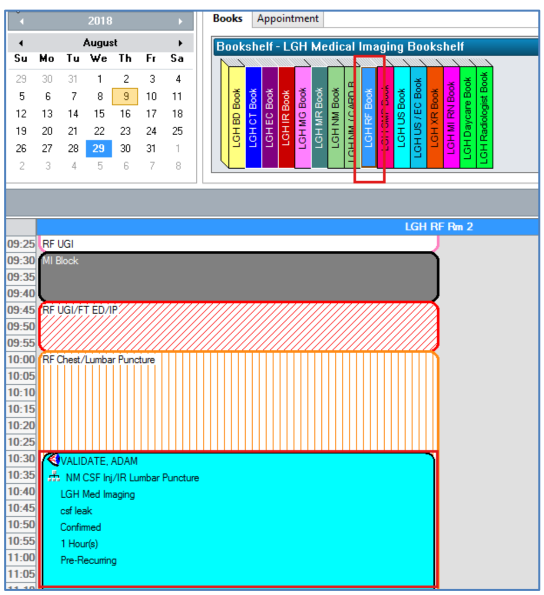
7. Click **Add Enc** to create a new **pre-recurring encounter** for this appointment. Associate the same encounter with each component of the scheduled appointment.

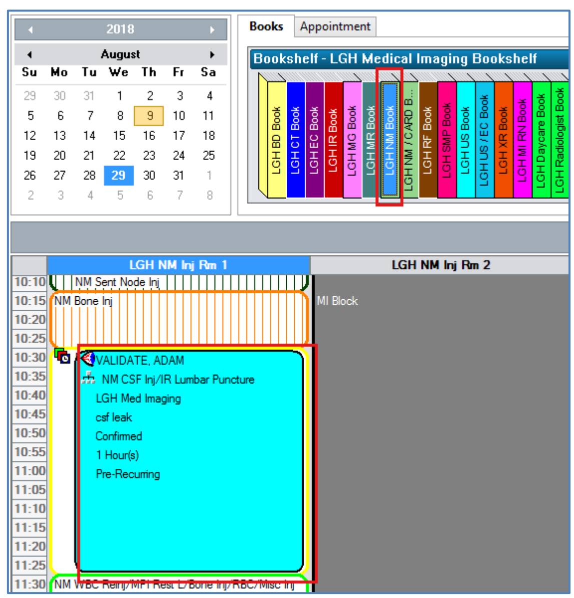
NOTE: If the patient has an active inpatient or emergency encounter, ensure to choose that encounter, if it will be performed on that encounter.



8. Check the **RF** and the **NM books** on the appropriate dates to see the appointments.

9.





Activity 5.2 – Scheduling a Recurring Appointment Across Departments

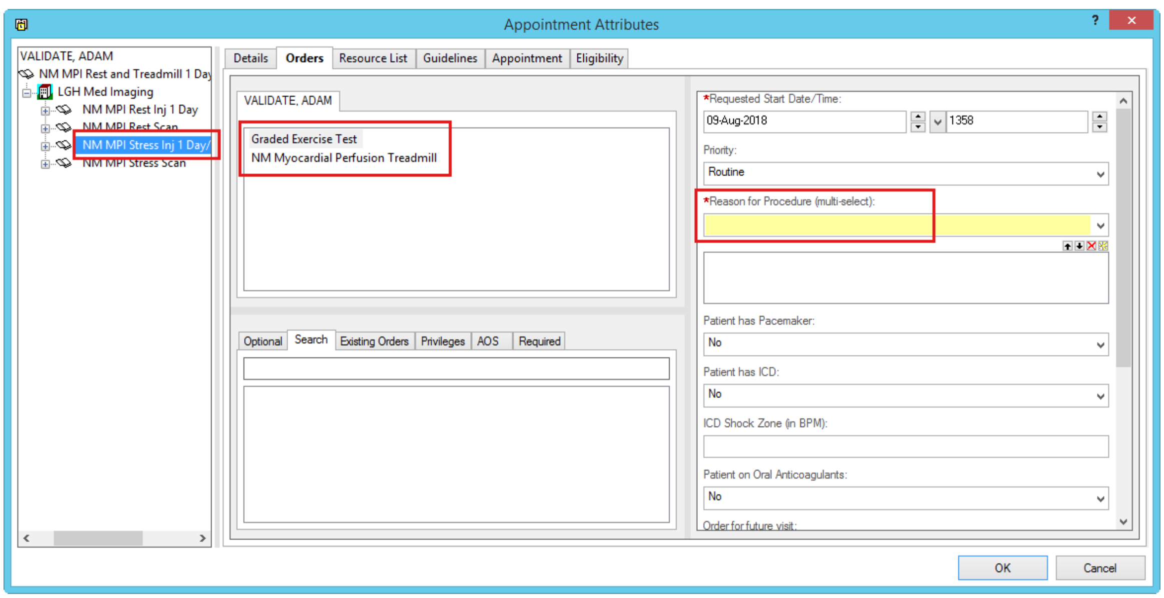
Now let's book a **NM MPI Rest and Treadmill 1 Day** for your outpatient.

1

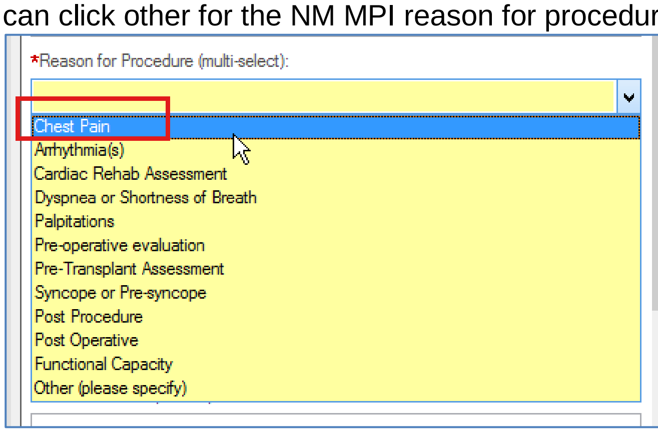
1. Click on the **Appointment** tab and complete the mandatory fields for this exam.
2. Click **Move** to bring your patient into the WIP.

NOTE: If you type NM and the ellipses beside appointment type, more NM exams will populate.

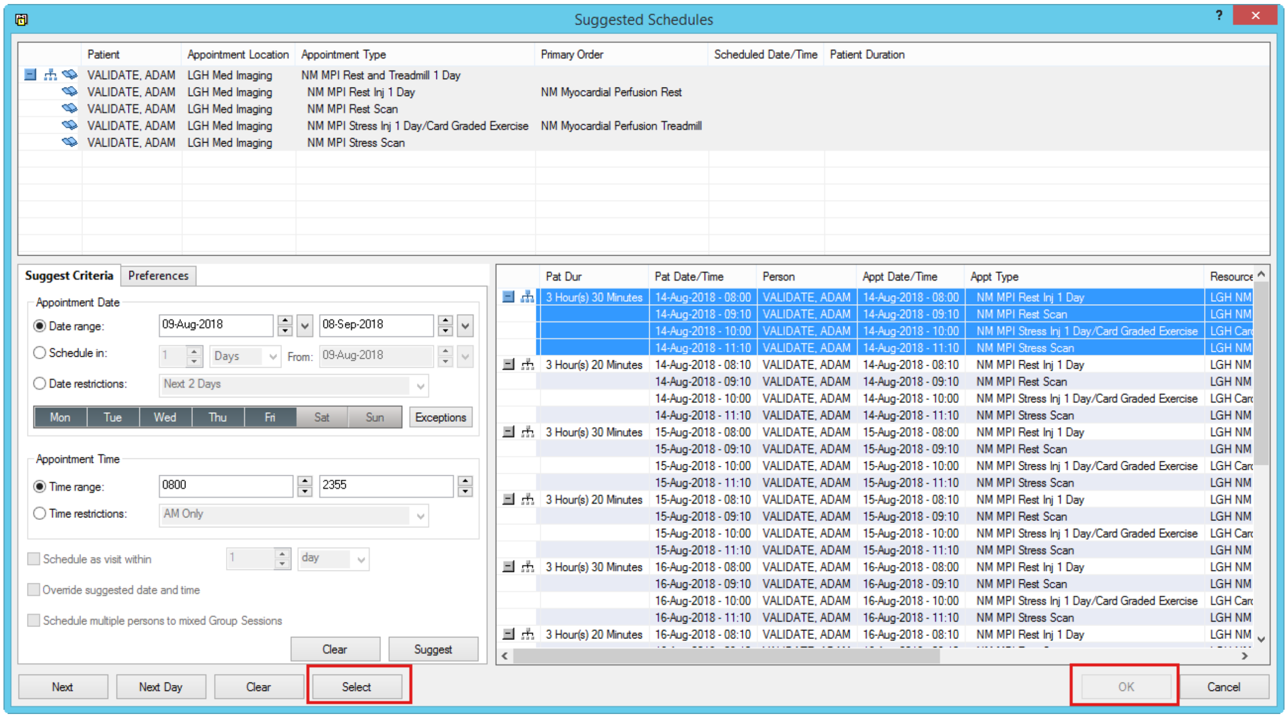
3. Fill out mandatory information in the Appointment Attributes window. Click on **NM MPI Stress Injection 1 day/ Card** which has two components (2). One of these is a NM order (NM Myocardial Perfusion Treadmill), while the other is a Cardiology order (Graded Exercise Test) (2). Because the Graded exercise order belongs to a different department, the reason for procedure (3) in this case is a drop-down menu to choose from, unlike the MI procedures reasons that are free text.



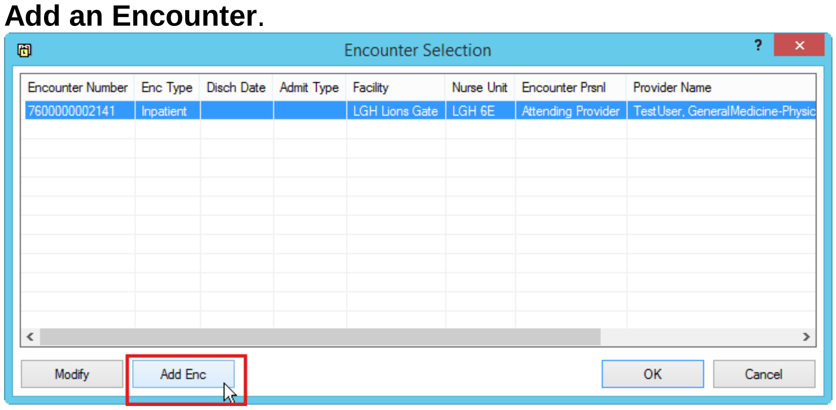
4. Select a **Reason for Procedure** to proceed with the appointment booking. Click **OK**. You can click other for the NM MPI reason for procedure.



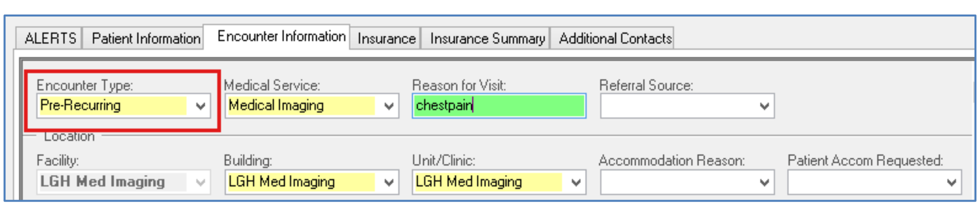
5. Click **Suggest** to find an appointment for the patient.

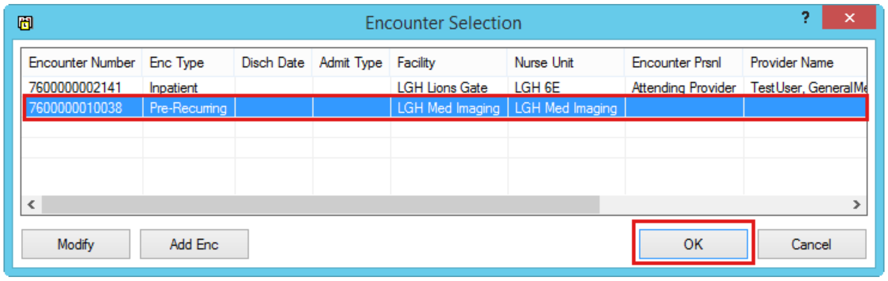


6. Change the Suggest Criteria as appropriate. Click **Suggest**.
7. **Select** an appointment, noting the date and time. Click **OK.**
8. **Confirm** the appointment in the WIP. Ensure you have the correct day selected to view the appointments in the different books.
9. **Add an Encounter**.

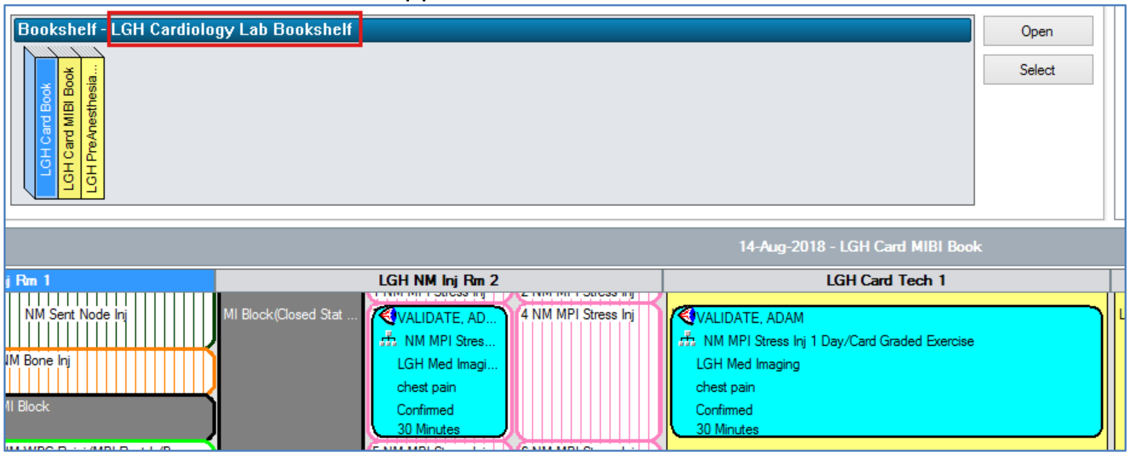


10. Ensure you select a **Pre-Recurring** Encounter Type. Once you click OK, you will see a box appear with the Encounter number. Note this number and associate the new encounter to the rest of the appointments.

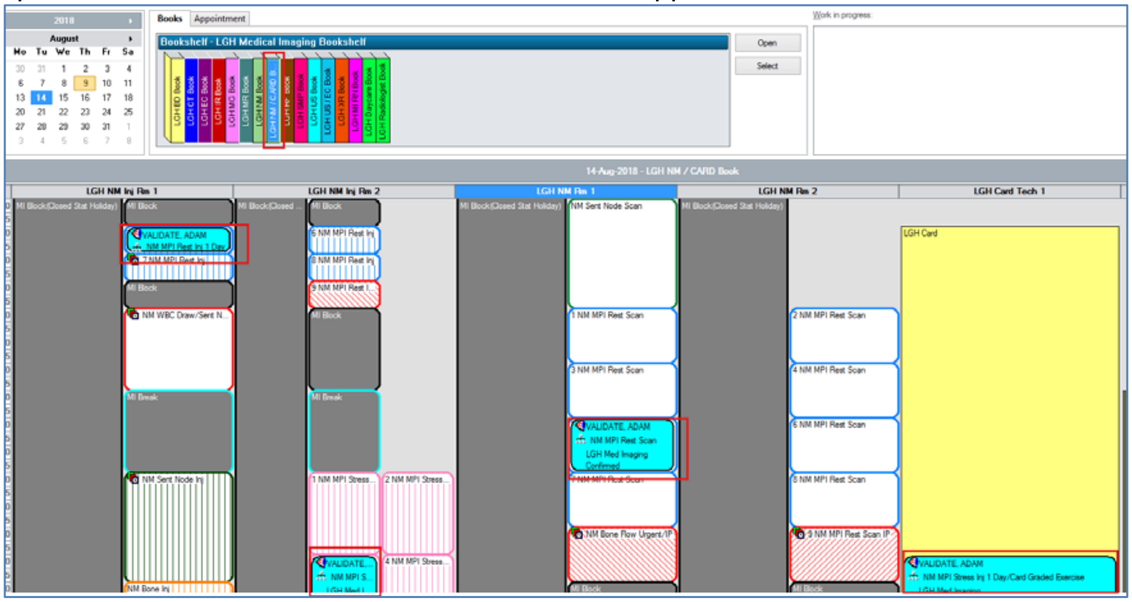




11. Confirm your appointment by looking in the **NM book** and then opening the **Cardiology bookshelf** to see the cardiac appointment.



12. Open the **LGH NM/Card Book** to see both of the appointments in the same book.



Key Learning Points

- Scheduling a multimodality appointment will require booking rooms in different Scheduling Books. While the system will suggest those rooms automatically, you need to make sure that all the components' details are completed.
- When you add a new encounter for outpatient NM exams, always choose **Pre-Recurring** for the encounter type unless it is an inpatient or emergency encounter choose that encounter.
- All the components of an order must be scheduled on the same (newly created) pre-recurring encounter
- For the appointments across multiple departments (i.e. MI and Cardiology), you must enter the reasons for exam separately using Appointment Attributes. You can do this by highlighting each order. In other departments the reasons may be pre-defined drop-down items, while in MI they are free text.
- In addition to NM orders, the XR Colon Transit Study needs to be scheduled as a Pre-recurring encounter.

PATIENT SCENARIO 6 (Supervisors Only)

Learning Objectives
At the end of this Scenario, you will be able to: ■ Remove a completed exam on an incorrect patient ■ Run Reports using Discern Reporting Portal

SCENARIO
As a supervisor you have some extra tasks to complete. A tech informs you that an exam was completed on the wrong patient but has not yet been reported on. You will now learn how to remove the exam so it does not get reported on by the Radiologist. After you will run a departmental report.

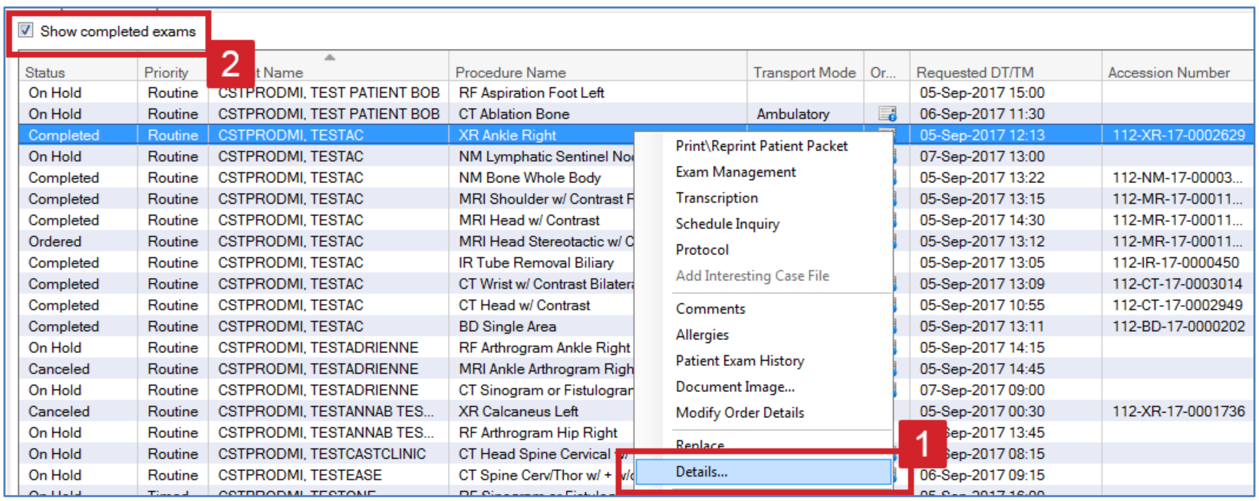
Activity 6.1 – Removing a Completed Exam (Supervisors Only)

There may be an occasion where a technologist has completed an exam on an incorrect patient. You can remove this by following the steps below. Please note that as per your site, you will need to reorder the exam on the correct patient following this activity if you have not done so already. In order to complete this activity you **must be logged in as a supervisor.**

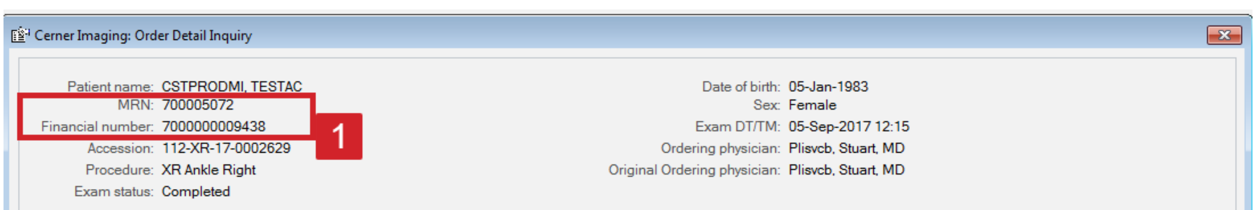
1 Find the completed **XR Chest/Abdomen Single Exposure** exam for your patient on the **Online Work List**.

1. Right-click on the Exam and select **Details**.

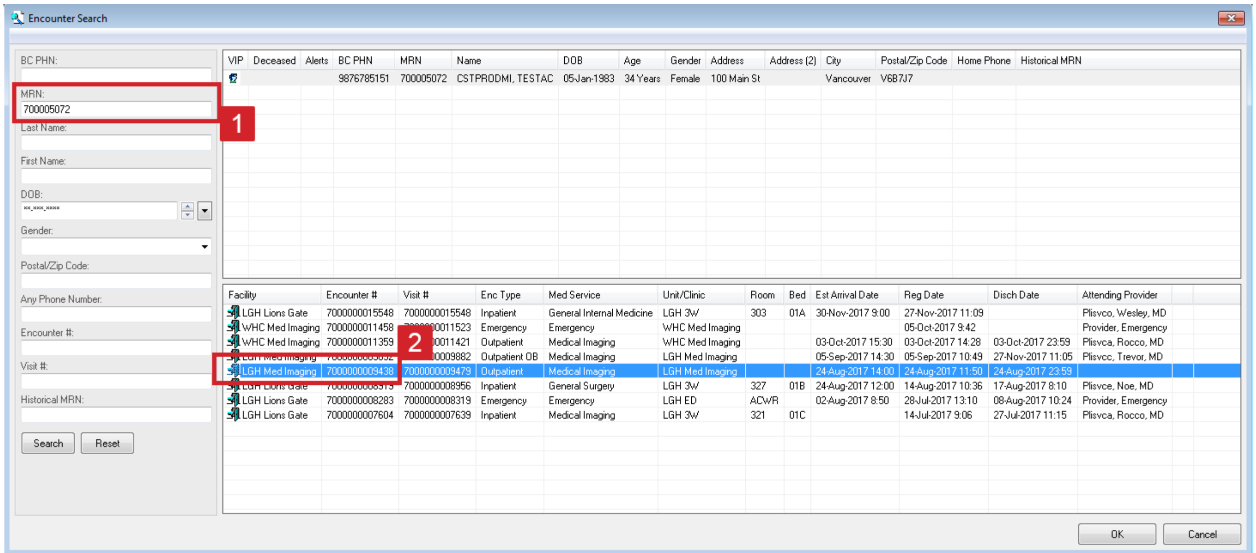
NOTE: Make sure you have the **Show completed exams** ticked.



2 In the Order Detail Inquiry, note the patient's MRN and their Financial number (their Encounter #).



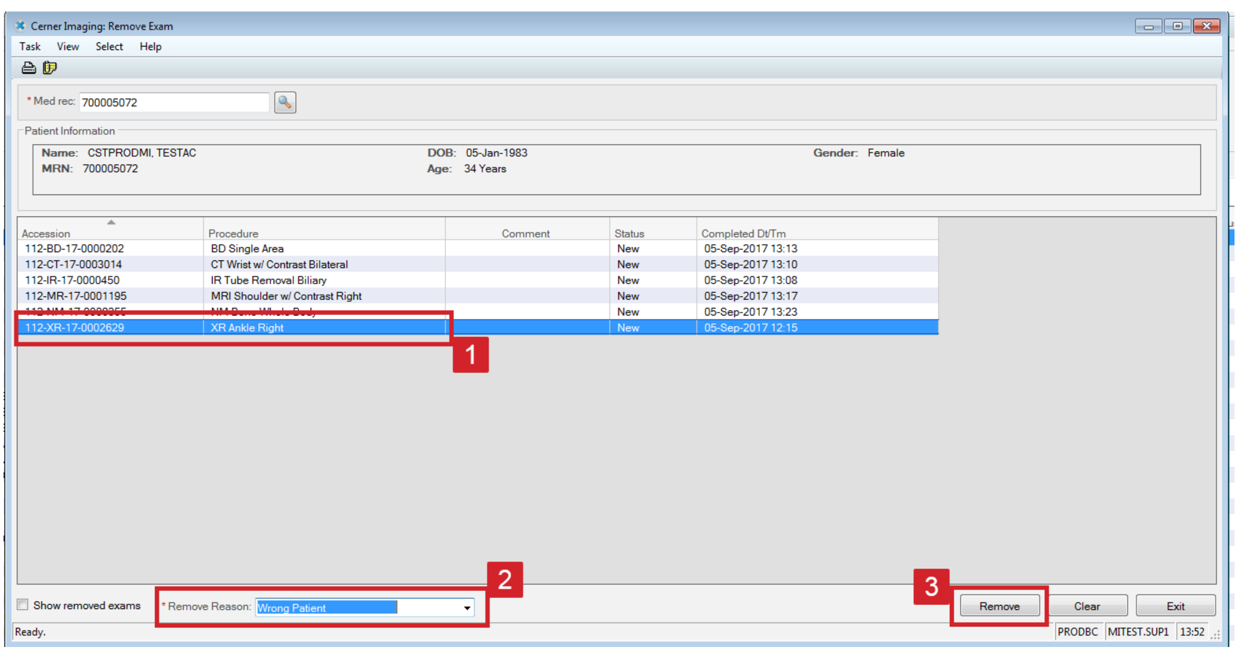
3 Next, select the **Remove Exam** icon from Store Front. Find your patient by clicking the **magnifying glass** and using the person search.



Only people in Supervisor positions have the ability to remove exams; an exam would be removed if completed on the wrong patient (data remediation). If you have difficulties, please address your instructor.

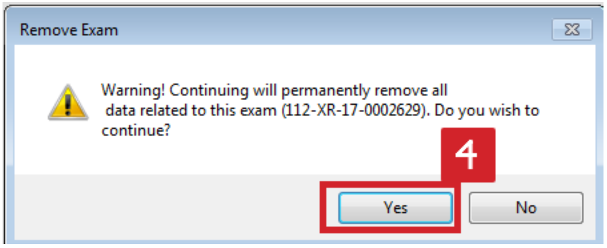
4 The Remove Exam window will reopen.

1. Select the **Exam** you wish to remove.
2. Choose a **Remove Reason** from the drop-down list.
3. Select **Remove**.



An Alert will pop up.

4. Click **Yes**



The exam will be removed.

5. Click **Exit**.

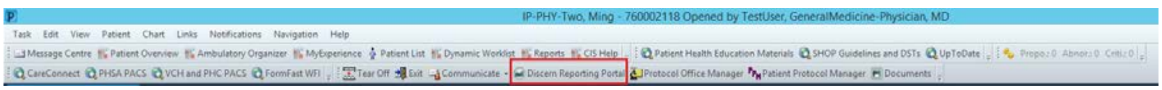
The exam's status will be listed as **Removed** on the **Online Work List**.

Activity 6.2 – Run Reports from Discern Reporting Portal (Supervisors Only)

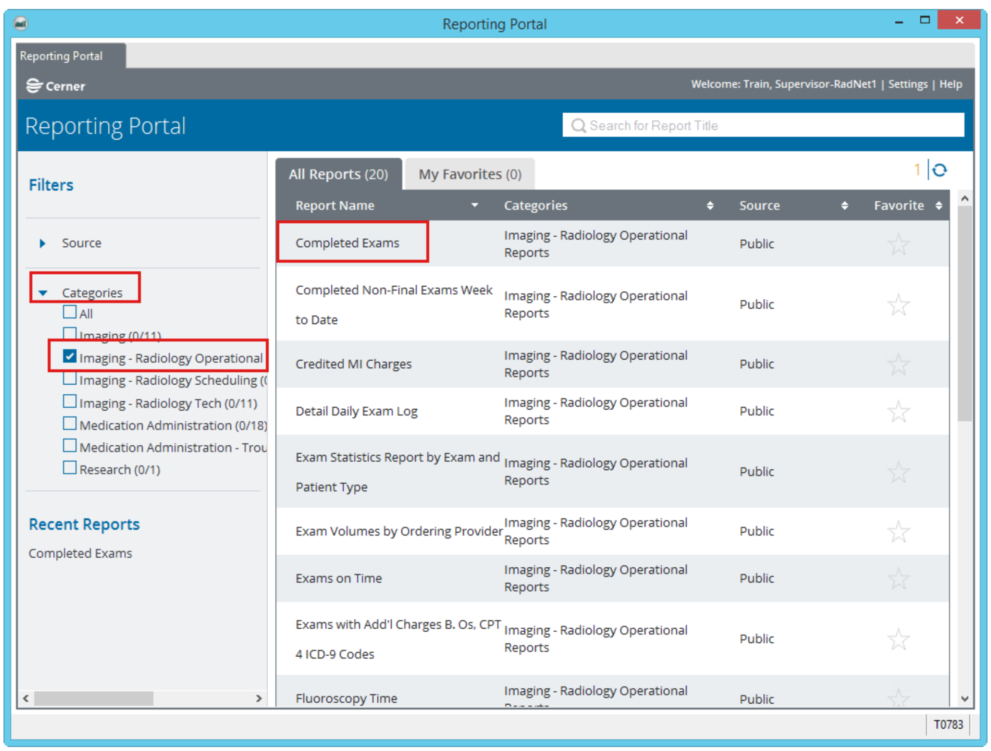
The **Discern Reporting Portal** tool will be used by techs, clerks, database analysts (DBAs), database coordinators (DBCs), and supervisors to generate reports on Medical Imaging activity such as Run, Cancel, Removed, and Replaced Exams by Personnel report. This activity will show you how to run a report.

1

1. Select the **Discern Reporting Portal** icon  from StoreFront or you can find it in the toolbar in PowerChart.



A list with all reports opens up.



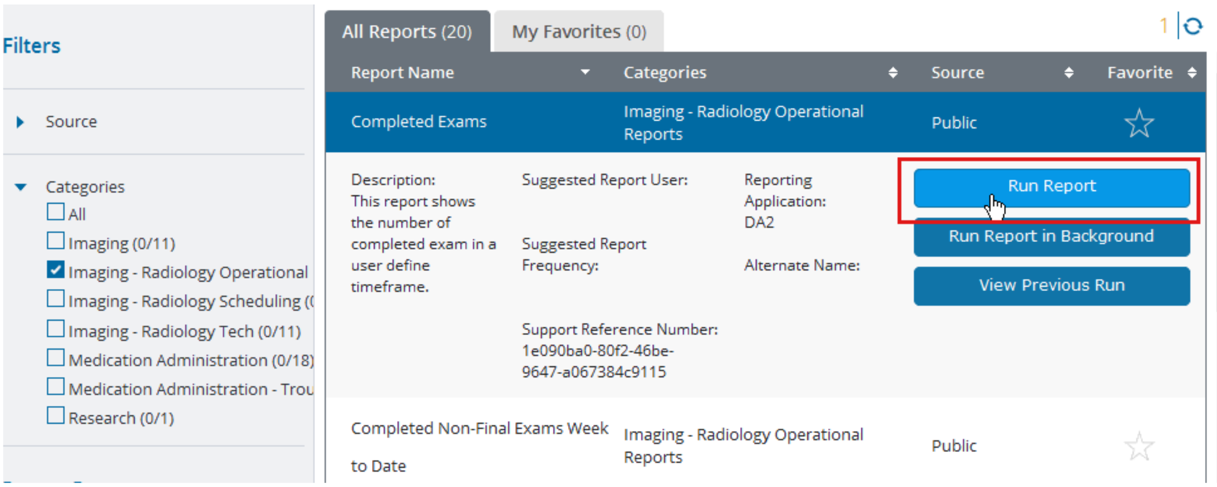
You can select the reports by **Source** or by **Categories**. The Categories will help you narrow down your reports by selecting the appropriate imaging folders: Imaging – Radiology Operational etc.

1. Scroll to see the different reports available, use the numbers or arrows to change the page.

NOTE: Depending on your position, you are permitted access to all folders or only certain folders. You can add a report to your favorites by selecting the **star** which will then be highlighted in yellow and the report will appear in the My Favorites tab.

2

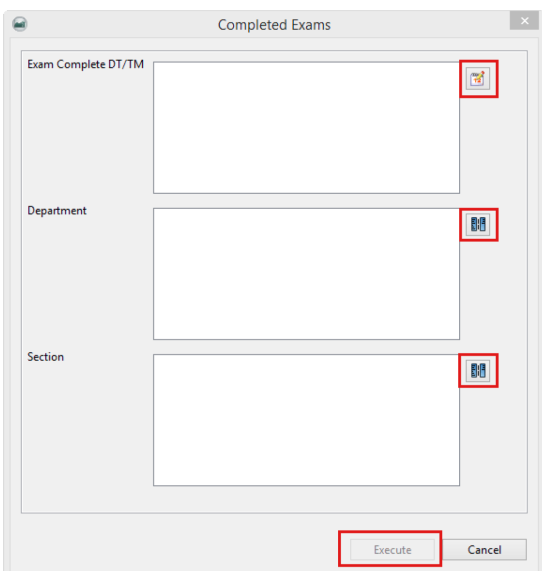
1. Click **Categories** to find the Imaging reports.
2. Select the **Imaging – Radiology Operational** box.
3. Click on the report titled **Completed Exams**.
4. Click **Run Report**.



3

A window pop- up requesting for you to select the Exam Complete DT/TM, department and Section before you can execute the report.

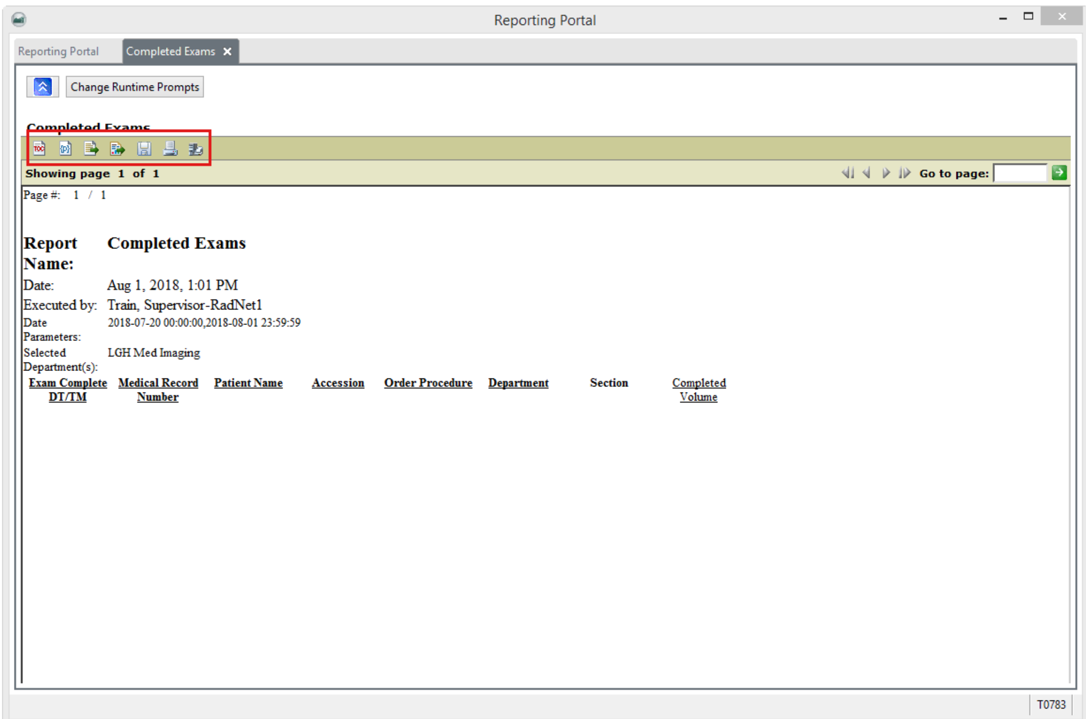
1. Click the **icons** to choose the appropriate dates, departments and section you want to display in your report.
2. Click **Execute**.



NOTE: The reports in the Train domain may not produce any results. The criteria you enter will differ depending on the report you run.

4 The report will load and then display. If you would like to save this report, you can export it and you can save it directly onto your desktop. You can also print this report by selecting the printer icon and choosing your printer. Hover to discover over each of the icons.

NOTE: If you chose to save your report on the portal it will only be saved for a period of 24 hours.



Key Learning Points

- Only supervisors can remove exams for data remediation.
- Exams can only be removed if they haven't been reported on by a radiologist.
- Use Discern Reporting Portal to run reports.

End of Book

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.