





User Manual

Patient Scheduling - Foundational

Part #1

N29-A

Version Control

Revision History

Version	Date	Summary of Changes	Author (Last, First Name)
1.0	2017-12-15	First draft	Mohsin, Rubana
			Eligh, Heather
2.0	2018-02-02	Second draft	Mohsin, Rubana
			Eligh, Heather
			Parmar, Anup
	Date		

Table of Contents

OVERVIEW
Learning Objectives
GETTING STARTED
Logging In
OVERVIEW OF SCHAPPTBOOK INTERFACE
USER PREFERENCE SETUP
BOOK SETTINGS
View11 Appointment Book Properties
OPENING A BOOKSHELF/BOOK
APPOINTMENT INQUIRY
APPOINTMENT SCHEDULING
Pre-requisite Steps for Booking an Appointment18Three Methods of Booking an Appointment20A. Drag and Drop Method20B. Suggest Scheduling Method21C. Schedule Button Method22Confirming an Appointment23Inpatient Scheduling26
APPOINTMENT SCHEDULING – ADVANCED
Booking Multiple Appointments for a Patient.28Recurring Appointments.31Scheduling a Recurring Appointment31Modify a Recurring Appointment35Group Appointments.36Create Group Sessions36Group Appointment Scheduling38Group Appointment Cancellation and Group Session Inquiries.41
SLOT MAINTENANCE
Adding Slots for a Day

Blocking Schedules	
APPOINTMENT MANAGEMENT	
Modifying Information	
Appointment Cancellation	
Option 1: Right-click on the appointment within the Appointment Inquiry	51
Option 2: Right click on the appointment within the scheduling grid area	53
Option 3: Click on the Cancel icon on the toolbar	53
Appointment No Show	
Appointment Reschedule	58
Option 1: Right-click on the appointment within an Appointment Inquiry	58
Option 2: Right click on the appointment within the scheduling grid area	60
Option 3: Click on the Reschedule icon on the Toolbar	61
Option 4: Drag-and-Drop into WIP	61
Appointment Shuffle	62
Swap Resources	63
Batch Reschedule	
APPOINTMENT CHECK IN	
Option 1: Right-click on the appointment within an Appointment Inquiry	
Option 2: Right click on the appointment within the scheduling grid area	
Option 3: Click on the Check-In icon on the Toolbar	
APPOINTMENT LINK	
Option 1: Link to an existing (previously confirmed) appointment	
Option 2: Link to a new appointment	

Overview

This reference manual is designed to supplement a hands-on, instructor led session. In order to show general information placement, pictures of various screens have been included. Please note that these are standard screens and may not match exactly to those at your site.

Learning Objectives

At the end of this session, class participants will be able to:

- Navigate the Scheduling application
- Run Inquiries on Patient, Resource and Location schedules
- Schedule single, multiple and group appointments
 - Use the three different methods (Drag & Drop, Suggest and Schedule) to schedule appointments
- Cancel and reschedule appointments
- Shuffle appointments
- Schedule recurring appointments
- Check-in appointments
- View appointment details and history
- Manage Request List
- Use Work Queue Monitor (WQM)
- Manage Referral Triage for a clinic
- Use Multi-Patient Task List (MPTL)

Course Audience

The target audience for this course is patient scheduling staff at Lions Gate Hospital and Squamish General Hospital.

Prerequisites

Registration for Inpatients and Outpatients are pre-requisites for taking the Scheduling course as Enterprise Master Patient Index (EMPI) search is only covered in this course only.

All participants are expected to be competent in the following areas:

- Computer basics
- Microsoft Windows

Getting Started

Logging In

Double-click on the SchApptBook icon

to open the application.

Logging Out

When you have completed your activities, remember to log out of the application you are working on for security purposes. Logging out can be done in one of the following two ways:

1. From the Toolbar, you may select the Exit icon (recommended to avoid locking the

patient record).

2. You may also click the is in the upper right hand corner of your screen.

Overview of SchApptBook Interface

When you log-in to the Scheduling Appointment Book application, the Scheduling Appointment Book window displays.

Scheduling: Scheduling Appo Task Edit View Help Mul の 後 感 愛 面 中国のた - 中 - 図 点	3 � .i .J % # 3 ŀ	ब स• 王 ≛ €् ⊂्	1 1 3 8 2 4 6 7	: o a @ @ 2 # 4 [3 a p t	2		- 8 ×
Name: CSTSCHEMPI, RANDY		BC PHN: 9876	488326	Gender: Female		Person Comments:		
Preferred Name: MBN: 700	007891 3	D0B: 06-Nov-1		Language:		Location:		
Disease Alert: None Process A	lert: None	Age: 40 Years		Interpreter Requ	ired:	Preferred Phone:		
Books Appointment				Work in progress:				
De 4 Bookshelf - LGH Rel	nab Services Bookshelf			lpen				Schedule
			s	elect				Confirm
3 4 5 6 7 8 9	198 GE 199 GE 19				6			Recur
	5							Suggest
24 25 26 27 28 29 30	CH3 CC							Request
31 1 2 3 4 5 6								Inset
								^
Confortin, Mary PT Geelen, Claire PT	Karst, Lauren PT	Lun, Janet PT	O'Laughlin, Geraldine PT	Thirtle, Amanda PT	Fischer, Casie OT	Perry, Megan OT	Pursell, Ja	net OT
8:00 LGH R 8:15	LGH Rehab		LGH R	LGH Rehab		LGH Rehab	LGH Rehab	
8:30					LGH Rehab			=
8:45	7							
9:15								
9:45	LG	3H Rehab						
10:00 10:15			LGH R LGH R LGH R			LGH Rehab		

- 1. Menu Bar: Includes Task, Edit, View and Help options.
- Toolbar: Includes buttons or other window elements (such as 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 Resource (person, equipment, room/place) schedules. This is where appointments are scheduled and managed.

User Preference Setup

Within the Scheduling Appointment Book application, there are several options which are set at the user level. These options will already be applied to the user accounts. Once these preferences are applied, the information will not be needed to be entered /changed again unless different preferences are required.

Refer to the "Scheduling User Preferences Quick Reference Guide" for more details about all of the Scheduling Preferences. The sub-sections below will cover the "Preference" options that are most likely to be modified by the users.

Setting Default Location/Book

- View Help Task Edit 📲 | 🗹 🕅 Toolbars 🕨 🕼 🕲 🕲 **Demographics Bar** 🖨 Back 👻 Availability Bar Name: Status Bar MRN: Small Buttons Large Buttons ~ Cancels Appointment Reschedules **On-Hold Appointments** ۰. kshelf Mo Su **Empty Schedules** 29 30 Refresh 5 6 Options... 12 13 Customize... 19 20 26 27 28 29 30 2 1 3 5 4 6 7 8 9
- 1. Click View in the Toolbar and select "Options."

2. This will open the "Options" window 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.

Options						? ×
User Defaults	Appointment	Navigation	Details	Allergies	Confirm	CI∢►
Default location:						
- Default Appoints	ant Tuna	•	1			
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Appointment Sch Days in past: Days in future:	neduling Range 0 0	A F A A A A	ppointment o Person Name oppointment oppointment	detail fields: Location Type		
Allow multiple a Upon move to the Role	appointment locatior work in-progress, e	n values xpand the tree to	o level (Defa	ult = Role):		
Amount of inactive	e time (in seconds) b	efore automatica	ally refreshin	g request lists	and queries:	
				ОК		Cancel

- 1. **Default Location** can be chosen from the drop down menu. This function would be used if a user schedules consistently for one location, i.e. the LGH RAN Clinic.
- 2. Default Appointment Type Synonym can be chosen by selecting the radio button
- 3. **Appointment Synonym** can be selected from searching in the box for the desired appointment type. This option could be used if a user consistently schedules one appointment type. The appointment type selected will automatically defaults into the appointment type field.

			201	7		Þ	Book	Appointment		1	
•		D	есеп	nber		•	Perso	n name:	Default Location		Move 🕨
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26	27	28	29	30	1	2	±^	sistment leastion :			Next
3	4	5	6	7	8	9	App	pintment jocation:			Clear
10	11	12	13	14	15	16					
17	18	19	20	21	22	23	Appo	ntment type:			Allergies
24	25	26	27	28	29	30					
31	1	2	3	4	5	6					

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

Options					[? <mark>- X-</mark>
User Defaults	Appointment	Navigation	Details	Allergies	Confirm	CI∢►
Default bookshelf:						
<none></none>		-				
Default book:						
		-				
Toolbar Preferen Number of iten	nces ns to retain in most	recently displaye	d list:			
15 🚔						
Home butter	on returns to curren	t date				
Back/Forw	vard buttons retain o	date context				

Default Bookshelf: Enter the name of the **Bookshelf** that you would like to 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 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 Outpatient Care Centre Bookshelf" and the default Book is the "LGH RAN Book."

•			201	7		F	Books	Appoin	tment							Work in progress:
∢ Su	Mo	D Tu	ecen We	nber Th	Fr	► Sa	Books	shelf - L	GH Ou	tpati	ent	Car	re Centre Bookshelf		Open	
26	27 4	28 5	29 6	30 7	1 8	2 9	ay c	ogra y Fu	look Tesia	4	ğ	smo			Select	
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31	1	2	3	4	5	6			- 2	9	4	2				
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				D	hawa	n, Priya	MD				Do	mma	ann, Steven MD		Kai	iway, Sarah MD
12:3 12:4 13:0	0 5 LG 0	H RA	N						LGH R/	AN					LGH RAN	

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**."

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**."

 Actions	•	
 Add New Appointment		
 Book Request		
 Confirm Request		
 Remove Request	_	
Recur Appointment		
Navigation	•	
Inquiry	+	LGH Rehab
Report	- +	
Applications	•	
Person	•	
Slots	- • 🗖	View
Resources	•	Date and Time
 Book Settings	•	Properties

General Tab

Appointme	nt Book Pr	operties		? 💌
General	Icons	Fonts	View - Proportional, Single	-day
Column H	leadings olay number	r of schedul	ed appointments	
Visible Da Begin time 0800 Tooltips	ay Range	1 for:	End time:	×
Display F	ields on pintment typ	e schedule ation	d as	•
Requ Rease Appo Enco Anese	uesting prov son for appo pintment sta punter type thesia type	rider bintment te	3	•
			ОК	Cancel

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

NOTE: If there are any slots beyond the 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.

	ent Book Pr	operties		? 🗙
General	Icons	Fonts	View - Proportional, Sing	le-day
Slot icons:				
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NOTE: Making changes to the default setting is not recommended.

Fonts Tab

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



View Proportional Single-day

Appointment Book Properties	? <mark>×</mark>
General Icons Fonts View - Proportional, Single-d	ау
Display binder 1	
Time interval: 15 2 Column Width (In Pixels) Custom width: Size to fit all, with minimum width: Size to fit all	
Start display at: 0700 On current date start at current time	
ОК	ancel

- 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.

Opening a Bookshelf/Book

Follow the steps below to open a Bookshelf/Book in SchApptBook:

- 1. Click on the **Bookshelf** banner to select a **Bookshelf**.
- 2. Select the appropriate **Bookshelf** and click **OK**.

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Task	Edit	V	iew	Help																												
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4		N	ovem	ber		•	Bo	bkshelf	i i					Select	Booksh	nelf							8	×				Opt	80			
Su	Мо	Tu	We	Th	Fr	Sa								-	🎽 Inde:	x Books																
29	30	31	1	2	3	4		_			۰.				9- 🏨 E	CG Medi	ical Ima	ging Bo	ookshelf									Sele	ect			
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- 20	4	5	6	30	8	9									i 📶 L	.GH EEG	aluneni i Booksł	helf	Jperative	Services												
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9:15															17																	
9:30																					DK.		Cancel	ł								
9-45													l	_										-								
0.10																																

3. Double-click on a **Book** to open.

Scheduling: Scheduling Appointment Book														
Task Edit View Help														
# 11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	🚸 🖟 🗿 % 🥒 🥔 🕪 포 프	🔍 🔍 🖂 🗇 🖓 🔣 📥 🕼 .												
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19 20 21 22 23 24 25														
Confortin, Mary PT Geelen, Claire PT Karst, Lauren P1	Lun, Janet PT Murry, Liz PT	O'Laughlin, Geraldine Sharpe, I	Nina PT Thirtle, Amanda PT Fischer, Casie OT											
8:00 LGH LGH Rehab		LGH LGH Rehab	LGH Rehab											
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9:00 LGH Rehab	Contrained													
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9:30														
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10:00 LGH LGH LGH		LGH LGH												
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10:30 10:45														
10:30 10:45 11:00 LGHLGH		LGH LGH												
10-30 10-45 11-00 11-15 11-15		LGH LGH												

Appointment Inquiry

Appointment Inquiry allows the users to view appointments in a list format. "Schedule Inquiry" window 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 the "Schedule Inquiry" window: 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** (eyeball) located at the top of your screen.



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



3. The Appointment Inquiry window appears on your screen.

🛞 Schedule Inquiry - Person Schedule Inquiry -	Standard	
Task Edit View Help		
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Name:		
	MRN:	DOB:
A B C D		Age:
Person Resource Location Request List		
Inquiry: Person Schedule Inquiry - Standard Person: Start date: 28-Nov-201; v 0000 v End date: End date: Magnetic for a start time: 2355 v		
Find Clear Clo	se	
For Help, press F1		

- A. **Person Inquiry Tab**: Use this inquiry to view information (such as confirmed appointments, no-show, inquiry w/orders) associated with a specific person in the SchApptBook.
- B. **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.
- C. **Location Inquiry Tab**: Use this inquiry to view information (such as location with person name, check-in, group session) associated with a specific location in the SchApptBook.
- D. **Request List Inquiry Tab**: Use this inquiry to view information (such as request list by location, cancellation list, waitlist) associated with a specific request list in the SchApptBook.

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

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.

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.

Appointment

- 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 (*) 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).
- 5. If you have found the correct patient, click only ONCE on their name to select, then click **OK**.

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.

6. The "Organization" window appears. Click on the Ellipsis button.

🚯 Organizatio	n 💌
Please select the	e facility where you want to view person aliases.
Facility Name	Facility Alias
Facility:	
	OK Cancel

7. Scroll down through the list of the clinics until you see your clinic name, click on it to select it, then click **OK**.

🗗 Organization 🛛 💽
Please select the facility where you want to view person aliases.
Facility Name Facility Alias
lgh
LGH Rapid Access Neurology Clinic RAN
LGH Rehab Outpatient LGH Rehab Speech Language Pathology LGH Respiratory Education Program
Facility:
LGH Rehab Outpatient
OK Cancel

- 8. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
- 9. 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.

🔁 F	uture Requests/	Appointments for	CSTSCHEMPI, RAM	IDY				? **							
Futur	Aure parter (requestig):														
	Request Action	Appointment Type	Earliest Request D	ste Latest Request Date	Created By		Date Created								
	Book	RAN F/Up	06-Nov-2017 - 7:0	0 06-Dec-2017 - 18:00	TestUser,	ClerkAdvanced-Scheduling	06-Nov-2017 - 14:13								
4					m			F.							
Futur	Carriert Option	Anne cinternat Trans	Parts Date Dat	Contract Contract Contract	Constant Da	Data Canada d									
	conent state 1	opportanient type	Location Deginida	er nine Lind Dater nine	created by	Date created									
•						m		- F							
	Select	Unselect					OK	Cancel							

- 10. The patient's name will now display in the **Person Name** field.
- 11. Click the **Ellipsis** button beside the **Appointment Location** field and double click on your clinic location name to select as the appointment location.

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

- 12. Select the **Ellipsis** beside the **Appointment Type** field and double click on an appointment type to select.
- 13. Once an Appointment Type is selected, additional fields will appear.

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

14. Complete any mandatory fields and click the **MOVE** button to move the appointment into the **Work In Progress (WIP)** area.

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

Three Methods of Booking an Appointment

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

A. 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 predetermined date and time. This method works best for clinics that do not book appointments too far into future. This method is not recommended when an appointment needs to be scheduled to multiple resources.

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



II. Once the mouse button is released, 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**.

Schedule - Rehab Arthritis New - PT	? 🔀
Resource:	
Karst, Lauren PT	-
Default slot:	
<none></none>	•
Time:	
Duration: 1 A Hour(s) Minutes	Tay Day
Distinguish setup and cleanup durations	OK Cancel

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

😫 Scheduling: Scheduling Appointment	Book						
Task Edit View Help							
144 🗹 🗞 📾 🧐 🗶 🖬 20 0	新聞 小口の NL & B � 計 J 陽 W / 2 (N ++) 3	: ± i 🔍 🔍 i 🖽 🖄 🖗 🖪 🌰 🕼 🐺 i 🕫 🕭 📾 🗐 🜗	📓 🖾 😰 🕼 😌				
💠 Back - 🔿 - 🛃 🚮							
Name: CSTSCHEMPI, R	ANDY	BC PHN: 9876488326	Gender: Female	Person Comments:			
Preferred Name:	WRN: 700007891	DOB: 06 Nov-1977	Language:		Location:		
Disease Alert: None	Process Not: None	Age: 40 Years	Interpreter Required:	Preferred Phone:			
. 2017 .	Books Associatment		Work in progress:				
4 November b			B-C CSTSCHEMPI, RANDY		Schedule		
Su Ho Tu We Th Fr Sa	CSTSCHEMPL BANDY		Move Rehab Arthritis New - PT		Continu		
29 30 31 1 2 3 4	Involvent location		Next GHER Schedule		Passa		
5 6 7 8 9 10 11	LSH Rehab OP		Cear (P- Rehab Providers		necur		
12 13 14 15 16 17 18 19 20 21 22 23 24 25	Second early have		ANR B		Suggest		
26 27 28 29 30 1 2	Rehab Athritis New - PT				Request		
3 4 5 6 7 8 9					inset		
		15 Nov. 2017 , Behah Providers					
	Kent Laure PT		Sharpa	New PT			
8:00 LGH Rehab		LGH Rehab	unape.		1		
8:15							
8:30							
9.00							
9:15							
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9:45 10:00 10:15							
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9.45 10.00 10.15 10.30 10.45 11.00 11.15							
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946 10-00 10-15 19-30 19-45 11-30 11-30 11-30 11-30							
9-65 19:00 19:00 10:05 10:45 11:00 11:15 11:00 11:05 11:							
9.00 10.00 10.00 10.00 10.00 10.00 11.00 11.00 11.00 11.00 11.00 12.00 13.00 12.00 10.00 1							
146 1000 1015 1020 1	11 Mar 49						
14.6 10.0 10.5	11 Mar 49						

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

B. Suggest Scheduling 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).
- Results in the least amount of booking errors.
- I. With your appointment in the Work In-Progress area, click the Suggest button to open the Suggested Schedules window.

Scheduling: Scheduling Appointment Book						- G 🕰
Task Edit View Help						
MIN & M & O 73 MIN & 0 ***	N 🗛 🔠 🚸 🖈 🚚 % 🖉 🖉 İN 🗰 🗉 🔍 🔍 İM	1 🛪 🗉 🛋 象 🗩 🖉 🕭 🚑	i i i i i i i i i i i i i i i i i i i	. Q.		
🖨 Back - 🔿 - 👔 🚮						
Name: CSTSCHEMPI, RANDY		BC PHN: 9876488326		Gender: Female	Person Comments:	
Preferred Name:	MRN: 700007891	D08: 06-Nev-1977		Language:	Location:	
Disease Alert: None	Process Nert: None	Age: 40 Years		Interpreter Required:	Preferred Phone:	
Appo	intment			Work in progress:		
< November > Person parter			A Maria A	CSTSCHEMPI, RANDY		Schedule
Su Mo Tu We Th Fr Sa CSTSCHEMPI	BANDY			Rehab Arthritis New - PT		Confirm
29 30 31 1 2 3 4			Next	G IGH Rehab OP		
5 6 7 8 9 10 11	a and a second se		Cear	- Sehab Providers		
12 13 14 15 16 17 18			-	- S Patient		Suggest
19 20 21 22 23 24 25 • Sppointment ty	pe:		ANH			
Rehab Athritis	New - PT		(100)			
						insert
	Kant, Lauren PT			S	harpe, Nina PT	*
9:00						
9:15 LGH Rehab						
9.45						1
10:00						
10:15						
10:30						
10:45						
11:00						
11:10						
11:45						
						-

II. If Preferences need to be modified (for example: the number of options returned), click on the **Preferences** tab in the "Suggested Schedules" window.

	Patient	Appointment Location	Appointment	Туре	Primary Order	Schedul	ed Date/Time	Patient Du	ration							
• 4	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthr	tis New - PT				0 Minutes								
uggest Cr	iteri					Pat Dur	Pat Date/Time	e Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order	Resource Duration	Slot Type	
umber of s	uggestions to return :	l		10												
lumber of d	ays in date range:			30	-											
efault time	range:	080	0	1700												
uccess rati	D:			1	-											
cceptable (ime variation:	1	*	hour	•											
Mon	Tue Wed	Thu F	ini Sa	nt S	m											
Do not a	low multiple secondary su	ggestions														
🛛 First avai	able with sequencing	1 day	· -													
Display d	ay of week with date/time															
Optimize	patient time															
Return si	ggestions in	5 v minu	te intervals.													

- III. Click for the system to display suggested times that the appointment could be scheduled.
- IV. If the suggested times do not work, click **Next** to display the next available times.
- V. If the suggested dates do not work, click **Next Day** to display the available times for the next day.
- VI. Once you have found a suggested date and time to use, click **Select**. Click **OK** to close the "**Suggested Schedules**" window and schedule the appointment.
- VII. The appointment will appear in the scheduling grid in a "Pending" state.

C. Schedule Button Method

The **Schedule** button allows the user to view the default selections such as duration and slot. Within one window, the user can verify or change the resource, duration, slot, and

time using the dropdown boxes that display available options. It is the **least** recommended method for booking regular appointments as users can accidentally book appointments outside the slot resulting in double-booking.

Highlights:

- Allows you to pre-select the time slot you would like to schedule to.
- Allows you to view/modify the appointment Resource, Slot, Start time and Duration.
- Allows you to book appointments outside of slots when required.
- I. With the appointment in the WIP, select the preferred time and resource in the scheduling grid and click the **Schedule** button.

Schedule - Rehab Arthritis New - PT	? 🔀
Resource:	
Karst, Lauren PT	•
Default slot:	
LGH Rehab (8:00 - 12:00)	•
Time: 0800	
Duration: Hour(s) Minutes	Day
Distinguish setup and cleanup durations	OK Cancel

- II. If necessary, modify any of the fields (Resource, Default Slot, Time and Duration) and click **OK**.
- III. The appointment will appear in the scheduling grid in a "Pending" state.

Confirming an Appointment

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

- 15. Click the button to confirm the appointment. The Confirm window will display a summary of the appointment including any patient preparations/instructions.
- 16. Click **OK** in the Confirm window.

NOTE: At your clinic, you may print and give a copy to the patient by using the "Print" button at the bottom of this Summary page.

🔁 Confirm					? ×
Name: CSTSCHEM	PI, RANDY	BC PHN: 9876488326	Gender: Female	Person Comments:	
Preferred Name:	MRN: 700007891	DOB: 06-Nov-1977	Language:	Location:	
Disease Alert: None	Process Alert: None	Age: 40 Years	Interpreter Required:	Preferred Phone:	
CSTSCHEMPI, RANDY	Summary General Resource View CSTSCHEMPI, RAN Allergies: Allergies Not Recorded 16-Nov-2017 - 11:49 1 Hour(s Preparations: Location: Lions Gate Hospital Address: 231 15th St E, North Va	Guidelines Notification Conversatio DY Med Rec Nbr: 701 Rehab Arthritis New - PT ancouver, BC V7L 2L7	n Summaries Itineraries Locks I 2007891 LGH Rehab OP Karst, Lauren PT	Options Print Print	t ABN
				ОК	Cancel

17. The Encounter Selection window will open with the patient's previous and current encounters. Click on the Add Enc button to create a new encounter for this

appointment.

- 18. The "External MPI" window appears momentarily to ensure you have the most up-todate demographics on the patient.
- 19. The "Pre-Register Outpatient" window will appear for you to complete the preregistration. Only the **Patient** and **Encounter Information** tabs are necessary to complete a pre-registration.
- 20. If you are not in contact with the patient to confirm the information, leave the Pre-Reg

Status as Incomplete **Incomplete**. If you are in contact with the patient to verify all the information, update the Pre-Reg Status to **Complete**.

- 21. In the Patient Information tab _______verify the demographic information on every visit.
- 22. Click on the Encounter Information tab.
- 23. In the Location section, the Facility is auto-populated. Verify that the Building and Unit/Clinic are correct.

- Location					
Facility:		Building:		Unit/Clinic:	
LGH Rehab OP	-	LGH Rehab OP	-	LGH Rehab OP	-

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

Encounter Type: Pre-Outpatient

Medical Service: Select one from the drop-down list



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

25. 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.

- 26. Click **Complete** to finish.
- 27. The "Document Selection" window displays. Uncheck the "Do not Print Documents" checkbox to print any relevant documentation. Click **OK** to complete.

Document	Printer	Copies
Mand Label	590_1stfl_t8	1
🕼 Lab Blood Specimen Label	590_1stfl_t8	1
🕅 Lab Non-Blood Specimen Label	590_1stfl_t8	1
M PHSA Facesheet	ph_590_it_l1-General	1

28. The "Pre-Register Outpatient" window displays. Verify and click OK.



Inpatient Scheduling

Patients with current "Inpatient Encounter" may require care from the Outpatient clinics. The below steps are used for booking appointments for these patients with Inpatient Encounters in the SchApptBook.

 Follow the steps (1 to 14) from <u>Appointment Scheduling - Pre-requisite Steps for</u> <u>Booking an Appointment</u> to fill in the Person Name and Appointment Location fields in the accept format.

Books Appointment	
Person name:	Move 🕨
CSTSCHEMPI, PAULJOSEPH	Next
*Appointment location:	Clear
*Appointment type:	ANR

2. Complete the below mandatory fields and click Move button:

Appointment Type: Inpatient

Comments: add any applicable comments

 From this point, use either "Drag & Drop" or "Schedule" button to book a "Pending" appointment. Click Confirm button.

	4 2017 > Books Appointment											Work in progr	ess:				
4		D	ecem	ber		•	* <u>P</u> e	E CST	ISCHEMPI, PAUL-JOSEPH								
Su	Мо	Tu	We	Th	Fr	Sa	CS	TSCHEMPI	PAUL-JOS		間 Current Schedule						
26	27	28	29	30	1	2	840	nointment li	cation:		🖨 🗐 LGH RAN						
3	4	5	6	7	8	9		an Barrier a g							Clear		💼 🚸 Resource
10	11	12	13	14	15	16	LG	H RAN									🗈 🚸 Patient
17	18	19	20	21	22	23	*Ac	pointment t	/pe:						ANR		
24	25	26	27	28	29	30	Inp	atient						·			
31	1	2	3	4	5	6								*			
_	_	_	_	_													
			13-Dec-2017 - LGH Rehab Book														
								selen Claire PT Karst Lauren PT Lun Janet PT Murry Liz PT O'Lauchlin Geraldine PT Shame Nina									
		Con	fortin,	Mary	r PT		Gee	elen, Claire	PT	Karst, Lauren PT	Lun, Janet PT	Murry, Liz PT	O'Laugi	hlin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT
9:30	CS	Con	fortin, IEMPI,	Man	JOSE		Gee GH R	elen, Claire	PT	Karst, Lauren PT LGH Rehab	Lun, Janet PT	Murry, Liz PT	O'Laug LGH R	hlin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
<mark>9:30</mark> 9:45	CS	Con TSCH	fortin. IEMPI,	PAUL	JOSE	L	Gee GH R	elen, Clain	PT	Karst, Lauren PT LGH Rehab	Lun, Janet PT	Murry, Liz PT	O'Laugi LGH R	hlin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
<mark>9:30</mark> 9:45 10:00	CS Inpa LGI	Con TSCH atient H RAI	fortin. IEMPI. N	Man PAUL	JOSE		GH R	len, Claire	LGH R	Karst, Lauren PT LGH Rehab	Lun, Janet PT	Murry, Liz PT	O'Laugi LGH R	hlin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
9:30 9:45 10:00 10:15	CS Inpa LGI	Cont TSCH atient H RAI atient	fortin, IEMPI, N	Mary PAUL	JOSE		Gee GH R GH R	len, Claire	LGH R	Karst, Lauren PT LGH Rehab	Lun, Janet PT	Murry, Liz PT	O'Laugi LGH R LGH R	LGH R LGH R	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
9:30 9:45 10:00 10:15 10:30	CS Inpa LGI Inpa Per	Cont TSCH atient H RAI atient	fortin, IEMPI, N coming	Mary PAUL	JOSE		Gee GH R GH R	len, Claire	LGH R	Karst, Lauren PT LGH Rehab	Lun, Janet PT	Murry, Liz PT	O'Laugi LGH R	hlin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
9:30 9:45 10:00 10:15 10:30 10:45	CS Inpa LGI Inpa Per	Con TSCH atient H RAI atient nding	fortin, IEMPI, N coming	Mary PAUL	JOSE		GH R GH R	len, Claire	LGH R	Karst, Lauren PT LGH Rehab	Lun, Janet PT	Murry, Liz PT	O'Laugi LGH R LGH R	hlin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
9:30 9:45 10:00 10:15 10:30 10:45 11:00	CS Inpa LGI Inpa Per	Con TSCH atient H RAI atient	fortin, IEMPI, N coming	Mary PAUL	-JOSE		GH R GH R GH R	LGH R	LGH R	Karst, Lauren PT LGH Rehab	Lun, Janet PT	Muny, Uz PT	O'Laugi LGH R LGH R	LGH R LGH R	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
9:30 9:45 10:00 10:15 10:30 10:45 11:00 11:15	CS Inpa LGI Inpa Per	Cont TSCH atient H RAI atient nding	fortin. IEMPI, N coming	Mary PAUL	-JOSE		Gee GH R GH R	LGH R	LGH R	Kanst, Lauren PT LGH Rehab	Lun, Janet PT	Murry, Liz PT	O'Laugi LGH R LGH R	hlin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab
9:30 9:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30	CS Inpl LGI Inpl Per	Cont atient H RAI atient nding	fortin. IEMPI. N coming	Mary PAUL	, PT JOSE		Gee GH R GH R	LGH R	LGH R	Kanst, Lauren PT LGH Rehab	Lun, Janet PT	Muny, Liz PT	O'Laug LGH R LGH R	hin, Geraldine PT	Sharpe, Nir	na PT	Thirtle, Amanda PT LGH Rehab

- 4. Click **OK** to close the "Confirm" window.
- 5. Select the existing "Inpatient" encounter and click **OK**.

Encounter Selec	tion									?
Encounter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name	Reg Date	Arrive Date	
7000000016566	Inpatient		Elective	LGH Lions Gate	LGH ASC	Attending Provider	Plisvca, Rocco, MD	13-Dec-2017 - 9:22	13-Dec-2017 - 9:22	
700000012227 700000012917 7000000012425	Outpatient Referral Pre-Outpatient	18-0α-2017 - 23:39		LGH JRAC LGH Rehab OP LGH JRAC	LGH JRAC LGH Rehab OP LGH JRAC	Attending Provider Referring Provider Attending Provider	Jando, Victor Tibor Baggoo, Alan Kieth Jando, Victor Tibor	18-0α-2017 - 10:27	18-0et-2017 - 10:27	
Modify	Add Enc							(ок	

6. The appointment is booked with an Inpatient encounter.

CSTSCHEMPI, PAUL-JOSE
Inpatient
LGH RAN
Inpatient coming for an appo
Confirmed
Inpatient

Appointment Scheduling – Advanced

Booking Multiple Appointments for a Patient

The **Next** button can be used to schedule multiple appointments for the same patient without re-entering the fields in the Appointment tab. The "Appointment Type" can be the same or different.

1. Enter in appropriate information into the fields on the Appointment Tab and press the **MOVE** button to move the information to the Work-In-Progress (WIP).

Books Appointment		Work in progress:
	Next Clear ANR	CSTSCHEMPI, RANDY Creater Control of the second s

- 2. Once you have entered in all of the information for the first appointment, press the **NEXT** button. Your cursor will move back to the fields within the Appointment tab.
- 3. Select the appropriate Appointment Location.
- 4. In the **Appointment Type** field, replace the first Appointment Type name with the next appointment type that you are scheduling and press enter or the ellipses button to search. Select the appropriate Appointment Type from the search window.
- 5. Scroll down through the rest of the fields. You will notice that the information entered for the first appointment has been retained. Change any appropriate information and press the **MOVE** button.
- 6. Both appointments will now display within the WIP.



7. Press the **Suggest** button to allow Suggested Scheduling functionality to help you find an available appointment time. The "Suggested Schedules" window will display.

NOTE: Once the appointments are in the WIP, it is possible to use any of the scheduling options to book them.

8. Press your Shift key and highlight both appointments.

	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration
• 🛸	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - PT			0 Minutes
. 🥨	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - OT			0 Minutes

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

Suggest Criteria Pre	ferences		
Appointment Date			
Oate range:	22-Nov-2017	22-Dec-2017	× •
Schedule in:	1 📩 Days	From: 23-Nov-2017	×
Date restrictions:	Next 2 Days		-
Mon Tue	Wed Thu	Fri Sat Sun	Exceptions
Appointment Time Time range: Time restrictions:	0800 AM Only	× 1700	V
Schedule as visit with	n 1	day 🗸	
Override suggested da	ate and time		
Schedule multiple per	ons to mixed Group Se	essions	
		Clear	Suggest

- 10. Press the **Suggest** button.
- 11. The "Suggested Sequence" window will display. This allows you to indicate to the system which appointment you would like to schedule first. Leave the appointments in the order they defaulted and press the **OK** button.

Suggested Sequence										
Appt Type Location										
Rehab Arthritis New - OT LGH Rehab	OP 🔳									
Rehab Arthritis New - PT LGH Rehab	OP 💟									
Based on the displayed order, defined interactions will require 0 minute(s) between appoint types.										
Undo OK	Cancel Apply									

NOTE: By default the Appointment Type sequence is in alphabetical order.

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

Suggest	ed Schedules													
	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration								
- <i>\$</i>	CSTSCHEMPI, RANDY CSTSCHEMPI, RANDY	LGH Rehab OP LGH Rehab OP	Rehab Arthritis New - PT Rehab Arthritis New - OT			0 Minutes 0 Minutes								
uggest (Criteria Preferences				Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order Re	esource Duration	Slot Type
Appointm	nent Date				18 Hour(s) 45 Minut	es 22-Nov-2017 - 14:15	CSTSCHEMPI, RANDY	22-Nov-2017 - 14:15	Rehab Arthritis New - OT	Pursell, Janet OT	LGH Rehab OP	1	Hour(s)	LGH Reh
) Date r	ange: 22-Nov-	2017 📑 💌	22-Dec-2017		= 12 Here(a) 50 March	23-Nov-2017 - 8:00	CSTSCHEMPI, RANDY	23-Nov-2017 - 8:00	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP	1	Hour(s)	LGH Ref
	-				 To moul(s) 50 Minut 	23.Nov-2017 - 14:15 23.Nov-2017 - 8:05	CSTSCHEMPI, RANDY	23.Nov.2017 - 14:15	Rehab Arthritis New - OT	Karet Lauren PT	LGH Rehab OP	1	Hour(s)	LGH Rel
) sched	uie in: 1 🚊	Days 👻 From:	23-Nov-2017		= 18 Hour(s) 55 Minut	es 22-Nov-2017 - 14:15	CSTSCHEMPI, RANDY	22-Nov-2017 - 14:15	Rehab Arthritis New - OT	Pursell, Janet OT	LGH Rehab OP	1	Hour(s)	LGH Re
	Mark 1	2010		-		23-Nov-2017 - 8-10	CSTSCHEMPL BANDY	23-Nov-2017 - 8:10	Rehab Arthritis New - PT	Karst Lauren PT	LGH Rebab OP	1	Hour(s)	LGH Re
*** Date r	estications: Dept 21	10000												

- 13. Highlight one of the available times and press the **SELECT** button.
- 14. Press the **OK** button and both appointments will display in the WIP in a "Pending" status.
- 15. Highlight the patient's name, press the **CONFIRM** button, and the "Confirmation" window will display a summary of both appointments.

🕅 Confirm					? 💌
Name: CSTSCHEM	PI, RANDY	BC PHN: 9876488326	Gender: Female	Person Comments:	
Preferred Name:	MRN: 700007891	DOB: 06-Nov-1977	Language:	Location:	
Disease Alert: None	Process Alert: None	Age: 40 Years	Interpreter Required:	Preferred Phone:	
CSTSCHEMPL RANOV	Summary General Resource View Guidelin CSTSCHEMPI, RANDY Allergies: Allergies: Allergies: Allergies: Allergies: Allergies: Resource View Preparations: Location: Lions Gate Hospital Address: 231 15th St E, North Vancouver, E	es Notification Conversation Summariles Nin Med Rec Nbr: 700007891 hab Arthritis New - OT LGH Ref ic V7L 2L7 hab Arthritis New - PT LGH Rehab OP I ic V7L 2L7	ranies Locks Eligibility Booking Notes	Options Pirz	E Pret ABN
· · · · · ·				ОК	Cancel

16. Press the **OK** button. Follow the steps (20 to 33) from Appointment Scheduling to complete scheduling each appointment with a Pre-outpatient encounter.

Recurring Appointments

Recurring appointment functionality is designed to help in situations where the same appointment type needs to be scheduled multiple times over a specified time period. For example, a Rehab patient may be scheduled for a bi-weekly therapy session for 10 weeks.

The following Appointment Types can be associated with Recurring encounters:

- a. Rehabilitation: Physiotherapy/Occupational Therapy/Speech Language Therapy
- b. IV Therapy (Medical Day Care)
- c. Chemotherapy (Chemo Injection Visit)
- d. Radiation Therapy (RT Treatment Visit)
- e. Hemodialysis
- f. Mental Health
- g. Wound Care
- h. Nuclear Medicine

Scheduling a Recurring Appointment

- 1. Open the Scheduling Appointment Book application, click the Appointment tab, and fill out the accept format fields the same as in previous examples. Press the **MOVE** button to move the information to the WIP.
- 2. Click the Recur button. The "Recurring Frequencies" window will display.
- 3. Within the Recurrence pattern area, you have many different options to choose from when selecting the frequency of the appointment. You have the option to select which day of the week the patient should be scheduled in addition to the frequency (i.e. daily, weekly, monthly, yearly). For example: you many choose to pick every Monday and Wednesday of each week.
- 4. In the Range of Recurrence area, select the date which you would like the appointments to begin and how many instances of the appointment need to be scheduled (an end date can be entered instead of number of instances).
- 5. The "Allow multiple recurring frequencies" option allows you to select different types of frequencies for different days of the week. For example, you might choose to schedule the appointment for every Monday, but only want to schedule the appointment for every other Wednesday.

Every 1	hour(s) Begin time: 0000
	● End time: 2355 ★
Recurrence Patter	m
Daily	Every 1 week(s)
Weekly	Sunday 🕼 Monday Tuesday 🕼 Wednesday
Monthly	Thursday Friday Saturday
Yearly	All days Weekdays
Parata Of Parata	
Start date:	27-Nov-2017 Sector Sec
Allow multiple rec	s imino frequencies

- 6. Once you have made your selections, press the **OK** button.
- 7. The information for all instances of the recurring appointment will display in the WIP.

Work in progress:	
E CSTSCHEMPI, RANDY	Schedule
🖕 🖇 Recurring sequence	
🚍 🖘 Rehab Arthritis New - PT (Monday, 27-Nov-2017)	Contim
🖨 🛅 Current Schedule	Recur
🖨 🗐 LGH Rehab OP	
	Suggest
Patient	
🖮 🖘 Rehab Arthritis New - PT (Wednesday, 29-Nov-2017)	Request
	Insert

- 8. Suggested Scheduling is the best method for finding available appointment times for multiple appointments at once. Press the **Suggest** button.
- 9. All appointments will display in the top portion of the "Suggested Schedules" window. Press the **Suggest** button.
- 10. Available appointment options will display on the right portion of the screen. Notice that the results include available appointment times for all appointments within the recurring series.
- 11. Highlight one of the options and press the **SELECT** button. A red check mark will display next to the selected appointment times.

Patient		Appointment Location	Appointment Type	Primary Order	Scheduled Da	e/lime Pat	ent Duration									
4 STSCHE	MPL RANDY	LGH Rehab OP	Rehab Arthritis New - PT													
CSTSCHE	MPL RANDY	LGH Rehab OP	Rehab Arthritis New - PT		27-Nov-2017 -	0.00 0 N	nutes									
CSTSCHE	MPL RANDY	LGH Rehab OP	Rehab Arthritis New - PT		29-Nov-2017	0:00 0 N	inutes									
igest Criteria P	references				Pat Dur	Pat Date/Ti	ne Person	Appt Date	Time	Appt Type	Resource	Appt Loc	Primary Order	Resource Duration	Slot Type	
and the second second					T Houris)	27-Nov-201	7-8:00 CSTSCH	MPL RANDY 27-Nov-20	17-8.00	Rehab Athritis New - PT	Kent, Lauren PT	LGH Rehab OP		1 Hourts)	LGH Rehab	
ponentine conte				1.822	1 Houris)	29 Nov 201				Rehab Arthritis New - PT	Kans, Lauren PT	LGH Rehab OP		1 Houria)		
Recurrence freque	ncy Start dat	e End date Recum	ence Pattern Number	of inst 📃	EL. 1 Houris)	27-Nov-201	7-8.05 CSTSCH	MPL RANDY 27-Nov-20	17-8:05	Rehab Arthritis New - PT	Kanst, Lauren PT	LGH Rehab OP		1 Houria)	LGH Rehab	
Weekly	27-Nov-	Every	veek on M., 2		1 Houris)	29-Nov-201	7-8.05 CSTSCH	MPL RANDY 29-Nov-20	17 - 8:05	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Houris)	LGH Rehab	
				3	Ey. 1 Houris)	27-Nov-201	7-810 CSTSCH	MPL BANDY 27-Nov-20	17-8:10	Rehab Arthritis New - PT	Kant, Lauren PT	LGH Rehab OP		1 Houria)	LGH Rehab	
					1 Houris)	29-New-201	7-8-10 CSTSCH	MPI RANDY 29-Nov-20	17-8-10	Rebah Arthritis New - PT	Kent Lauren PT	LGH Behah OP		1 Houris)	1GH Rebah	
*		m	11) al	E ₄ 1 Houris)	27.Nov-201	7.815 CSTSCH	MPI BANDY 27-Nov-20	17.8.15	Rehab Arthritis New - PT	Kant Lauren PT	LGH Behab OP		1 Houris)	LGH Rehab	
		1990		_	1 Maurich	29.May.201	7.815 CSTSCH	MPI RANDY 28 May 20	17.0.16	Rahah dathatis Nasa - PT	Kent Laura PT	LGH Rebab OP		1 Mountal	LGM Rebab	
				-	E 1 Houris)	27.Nov-201	7.9.20 CSTSCH	MPI BANDY 27.Nov-20	17.9.20	Rahab Arthetic New - PT	Kant Lauren PT	LGH Rebab OP		1 Hourie)	LGH Rehab	
				-	1 Houris)	29.Nav.201	7.920 CSTSCH	MPI RANDY 29 Nov 20	17.9.20	Rebab Adhetis New - PT	Kant Lauren PT	LGH Rebab OP		T Moural)	1 GM Rehab	
ppointment Time					I Hourity	23-W0V-201	7 8.25 CETECH	MPL PANOY 23-Nov-20	17 0.20	Patrab Antribe New PT	Kant, Lauren PT	LCH Rehab OP		1 Hourgy	LOH Rehab	
		1.01	1200	- m 1 =	Ta Hours	20 May 201	T AGE COTOCU	MDI DANDY 20 New 20	17 0.05	Dalack Ashers New OT	Vent Learn DT	LOU Datat OD		1 (Accels)	LCU Dahah	
Time range:	0800	-	1700	8	I Hour(s)	29-NOV-201	-825 LSTSLH	MPI, HANDT 29400V-20	17-8:20	Henap Artning New - PT	Kant, Lauren PT	LGH Henab OP		1 Hours	LGH Henao	
Time restortions	am make			-	Y, THOURS	27-1404-201	7-8:30 CSTSCH	MPI, RANUT 27-NOV-20	17-8:30	Prehab Arthreis New - PT	Kanst, Lauren PT	LGH Henab OP		T Plour(s)	LGH Henab	
/ TRINS REDUCED IN	Con City				1 Hour(s)	29-NOV-201	-8.30 LSTSLH	MPL HANUT 29-9024-20	17-8:30	Henab Attritts New - PT	Narst, Lauren PT	LIGH Henab UP		T Hours)	LGH Henao	
					", THour(s)	27-1604-201	- 8:35 CSTSCH	MPI, HANUT 27-Nov-20	17-8:35	risenadi Arthritis New - PT	Nant, Lauren PT	LUH Hehab OP		I PIQUER)	LOH Hehab	
	hin	1 🔄 day	-		1 Hour(s)	29-140V-201	- a ab CSTSCH	MPI, MANUT 29-Nov-20	17-8:35	rvenab Annitis New - PT	Nans, Lauren PT	curr mehab OP		1 Hours)	Lun nehab	
Schedule as visit wi		1.00		1	"Z THour(s)	27-Nov-201	-840 CSTSCH	MPI, HANDY 27-Nov-20	17-8:40	Hehab Arthritis New - PT	Kanst, Lauren PT	LGH Hehab OP		1 Hour(a)	LGH Hehab	
Schedule as visit wi	date and time				1 Hour(s)	29-Nov-201	7-8.40 CSTSCH	MPI, RANDY 29-Nov-20	17-8:40	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab	
Schedule as visit wi Override suggested				3	El. 1 Hour(s)	27-Nov-201	7-8:45 CSTSCH	MPI, RANDY 27-Nov-20	17-8:45	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Houris)	LGH Rehab	
Schedule as visit wi Override suggested					1 Hour(s)	29-Nov-201	7-8.45 CSTSCH	MPI, RANDY 29-Nov-20	17-8:45	Rehab Arthritis New - PT	Kanst, Lauren PT	LGH Rehab OP		1 Hour(a)	LGH Rehab	
Override suggested Schedule multiple p	bexim of anoare	Group Sessions														
Schedule as visit wi Override suggested Schedule multiple p	bexim of anoare	Group Sessions		_												
Schedule as visit wi Override suggested Schedule multiple p	ensona to mixed	Group Settlone	Clear Suppr	est												
Schedule as visit wi Dveride suggested Schedule multiple p	ensona to mixed	Group Setelons	Clear Suggr	est												

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

🕽 Suggeste	d Schedules					
	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration
₽ ² 2. ©	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - PT			
۲	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - PT		27-Nov-2017 - 8:00	1 Hour(s)
Ø	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - PT		29-Nov-2017 - 0:00	0 Minutes

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

	Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order	Resource Duration	Slot Type
$\equiv z_{e_{a}}$	1 Hour(s)	29-Nov-2017 - 8:00	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:00	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\equiv z_{z_{\alpha}}$	1 Hour(s)	29-Nov-2017 - 8:05	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:05	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\equiv z_{z_{\alpha}}$	1 Hour(s)	29-Nov-2017 - 8:10	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:10	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\equiv z_{z_{\alpha}}$	1 Hour(s)	29-Nov-2017 - 8:15	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:15	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\equiv z_{z_{\alpha}}$	1 Hour(s)	29-Nov-2017 - 8:20	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:20	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\blacksquare \ ^{2} \tau_{a}$	1 Hour(s)	29-Nov-2017 - 8:25	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:25	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\equiv z_{z_{\alpha}}$	1 Hour(s)	29-Nov-2017 - 8:30	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:30	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\square z_{z_{\alpha}}$	1 Hour(s)	29-Nov-2017 - 8:35	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:35	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
$\blacksquare z_{z_{\alpha}}$	1 Hour(s)	29-Nov-2017 - 8:40	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:40	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab
	1 Hour(s)	29-Nov-2017 - 8:45	CSTSCHEMPI, RANDY	29-Nov-2017 - 8:45	Rehab Arthritis New - PT	Karst, Lauren PT	LGH Rehab OP		1 Hour(s)	LGH Rehab

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

i (1)	Suggeste	d Schedules					
		Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration
Ξ	÷, 🔶	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - PT			
	۲	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - PT		27-Nov-2017 - 8:00	1 Hour(s)
	٠	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis New - PT		29-Nov-2017 - 8:45	1 Hour(s)
-							
-							

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



- 17. Press the **CONFIRM** button and the "Confirmation" window will display with a summary of each appointment. Press the **OK** button to close this window.
- 18. Follow the steps (20 to 28) from the "Appointment Scheduling Confirming an Appointment" section to create an Encounter for the first appointment.
- 19. In the Current Encounter Information section, complete the below blank mandatory fields:

Encounter Type: Pre-Recurring

Medical Service: select from the drop-down list

Encounter Type:		Medical Service:	Reason for Visit:		
Pre-Recurring	-	Occupational Therapy	•	rehab	

- 20. Click **Complete** to finish.
- 21. The Document Selection window displays. Click **OK** to complete.
- 22. The Pre-Register Outpatient window displays. Verify and click OK.

Pre-Register Outpatient	×
The following LGH Rehab Outpatient aliases have been assigned for CSTSCHEMPI, RANDY:	r
Encounter Number: 700000015484 Visit Id: 7000000015484	
ОК	

- 23. The "Encounter Selection" window re-opens for the second appointment.
- 24. Select the already created "Pre-Recurring" encounter number for the second appointment from the selection window.

🕅 Encounter Select	tion								? X
Encounter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name	Reg Date	Arrive Dat
700000015175	Pre-Outpatient			LGH Rehab OP	LGH Rehab OP	Referring Provider	TestCST, FamilyNursePractitioner-MH1 MH, NP		
700000015484	Pre-Recurring			LGH Rehab OP	LGH Rehab OP	Referring Provider	TestCST, FamilyNursePractitioner-MH1 MH, NP		
700000013101	Referral	06-Nov-2017 - 11:45		LGH RAN	LGH RAN	Referring Provider	Baggoo, Alan Kieth	06-Nov-2017 - 11:45	
700000015242	Referral			LGH Chemo	LGH Chemo	Referring Provider	Mytropan, France		
700000013132	Referral			LGH RAN	LGH RAN	Referring Provider	Baggoo, Alan Kieth		
< [III				•
Modify	Add Enc							ОК Са	ancel

25. Click **OK** to close the window.

NOTE: The Recurring encounter will have to be manually discharged once the course of treatment is complete.

Modify a Recurring Appointment

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

A message similar to the following will display when performing an action (example: Actions ---> Modify or Actions ---> Reschedule) on an appointment scheduled within a recurring series:

🕅 Modify Recurring Appointment Type
This is a recurring appointment. Do you want to open this occurrence, multiple occurrences, or all occurrences?
Open one or more occurrences
Open all occurrences
Rehab Arthritis New - PT (Monday, 27-Nov-2017, CONFIRMED) Rehab Arthritis New - PT (Wednesday, 29-Nov-2017, CONFIRMED)
OK Cancel

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

Refer to the "Appointment Reschedule" section to learn more about how to reschedule an appointment.

Group Appointments

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

Create Group Sessions

Prior to scheduling a Group Appointment Type, a Group Session must be created. To create a group session, complete the following steps:

NOTE: To be able to create the group sessions, the resource must have an open slot on their calendar for the date and time of the group session. Please refer to section Adding Slots for a Day. From the Task menu in SchApptBook, select **Group Session** -> **Create**. The Create Group Session window will display.

- 1. In the **Group Session Type** field, type in the name of the Group Appointment Type and press **Enter** or the Ellipses button.
- 2. In the **Description** field, type a more detailed description of the session that the scheduler will understand; such as "8:30 am Diabetic Ed Session."
- 3. The **Location** field will be defaulted with the location associated to the group appointment type.
- 4. Enter the **Capacity** of the group.
- 5. If "Shared Session" attribute is checked, the group session can be scheduled with other available group sessions otherwise it is non-shared.
- 6. If "Open Session" attribute is unchecked, indicates the session is closed and should not allow scheduling into any of the reoccurring group sessions after the first group session begin date.
- 7. In the **Begin Date** field, place the date that this session should start.
- 8. Change the **Begin time** to a time corresponding to the time of the session.
- 9. Leave the next field as it defaults with the resource for the group session.

Create a Group Session				? 🗙
Group Session Recur				
Group session type:				
Rehab Knee Group				
Description:				
Rehab Knee Group				
Location:				
LGH Rehab OP				•
Canacity:				
2				
Shamd assesses				
Begin date:		Begin time:		
24-Nov-2017		0800		
SS Rehab Asst				
LGH Rehab Assistant				-
Group session conflicts:				
Role	Date		Time	
Check Overrid	e		ОК	Cancel

- 10. Click the **Recur** tab.
- 11. In the Recurrence pattern section, specify the appropriate recurrence pattern of the group. For example: a group that happens every Tuesday, click on the "Weekly" radio button and unselect every day except for Tuesday (see screenshot). In the Range of Recurrence, specify a start date. There is an option to specify an "End Date" or have the recurrence end after a specified number of instances.

Group Session R	ecur
Time Pattern	
Every 1	hour(s) Begin time: 0000
	C ⊑na time. 2355
Recurrence Pattern	
C Daily	Every 1 week(s)
O Daily	Livity Hookey
() Weekly	Sunday Monday V Tuesday Wednesday
Maathki	The unday
<u>Y</u> early	All days Weekdays
Range Of Recurrence	28
Start date:	27-Nov-2017 💮 💽 End after: 1 🚔 instances
	California 29. Nove 2017

12. Press the **OK** button in the lower right corner of the window.

Group Appointment Scheduling

- 1. To schedule a group appointment, click on the **Appointment Tab**.
- 2. Click the Ellipsis button beside the Person name field.
- 3. 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.
- 5. Select a Facility Name in the "Organization" window.
- 6. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
- 7. The "Future Requests/Appointments" window will appear for the patient if they have any appointments booked in the future. Click **OK** to close the window.
- 8. The patient's name will now display in the **Person Name** field.
- 9. Enter an Appointment Location and the name of the Appointment Type.
- 10. Scroll back up to the **Person Name** field. Notice that the field changes to allow for multiple patients. This is because group appointment types allow for booking multiple patients to the same resource at the same time.

Books	Appointment			
* <u>P</u> erson	name:			*
CSTSC	HEMPI, RANDY			
			\ge	Ξ
CST	Schempi, Rand	(
*Appoin	tment location:			
I GH Re	ehah OP			Ŧ

- 11. In the **Person Name** field, clear out the first patient's name and type in the name of your second patient. The "Person Search" window will display. Follow the same steps (3 to 8) from above to select the appropriate patient from the list and press the **OK** button.
- 12. Both patients should now display.



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



- 15. Use Suggested Scheduling to help find an available appointment time. Press the **Suggest** button.
- 16. In the Suggested Schedules window, press the Suggest button.
- 17. An available time will display. Press the Select button and then press OK.

🗃 Sugge	ted Schedules														? 🗙
	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration									
4	 CSTSCHEMPI, JO CSTSCHEMPI, R 	HNNY LGH Rehab OP ANDY LGH Rehab OP	Rehab Knee Group Rehab Knee Group			0 Minutes 0 Minutes									
Sugges	Criteria Preferen	ces			Pat Dur I	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order	Resource Duration	Slot Type	
Appoir	tment Date				45 Minutes	27-Nov-2017 - 15:00	CSTSCHEMPI, JOHNNY CSTSCHEMPI, BANDY	27-Nov-2017 - 15:00 27-Nov-2017 - 15:00	Rehab Knee Group	Rehab Knee Group	LGH Rehab OP		45 Minutes 45 Minutes	Group Session Group Session	
Oat	a range: 2	HNov-2017 🔹 💌	24-Dec-2017		45 Minutes		Corportenti, rootor	2111012011 10:00	Tranco refee droop	The full of the cardop	Contriction		Ho Manaceo	Croop Session	
Sch	edule in: 1	Days - From:	27-Nov-2017	× v											
O Dat	e restrictions:	ext 2 Days	v	1											
Mor	Tue We	d Thu Fri S	Sat Sun Ex	ceptions											
Appoir	tment Time														
@ Tim	a range: 0	300	1700												
© Tim	e restrictions: A	M Only													

NOTE: The Suggest function only returns one appointment option for group appointments. To view additional options, you must select the "**Next**" button on the bottom left corner.

- 18. Press the **Confirm** button to view the summary info.
- 19. If your appointment is designed to require an encounter added at the time of booking, then the "Encounter" selection window will display. Either select an existing encounter, or press the **Add Enc** button to generate a new encounter.
- 20. Click on the **Bookshelf** bar. Select the bookshelf for the department which schedules the group appointments from the list of Bookshelves. Press the **OK** button.



- 21. Double click on the appropriate book. You should see the resource that performs the group appointments and the available sessions for the day.
- 22. Press the **Group Session** icon within the session that you just booked. The "Group Session Information" window will display.



Group Session Information		? 🔀
Group Session Type:	Rehab Knee Group	
Description:	Rehab Knee Group	
Location:	LGH Rehab OP	
Capacity:	2	
Number Scheduled:	2	
Shared:	No	
Open:	No	
Persons:		
Name		Status
CSTSCHEMPI, RANDY CSTSCHEMPI, JOHNNY		Pending Confirmed
Resources:		
Resource	Role	
LGH Rehab Assistant		Rehab Asst
<u>r</u>		

Group Appointment Cancellation and Group Session Inquiries

- 1. Open Appointment Inquiries by clicking on the icon at the top of the screen. The "Appointment Inquiries" window will display.
- 2. Use the arrow buttons to navigate to the **Location** tab. Click on this tab.
- 3. Choose "Group Session Standard Inquiry" from the Inquiry dropdown.
- 4. Choose "Ambulatory" from the Location Type dropdown and "Appointment Location" from the Location dropdown.
- 5. Ensure that your date range is set to include the appropriate timeframe and press the **Find** button.
- 6. Highlight the appropriate group session, right click and choose **Cancel**. The "Group Session Persons" window will display. There is an option to select a single patient, multiple patients or the entire group.
- 7. Select **OK** to close the "Group Sessions Persons" window and proceed with cancelling the selected patient(s).

3	Group	Session	Stan	dard Inqu	uiry														
1	Task	Edit	View	Help															
E Is	1 %	1	≩ β10,	81.8	0 0	<u>k X0</u>	101	10 V2		a 🗆	a 📩	81.6	# A 19	u 🖂 🔟 🚜 炎	1.12				
1	U 1%4	<u></u> -	ଞ୍			PX 990	W.	જ વ				010		<u>9</u> E # # #	n-				
N	ame																		Person Comments:
								MRN-						DOB-					
														Age:					
F	erson	Reso	urce	Locatio	on f	Reques	t List		Beg	in Date		Duration	State	Appointment Type	Resource	Capacity	Patients		
I.F.									27-1	lov-20	17 - 15:00	45	Confirmed	Rehab Knee Group	LGH Rehab Assistant	2/2	CSTSCHEMPL F	RANDY: CSTSCHEMPL JOHNNY	
	nquiry:																		
	Group	Session	Stand	ard Inquig	у			•)	
	eestie	. hmo:										📆 Gr	oup Sessior	n Persons			? ×		
	Ambul	tory(s)										This a	ppointment is	s part of a group session	n. Do vou want to oper	this persor	ns, multiple		
												persor	ns, or all pers	ons?					
	Locatio	n:											en one or m						
	LGH F	lehab Ol	Р					-					en all nersor	ne persona.					
	Charl da			Chart time															
	27-Nor	-2011	·										STSCHE	API, JOHNNY (COI	IFIRMED)				
			•		•				-				STSCHE	API, RANDY (CON	FIRMED)				
	End dat	e:		End time	e:														
	27-No	-2011		2355	-														
																OK	Cancel		
																UK	Carlobi		
												_							

- 8. The Cancel window will display. Select the appropriate cancellation reason from the dropdown and press the **OK** button.
- 9. You will now see the Capacity number decrease for the session which your patient was originally booked.

Slot Maintenance

Adding Slots for a Day

- 1. Right-click on the scheduling appointment grid, select **Slots** then **Add Slots**.
- 2. Change the time interval of the slots on the right if necessary.
- 3. Open the + sign next to the All Slot Types.

Add Slots - Dommann, Steven MD	? 💌
Day begin: Day end:	Schedule:
☑ Display slot properties when adding a new slot Slot groups and types:	8:30 8:45 9:00 9:15
Slot Groups All Slot Types	9:30 9:45 10:00

- 4. Find the appropriate slot type and select for your clinic.
- 5. Drag and drop the selected slot type to the appropriate start time on the right side of the screen.

Add Slots - Dommann, Steven MD		? <mark>- ×</mark>
Day begin: Day end: 0800 1600		Schedule:
Time interval:		8:00
15	•	8:30
Display slot properties when adding a new slot		5.45
Slot aroune and types:		9:00
LGH NBOP Team Meeting		9:15
		9:30
LGH OB Induction		10.00
		10:15
LGH PF		10:30
LGH PF - Peds Asthma		10:45
LGH POU Chic		11:00
LGH RASC		11:15
= LGH Rehab		11:30
LGH Rehab Total Knee		11:45
LGH Resp		12:00
IGH SLP Dysphagia Assmt		12:13
	-	12:45
	- F	13:00

6. If more than one slot of the same type is required, you can right-click; select copy and then paste the slot into the desired time slot.

Add Slots - Dommann, Steven MD		8 💌
Day begin: Day end: 0800 Time interval:	×	Schedule:
15 Display slot properties when adding a new slot Slot groups and types: - = LGH OCC	•	8:30 Cut Slet 8:45 <u>9:00</u> 9:00 Paste Slot 9:15 P:30
		9:45 Slot Properties 10:00 Slot Release Times 10:15 Partial Time Block Release
		10:45 11:00 11:15 11:30
		12:00 12:15 12:30 12:45
I Marmo	Þ	13:00

7. To change the duration or description of the slot right-click and select **Slot Properties**.

Slot Properties		? ×
Mnemonic:		
LGH RAN		
Description:		
LGH RAN		
Display scheme:		
Lt Yellow/Black		•
Flex string:		
<none></none>		-
Duration:		
1 Hour(s)	Minutes Day	
Contiguous		
Appointment start time inter	val:	
15 -		
Group slot count		
1		
Applied default schedules:		
Template	Range	Applied

- 8. Change the slot information and click **OK**. The information typed into the mnemonic field will display on the appointment screen.
- 9. Click **OK** on the "Add Slots" window to save the changes to the new slot.

NOTE: It is not possible to modify a slot after it is created. You must use the "Remove Slots," "Add Slots," or the "Replace Slots" function to make any changes to the slot.

Removing Slots from a Schedule

- 1. Right-click on the slot to be removed.
- 2. Select Slots then Remove Slots.

27-Nov-2017 - LGH RAN Book								
D	ommann, Steven MD	Kaiway, Sarah ME)					
LGH RAN			LGH RAN					
	Actions	•						
	Add New Appointment							
	Book Request							
	Confirm Request							
	Remove Request							
	Recur Appointment							
	Navigation	+	Add Slots					
	Inquiry	•	Remove Slots					
	Report	•	Partial Release Slot					
	Applications	•	Replace Slot					
	Person	•	Slot Comments					
	Slots	•	View Slot Information					
	Resources	•						
	Book Settings	•						

3. A confirmation window will appear. Click **Yes** to remove the slot.

Replacing Slots from a Schedule

- 1. Right-click on the slot to be replaced.
- 2. Select Slots then Replace Slot.
- 3. Open the + sign next to the All Slot Types.
- 4. Find the slot type that the current slot will be replaced with.
- 5. Drag and drop the selected slot type to the start time on the right side of the screen.

Replace Slots - Dommann, Steven MD	? <mark>*</mark>
Time interval:	Schedule:
15	12:30
Slot groups and types:	13:00
Slot Groups All Slot Types BD Any BD QC Daily BD QC Morthry Block Cardiac Rehab Cardiac Rehab Cardiac Rehab Cath Lab Clinic Closed Coffee CT Coffee CT Colon CT Bicarb CT Cardiac CT Colon CT ED Scheduled OP CT ED Scheduled OP CT ED /IP CT Interventional	13:15 13:30 13:45 14:00 14:15 14:30 14:45 15:00 15:15 15:30 15:45 16:00 16:15
	OK Cancel

6. Follow steps (7 to 9) from Adding a Slot to complete replacing the slot.

NOTE: When replacing slots, the new slot(s) must be the same duration as the original slot. (It is possible to add multiple slots of different types and durations to fill up the time block).

Blocking Schedules

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

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 <u>Pre-requisite Steps for Booking an Appointment</u> to go to the Appointment tab.
- 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 "Schedule" button option to block the time on calendar.
- 7. Click **Confirm** to complete booking the Blocked Time appointment.

•			2017			•	Во	oks App	ointment			
•		N	oveml	ber		•	Pe	rson name:				
Su	Mo	Tu	We	Th	Fr	Sa		contraino.				
29	30	31	1	2	3	4	- Ľ					
5	6	7	8	9	10	11	*A	ppointment !	ocation:			
12	13	14	15	16	17	18						
19	20	21	22	23	24	25	Ap	pointment tv	pe:			
26	27	28	29	30	1	2						
3	4	5	6	7	8	9						
		Cord	ortin	Man	DT	-	Go	olon Clain	PT	Kamt Laumo PT	Lun Janet PT	Murry Liz PT
9.00		Coni	orun,	Mary				len, uan	8 F I	I GH Pakak	Lun, Janet Fi	Muny, Liz Fi
8-15							Lun n			Lan Neriab		
8-30												
8.45												
9:00										Rehab Arthritis New - PT		
9:15										LGH Rebab OP		
9:30	LGH	l Reha	ab							TestCST, FamilyNursePr		
9:45											Blocked Time	
10:00							LGH R	LGH R	LGH R		LGH RAN	
10:15											Confirmed	
10:30												
10:45												
11:00							LGH R	LGH R				
11:15												
11:30												
11:45												

Appointment Management

Modifying Information

There are two 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 Patient information such as their Date of Birth, Last Name, and Phone Number, etc.

NOTE: Do not use these steps if you have a preference card associated with the appointment.

Appointment information can be modified in two ways.

1. First, you can right click on the appointment, go to Actions, and then select Modify.



- 2. You can also highlight the appointment, and then click the **Modify** button at the top of your screen.
- 3. The "Modify" window will pop up allowing you to make any changes.

🕅 Modify											? <mark>×</mark>
Name: CSTSCHEM	PI, JOH	INNY			BC PHN: 9876706228		Gender: Male		Pe	erson Comments:	
Preferred Name: MRN: 700006538			1	DOB: 01-Sep-1999		Language:		Location:			
Disease Alert: None	Proces	s Alert: Fall	s Risk, Co	ommu /	Age: 18 Yea	irs	Interpreter Requi	red:	Pr	eferred Phone:	
☐	General Modify reas Comments:	Summary	Details	Orders	Guidelines	Notification	Conversation Summaries	Itineraries	Locks	Booking Notes	•

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

General	Summary	Details	orders	Guidelines	Notification	Conversation Summaries	Itineraries	Locks	Booking Notes	
*Reason	For Visit:									
rehab										
Ordering	Provider:									
*Referrin	g Provider:									
Baggoo,	Alan Kieth									9
*Referral	Received Dat	te:								
27-Nov-	2017									× •
*Priority:										
Routine										•
*Interpret	er Required?:									
No										•
Language	e:									
										-
Special Ir	nstructions:									

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

- 5. You can type in any additions you need or delete information, then click **OK** to save.
- 6. To modify patient information, you will need to highlight that person's appointment, right click, go to **Person**, and select **Modify Person**.



- 7. Select Facility Name in the "Organization" window. The EMPI window briefly launches.
- 8. 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.

Add/Modify Person					
<u>a</u>					
Medical Record Number: Last Name: 700007891 CSTSCHEMPI	First Name: RANDY	Middle Name:	Preferred Name:	Previous Last Name:	Maiden Name:
Date of Birth: OG-Nov-1977 Age: 40Y 40Y	Gender: Female	BC PHN: 9876488326			
ALERIS Fallerit monitation insurance Additio	onal Contacts				
Address and Contact Information Address Information: Previous Add	r - Clear (c): Mailing Addr - Clea	r (c): Temporary/S	acondary Addr - Clear (c):		
Permanent Address: Previous Pe 900 E. 29th Ave. Add Addres Vancouver, British Columbia Canada	rmanent Address: Mailing Address: \$ Add Address	: Tempora Add Add	y/Secondary Address: ress		
Preferred Phone: Home Phone () ·	Number: Mobile Phone Num	work Phone	Number: Work Ex	tension:	Alternate Phone Number:
Email Address:					
Personal Information Marital Status:	Interpreter Require	id: Language:	VIP - Pe	rson Levet.	
Primary Care Provider (PCP):					
Deceased Details Deceased ?: Official Confin	nation: Deceased Advising	g Source:			
 Do you identify as an Aboriginal/Indigenous pers 	on?				
If yes, do you identity as hirst Nations, Metis or In Indigenous Identity:	uil'? [You can choose more than one] —				
— BC Cancer Agency — Dual Modaîty:					
ADDRESSING GUIDELINES: Dient's address: Becord the client's Home Address	ess in the Permanent Address section. If	the client is visiting or temporar	lu relocated within the province	also record the temporary a	address if available in the Tempora
Address for Child in Foster Care: Record the Foster	ter Family Address as the Home Address.			, and record the tempolary (The second secon
					Complete Cancel

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

Appointment Cancellation

There are multiple options for canceling appointments:

Option 1: Right-click on the appointment within an **Appointment Inquiry**.

Option 2: Right-click on the appointment within the scheduling grid area.

Option 3: Click on the Cancel icon on the Toolbar. 🛅

Option 1: 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** such as "Person Schedule Inquiry Standard"

- Search for the appointment by the Resource name using a Resource Inquiry such as "Resource Schedule Inquiry – Standard"
- Search for the appointment by the appointment's scheduled location using a **Location Inquiry** such as "Location w/Person Name"
- 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**.

BEG DATE	DURATION	STATE	APPT TYPE		REQ DOCTOR RESOUR		
11-Dec-2017 - 8:00	20	Confirmed	Rehab F/Up		Baggoo, Alan Kieth	Confortin, Ma	ry PT
12-Dec-2017 - 8:45	20	Confirmed	Rehat 9	C/116	Dagaaa Alan Kiath	Dome Mooon	ОТ
				0	Confirm		
				C	Contact		
				N	/lodify		
				F	Reschedule		
				H	lold		
				C	Cancel		
				N	No Show		

- 5. If the "Interpreter Required?" field was set to "Yes" when the appointment was scheduled, an Appointment Guideline will appear reminding the clerk to cancel the interpreter request.
- 6. The Cancellation window will display. Select an appropriate reason in the **Cancel Reason** dropdown and press the **OK** button.

	General	Summary	Details	Orders	Guidelines	Notification	Conversation Summaries	Itineraries	Locks	Booking Notes	
$\boldsymbol{<}$	*Cancel rea	ason:									
											•
	Comments:										
											~
											-

- 7. The appointment is now in a cancelled state. If there is an order associated to the appointment, the order will get auto-cancelled.
- 8. 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.

Option 2: Right click on the appointment within the scheduling grid area

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

8 🔒 🕸 ₊∲ 🔎 🍱 ø	# : ⊧ч +⊪+ 王 ≐ €	Confirm Contact Modify Reschedule Hold Cancel No Show
ent Rehab Services Books	helf	Check In Check Out Patient Seen Batch Beschedule
CH NROP Book LGH IROP Book H SLP Rehab Bo	Request Verify Med Nec Check	
2 2		Lock Unlock
Karst, Lauren P	T Lun, Janet PT	Swap Resources
R Rehab Arthritis Name LGH Rehab OF	DY PT Actions	Link Unlink
Baggoo, Alan K	Add New Appointment Book Request Confirm Request Remove Request	

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

Option 3: Click on the Cancel icon on the toolbar

- 1. Again, highlight the appointment you want to cancel, and then click the **Cancel Icon** at the top of your screen.
- 2. The "Cancellation" window will display the same as in the previous methods of appointment cancellation.

Appointment No Show

If a patient does not show up for their scheduled appointment, the appointment should be "No Showed" (the guidelines around No Showing may differ by clinic). This action will change the status of the appointment to "No Show." It will also create a reschedule request so the appointment can easily be moved to another date/time (if appropriate). Follow the steps below to "No Show" an appointment.

1. From the Scheduling Grid or an Inquiry, right-click on the appointment, go to **Actions**, then **No Show**. The No Show window will open.

🖻 No Show							? 🗙
Name: CSTSCHDE	MO, STLAURENCE	BC PHN: 98781	19764	Gender: Mal	le	Person Comments:	Ð
Preferred Name:	MRN: 700002678	DOB: 18-Apr-19	67	Language:		Location:	
Disease Alert: None	Process Alert: None	Age: 50 Years	Age: 50 Years		Required:	Preferred Phone: (6	04) 558-3426
CSTSCHDEMO, STLAUR	General Summary Details Comments:	Orders Guidelines N MRN Home Phone 700002678	Enc Type Pre-Outpatient	Encounter Number 700000010353	VIP Yes	es Locks Booking Notes	Cancel Enc
• <u> </u>						ОК	Cancel

- 2. Verify you have selected the correct patient/appointment and click the **OK** button.
- 3. The appointment will appear as No Showed (grey) in the Scheduling Grid.

			201	7		Þ	Books Appointment	Work in progress:		
•		D	ecen	nber		•	Bookshelf - I GH Outpatient Care Centre Bookshelf			
Su	Мо	Tu	₩e	Th	Fr	Sa				
26	27	28	29	30	1	2	Select			
3	4	5	6	7	8	9	and the second s			
10	11	12	13	14	15	16				
17	18	19	20	21	22	23				
24	25	26	27	28	29	30				
31	1	2	3	4	5	6				
							06-Dec-2017 - LGH RAN Book			
				Dł	nawa	n, Priya	D Dommann, Steven MD Kaiv	vay, Sarah MD		
12:1	12:15									
12:3	e C	STSC	HTES	T, JO	ETRI	AGE	GH RAN			
12:3 12:4	C C	STSC AN N	HTES ew	T, JO	ETRI	AGE	GH RAN			
12:3 12:4 13:0		STSC AN N	HTES ew	IT, JO	ETRI.		GH RAN			
12:3 12:4 13:0 13:1		STSC AN N CST RAI	HTES ew SCHI New	IT, JO	etri.	AGE	GH RAN			
12:3 12:4 13:0 13:1 13:3 12:4		STSC AN N CS1 RAI	HTES ew ISCHI New	ST, JO	ETRI.	AGE	GH RAN			
12:3 12:4 13:0 13:1 13:3 13:4 14:0	C R R R	STSC AN N CS1 RAI	HTES ew ISCHI	IT, JO	ETRI.	AGE	GH RAN			

A Reschedule Request is automatically generated when an appointment is "No Showed." Open the "Reschedule Requests" Request List to view and manage the request.

4. Click on the **Request List Inquiry** icon.



6. Enter the appropriate **Location Type** (i.e. Ambulatory) and **Location** (i.e. LGH RAN) and click the **Find** button. All appointment requests that meet the search criteria are displayed.

Schedule Inquiry - Request List by Location						[- • •
Task Edit View Help							
🛙 🏷 🛒 🥶 🖞 🖄 🕼 👘 🖓 🔍 🕅		I 🔚 🟮 🕫 📖 🍕 📓	🖻 🕑 # 🖋	N 2			
Name:					Pe	rson Comments:	
MBN:		DOB:					
		Age:					
Request List	MRN	Person Name	Appointment Type	Order	Priority	Received Date	Requested Date
	700003998	CSTSCHEMPI, PETE	RAN F/Up	Follow Up - Clinic	Routine		
Inquiry:	700007891	CSTSCHEMPI, RANDY	RAN New		Routine	28-Nov-2017 - 0:00	
Request List by Location 👻	700006487	CSTSCHTEST, JOETRIAGE	RAN New		Emergent (less than 1 week)	06-Dec-2017 - 0:00	
	700008683	JOHN, SMITH	RAN New		Routine	06-Dec-2017 - 0:00	07-Dec-2017 - 7:0
Request List Queues:	700002678	CSTSCHDEMO, STLAURENCE	RAN New		Emergent (less than 1 week)	07-Dec-2017 - 0:00	
Reschedule Requests							
Location type:							
Ambulatory(s)							
Location:							
LGH RAN 🗸							
Find Clear Close	•						Þ

- 7. If the appointment is not going to be rescheduled, follow these steps:
 - a. Right-click on the patient and select Cancel Request.

NOTE: It is important you select "Cancel Request" and not "Cancel".

Schedule Inquiry - Request List by Lo Task Edit View Help Image: Ima	nation	nce	🖹 🚺 🗭 🗮 🍕 BC P	HN: 987	Ba G Ve	atch Reschedule roup Info erify led Nec Check	Male	Pe	erson Comm
Preferred Name:	MRN: 700002	678	DOB:	18-Apr	Lo	ock	ge:	ما	cation:
Disease Alert: None	Process Alert:	None	Age:	50 Yea	0	nlock	ter Required:	Pn	eferred Pho
Request List		MRN	Person Name	Δ.	A	dd New Appointment		Received Date	Requested
		700002000			С	omplete Request		Neceived Date	nequesteu
Inquiry:		700003338	CSTSCHEMPI, PETE	B	M	lodify Request	e	28-Nov-2017 - 0:00	
Request List by Location	-	700008683	JOHN, SMITH	R	N	love Request	e	06-Dec-2017 - 0:00	07-Dec-201
Request List Queues: Reschedule Requests		700002678	CSTSCHDEMO, STLAURE	NCE R	C	ancel Request	ent (less than 1 week)	07-Dec-2017 - 0:00	
Location type: Ambulatory(s)					So	hedule			
Location:					In	quiry otifications	·		
					Su	uperbill			

b. A "Cancel Request" window will open. Enter comments into the Comments field if necessary and click **OK**. The patient will fall off the list.

Name: CSTSCHDEMO, STLAUREN BC PHN: 9878119764 Gender: Male Person Comments: * Preferred Name: MRN: 700002678 D0B: 18-Apr-1967 Language: Location: Disease Alert: None Process Alert: None Age: 50 Years Interpreter Required: Preferred Phone: (604) 558- CSTSCHDEMO, STLAUREI General Comments: Comments: *	🛅 Cancel Request				? 💌
Preferred Name: MRN: 700002678 D0B: 18-Apr-1967 Language: Location: Disease Alert: None Process Alert: None Age: 50 Years Interpreter Required: Preferred Phone: (604) 558- CSTSCHDEMO, STLAUREI General	Name: CSTSCHI	DEMO, STLAUREN.	BC PHN: 9878119764	Gender: Male	Person Comments: 🖻
Disease Alert: None Process Alert: None Age: 50 Years Interpreter Required: Preferred Phone: (604) 558- CSTSCHDEMO, STLAUREI General RAN New (Reschedule Comments:	Preferred Name:	MRN: 700002678	DOB: 18-Apr-1967	Language:	Location:
CSTSCHDEMO, STLAUREI RAN New (Reschedule Comments:	Disease Alert: None	Process Alert: None	Age: 50 Years	Interpreter Required:	Preferred Phone: (604) 558
	CSTSCHDEMO, STLA	Seneral eduk Comments:			

- c. Log into **PMOffice** to cancel the Pre-Outpatient encounter.
- d. Click on the **Conversation** tab and double-click on the **Cancel Encounter** conversation.

Recess Management Office				
<u>T</u> ask <u>V</u> iew <u>G</u> roups <u>H</u> elp				
🖴 🔒 😹 📵 😥	🖌 🕥 🔁	🌀 🗐 🏐 🎝 As Of 11:36	🌮 Groups 👻 🥀 Help	
Conversation	←			
😰 Add/Modify Person				
🔚 Cancel Encounter 🛛 🔫				
🚮 Discharge Encounter				
🧔 Leave of Absence				
🚽 Modify Discharge				
👩 Modify Discharged Outpatient				
🛉 Pre-Register Outpatient				

- e. Refer to the Person Search Quick Reference Guide to find the appropriate patient.
- f. Be careful to select the appropriate Pre-Outpatient encounter and click **OK**.
- g. The Cancel Encounter window will open. Confirm you have selected the appropriate patient and encounter then click **Complete**.

NOTE: If you are cancelling the encounter the same day as the appointment, you can use "Today's Expected Arrivals" worklist to find the patient/encounter. If you do not cancel the encounter, it will appear on the "Past Due Arrivals" worklist.



- 8. If the appointment should be rescheduled, follow these steps:
 - a. Right-click on the patient and select Complete Request...

Name: CSTSCHDE	MO, STLAURE	NCE	BC	Med	y Nec Check		Gender: Male
referred Name:	MRN: 70000	2678	D(Lock			Language:
lisease Alert: None	Process Aler	t: None	Ag	Unlo	ck		Interpreter Requi
Request List		MRN	Person Name	Add	New Appointment	F	Priority
		700003998	CSTSCHEMPI, PETE	Com	plete Request	linia	Routine
Inquiry:		700007891	CSTSCHEMPI, RANDY	Mod	ify Request		Routine
Request List by Location	•	700008683	JOHN, SMITH	Mov	e Request		Routine
Request List Queues:		700002678	CSTSCHDEMO, STLAU	Cano	cel Request		Emergent (less th
Reschedule Requests	•			Resto	ore Request		
Location type:				Sche	dule	_	
Ambulatory(s)	•			Incui	in.		

- a. Click **OK** if the "Future Requests/Appointments" window opens.
- b. In the "Existing Encounter" window, click Yes to retain the associated encounter.
- c. The appointment will appear in the WIP. Refer to the steps 7-10 in the Appointment Reschedule section (Option 1) to complete the rescheduling of the appointment.

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

Appointment Reschedule

There are multiple methods for rescheduling an appointment.

Option 1: Right-click on the appointment within an Appointment Inquiry

Option 2: Right-click on the appointment within the Scheduling Grid area

Option 3: Click on the Reschedule icon on the Toolbar

Option 4: Drag-and-Drop into WIP

Option 1: Right-click on the appointment within an Appointment Inquiry

- 1. To reschedule 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** such as "Person Schedule Inquiry – Standard"

- Search for the appointment by the Resource name using a **Resource Inquiry** such as "Resource Schedule Inquiry Standard"
- Search for the appointment by the appointment's scheduled location using a **Location Inquiry** such as "Location w/Person Name"
- 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**.

🛞 Schedule Inquiry - Person Schedule Inquiry - St	tandard		
; Task Edit View Help			
i 🗹 🗞 🛍 🤨 🔮 🏭 🌆 👫 🗿 👘	🛇 🍆 🖪 🔡 🖼 🔚 🕄 🕫	🕙 🔟 🝺 # 🖑 🕅	
Name: CSTSCHEMPI, RAND	Y	BC PHN: 9876488326	Gender: Female
Preferred Name:	MRN: 700007891	DOB: 06-Nov-1977	Language:
Disease Alert: None	Process Alert: None	Age: 40 Years	Interpreter Required:
Person Resource Location Request List	BEG DATE DURATION S	TATE APPT TYPE REQ DOCTOR	RESOURCE
Inquiry: Person Schedule Inquiry - Standard Person: CSTSCHEMPI, RANDY Start date: 20-Nov-201;	20-Nov-2017 - 8:00) 60 Ca Image: State	orfimed Rehab / Confirm Contact Modify Reschedule Hold Cancel No Show Check In Check Nu Patient Seen Batch Reschedule	ttioner-MH1 MH, NP Kanst, Lauren PT

- 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. If the "Interpreter Required?" field was set to "Yes" when the appointment was scheduled, an Appointment Guideline will appear reminding the clerk to reschedule the interpreter.
- 8. If there is an order associated to your appointment, the Appointment Attributes window will display. Press the **OK** button within this window.
- 9. The appointment information will now display within the WIP.

w	lork	in	prograee.
			DIOUICSS.

E	
🖃 🖘 Rehab Arthritis New - PT	
🛓 🗟 Reschedule	
🚊 📓 Current Schedule	
📥 🗐 LGH Rehab OP	
Rehab Providers	

- 10. From this point, you will find a new available appointment time using one of the methods previously described (reference: Drag and Drop Method, Suggest Scheduling Method or Schedule Button Method). Find a new appointment time and press the **Confirm** button. The "Confirmation" window will display. Press the **OK** button.
- 11. The **Reason** in "Reschedule" window will display. Select a reason from the dropdown and press the **OK** button.

🕅 Reschedule	? 🔀
*Reason:	
_Patient Requested	-
Comments:	
	<u>^</u>
	T
ок	Cancel

12. Your appointment will now appear in a Confirmed status in the new appointment time.NOTE: the attached encounter will be updated with the new date and time.

Option 2: Right click on the appointment within the scheduling grid area

1. You may also reschedule appointments directly within the grid area. To accomplish this, right click on the appointment, go to **Actions**, and then click on **Reschedule**.

Rehab Arthritis New - PT	Actions	 Confirm
GH Rehab OP TestCST, FamilyNursePractitioner-MH1.MH, NP.	Add New Appointment Book Request Confirm Request Remove Request Recur Appointment	Contact Modify Reschedule Hold Cancel
	Navigation	No Show
	Inquiry Report	Check Out Patient Seen
	Applications	Batch Reschedule
	Person	Request
	Slots Resources	 Verify Med Nec Check
	Book Settings) Lash

2. From the WIP, continue to reschedule the appointment following the same steps as <u>Option 1</u> (refer to steps 5-10).

Option 3: Click on the Reschedule icon on the Toolbar

- 1. Another method for Rescheduling appointments is to use the Reschedule icon
- 2. Again, highlight the appointment you want to reschedule, and then click the **Reschedule** icon at the top of your screen.
- 3. From the WIP, continue to reschedule the appointment following the same steps as <u>Option 1</u> (refer to steps 5-10).

Option 4: Drag-and-Drop into WIP

1. To reschedule an appointment using Drag & Drop into the WIP, select the appointment you want to reschedule and drag & drop it into the "Work in Progress" (WIP) window.



2. From the WIP, continue to reschedule the appointment following the same steps as <u>Option 1</u> (refer to steps 5-10).

Appointment Shuffle

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

- 1. Select the **Shuffle** option in the Appointment Book ^{*} to open the "Appointment Shuffle Criteria" window. You may also highlight an appointment within the grid area, right click, choose **Actions**, and then **Shuffle** from the menu.
- 2. The "Appointment Shuffle Criteria" window will display. Press the OK button.

Appointment Shuffle Criteria	? 💌
Resources:	
Confortin, Mary PT;Geelen, Claire PT;Karst,	Lauren PT;Lun, Janet PT;Muny, Liz PT;O'Laugh
Date: 20-Nov-2017	
Begin time: End 0800 180	ime: D
Retain Times	OK Cancel

3. The "Appointment Shuffle" window will display.



- 3. To move appointments to a different time or Resource, highlight the appointment you would like to shuffle. You are only able to shuffle appointments from the primary resource to which they are scheduled. It is also important to note that appointments can only be shuffled to a new slot or resource on the same day the original appointment was scheduled.
- 4. Left click and drag to the new time and Resource. You will see a blue bar display before you release your left mouse click.

	Confortin, Mary	Geelen, Claire PT	Karst, Lauren PT	Lun, Janet PT	Murry, Liz PT	O'Laughlin, Ger	Sharpe, Nina P
:00	LGH Rehab	L	CSTSCHEMP	1		L	
15			Rehab Athrti				
30			LGH Rehab OP				
15			TestCST, Fa	\subset	LGH Rehab		
00							
5							
30							
45							

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

ł) App	ointment Shuffle -	[Mond	ay, Novemb	er 20, 2017, 8:00 - 1	18:00]			
		Confortin, Mary	Geelen	, Claire PT	Karst, Lauren PT	Lun, Janet PT	Murry, Liz PT	0'Laughl	in, Ger
	8:00	LGH Rehab	L		LGH Rehab			L	
	8:15								
	8:30								
	8:45						CSTSCHEMP		
	9:00						Rehab Arthriti		
	9:15						LGH Rehab OP		
	9:30						TestCST, Fa		
	9-45						1		

- 6. Press the **OK** button. The **Reason** for Shuffle window will display. Select a reason from the dropdown and press the **OK** button.
- 7. The Shuffle window will close and the appointment will now appear in a Confirmed status in the new timeframe/Resource.

Swap Resources

Swap resources is used only to swap all appointments on the same day with another resource in the same appointment book.

- 1. Select the resource that the appointments are to be swapped from.
- 2. From the Task menu, select **Swap Resources** icon. The "Swap Resources" window opens.

Swap Resources							
Swap LGHOR GAR with:							
LGHOR CAP	•						
ОК	Cancel						

3. From the Swap Resources list, select the resource where you want to move the appointments. The list contains only the resources that you are allowed to access.

Or, another way to swap resources is by selecting the resource header and "Dragging & Dropping" it into another resource.

- 4. Click **OK** in the "Confirm Swap Resources" window.
- 5. You will see the "Confirmation Swap Resources" window. Verify the resources you are swapping are correct, and click on **Yes**.



Batch Reschedule

Batch Reschedule simultaneously reschedules multiple appointments while by-passing the Work-In-Progress window. Perform the following steps to reschedule appointments using the Batch Reschedule functionality:

- 1. Select one or multiple appointments within the appointment grid or appointment inquiry by holding down the **Ctrl** key and highlighting each appointment to be rescheduled.
- 2. Right-click on the appointments and select **Actions->Batch Reschedule** from the list.

											_		
е.												Confirm	
									IRN:			Contact	
												Modify	
												Reschedule	
		2017	/		•	Book	s Appointn	nent				Hold	
	N	ovem	ber		•	Pers	on name:					Cancel	
Мо	Tu	We	Th	Fr	Sa							No Show	
30	31	1	2	3	4	*Apr	contment location	n:				Check In	
6	7	8	9	10	11							Check Out	
13 20	21	22	23	24	18	Anne	intmant hina:					Patient Seen	
27	28	29	30	1	2		anument type.				<	Batch Reschedule	>
4	5	6	7	8	9							Request	•
												Verify	
												Med Nec Check	
)hawan,	Priya MD						
												Lock	
												Unlock	
												Shuffle	
												Swap Resources	
												Reorder	
CS BA	TSCH	EMPI,	RANE)Y						LGH RAN		Group Session	•
1	CSTS	CHEM	PL IO	HNNY		mmm		mmm				Link	
	RAN	New					*****		actions 2	•		Unlink	
ļ								. 4	dd New Appointment	t			
.								. 8	ook Request				
									onfirm Request				
R								, R	emove Request				

3. The "Batch Reschedule" window opens with all of the appointments selected displayed.

街 Batcl	n Reschedule						? 🗙
Mode							
00	ffset from original time						
	Offset:	Hours 👻					
0 F	eschedule into next available slo	ot					
	Start date: En	d date:					
	28-Nov-2017 🚔 👻 28	3-Dec-2017 🚔 💌]				
	Reason for reschedule:	-					
Use	originally scheduled resource						
Alle	cations						
	Deliant	Anne sinter and the section	Anneistant Trans	Dimen Order	Calculated Data (Trans	Patient Duration	
-		Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration	
	CSTSCHEMPL IOHNNY	LGH RAN	RAN New			0 Minutes	
_	COTOCILEMIT, COTINIT	Larrow	TO UN THOM			o minutes	
Send	all appointments that could not I	be rescheduled to a requ	est list for manual res	cheduling			
						Reschedule OK Ca	ncel

- 4. Select the appropriate batch reschedule mode and parameters.
 - If "Offset from original time mode" is selected, the offset parameter for rescheduling will need to be specified. For example, an offset of "-1 Hours" will cause all affected appointments to be rescheduled for an hour earlier into the same resource.
 - If "Reschedule into next available slot" mode is selected the begin date and end date range parameter for rescheduling will need to be specified. Additional options of "Use originally scheduled resource" and "All Locations" become available in this mode. If "Use originally scheduled resource" is checked, Batch Reschedule will attempt to reschedule all appointments into the same resources they were originally scheduled for rather than the first available slot across all appropriate resources. If "All Locations" is selected, Batch Reschedule will perform first available rescheduling across all valid locations for the appointment instead of only allowing the originally scheduled location.
- 5. A reschedule reason is required and will be applied for all appointments currently residing in the "Batch Reschedule" window.

Rea	son for reschedule:		-		
🔲 Use origir	nally scheduled resou	_Auto Discharge			
All locatio	ons	_Cancellation List Book _Care Transfer			
	Patient	_Consent not Received Delay Treatment			
🔹 🛸	CSTSCHEMPI, RA	_Exam Replaced			
■ 🕸	CSTSCHEMPI, JOH	_Incomplete Prep			
		_Incomplete Requisition	-		
		_Job Action	-		
		_Leave of Absence			
		_No Show			
		_Order Contraindicated			
		_Order Modification			
		_Patient Admitted to Ho			
		_Patient Discharged			
		Patient Left Before Ser			

 Click the **Reschedule** button. The book icon for all appointments that can be rescheduled will close and turn red. The Scheduled Date/Time column will be populated with the newly rescheduled time.

🕅 Batch Res	schedule						? ×
Mode							
Offset	from original time						
0 01001	Offeret:						
Resch	edule into next available slo	t					
Start	date: End	date:					
28-N	lov-2017 🚔 💌 28	-Dec-2017 💂 💌					
Rea Use origin	son for reschedule:aue	nt Requested 👻					
	Patient	Appointment Location	Appointment Type	Primary Order	Scheduled Date/Time	Patient Duration	
	CSTSCHEMPI, RANDY	LGH RAN	RAN New		28-11-2017 - 13:30	30 Minutes	
	CSTSCHEMPI, JOHNNY	LGH RAN	RAN New		28-11-2017 - 14:00	30 Minutes	
Send all ar	projetments that could not h	e rescheduled to a requi	eet liet for manual ree	cheduling			
				onodaling			
						Reschedule OK	Cancel

- 7. If an appointment or appointments cannot be rescheduled using Batch Reschedule, an option to send the appointments to a request list for manual rescheduling appears.
- 8. Click **OK** to complete the Batch Reschedule action. All appointments previously residing in the Batch Reschedule window are now rescheduled or reside on a request list as a request for reschedule.

NOTE: The associated encounters are retained with the appointments.

Appointment Check In

Checking-in appointments is a good way to keep track of patients who have shown up for their appointments and those who have not. It's also an easy way for a tech, nurse or other staff members in the department to know which patients have already arrived.

There are multiple options for Checking-In appointments:

Option 1: Right-click on the appointment within an **Appointment Inquiry.**

Option 2: Right click on the appointment within the scheduling grid area.

Option 3: Click on the Check-In icon on the Toolbar

Option 1: Right-click on the appointment within an Appointment Inquiry

- To Check-In an appointment from an Inquiry, first open the "Schedule Inquiry" window by clicking on the eyeball icon in the Toolbar.
- 2. Appointments can be checked in from any Inquiry, but the recommended Inquiry is called "Appointment Check-In by Location." Click on the **Location** tab, enter the search criteria below and press the **FIND** button.

Inquiry: "Appointment Check-In by Location" Start date: add a valid start date Start time: add a start time, if appropriate End date: add a valid end date End time: add an end time, if appropriate Location type: Ambulatory Location: select from the drop-down list

3. Once you have found the appointment you would like to check in, highlight that appointment, right-click and choose **Check In**.

VIP	PHN	Est Anival	Encounter N	lumber	Patient Type	MRN	Patient Name	Appt Date	
	9878213221		700000011	1240		700001789	CSTSCHPROD, TESTLYNDA		
Yes	9878213221	03-OCT-2017 12:30	700000011	1240	Pre-Outpatient	700001789	CSTSCHPROD, TESTLYNDA	04-DEC-2017 13:30	
	9897000022		700000016	6206		700000942	DOE, JANE ELIZABETH		
	9876703319		700000016	6245		700006605	JOHN, SMITH		
				C	onfirm				
				С	ontact				
				N	lodify				
				R	eschedule				
					lala				
					1010				
				C	ancel				
				N	lo Show				
				_	h a alt In				
					neck In				
				C	heck Out				
				P	atient Seen				
				R	atch Reschedule				
				D	aten Kescheuule				

4. The "Check In" window will display.

🔁 Check In							? 🗙
Name: CSTSCHEM	PI, RANDY			BC PHN: 9876488	326	Gender: Female	Person Comments:
Preferred Name:	MRN: 700	0007891		DOB: 06-Nov-1977		Language;	Location:
Disease Alert: None	Process /	Vert: None	,	Age: 40 Years		Interpreter Required:	Preferred Phone:
CSTSCHEMPI, RANDY	General Summary	Details Orders (Suidelines Notificat	tion Conversation	n Summaries Itineraries	Locks Eligibility Book	ing Notes
🕀 🚸 Rehab Arthritis New	Date:				Time:		
	24-Nov-2017			-	1140		
	Tracking location:						
	<none></none>						•
	Comments:						
							A
							*
	Person Name	MRN Home F	Phone Enc Type	Encounter Number	VIP		
	CSTSCHEMPI, RANDY	700007891	Pre-Outpatient	700000015175			
	ne Process Nett: None Age: 40 Years Interpreter Required: Preferred Phone: VME EAANOY Arthritis New Variations: General Summary Details Orders Guidelines Notification Conversation Summaries Lineraries: Locks Eligibility Booking Notes Date: Time: Z4-Hor-2017 Image: Time: Image: Imagee	View Modify Set Enc Charges					
	Request Information	No					
	Status of medical record re	equest:					
	L						
4 III +							
							OK Cancel

5. Press the **OK** button select an option from "Available Conversations" window.

4 Available Conversations	×
Please select the conversation you would like to use:	
	-
Register Outpatient Register Patient To A Bed	

- 6. Select "Register Outpatient" from the drop-down list and click **OK**.
- 7. The EMPI window briefly launches and opens the Register Outpatient Conversation window.
- 8. 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.

NOTE: If a patient checks in at the Central Registration prior to arriving at the clinic, these mandatory fields will already be filled.

9. In the **Encounter Information** tab select "Outpatient" for Encounter Type and complete the rest of the mandatory fields.

Encounter Type:		Medical Service:		Reason for Visit:	
Outpatient	-	Occupational Therapy	•	Rehab 🛛	

10. Click on **Complete** button. The appointment is now in a Checked In status.

Option 2: Right click on the appointment within the scheduling grid area

- 1. You may also Check In appointments directly within the grid area. To accomplish this, right-click, go to **Actions**, then **Check In**.
- 2. The "Check In" window will display and the same steps as above are followed.

	Actions	Con	firm	
	Add New Appointment	Con	itact	
	Book Request	Mod	dify	
	Confirm Request	Reso	chedule	
	Remove Request	Hole	d	
	Recur Appointment	Can	cel	
LGH Rehi	Navigation	No :	Show	
	Inquiry	Che Che	ck In	
	Report	Pati	ent Seen	
	Applications	▶ Bato	h Reschedule	
	Person	▶ Req	uest	×
LGH Reh	Slots	Veri	fy	
	Resources	Med	l Nec Check	
	Book Settings	Loc	k	
CSTSCHEM Rehab Arthri	PI, RANDY tis New - OT	Unk	ock	
LGH Rehab	OP	Shu	ffle	
Baggoo, Ala	n Kieth	Swa	p Resources	
		Reo	rder	
		Gro	up Session	÷
		Link		Þ
		11-12	- 1	

Option 3: Click on the Check-In icon on the Toolbar

You can also highlight the appointment in the grid area, and then click the Check-in icon icon at the top of your screen.

2. The Check In window will display and you will follow the same steps as in the above methods of Check In.

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

Appointment Link

Appointment link functionality allows you to manually tie two unrelated appointments together for a particular patient situation. As with the Recurring appointments, the system will recognize these appointments are linked and warn the user if any action is performed on one of the linked appointments.

You have two options for linking appointments:

Option 1: Link to an existing (previously confirmed) appointment

Option 2: Link to a new appointment

Option 1: Link to an existing (previously confirmed) appointment

- 1. Schedule two different appointments for any patient using one of the previously described methods.
- 2. Find one appointment which you have just scheduled, highlight, right click, go to **Actions**, and then **Link**. At this point, you will see the two options for linking appointments.
- 3. Choose Existing Appointment or Request.



4. The "Link" window will display. You will notice the Future Patient Appointments section. This section should list the other appointment that you scheduled for this
patient. Highlight this appointment and press the **Select** button. A red checkmark will display.

5. In the Link Reason dropdown, select one of the reasons and press the **OK** button.

Vame	: CSTSC	CHEMPI, RAN	DY BC PHN:	9876488326 G	iender: Female	Person Comments:
referred	Name:	MRN: 700007891	DOB: 06-	Nov-1977 L	anguage:	Location:
)isease /	Alert: None	Process Alert: Non	e Age: 40	Years Ir	nterpreter Required	d: Preferred Phone:
Existir	ng appointment o	or request				
🔘 New a	appointment					
Appointme	ents and Reques	ts Event Details Orden	5			
F . 4	··					
Future pa	tient requests:	A		0 1 5 5 4	D	
	Request Action	PANE/Up	Cation Urders	Surgeon I Earliest	Request date Lates	st Request date
	DOOK			001101	-2017 - 7.00 00-0	66-2017 - 10.00
Future pa	tient appointmen	its:				
	Current State	Appointment Type	Location	Resource	Orders Surgeon	1 Begin Date/Time Surgi
4	Confirmed	Rehab Arthritis New - PT	LGH Rehab OP	Karst, Lauren PT		29-Nov-2017 - 8:45
•						•
						Select Unselec
*Link reas	son:					
_Patient	Requested					
Comment	s:					

6. The two appointments are now linked.

Option 2: Link to a new appointment

1. Highlight the first appointment again, right click, choose **Action** and then click **Link**. This time select **New Appointment**.

Link	×	Existing Appointment or Request
Unlink		New Appointment

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

🕅 Link				? 🔀
Name: CSTSC	HEMPI, RANDY	BC PHN: 9876488326	Gender: Female	Person Comments:
Preferred Name:	MRN: 700007891	DOB: 06-Nov-1977	Language:	Location:
Disease Alert: None	Process Alert: None	Age: 40 Years	Interpreter Required:	Preferred Phone:
Existing appointment or	request			
New appointment				
Appointments and Requests	Event Details Orders			
*Link reason:				
				•
Comments:				
				<u>^</u>
				~
				OK Cancel

- You will be brought back to the Appointment tab to select a new appointment type. The Person name is already defaulted with your patient's name. Select an Appointment Type, Appointment Location and fill out the remaining fields in the "Accept Format Fields."
- 4. Press the **MOVE** button and finish scheduling the appointment same as any other appointment.

Books Appointment	
Person name:	Move 🕨
CSTSCHEMPI, RANDY	Next
*Appointment location:	Clear
Appointment type:	ANR

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

Tinked Appointments
This is a linked appointment. Do you want to open this occurrence, multiple occurrences, or all occurrences?
Open one or more occurrences
Open all occurrences
 ☑ Rehab Arthritis New - OT (Monday, 27-Nov-2017, CONFIRMED) ☑ Rehab Arthritis New - PT (Monday, 27-Nov-2017, CONFIRMED)
OK Cancel

7. This warning serves as a reminder that the appointment you are performing an action on is linked to other appointments. You can choose to perform the action only on your currently selected appointment, or to perform the action on all the linked appointments.