

Classroom Activity Book

Patient Scheduling – Foundational

N29 - B

Version Control

Revision History

Version	Date	Summary of Changes	Author (Last, First Name)
1	2017-12-15	New draft	Yuen, Brenda
2	2018-01-30	Noted exceptions for OB clerks	Mohsin, Rubana
3	2018-02-02	Removed selected activities: <i>Shuffle, Linking, Managing Slots, Undo Check-In</i> Re-arranged activities Revised selected activities Removed activity questions	Yuen, Brenda
	Date		

Table of Contents

ACTIVITY 1: NAVIGATING BOOKSHELF AND BOOK	4
a. Open Bookshelf & Book.....	4
b. Setting User Defaults/Preferences	4
c. Appointment Inquiry.....	4
ACTIVITY 2: SCHEDULING APPOINTMENTS.....	5
a. Scheduling Appointment Using Suggest	5
b. Scheduling Appointment Using Drag & Drop	5
c. Scheduling Appointment Using Schedule.....	6
ACTIVITY 3: RESCHEDULE APPOINTMENT	7
ACTIVITY 4: CANCEL APPOINTMENT	8
ACTIVITY 5: CHECK-IN APPOINTMENT	9
ACTIVITY 6: NO SHOW APPOINTMENT	10
ACTIVITY 7: REQUEST LISTS.....	11
a. Create a Request (Manual)	11
b. Move a Request.....	11
c. Schedule from a Request List (Orders-to-Scheduling).....	12
d. Appointment Reviews.....	12
ACTIVITY 8: REFERRAL TRIAGE PROCESS	13
a. Manage New External Referral (Work Queue Monitor).....	13
b. Manage Multi-Patient Task List (PowerChart).....	13
c. Scheduling the Referral (SchApptBook).....	14
d. Updating Encounter Type (PMOffice).....	14
e. Process Task on Multi-Patient Task List (PowerChart)	15
ACTIVITY 9: RECURRING APPOINTMENT	16
ACTIVITY 10: ONCOLOGY SCHEDULING	17
Modifying Chair & Nurse Times.....	17
ACTIVITY 11: REPORTS	18

Activity 1: Navigating Bookshelf and Book

a. Open Bookshelf & Book

Scenario:

You have been assigned to work at the LGH Vascular Access clinic and need to access the clinic's appointment book schedule to start the day.

1. Open the following Bookshelf and Book in Scheduling Appointment Book application (SchApptBook) to view LGH Vascular Access clinic's schedule:
 - Bookshelf - LGH Vascular Access Bookshelf
 - Book - LGH Vascular Access Book

Reference steps: *Appointment Scheduling* section of the User Manual

b. Setting User Defaults/Preferences

Scenario:

You have been informed that you will be working at LGH Vascular Access clinic for an extended period, and will need to access the clinic's appointment book on a regular basis for managing appointments.

1. Set up user preference options so that Location, Bookshelf and Book will default to LGH RAN clinic. (*Hint: View options in menu bar*)
 - Location - LGH Vasc Access
 - Bookshelf - LGH Vascular Access Bookshelf
 - Book - LGH Vascular Access Book

Reference steps: *Preference Options* in User Preference Set Up section of the User Manual

c. Appointment Inquiry

Scenario:

It is the start of a clinic day and you require a list of patients scheduled for today.

1. Using the Appointment Inquiry function, run an "Appt Check-In by Location" inquiry for the LGH RAN clinic (*Hint: Location tab of Appointment Inquiry*).
2. Within the same inquiry, sort the list of appointment by estimated arrival time, then by resources (*Hint: " Est Arrival" and "Resources" column headers*)

Reference steps: *Appointment Inquiry* section of the User Manual

Activity 2: Scheduling Appointments

a. Scheduling Appointment Using Suggest

Scenario:

A patient has been referred to the LGH Vascular Access clinic and needs to be scheduled for a new appointment.

- Using the assigned patient, schedule a “Vasc Access PICC Assessment” appointment to the appropriate resource (i.e. Vasc Access RN) for today’s date and assigned time. Use the **Suggest** method to schedule the appointment.

Action	Clinic	Patient	Interpreter Required	Appt Type	Resource	Date	Time #1
Schedule: Suggest	LGH Vasc Access	Assigned	No	Vasc Access PICC Assessment	Vasc Access RN	Today	Assigned

Reference steps: *Suggest Method* in Appointment Scheduling section of the User Manual

b. Scheduling Appointment Using Drag & Drop

Scenario:

A patient has been advised to make a future follow up appointment to the LGH Vasc Access.

- Using the assigned patient, schedule a “Vasc Access PICC Dressing Change” appointment to the appropriate resource (i.e. Vasc Access RN) for the next business day at the assigned time. Use the **Drag & Drop** method to schedule the appointment.

Action	Clinic	Patient	Appt Type	Resource	Date	Time #1
Schedule: Drag & Drop	LGH Vasc Access	Assigned	Vasc Access PICC Dressing Change	LGH Vascular Access RN	Next Day	Assigned

Reference steps: *Drag & Drop Method* in Appointment Scheduling section of the User Manual

c. Scheduling Appointment Using Schedule

Scenario:

A patient needs to be booked for a “Vasc Access Blood Draw” appointment one week from today’s date for a specified time. *It has been noted that the patient requires an interpreter.*

1. Using the **Schedule** button, schedule the patient for a “Vasc Access Blood Draw” appointment with the appropriate resource (i.e. Vasc Access RN) for 15 minutes. For the Default Slot, select “LGH Vascular Access”.
2. Be sure to indicate that an interpreter is required in the “Interpreter Required?” field.

Action	Clinic	Patient	Appt Type	Resource	Interpreter Required	Date	Time #1	Duration	Default Slot
Schedule with Schedule button	LGH Vasc Access	Assigned	Vasc Access Blood Draw	LGHVascular Access RN	Yes: Italian	In one week	Assigned	15 min	LGH Vascular Access

Reference steps: *Schedule Button Method* in Appointment Scheduling section of the User Manual

Activity 3: Reschedule Appointment

Scenario:

The patient who was booked for the “Vasc Access PICC Blood Draw” appointment (in previous Activity 2c) has requested the visit to be rescheduled for an earlier date.

1. Reschedule the “Vasc Access PICC Blood Draw” appointment for two business days from today for the same time and resource (i.e. Vasc Access RN).

Action	Clinic	Patient	Appt Type	Resource	Date	Time #1
Reschedule	LGH Vasc Access	Assigned	Vasc Access PICC Blood Draw	LGH Vascular Access RN	In 2 days	Assigned

Reference steps: *Appointment Reschedule* in Appointment Management section of the User Manual

Activity 4: Cancel Appointment

Scenario:

A patient called the LGH Vascular Access clinic to cancel his/her “Vasc Access PICC Blood Draw” appointment for the next day (same appointment from Activity 3).

1. Cancel the patient’s “Vasc Access PICC Blood Draw” appointment that has been scheduled for two business days from today.
2. Be sure to cancel the associated encounter in PMOffice.

NOTE: A warning will appear noting if there is another appointment linked to the appointment being cancelled. Choose to only to cancel the appointment you have selected.

Action	Clinic	Patient	Appt Type	Resource	Date	Time #1	Cancel Reason
Cancel	LGH Vasc Access	Assigned	Vasc Access PICC Blood Draw	LGH Vascular Access RN	In 2 days	Assigned	_Patient Requested

Reference steps: *Appointment Cancellation* in Appointment Management section of the User Manual

Activity 5: Check-In Appointment

Scenario:

A patient has arrived at the LGH Vascular Access clinic for today's "Vasc Access PICC Assessment" appointment and needs to be checked-in (same scheduled appointment from Activity 2a).

1. Check-In the patient's "Vasc Access PICC Assessment" appointment. Update the associated encounter to "Outpatient" during the check-in.

Action	Clinic	Patient	Appt Type	Resource	Date	Time #1	Encounter
Check-In	LGH Vascular Access	Assigned	Vasc Access PICC Assessment	LGH Vascular Access RN	Today	Assigned	Outpatient

Reference steps: *Appointment Check-In* section of the User Manual

Activity 6: No Show Appointment

Scenario:

It's been noted that a patient did not show up for an appointment.

1. No Show the patient's "Vasc Access PICC Dressing Change" appointment that has been scheduled for next business day (created in Activity 2b).

NOTE: For training purposes, assume this appointment is scheduled for today. The best practice to "No Show" an appointment is when the "no show" actually occurs.

Action	Clinic	Patient	Appt Type	Resource	Date	Time #1
No Show	LGH Vasc Access	Assigned	Vasc Access PICC Dressing Change	LGH Vascular Access RN	Next Day	Assigned

Reference steps: *Appointment No Show* in Appointment Management section of the User Manual

Activity 7: Request Lists

a. Create a Request (Manual)

Scenario:

A request has been made for a patient to be seen at the LGH RAN Clinic in two months. The appointment cannot be scheduled right away as the requested future date has not been made available on the clinic's schedule yet.

1. Create a request for a RAN New appointment for the assigned patient, date and time. Add the request to LGH RAN's "Waitlist" request list queue.

Action	Clinic	Patient	Appt Type	Requested Date	Requested Time Range	Request List
Create Appt Request	LGH RAN	Assigned	RAN New	In 2 months	1300-1600	Waitlist

Reference steps: *Create a Request Manually* in Request List section of the User Manual

NOTE: Not applicable for OB Clerks

b. Move a Request

Scenario:

After reviewing the list of future appointment requests for LGH RAN, it's been decided that the request created in the previous activity needs to be triaged.

1. Using the Request List Inquiry icon, find the assigned patient's RAN New appointment request on the LGH RAN's "Waitlist" request list queue (created in Activity 7a).
2. Move this appointment request to the clinic's "Triage List" request list queue.

Action	Clinic	Patient	Appt Type	Requested Date	Request List
Move Appt Request	LGH RAN	Assigned	RAN New	In 2 months	Triage List

Reference steps: *Move a Request* in Request List section of the User Manual

NOTE: Not applicable for OB Clerks

c. Schedule from a Request List (Orders-to-Scheduling)

Scenario:

A provider places an order requesting a patient to be scheduled for a new appointment at the LGH RAN clinic (this is the “Orders-to-Scheduling” process).

1. Using the Request List Inquiry icon, open the “Future Requests” list queue for the LGH RAN clinic to find the ordered appointment request for the assigned patient (*Hint: The “Order” column contains name of the order that triggered the appointment request*).
2. From the “Future Requests” list queue, schedule the appointment request (RAN New) to the appropriate resource (i.e. provider) for either three or four business days (as advised by your instructor) from today.

Action	Clinic	Patient	Appt Type	Resource #1	Date	Time #1
Schedule from request list	LGH RAN	Assigned	RAN New	Assigned	In 3 or 4 days (as per instructor)	Assigned

Reference steps: *Schedule an Appointment from a Request List* in Request Lists section of the User Manual

NOTE: Not applicable for OB Clerks

d. Appointment Reviews

Scenario:

A patient has already been scheduled for a future “Infusion - Antibiotics” appointment at LGH Medical Day Care clinic (MDC) in the Outpatient Care Centre (OCC). The Provider has requested a new appointment date for this existing appointment via the PowerChart.

1. Using the Request List Inquiry icon, open the “Appointment Review” list queue for the LGH OCC MDC clinic to find the patient’s “Infusion Antibiotics” appointment with the review request. Note the “Action” column.
2. Check the “New Appt Date” column. Reschedule the appointment for this date (**NOTE:** This date may become outdated due to nature of training environment. If so, schedule to a new date as advised by the instructor).

Actions	Clinic	Patient	Appt Type	Date	Time #1
Review & Reschedule	LGH OCC MDC	Assigned	Infusion - Antibiotics	As per “New Appt Date” column or instructor	Assigned

Reference steps: *Infusion Appointment Review/Reschedule Workflow* quick reference guide

NOTE: Not applicable for OB Clerks

Activity 8: Referral Triage Process

a. Manage New External Referral (Work Queue Monitor)

Scenario:

The LGH RAN Clinic has received some patient referrals from external sites. The new referrals have appeared on the clinic's queue in Work Queue Monitor.

In Work Queue Monitor:

1. Open the "LGH JRAC/RASC/RAN" queue and select a document with the status of "New."
2. Create a new Referral Encounter associated to the new referral document for the assigned patient. Indicate the Referral Status as "Ready for Triage."
3. Complete the mandatory fields for indexing the referral document.

Reference steps:

Link a Document to a Patient/Encounter & Index a Document in WQM in Work Queue Monitor section of the User Manual

b. Manage Multi-Patient Task List (PowerChart)

Scenario:

The referral for the assigned patient has been accepted by the Triage Provider. The Triage Provider has ordered an "Accept Referral" task, which lands on the Multi-Patient Task List.

In PowerChart:

1. Set up the Multi-Patient Task List in order to view the pending tasks for LGH RAN Clinic.
2. Review the Accept Referral task for the assigned patient found on the Multi-Patient Task List.

Reference steps: *Multi-Patient Task List in PowerChart* section of the User Manual

NOTE: Not applicable for OB Clerks

c. Scheduling the Referral (SchApptBook)

Scenario:

As noted in the previous activity, the patient's referral to the LGH RAN clinic has been accepted by the Triage Provider.

In SchApptBook:

1. Schedule the patient for a "RAN New" appointment to the appropriate provider for five or six business days (as advised by your instructor) from today.
2. During the scheduling process, select **appropriate referral encounter** created for the same patient from previous activity (*Manage New External Referral*).

Action	Clinic	Patient	Appt Type	Resource #1	Date	Time #1	Encounter
Schedule	LGH RAN	Assigned	RAN New	Assigned	In 5-6 days (as per instructor)	Assigned	Referral

Reference steps:

Accepted Referrals > Schedule Appointment in External Referral Triage section of the User Manual

d. Updating Encounter Type (PMOffice)

Scenario:

The patient's referral to the LGH RAN clinic has been accepted and an appointment has been scheduled. However, the new appointment is still associated with a Referral encounter type.

In PMOffice:

1. In the "Referral Encounter Worklist," find the patient's referral encounter associated to the newly scheduled appointment from the previous activity. It would have the Referral Status of "Ready for Triage" in training.
(NOTE: In reality, the Referral Status of the encounter would be "Accepted", triggered by the provider's Accept Referral order).
2. From this worklist, change the referral encounter to a Pre-Outpatient type and change the Referral Status to "Booked."

Reference steps:

Change Referral Encounter to Pre-Register Outpatient in Referral Encounter Worklist section of the User Manual

e. Process Task on Multi-Patient Task List (PowerChart)

Scenario:

You have just completed the **entire** Accept Referral task (a. Scheduling an appointment for the referral and b. Updating the referral encounter).

In PowerChart:

Complete the Accept Referral task for the assigned patient found on the Multi-Patient Task List.

Reference steps: *Multi-Patient Task List in PowerChart* section of the User Manual

NOTE: Not applicable for OB Clerks

Activity 9: Recurring Appointment

Scenario:

A patient requires multiple follow-up appointments for his current health condition.

- Using the Recur function, schedule the patient for three weekly "RAN F/Up" appointments to the appropriate resource (one appointment per week). The first appointment in the series needs to start in two weeks from today or the next business day (as advised by your instructor).

(Hint: Use **Suggest** method to select appointment dates and times).

Action	Clinic	Patient	Appt Type	Resource#1	Date	Time #1
Recur Appointment	LGH RAN	Assigned	RAN F/Up	Assigned	Start in 2 weeks from today/next business day: 3 weekly appts	Assigned

Reference steps: *Recurring Appointments* in Appointment Scheduling Advanced section of the User Manual

Activity 10: Oncology Scheduling

Modifying Chair & Nurse Times

Scenario:

A provider placed an order requesting a patient to be scheduled for a Chemo Infusion appointment at the LGH Chemotherapy clinic (“Orders-to-Scheduling” process). It’s been noted that the patient may require additional time for this appointment.

1. Using the Request List Inquiry icon, open the “Future Requests” list queue for LGH Chemo clinic to find the ordered appointment request (Onc Chemo Infusion) for the assigned patient.
2. Complete the request. While completing the request, increase the Chair and Nurse Times by 15 minutes. (*Hint: Orders tab within Appointment Attributes window*).
3. Schedule the appointment using Suggest method for the assigned date and time.

Action	Clinic	Patient	Appt Type	Chair & Nurse Times	Date	Time #3
Schedule from request list Use Suggest	LGH Chemo	Assigned	Onc Chemo Infusion	Increase by 15 minutes	Next available	Assigned

Reference steps: *Oncology Chair and Nurse Time Modifications* quick reference guide.

NOTE: Not applicable for OB Clerks

Activity 11: Reports

Scenario:

It's the end of the day and it's been advised to prepare for following day by printing a list of appointments scheduled for the next business day.

1. Using the Appointment Reports icon in the toolbar, run a "Standard Location Appointment List" report of the LGH RAN clinic for the next business day. Instead of printing the report, preview the report (*Hint: View button*).

Reference steps: *Reports* section of the User Manual