# User Manual

# Patient Scheduling – Foundational

# Part #2

# N29-A

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# Request Lists

Request Lists are a type of Inquiry that allow for a listing of appointment requests. Request lists are different than regular inquiries because they display requests for appointments rather than the booked appointments.

The requests for appointments can be generated automatically through an Order entered in PowerChart (refer to "Requests Generated Through Orders-to-Scheduling" section or through an action performed in the Scheduling Appointment Book. For example, appointments placed in a "no show" status can automatically generate a reschedule request for the patient. Requests can also be created manually in the Scheduling Appointment Book (refer to the "Manually Create a Request" section).

The table below lists the standard Request List Queues that are available to all clinics.

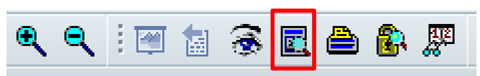
| Request List Queue | Description |
|---|---|
| Appointment Reviews | Automatically populated with review requests. These requests are generated when the associated order in PowerChart is modified by the Provider.<br>(Only to be used by clinics that schedule medication infusions such as MDC and Oncology.) |
| Cancellation List | Manually populated with patients who have a scheduled appointment but have requested an earlier appointment if one becomes available.<br>Refer to the Cancellation List Quick Reference Guide for more information. |
| Future Requests | Automatically populated with requests that have been generated via an order (Referral, Follow-up or Procedure order).<br>Manually generated requests can also be added to this list. |
| Reschedule Requests | Automatically populated with patients/appointments that have been No Showed or displaced due to a template change. |

| | |
|---|---|
| Triage List | Manually populated with requests that have been moved over from the Future Request list.<br>This list should be used by clinics that need to triage requests they receive via orders. |
| Waitlist | Manually populated with patients that could not be scheduled when the referral was received.<br>This list is populated by manually generated Requests or by moving a Request from another queue such as Future Requests. |

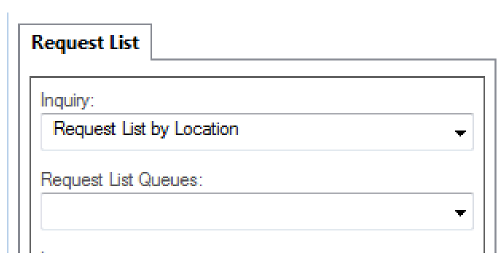
## Open a Request List

Request lists are a type of Inquiry. Therefore, the steps outlined in the Appointment Inquiry section could be used to open a Request List. The following steps are used to access the Request List directly.

1. Click on the **Request List Inquiry** icon located in the Toolbar. The "Schedule Inquiry window" will open.

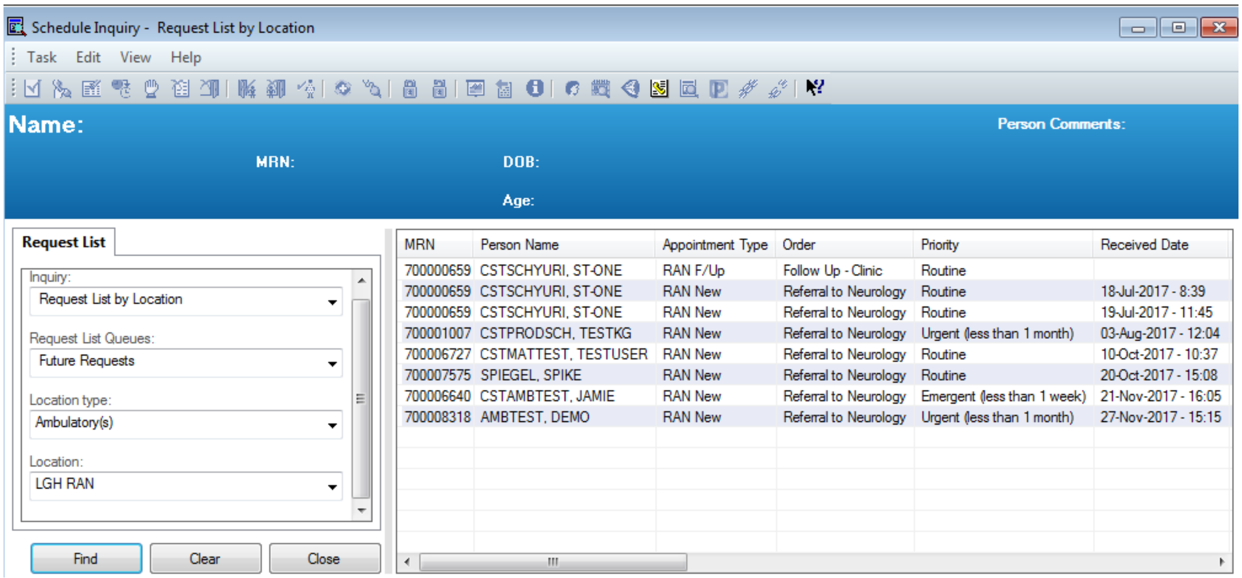


2. The Inquiry field should default to "Request List by Location." Keep this Inquiry to run a Request List for a specific clinic. The other Inquiries do not filter by Location so they could be very long.




3. Select the appropriate **Request List Queue** (refer to the table above for a brief description of the most common Request Lists).
4. Select the appropriate **Location Type** and select the appropriate clinic from the **Location** dropdown.

5. Click the **Find** button. All appointment requests that meet the search criteria are displayed.




## Create a Request Manually

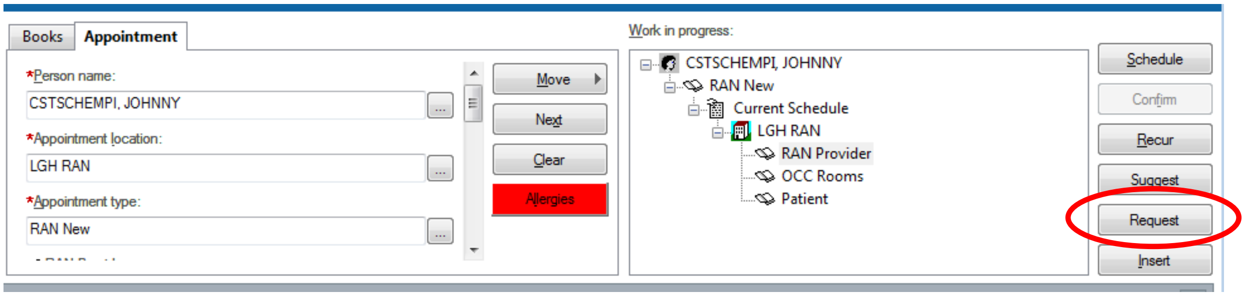
Requests can be generated manually in the Scheduling application. This option can be used for a variety of scenarios, but is most commonly used to:

- Add a patient to the Waitlist
- Add a patient to the Cancelation List
- Add a patient to the Future Requests List until an appointment time can be confirmed

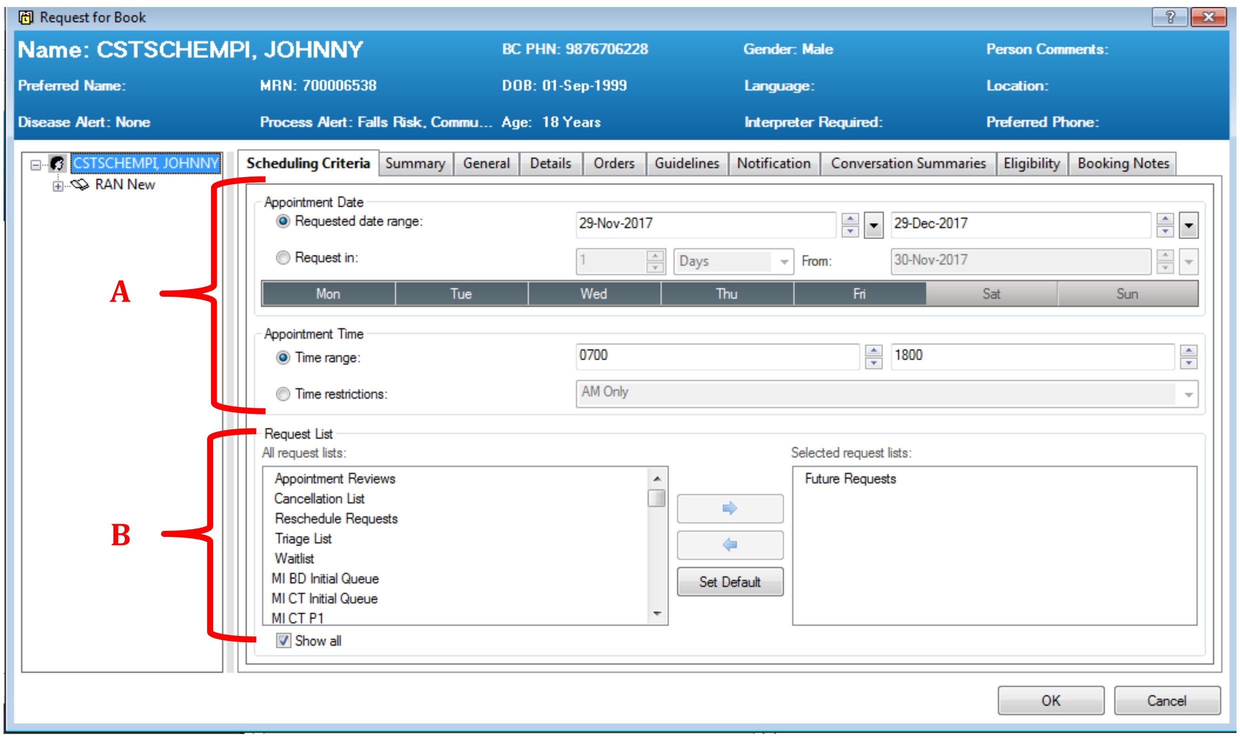
By placing an appointment request, the information entered in the “Accept Format Fields” and any associated order information is saved for when the user comes back to finish booking the appointment.

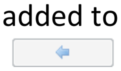
Complete the following steps to manually generate a request:

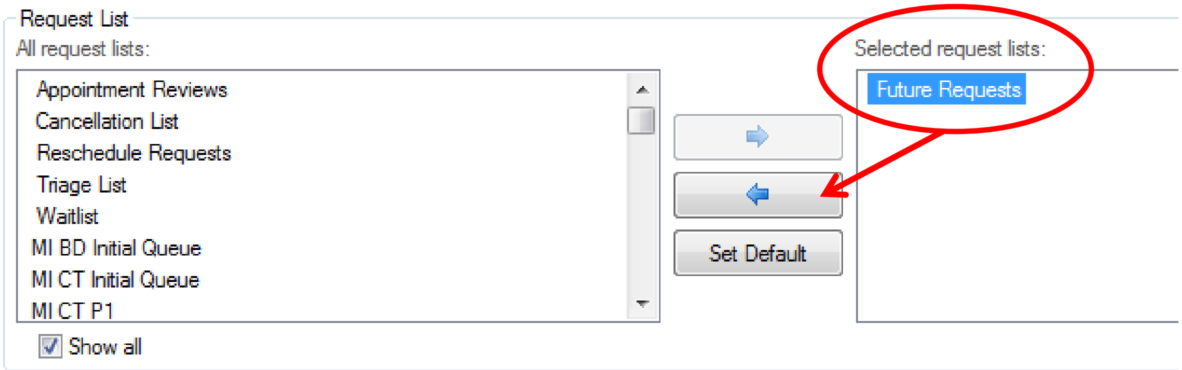
1. Enter patient/appointment information into the Appointment tab (follow steps 4-18 in the Appointment Scheduling section - Drag and Drop Method).
2. Click **Move** to move the appointment into the Work in Progress window.
3. Click on the **Request** button. The “Request for Book” window opens.



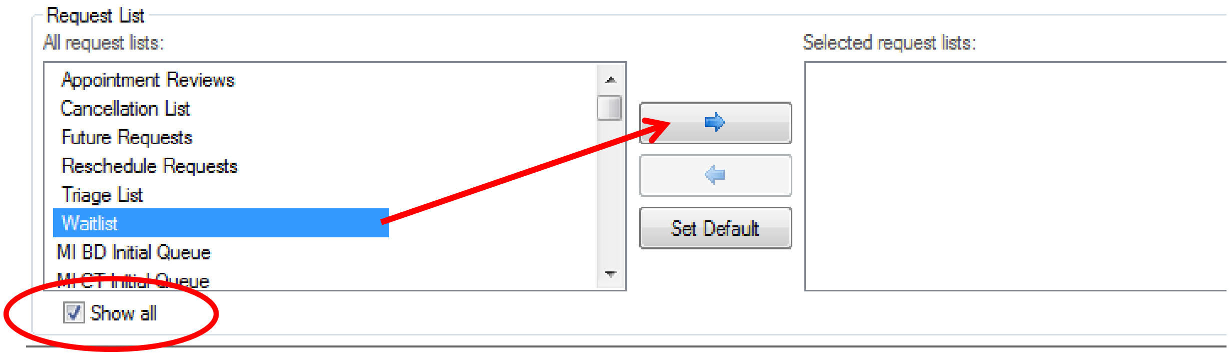

4. Enter the date and time range for the request (in section A) if the default values are not appropriate.




5. In the Request List section (section B), the “Future Requests” queue will default into the “Selected request lists” window. If the patient needs to be added to a different Request List, select the “Future Requests” list and use the left arrow  to remove it from the selected list.




6. To add the patient to a different request list, ensure the “Show all” checkbox is selected (at the bottom of the window) and scroll through the list to select the appropriate list.




7. Once the appropriate **Request List** is selected, click the right arrow  to move it into the **“Selected request lists”** box.
8. Click **OK.**

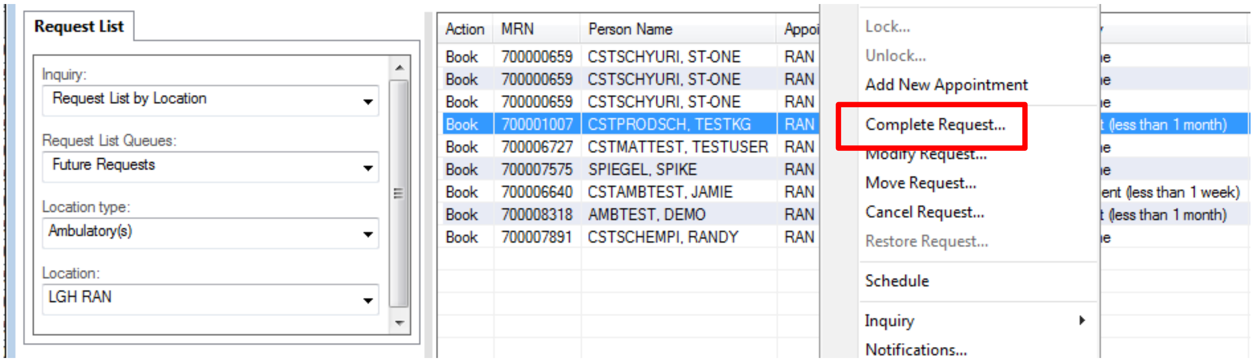
## Requests Generated Through Orders-to-Scheduling

The “Orders to Scheduling” functionality allows for an automatic appointment request to be sent to Cerner Scheduling Management when an order is placed in PowerChart. A scheduler can then view the request in their clinic-specific queue and schedule it according to the Provider’s instructions. The Orders to Scheduling workflow can be useful in the following scenarios:

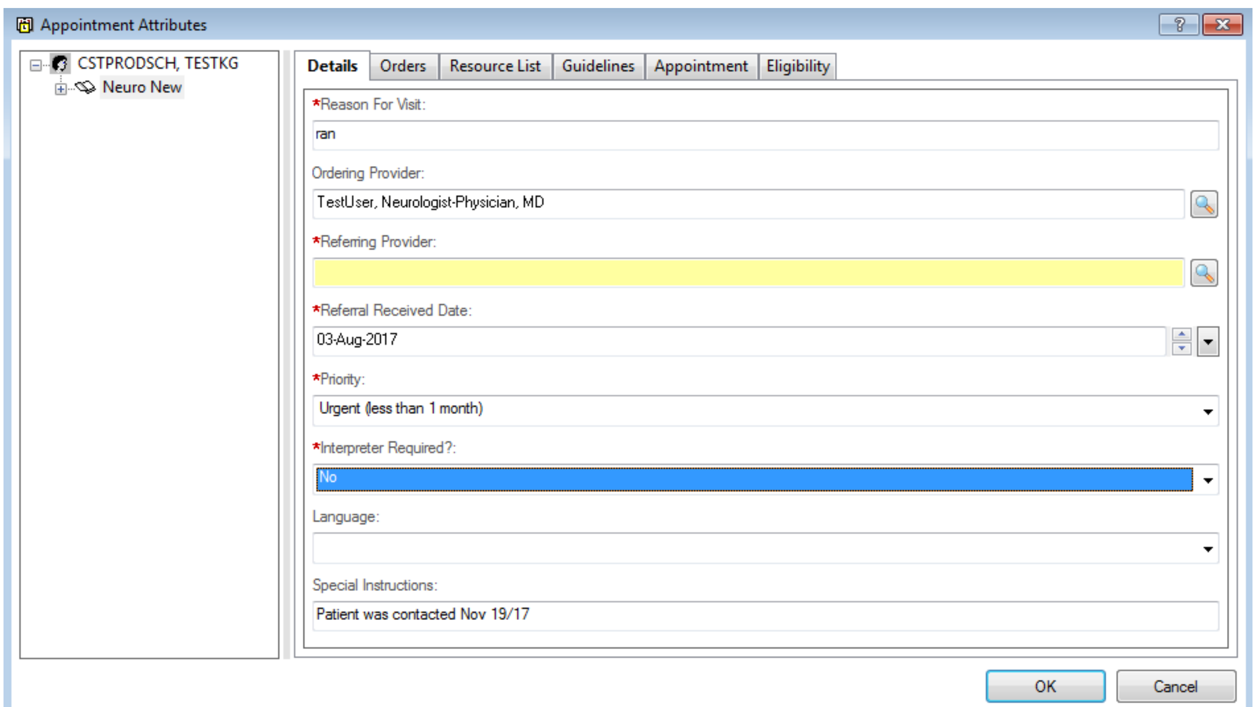
- Clinic to Clinic: For example, a specialty clinic referral.
- Discharge Follow Up: For example, an inpatient is discharged and is referred to a clinic to be seen as an outpatient.
- Internal Clinic Follow Up: For example, after seeing a patient in the clinic the Provider requests a follow-up appointment.

# Schedule an Appointment from a Request List

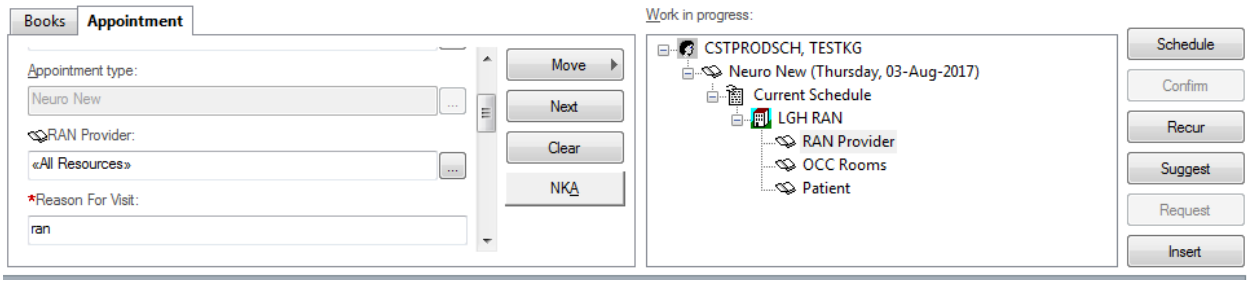
1. Follow the steps outlined in the "Open Request List" section above.
2. Right-click the person you want to schedule and select **Complete Request.**



3. If the "Future/Requests/Appointments" window opens, click **OK**.
4. The "Appointment Attributes" window will open if there are mandatory fields that have not been entered. Fill in the fields and click **OK**.
   **NOTE:** Copy and paste the Ordering Provider into the Referring Provider field.



5. The appointment opens in the WIP.



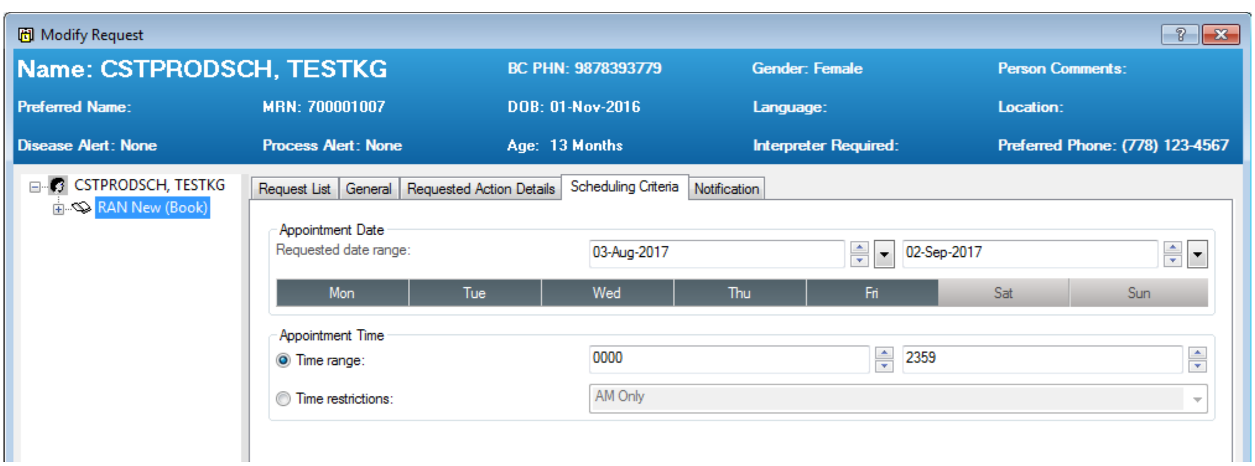

6. From this point, any of the scheduling methods can be used to complete the booking. However **Suggest** is recommended because the date range will default to the dates entered by the ordering Provider.

## Modify a Request

From the **Request List Inquiry**, it is possible to modify the details associated with the request or the details associated with the appointment linked to the request.

In order to modify details about the request (such as Scheduling Criteria), follow the steps below.

1. Follow the steps outlined in the "Open Request List" section above.
2. Right click on the **Request** and select **"Modify Request."**
3. Click on the **Scheduling Criteria** tab to change the requested date range and/or time of the Request.

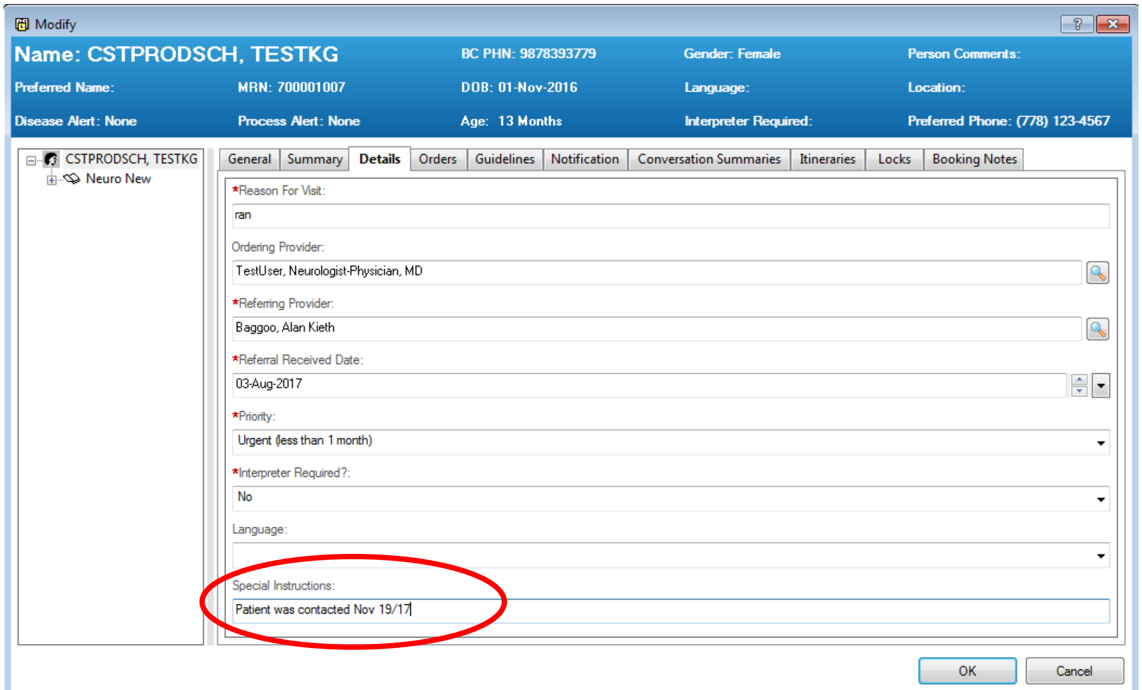



In order to modify details about the appointment linked to the request (such as "Accept Format Fields"), follow the steps below.

1. Right click on the **Request** and select **"Modify"**.

2. Click on the **Details** tab to edit the "Accept Format Fields."

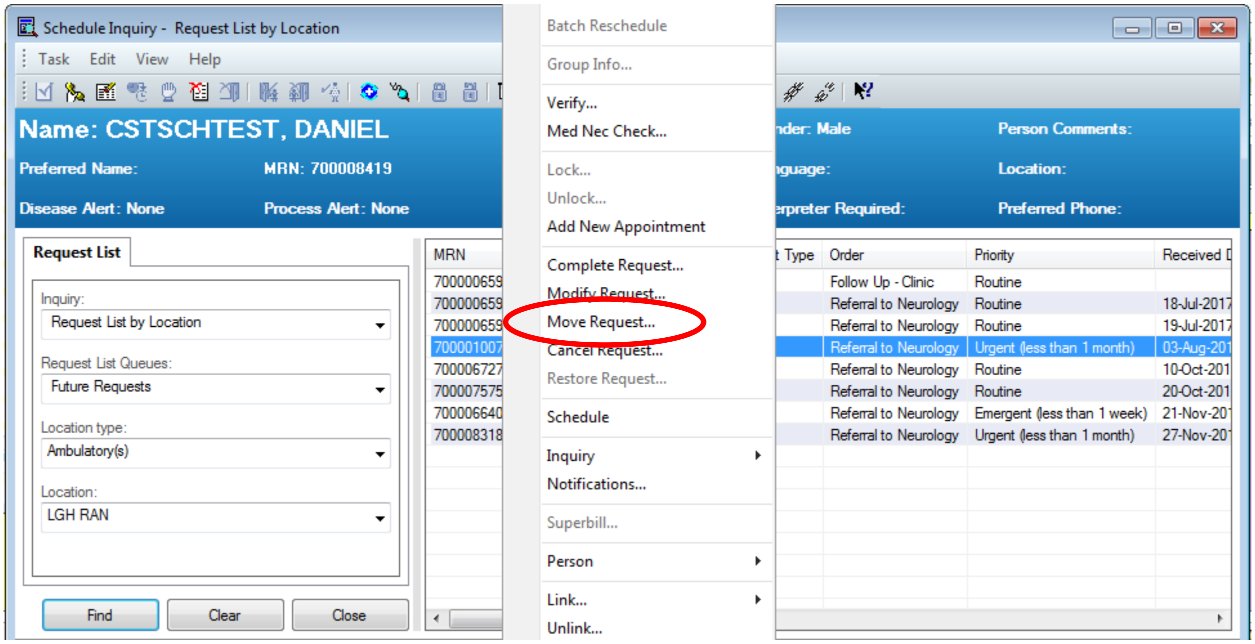
**NOTE**: This is where comments can be entered for waitlisted patients.



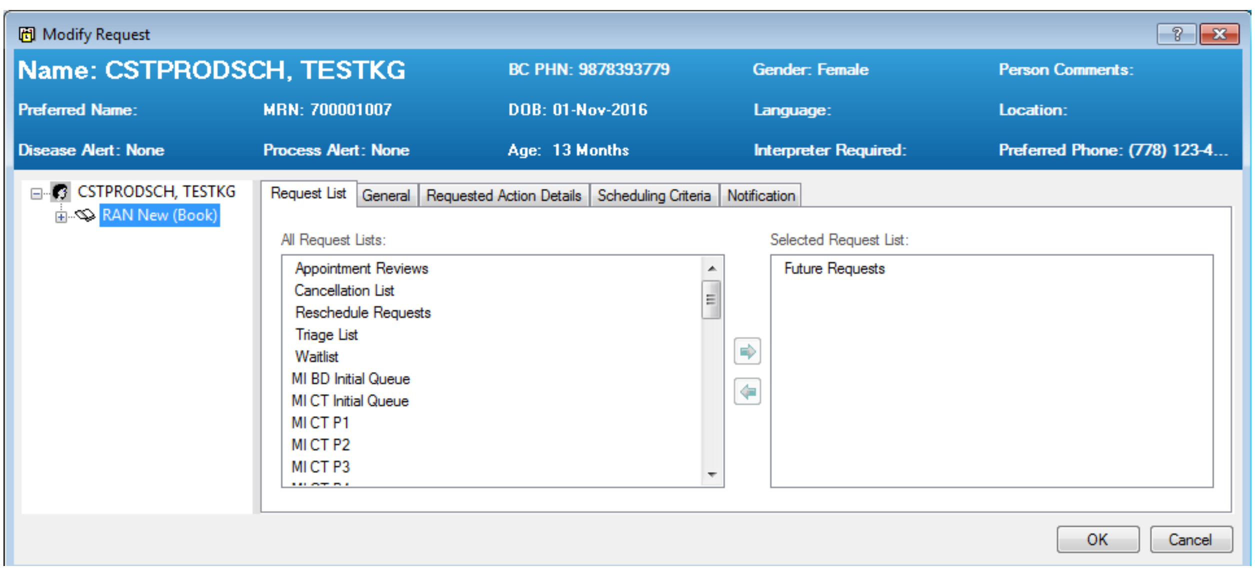

## Move a Request

Follow the steps below to move a request from one Request Queue to another.

1. Right-click on the appropriate Request and select **Move Request.** The "Modify Request" window will open.




2. In the “Modify Request” window, select the **Request List** in the “Selected Request List” section and click the left arrow. This will remove the Request from the current list.



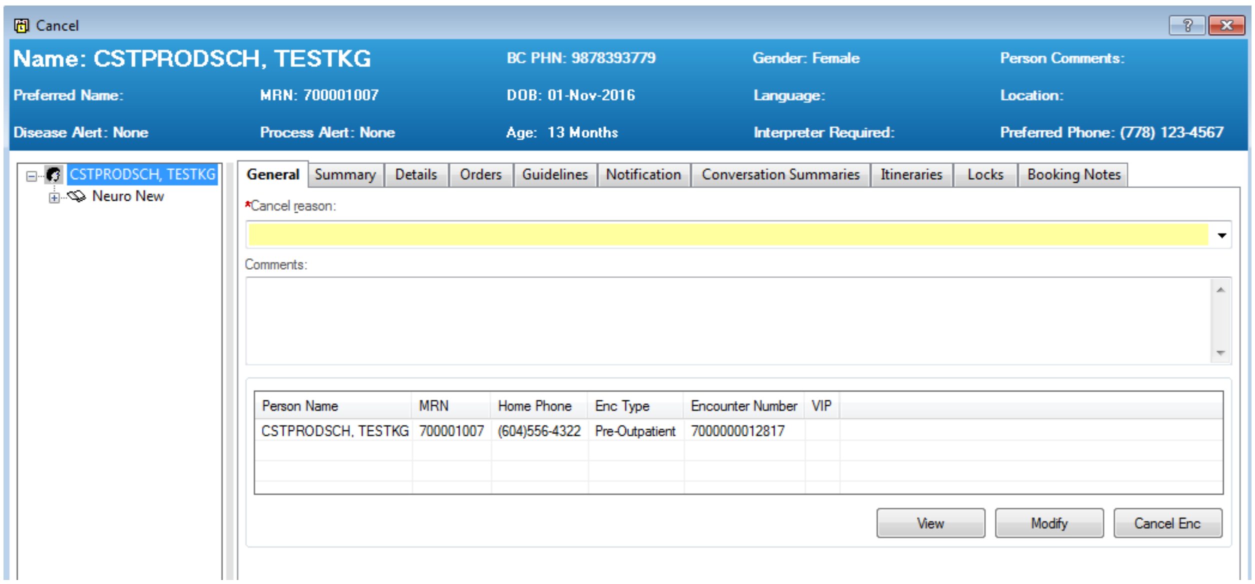

3. Select the **Request List** you would like to move the Request to (from the “All Request Lists” section) and click the right arrow.
4. Click **OK** to move the Request to the new list.

## Cancel a Request

Follow the steps below to cancel a request from a Request Queue.

**NOTE:** Once a request is cancelled, it cannot be un-cancelled. If a request is cancelled in error, a new request must be created either from the Scheduling Appointment Book or from an order in the PowerChart.

1. Right-click on the appropriate request and select **Cancel Request**. The “Cancel” window will open.



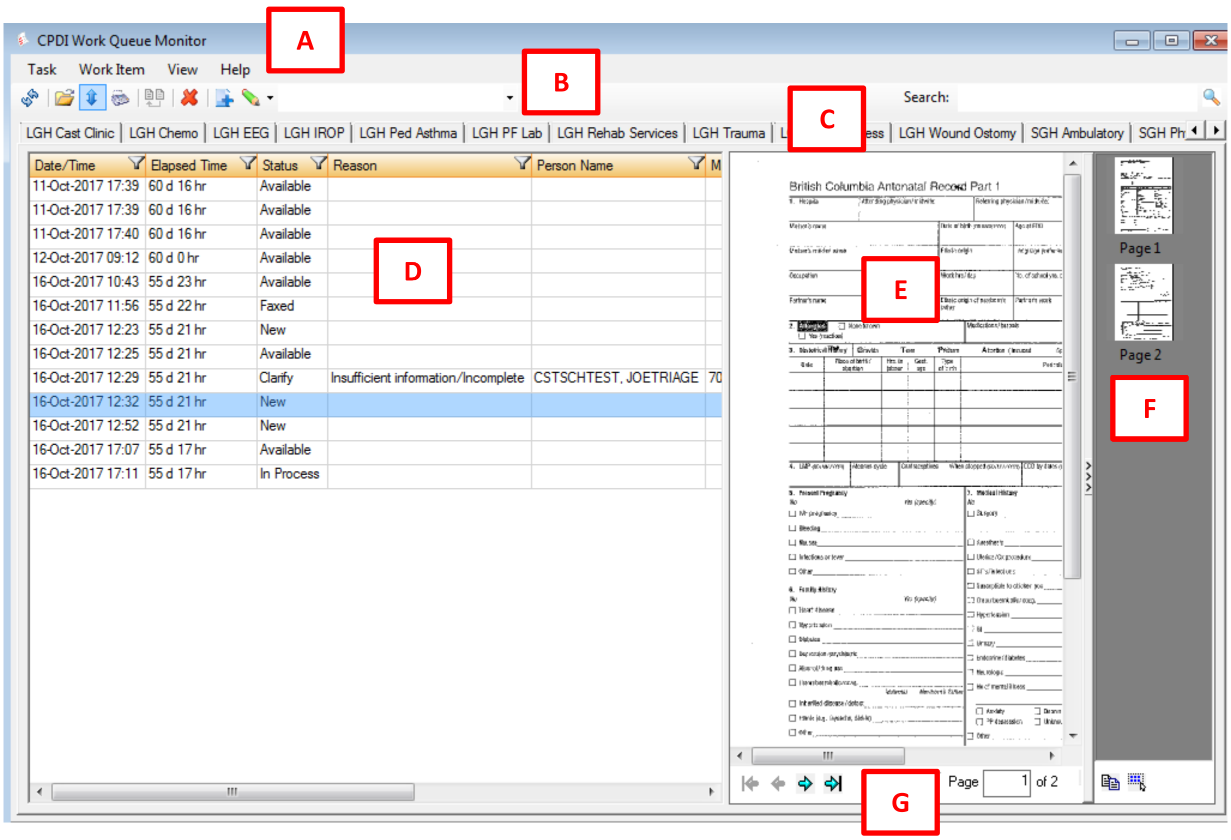

2. Select a **“Cancel reason”** from the drop down menu and click **OK** to remove the Request from the List.

# Work Queue Monitor (WQM)

With the CST implementation, all paper referrals and documents that are faxed to a clinic will be accessed in Work Queue Monitor (WQM). Faxes will no longer be printed on paper.

Work Queue Monitor (WQM) is a document management solution that enables scanned/faxed documents to be routed to specific queues for review. From WQM, you can associate documents to patients and visits, making them available in the patient's chart. This will streamline departmental processes by automatically populating work queues for processing and also eliminate the need to print and scan documents.

Below is a screenshot of the Work Queue Monitor home page.




A. **Menu Bar**: Includes Task, Work Item, View and Help options.

B. **Toolbar**: Includes buttons or other window elements (such as Refresh, Open, Route, Fax, Delete, New and Edit options).

C. **Clinic WQM Queues**: Each tab is for individual clinic's WQM queue. When a new fax is sent in, it goes directly to a specific clinic's WQM queue.

D. **A List of all Faxes**: Displays all the faxes received in a specific clinic with information on date/time, status, owner, encounter type etc.

E. **Faxed Document Image**: Displays the image of the fax sent to a clinic when a document is selected from the list of faxes.

F. **All Page View Bar:** Displays each page of a document separately on the right hand side of the screen. By clicking on a specific page number, the page displays in the faxed document image area.

G. **Task Bar:** Includes functions such as Printer, Scanner, Page Navigation, Copy, Zoom in/out etc.

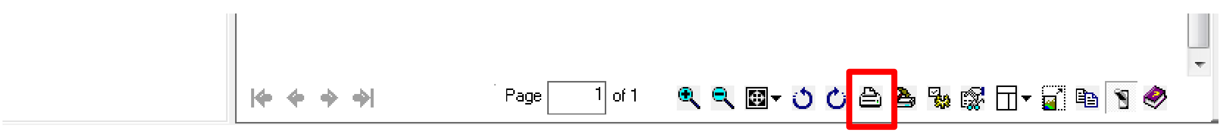
## Open a Document in WQM

Follow the steps below to open a faxed document in WQM:

1. Log into **CDI Work Queue Monitor**. 
2. Click on the appropriate clinic queue/tab.
3. Double-click on the appropriate row in the queue to open the “Add/Modify Work Item” window.

## Print a Document from WQM

1. Click on the document that you would like to print.
2. Click on the **Printer** icon located at the bottom-right side of the screen.



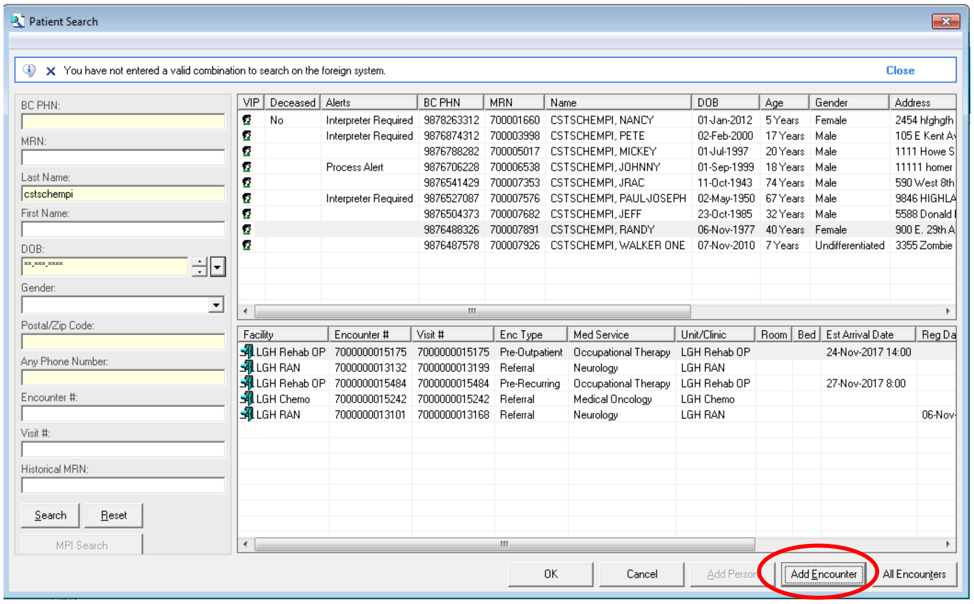

3. Find the appropriate printer and click **OK** to print.

## Link a Document to a Patient/Encounter

1. With the referral open in the “Add/Modify Work Item”, click on the **Select Patient** icon. 
2. 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).

3. If you have found the correct patient, click only ONCE on their name to select, then click **Add Encounter**.

   **NOTE:** The patient may already have an existing encounter that is appropriate for this document to be attached to. For instance, if information is arriving after the original referral package was received, there may already be a Referral encounter. If an appointment was already booked, there could be a Pre-Outpatient encounter. In this case, you would select an existing encounter from the Encounter list.




4. The “Organization” window appears.
5. Enter the “Facility Name” in Organization window and click **OK**.
6. The EMPI window briefly launches to open the “Referral Management” conversation window.
7. Click the Encounter Information tab to complete the below mandatory fields:

   **Encounter Type:** Referral (auto-defaults)
   **Medical Service:** Select an option from the list
   **Reason for Visit:** Add a reason for visit
   **Referring Provider:** Select a Referring Provider

8. Click the Referral Info tab to complete the below mandatory fields:

   **Referral Received Date:** Type “T” for today’s date
   **Referral Status:** Select an appropriate status from the list

   **NOTE 1**: Selecting a Referral Status of “Ready for Triage” drops the patient to the Triaging Provider’s Dynamic Worklist in PowerChart for review.

   **NOTE 2**: If there are additional steps that are required before sending the referral to Triage, set the Referral Status to “Referral Received”.

9. Click the **Complete** button to close the "Referral Management" conversation.
10. The "Referral Management" window opens with an Encounter Number and Visit ID.
11. Click **OK** to close the "Referral Management" window.

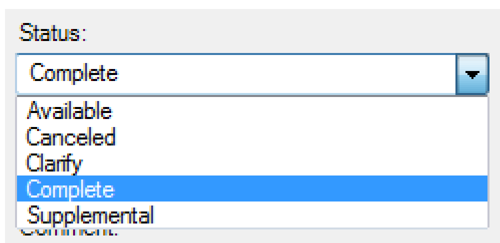
## Index a Document in WQM

All documents received in WQM must be indexed with an appropriate Document Type and Status so they are stored appropriately in the Patient's chart.

1. If sufficient information is provided to link the document to a patient/encounter, it is appropriate to "Complete" the document. This will take it off the queue and save it in the patient's chart.
   i. In order to complete indexing, enter the below fields in "Add/Modify Work Item" window and click **OK**.

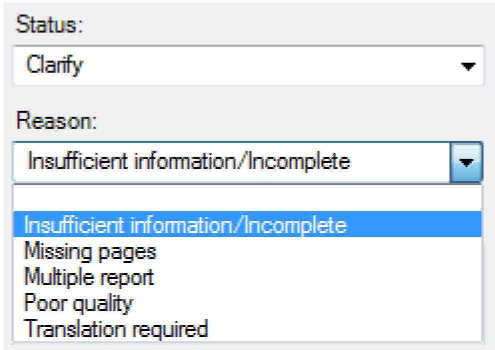
      **Document Type:** Choose the appropriate option from the list

      **Status:** "Complete"

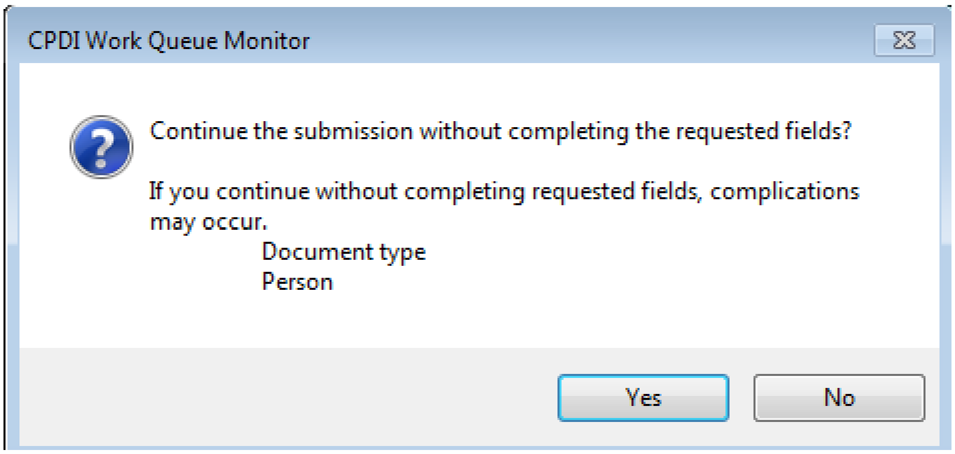



2. If there is not enough information to complete the document, the status should be set to "Clarify." This will keep the document in the queue until sufficient information is obtained.
   i. Enter the below fields in the "Add/Modify Work Item" window and click **OK**.

      **Document Type:** Choose the appropriate option from the list (it is possible to leave this field blank if the type is not known)
      **Status:** "Clarify"
      **Reason:** Choose the appropriate reason [for example: select "insufficient information/Incomplete" if the patient's name is not listed, select "missing pages" if an order is missing, or select "poor quality" if the reports are illegible etc.]




ii. The below “pop-up” window may appear. Click **Yes** to continue.



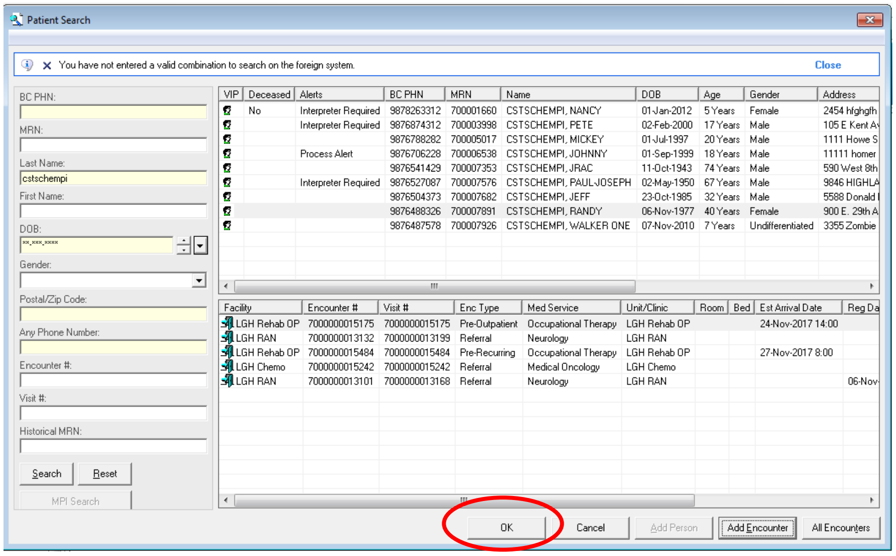

## Scan a Paper Document to a Patient Chart

Paper documents that are received or generated during a patient’s visit need to be attached to the patient’s chart. This will be done by faxing the document to your own clinic queue.

Follow the steps below to fax a document into WQM:

1. From a fax machine, fax the document to the correct fax number for the clinic.
2. Log into **CDI Work Queue Monitor.** 
3. Click on the appropriate clinic queue/tab.
4. Double-click on appropriate row in the queue to open the “Add/Modify Work Item” window.
5. With the referral open in the “Add/Modify Work Item,” click on the **Select Patient** icon. 
6. 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).

7. If you have found the correct patient, click only ONCE on their name, select the Encounter for the patient's current visit and select **OK** - do not create a new Encounter.




8. In order to complete indexing, complete the below fields in "Add/Modify Work Item" window:

    **Document Type:** Choose the appropriate option from the list (it is possible to leave this field blank if the type is not known)

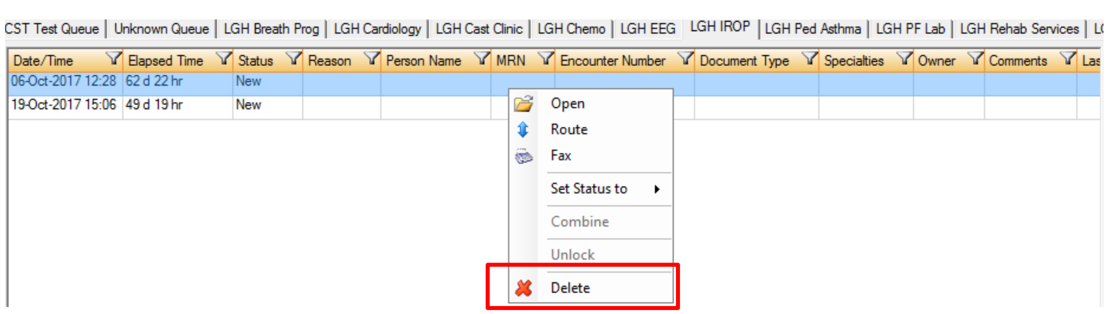
    **Status:** "Complete"

9. Click **OK** to close the "Add/Modify Work Item" screen and the document will drop off the clinic's WQM queue.

## Delete a Document in WQM

If a document on the queue is not appropriate to link to a patient's chart, it can be deleted. Follow the steps below to remove the document from the queue.

1. Right-click on the document that you would like to delete.
2. Click **Delete** to remove the fax from the queue.



# Split a Document in WQM

When a multi-page fax is received that includes different documents types (ex: Lab Results, Consent Forms, Imaging Reports, etc.), the clerk must "split" the document. This involves dividing the document into different sections, linking them to a Patient/Encounter and indexing them with the appropriate "Document Type" in WQM.

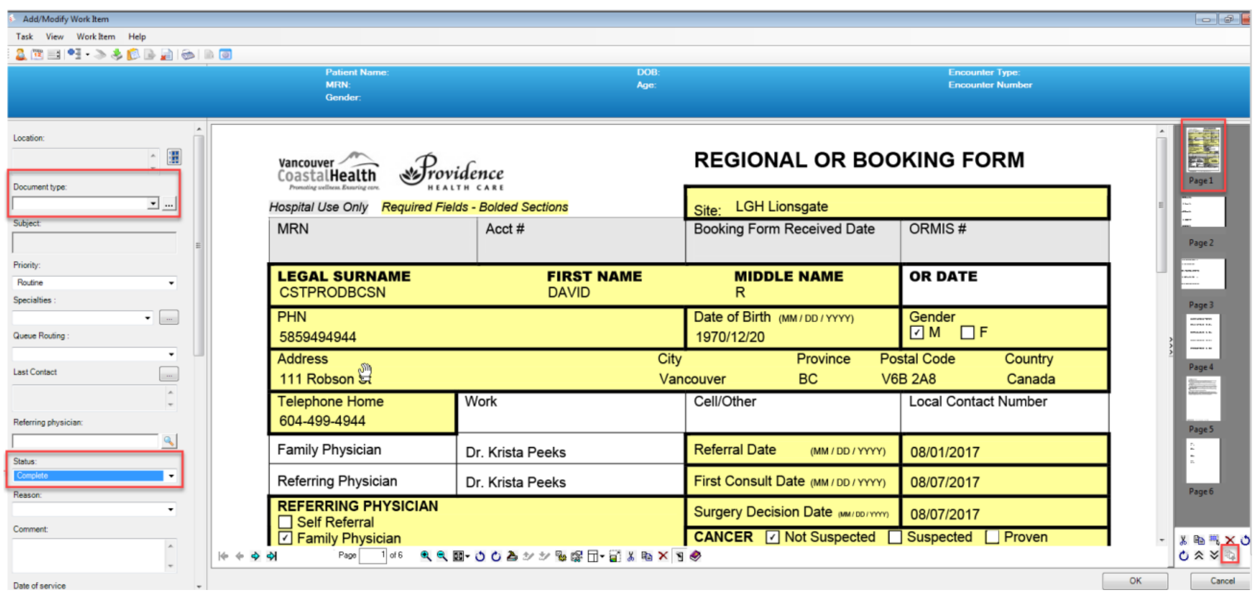
**NOTE:** Another reason why you may need to split the document is that multiple referrals have been sent in one package for multiple patients. You would need to split out each patient's referral and link it to the appropriate patient and encounter.

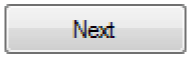
Follow the steps below to split a document into WQM:

1. Follow the steps in the **Link a Document to a Patient/Encounter** section to link all pages of the received fax to a patient/encounter.

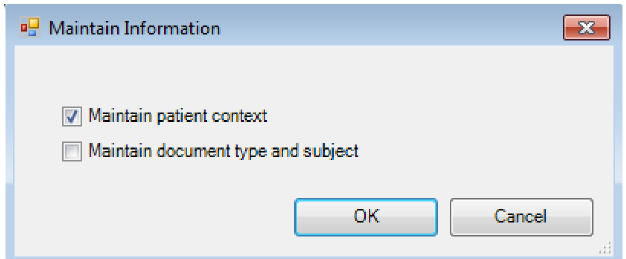
   In order to finish the indexing & splitting of the documents, complete the below steps in the "Add/Modify Work Item" window:

2. In the "Add/Modify Work Item" window, select the first document preview located on the far top right-hand side of the screen then click the "**Split**" icon from the Toolbar (located at the bottom of the right-hand side of the screen). The non-selected pages will be removed from the current work item and placed in a new work item, which will be processed later.



3. Process the current item by selecting the appropriate "Document Type" from the dropdown list and update the status to "Complete."
4. Click the 

button in the lower left corner.
5. The "Maintain Information" window will appear. If the documents are for the same patient, then select **"Maintain Patient Context,"** if the next document type is also the same, select **"Maintain Document Type and Subject."** Click **OK**.




**NOTE 1:** If the next document is for a different patient, unselect the "Maintain patient context" checkbox and follow the steps outlined in "Link a Document to a Patient/Encounter" to link to a different patient/encounter.

**NOTE 2:** If the next document is a different type, do not select the "Maintain document type and subject" checkbox. The appropriate Document Type should be selected in the "Add/Modify Work Item" window.

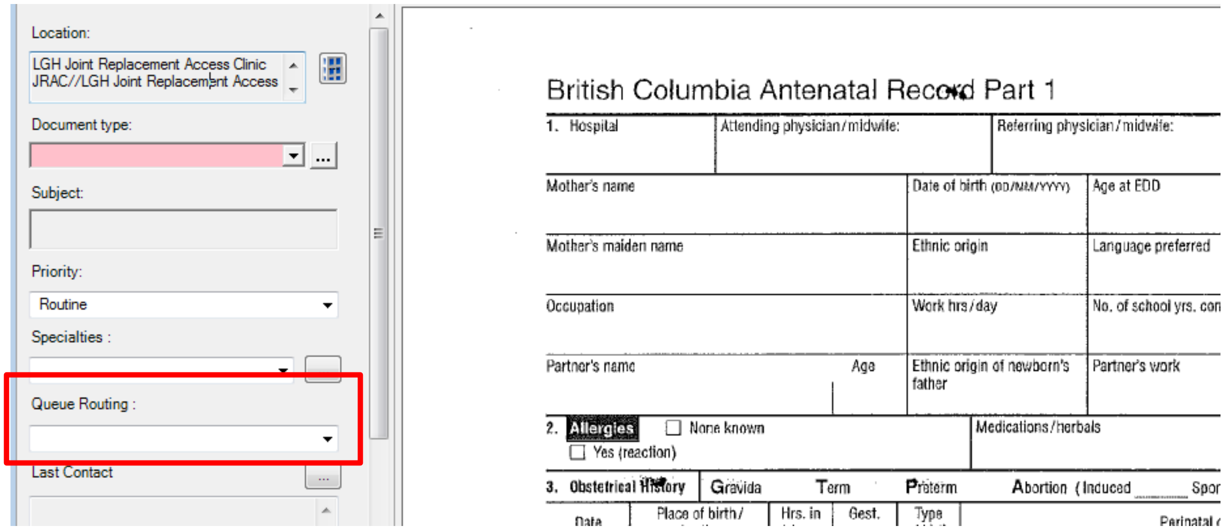
6. Continue to split documents until all the documents are processed.
7. Click **OK** to close the "Add/Modify Work Item" screen.
8. The referral will drop off the clinic's WQM queue.

## Re-Routing a Document to another Clinic in WQM

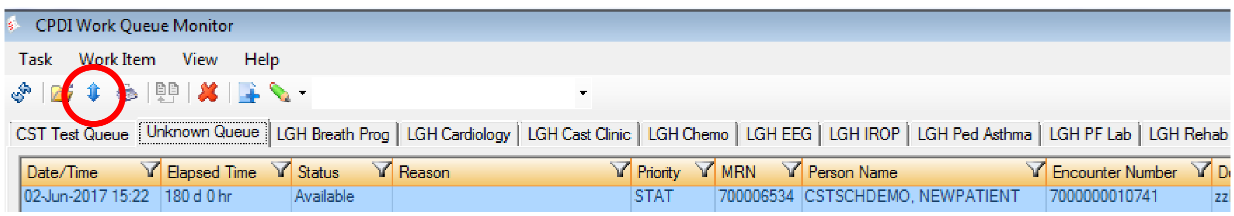
Queues in WQM are the equivalent of fax lines. It is therefore possible for a document to end up on the wrong clinic queue. Follow the steps below to re-route the document to the intended clinic.

**NOTE:** It is good practice to notify the Referring Provider of the error so it is not repeated.

1. In the "Add/Modify Work Item" window, select the correct clinic queue from the **Queue Routing** drop-down list.




2. Click **OK** to close the “Add/Modify Work Item” window.
3. Click the **Route** icon on Toolbar to forward it to the correct clinic queue. Once it has been re-routed, it should fall off the original queue.



# Multi-Patient Task List in PowerChart

Once a review of the referral has been completed by the Triaging Provider/Clinician, one of the following three orders will be entered in PowerChart to communicate the next steps to the clerk:

- Accept Referral
- Reject Referral
- Referral Information Request

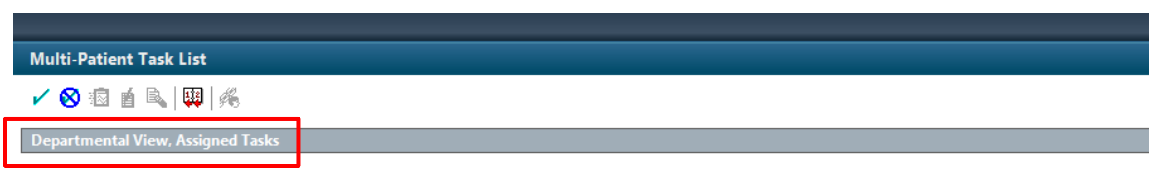
The order will cause the patient to display on the clerk's Multi-Patient Task List (MPTL) in PowerChart. From the MPTL, it is possible to view order details, task status, open the patient's chart and complete a task with a date and time stamp.

## Setting up the MPTL

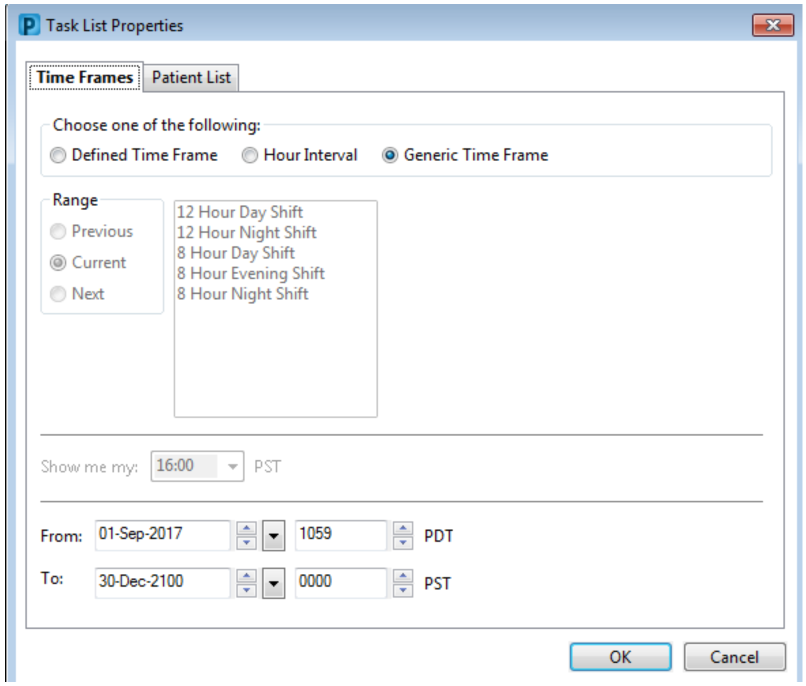
The Multi-Patient Task List (MPTL) must be set up by each user the first time they log into PowerChart. Follow the steps below to set-up (or modify) the MPTL:

1. From the "Multi-Patient Task List" window, right-click on the "(no time frame defined)" area on the grey bar and select "Change Time Frame Criteria."


**NOTE:** If an MPTL has already been set up and you need to make a modification, right-click on the **"Departmental View, Assigned Tasks"** area on the grey bar and select **"Customize Patient View."**

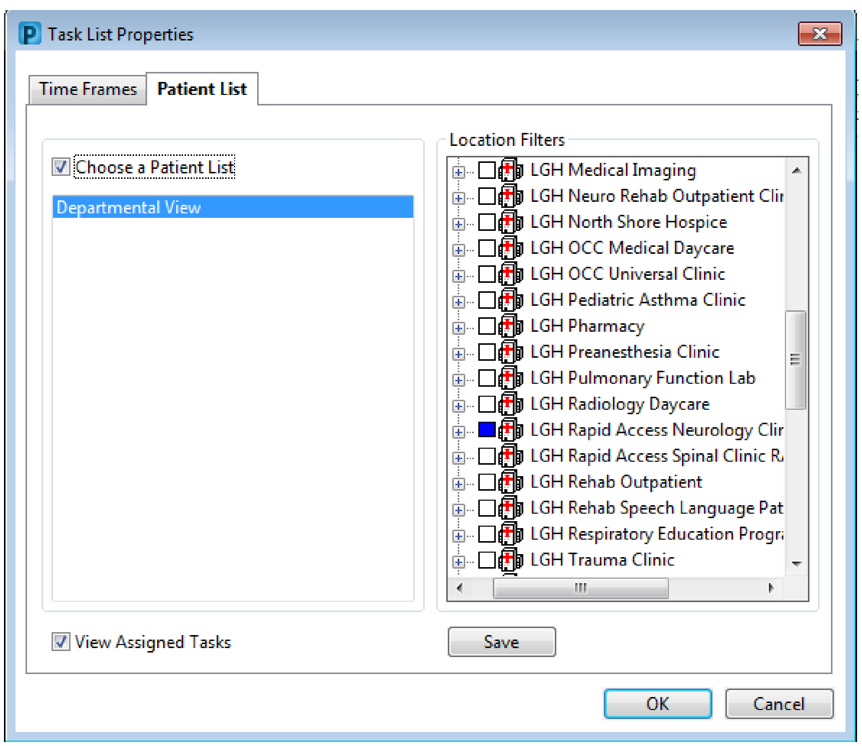



2. The "Task List Properties" window will open. Click on the **Time Frames** tab.




3. Set a wide time range to include all tasks (it is suggested that the **From:** date be set to two months in the past and the **To:** date be set to the year 2100).

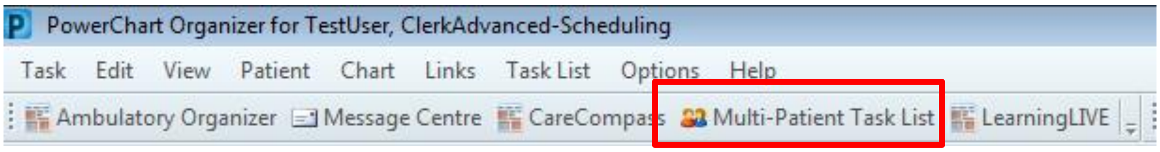
4. Click on the **Patient List** tab, find and select the appropriate clinic location in the Location Filters and click **OK.**



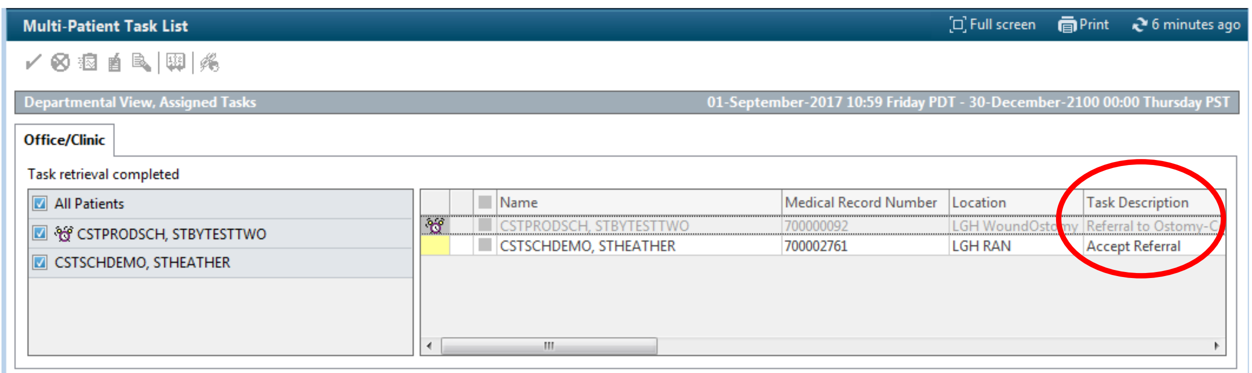
# Managing the MPTL

Follow the steps below to open the Multi-Patient Task List and complete a Task.

1. Log onto PowerChart. 
2. Find **Multi-Patient Task List** icon on the Toolbar and click on it.




3. A list of patients who have been triaged will appear. The "Task Description" column will indicate which order was submitted by the Triaging Provider/Clinician.




**NOTE:** Click on the **Refresh** button frequently to view the updated tasks coming from PowerChart.

There are three types of tasks that will be displayed on the MPTL:

6. **Accept Referral:** When a Provider places an Accept Referral Order in PowerChart, an Accept Referral task is generated in MPTL.
   i. **Next Step:** Based on the accept referral order, the scheduler can either book an appointment or add the patient to the waitlist.
      **NOTE:** When a Provider places an "Accept Referral" Order in PowerChart, the patient drops off the Provider's Dynamic Worklist and the system auto updates the Referral Status to "Accepted."
7. **Reject Referral:** When a Provider places a Reject Referral Order in PowerChart, a Reject Referral task is generated in MPTL.
   i. **Next Step:** Based on the reject referral order, the scheduler will follow-up with the Referring Provider (clinic dependant) and discharge the referral encounter with an applicable discharge disposition.

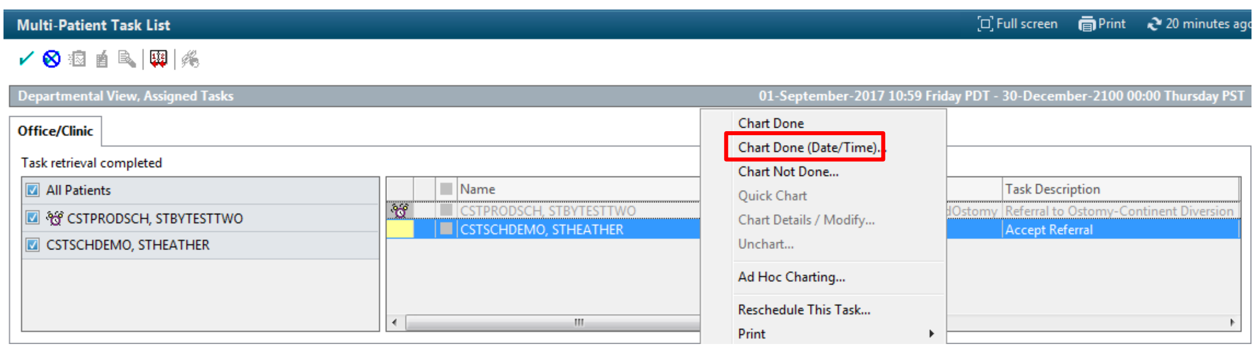
**NOTE:** When a Provider places a "Reject Referral" Order in PowerChart, the patient drops off the Provider's Dynamic Worklist and the system auto-updates the Referral Status to "Rejected."

8. **Referral Information Request:** When a Provider places a Referral Information Request Order in PowerChart, a Referral Information Request task for missing information is generated on the MPTL.

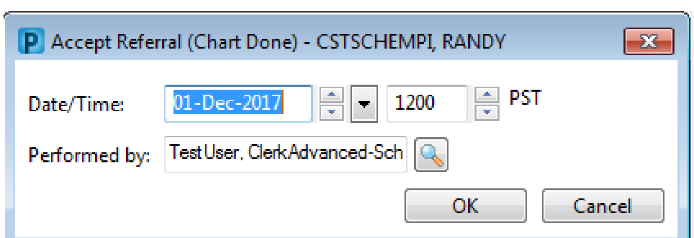
    i. **Next Step:** Based on the referral information request order, the scheduler will follow-up with the Referring Provider or patient to get the missing information. When the new information is received, it must be indexed to the same patient/encounter in WQM and the Referral Status must be set back to "Ready for Triage."

    **NOTE:** When a Provider places a "Referral Information Request" Order in PowerChart, the patient drops off the Provider's Dynamic Worklist and the system auto-updates the Referral Status to "Pending."

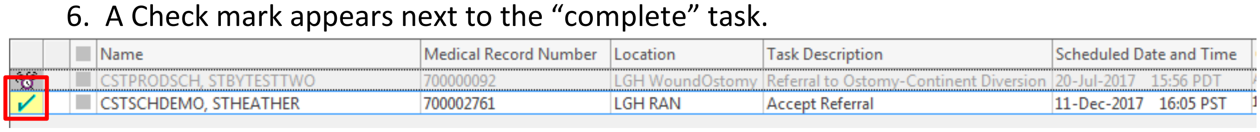
4. Once you are done completing any of the above "Next Steps," right click on the task that you just completed on MPTL and click on **Chart Done** (Date/Time).




5. Click on **OK** button on the Referral (Chart Done) window to complete a task.




6. A Check mark appears next to the "complete" task.

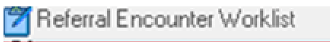



7. Click on the "Refresh" button to make the task drop off the MPTL

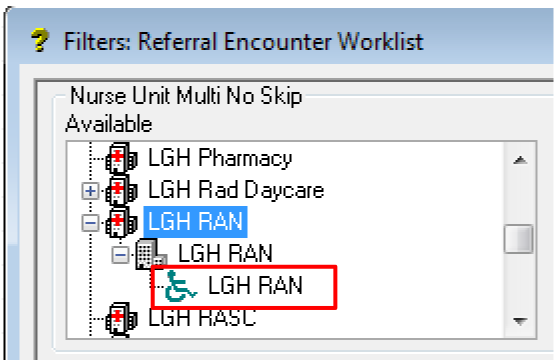
# Referral Encounter Worklist in PMOffice

Referral Encounter Worklist in PMOffice displays a list of all the open referral encounters for a selected location. The various functions performed by a scheduling clerk in this worklist are reviewed below.

### Open the Referral Encounter Worklist

1. Log onto **PMOffice** 
2. Click on the **Worklist** tab and double-click on the **Referral Encounter Worklist**


3. In the "Filters: Referral Encounter Worklist" window, select a clinic location (expand the list to select the clinic name prefixed with wheelchair sign).




4. Click the **Copy** button to move the clinic to selected box and click **OK**.
5. A list of the open referral encounters for this clinic is displayed.

Referral Encounter Worklist

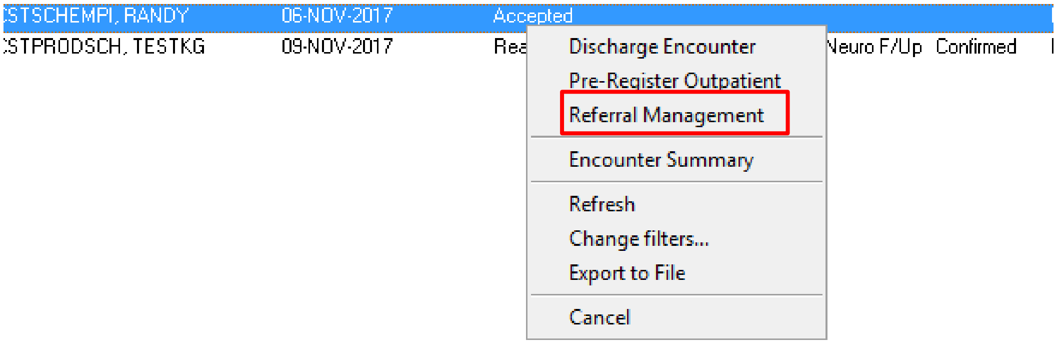
11 Results

| Patient | Referral Received Date | Referral Status | Cancelled Reason | Appt Type | Appt Status | Service | Encounter Number | MRN | Facility | Unit/Clinic | Encount |
|---|---|---|---|---|---|---|---|---|---|---|---|
| CSTSCHDEMO, STHEATHER | 01-SEP-2017 | Ready for Triage | | | | Neurology | 7000000009805 | 700002761 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTSCHPROD, TESTLYNDA | 29-SEP-2017 | Ready for Triage | | RAN New | Confirmed | Neurology | 7000000011198 | 700001789 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTSCHEMPI, PETE | 03-OCT-2017 | Pending | | Neuro F/Up | Noshow | Neurology | 7000000011326 | 700003998 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTPRODSCH, STBYTESTONE | 10-OCT-2017 | Referral Received | | | | Neurology | 7000000011692 | 700000089 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTSCHEMPI, JOHNNY | 23-OCT-2017 | Ready for Triage | | | | Neurology | 7000000012528 | 700006538 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTSCHYURI, ST-ONE | 24-OCT-2017 | Accepted | | | | Neurology | 7000000012589 | 700000659 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTSCHYURI, ST-ONE | 24-OCT-2017 | Rejected | | | | Neurology | 7000000012606 | 700000659 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTPRODSCH, STBYTESTONE | 03-NOV-2017 | Ready for Triage | | | | Neurology | 7000000013067 | 700000089 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTPRODSCH, STBYTESTONE | 03-NOV-2017 | Ready for Triage | | | | Neurology | 7000000013068 | 700000089 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTSCHEMPI, RANDY | 06-NOV-2017 | Accepted | | | | Neurology | 7000000013132 | 700007891 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |
| CSTPRODSCH, TESTKG | 09-NOV-2017 | Ready for Triage | | Neuro F/Up | Confirmed | Neurology | 7000000013381 | 700001007 | LGH Rapid Access Neurology Clinic RAN | LGH Rapid Access Neurology Clinic RAN | Referral |

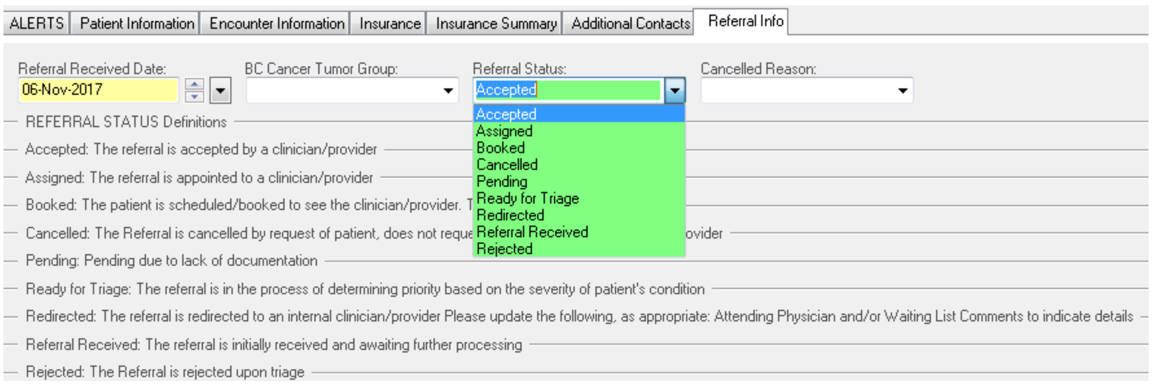
### Update Referral Status

When the status of Referral encounter needs to be updated, the clerk updates referral status using **Referral Encounter Worklist**.

6. With the Referral Encounter worklist open, right-click on the patient name and click **"Referral Management"** to open the conversation.




7. Click on **Referral Info** tab and select a new **Referral Status** from the drop-down list.

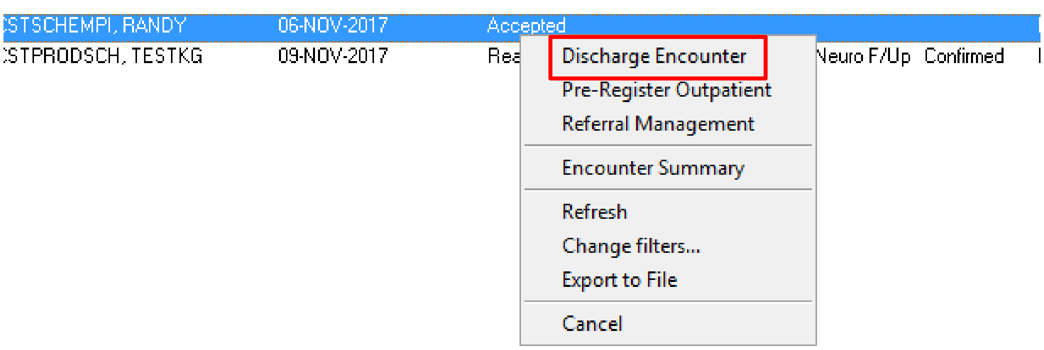



8. Click **Complete**.

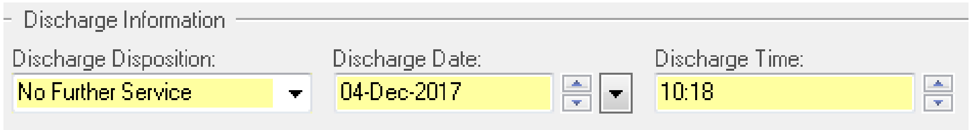
### Discharge Referral Encounter

When a referral encounter needs to be discharged because of cancellation or rejection, the clerk can discharge the encounter using Referral Encounter Worklist.

9. With the Referral Encounter worklist open, right-click on the patient name and click **Discharge Encounter** to open the conversation.




10. Update Referral Status, Discharge Disposition, Discharge date and Discharge Time.



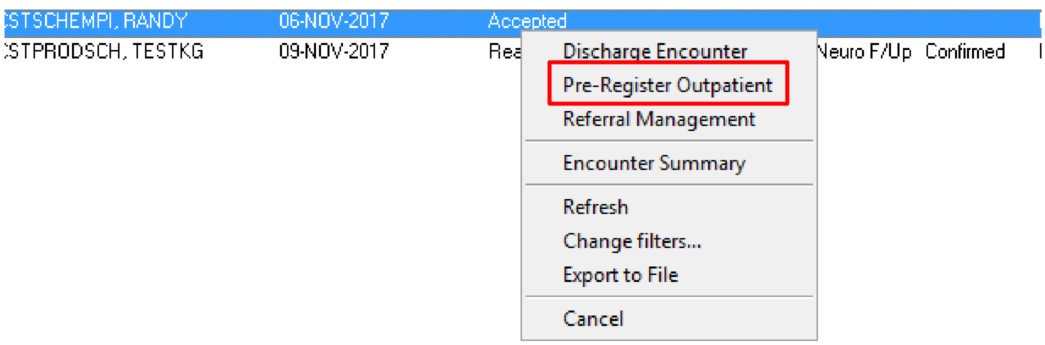

11. Click **Complete** to complete the discharge and close the window.

### Change Referral Encounter to Pre-Register Outpatient

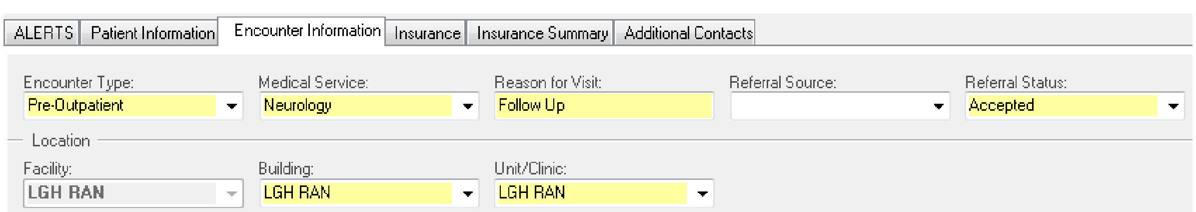
When a Referral is ready to be scheduled, the clerk books the appointment with the Referral encounter. The encounter is then flipped from Referral to Pre-Outpatient using the Referral Encounter Worklist.

It is vital that the encounter be updated to Pre-Outpatient so that it can be checked in appropriately when the patient arrives. Also, if the encounter type is left as Referral, the encounter will not appear in the "Past Due Arrivals" worklist.

1. With the Referral Encounter worklist open, right-click on the patient name and click **Pre-Register Outpatient** to open the conversation.




2. The EMPI window briefly launches.
3. Click **Encounter Information** tab to select Pre-Outpatient in **Encounter Type** drop-down list and update **Referral Status** to Accepted.




4. Click **Complete** button and the "Document Selection" window pops-up.
5. Click **OK** to close the "Document Selection" window.
6. The Referral encounter drops off the Referral Encounter Worklist.

# Referral Triage – At a Glance

Referral Triage is the process by which clinicians/Providers determine if and/or when a newly referred patient will be seen in an outpatient clinic.  This includes receiving the referral, triaging and booking the appointment.

Below is a high-level workflow for processing a referral received both from an internal (CST site) and external (non-CST) site.  The workflow includes receiving the referral, creating the referral encounter, sending it to the Triaging Provider and scheduling the appointment.

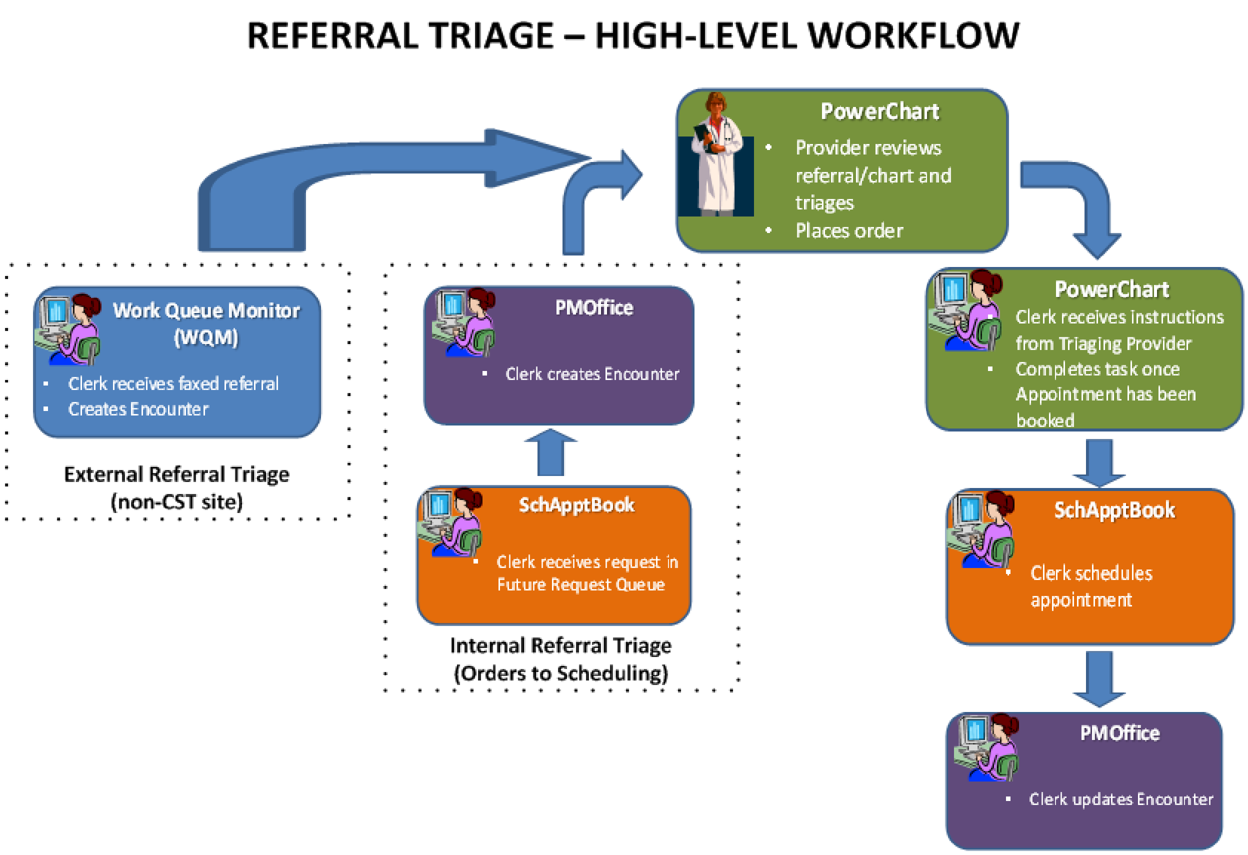



**Figure 01: Referral Triage – Internal and External**

**NOTE:** External Sites are the sites that are not using CST Cerner and Internal Sites are the sites that are using CST Cerner.

# External Referral Triage

The External Referral Triage process is initiated when a Provider/Clinician faxes a referral form to a clinic. The faxed referral form will automatically generate an item in Work Queue Monitor (WQM) that will be routed to a specific queue for review.

The clerk in the receiving clinic will find the new referral on their WQM Queue, link it to a patient/encounter and index it to send the referral to the Triaging Provider. Once the referral is reviewed, the clerk will be notified of the decision via a task on their Multi-Patient Task List. At this point the referral can be scheduled, waitlisted or rejected based on instructions from the Triaging Provider.

Follow the steps below to process an external referral that requires triaging.

## Process a Referral in WQM

1. Refer to the "Open a Document in WQM" section to open the faxed Referral form.
2. Refer to the "Link a Document to a Patient/Encounter" section to associate the faxed Referral form to the appropriate patient/encounter.

   **NOTE:** When the Referral Status is set to "Ready for Triage" (in the Referral encounter) the patient will appear on the Triaging Provider's Dynamic Worklist. Ensure that the Referral is indexed in WQM at this point otherwise the Provider will not be able to view the document in the PowerChart.
3. Refer to the "Index a Document in WQM" section to specify the document type and status.

   The referral has now been sent to the Triaging Provider for review. The Provider's decision regarding next steps will be communicated via an order that will trigger a task. Clerks must monitor the Multi-Patient Task List (MPTL) in PowerChart where the tasks can be viewed.

## Process a Task on the MPTL in PowerChart

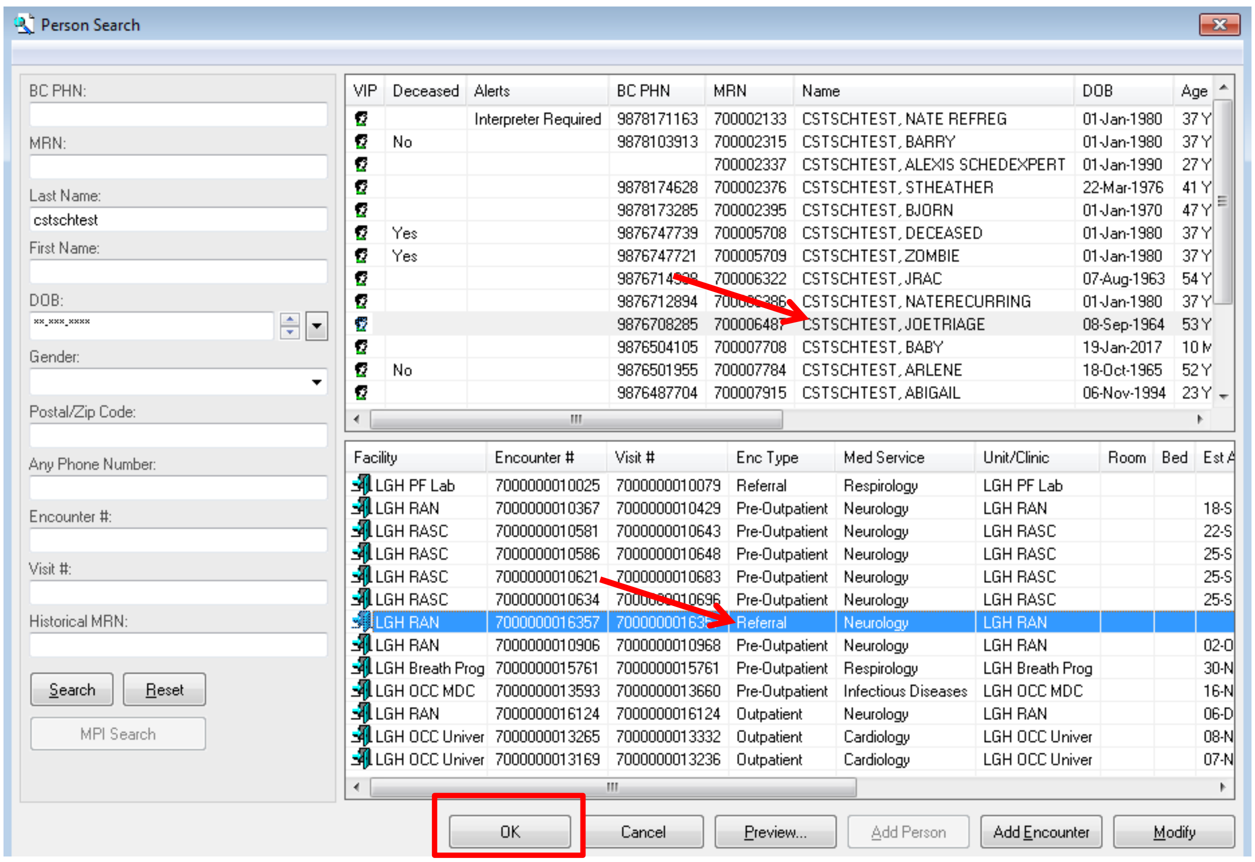
4. Refer to the "Managing the MPTL" section to open the **Multi-Patient Task List** and complete the Task.

## Accepted Referrals

5. When an Accept Referral order is entered by the Triaging Provider/Clinician, the clerk will schedule an appointment or add the request to the Waitlist depending on the Clinic's practice.

### Schedule Appointment

i. Refer to the **Appointment Scheduling** section to book an appointment. Use any of the three scheduling methods.
   - When performing the **Person Search** (step 4), select the patient **AND** the Referral encounter before clicking **OK**. By doing this the appointment will be linked to the existing Referral encounter.




ii. When the appointment is scheduled in a Pending state, click on the **Confirm** button.

iii. Click **OK** in the "Confirm" window.
   - Since the appointment is already linked to the Referral encounter, the Encounter Selection window will not open.

iv. Follow the steps in the "Change Referral Encounter to Pre-Register Outpatient" to update the encounter.

**Waitlist Appointment**

i. Refer to the "Create a Request Manually" section to add the patient to the Waitlist Request queue.

ii. When it is time to move the patient from the waitlist into an appointment, follow the steps in the "Schedule an Appointment from a Request List" section.

## Rejected Referrals

6. When a Reject Referral order is entered by the Triaging Provider/Clinician, the clerk will notify the Referring Provider (clinic dependant) and discharge the Referral encounter.

   i. Follow the steps in the "Discharge Referral Encounter" section to discharge the encounter.

## Referrals Requiring More Information

7. When a "Referral Information Request" order is entered by the Triaging Provider/Clinician, the clerk will follow-up with the Referring Provider or patient to get the missing information. When the new information is received, it must be indexed to the same patient/encounter in WQM and the Referral Status must be set back to "Ready for Triage."

**Process Additional Documents in WQM**

i. Additional information should be sent in via fax so an electronic version can be linked to the patient's chart. If the additional information is received on paper, follow the steps in "Scan a Paper Document to a Patient's Chart" to get the document into WQM.

ii. When the requested information is received in WQM, follow the steps in the "Link a Document to a Patient/Encounter" section to link the document(s) to the existing patient and Referral encounter.

iii. Follow the steps in the "Index a Document in WQM" section to link the document to the appropriate Document Type.

**Update Referral Encounter**

iv. Once the additional documents have been saved to the appropriate patient/encounter, follow the steps in the "Update Referral Status" section to change the status back to "Ready for Triage." This will cause the patient to re-appear on the Triaging Provider's Dynamic Worklist.

# Additional Referral/Triage Scenarios

**Scenario 1: Fax is received with insufficient information for triage.**

The Clerk will follow-up with the Referring Provider for additional details prior to sending it to triage.

1. With the referral open in WQM, the clerk identifies some missing information.
2. The Clerk contacts the Referring Provider to request additional information.
3. Follow steps 1 through 7 in Scenario 1 to begin linking the referral form to a patient/encounter.
4. Click the **Referral Info** tab to complete the below mandatory fields:

   **Referral Received Date:** Type "T" for today's date

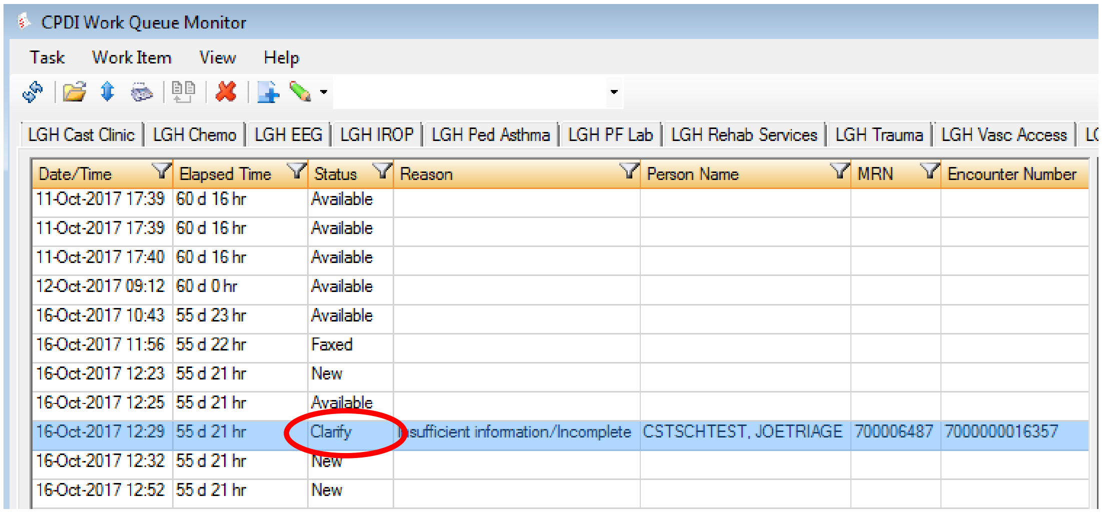
   **Referral Status:** Select "Pending" from the list
5. Click the **Complete** button to close the Referral Management conversation.
6. The "Referral Management" window opens with Encounter Number and Visit ID.
7. Click **OK** to close the "Referral Management" window.
8. Complete the below fields in "Add/Modify Work Item" window:

   **Document Type:** Select an appropriate option from the list

   **Status:** "Clarify"

   **Reason:** Select a reason from the list of options
9. Click **OK** to close the "Add/Modify Work Item screen."

   **NOTE:** the referral remains on clinic's WQM queue with the status of "clarify."

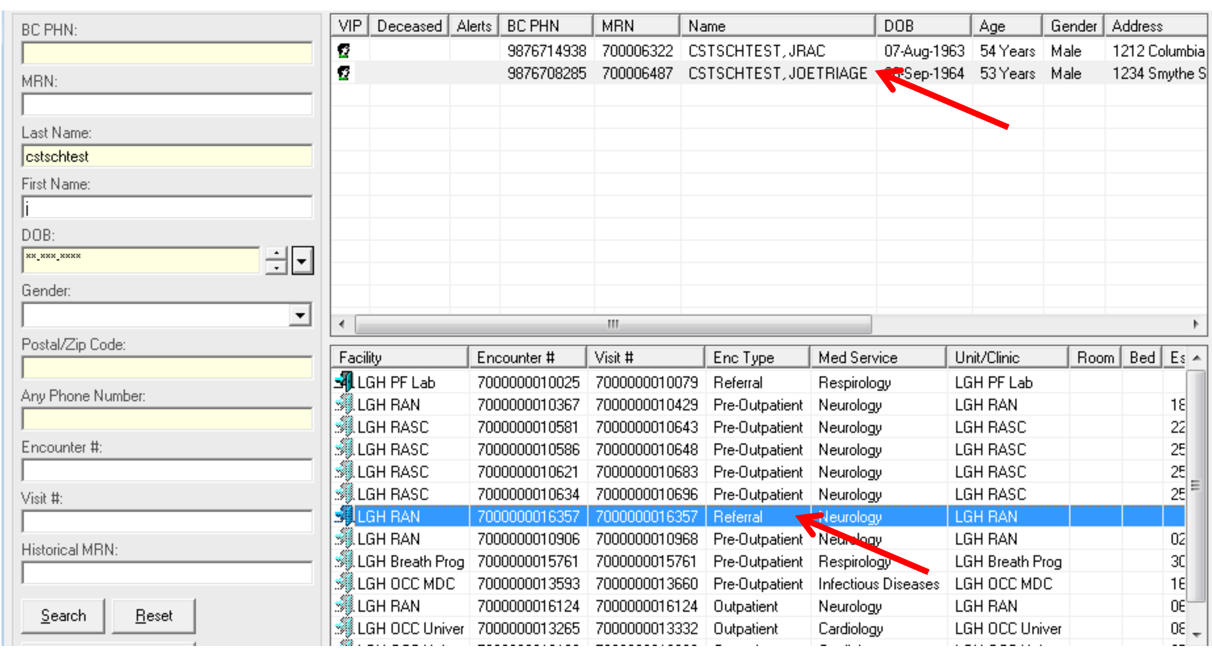



10. When additional information from the Referring Provider is received in WQM, double-click on the new queue item to open the “Add/Modify Work Item” window.

11. Click on the **Select Patient** icon. 

12. Search for the same 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).

13. Select the patient in the search results, select the <u>existing</u> Referral encounter in the window below and click **OK**.



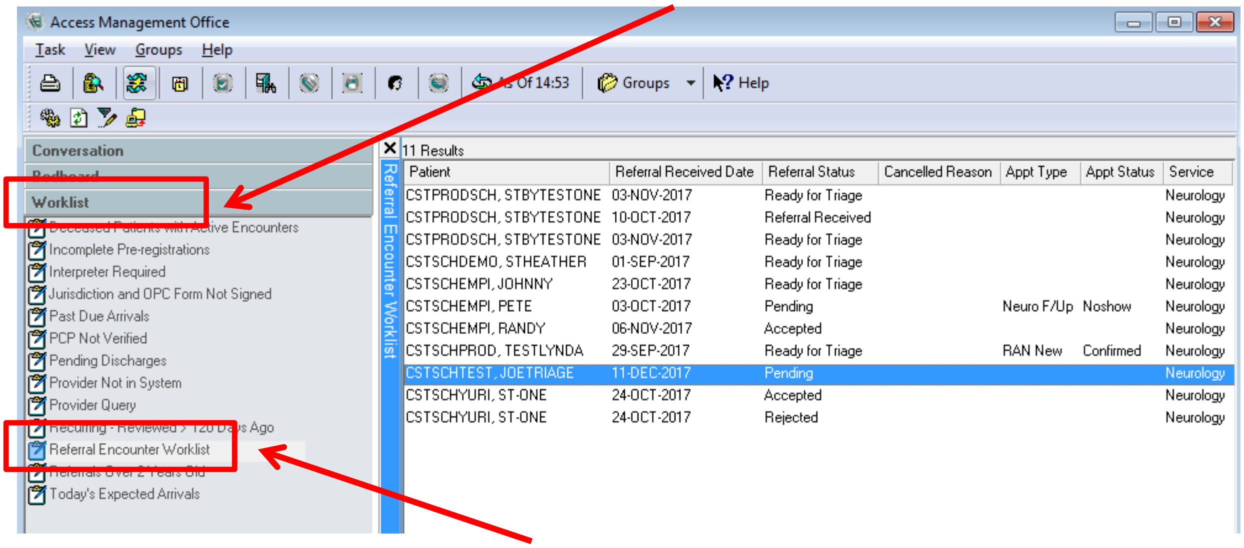

14. In order to complete indexing, fill in the below fields in the “Add/Modify Work Item” window:

Document Type: Select an appropriate option from the list

Status: **Complete**

15. Click **OK** to close the "Add/Modify Work Item" screen. The referral will drop off the clinic's WQM queue because the status was set to **Complete**.
16. Go back to the clinic queue to update the original faxed referral. Double-click on it to open the "Add/Modify Work Item" screen. Change the **Status** to "Complete" and click **OK** to have it drop off the queue.
17. The final step is to update the status of the Referral Encounter. This must be done in PMOffice. Follow the steps below.

    a. Log into **PMOffice** and open the **Worklist** section.




    b. Double-click on the **Referral Encounter Worklist.**

    c. In the Filters window, select the appropriate Facility Name, click the 

button and click **OK**.

    d. Find the patient on the list, right-click and select **Referral Management.**

    e. In the Organization window, enter the first few characters of the clinic name into the "Facility Name" field and click **enter**.

    f. Select the appropriate Facility from the list and click **OK.**

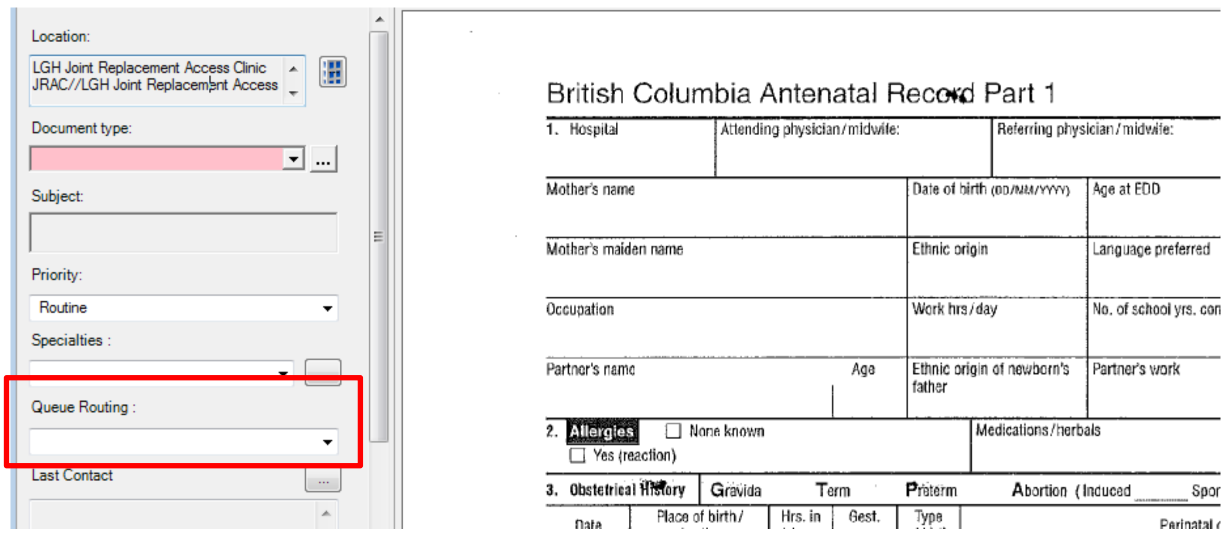
    g. The Referral Management window will open. Click on the "Referral Info" tab and change the **Referral Status** to "Ready for Triage" and click **Complete.** This will send the patient/referral to the Triaging Provider.

**Scenario 2: Fax is sent to the incorrect queue.**

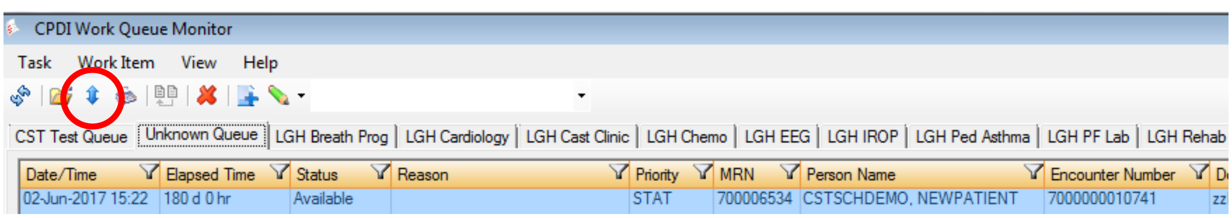
While reviewing the faxed referral in the “Add/Modify Work Item” window, the clerk identifies that the fax has been sent to the incorrect queue. Follow one of the two options below to have the referral forwarded to the correct clinic.

- **Option 1: Re-Route the referral to the appropriate queue** (this is only an option of the clinic the referral should be re-routed to has a queue in WQM)

4. In the “Add/Modify Work Item” window, select the correct clinic queue from the **Queue Routing** drop-down list.




5. Click **OK** to close the “Add/Modify Work Item” window.
6. Click the **Route** icon on Toolbar to forward it to the correct clinic queue.




- **Option 2: Notify Referring Provider of the error and link the referral to an encounter that will be discharged.**

1. Follow the steps (1 to 7) from the “Link a Document to a Patient/Encounter” section.
2. Click the Referral Info tab to complete the below mandatory fields:

   **Referral Received Date:** Type **T** for today’s date
   **Referral Status:** Select **Cancelled** from the list

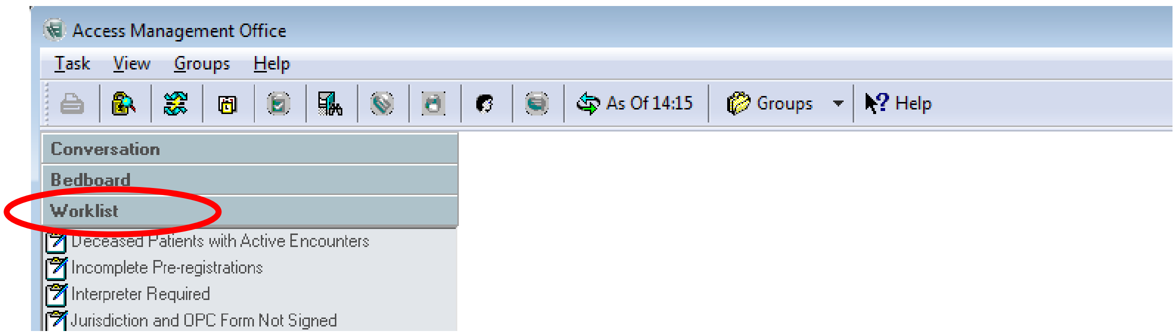
**Cancelled Reason:** Select an option from the list

3. Click the **Complete** button to close the **Referral Management** conversation.
4. “Referral Management” window opens with Encounter Number and Visit ID.
5. Click **OK** to close the “Referral Management” window.
6. In order to complete indexing, enter the below fields in “Add/Modify Work Item” window and click **OK**.

**Document Type:** Choose the appropriate option from the list

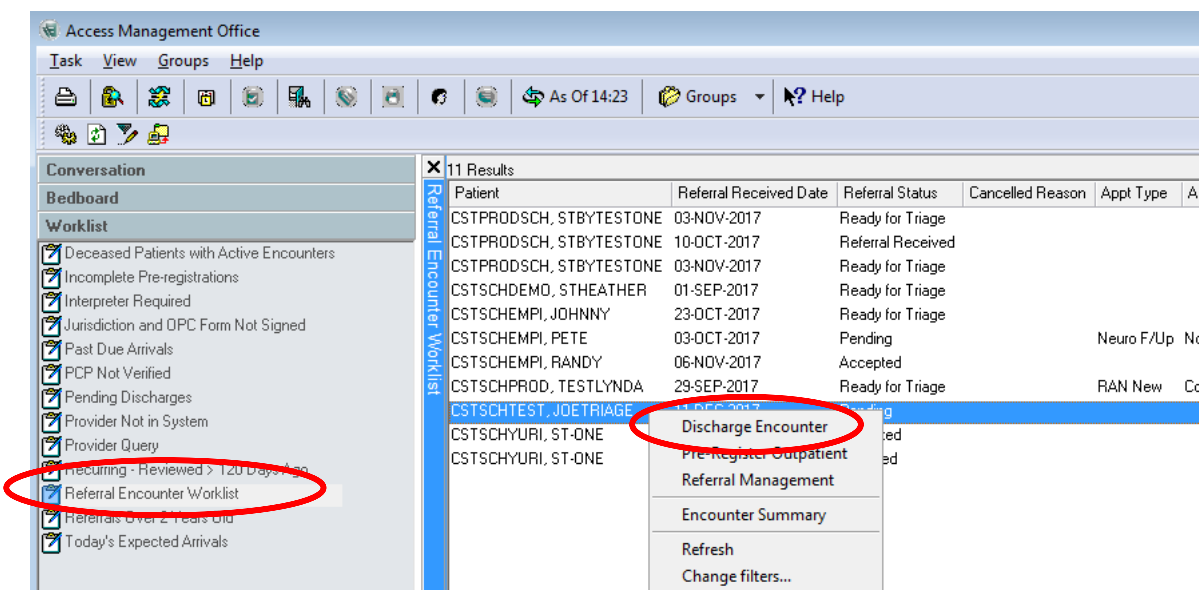
**Status:** “Complete”

7. Log into PMOffice and open the **Worklist** section.




8. Double-click on the **Referral Encounter Worklist**
9. Select the appropriate Facility Name, click the  button and click **OK**.

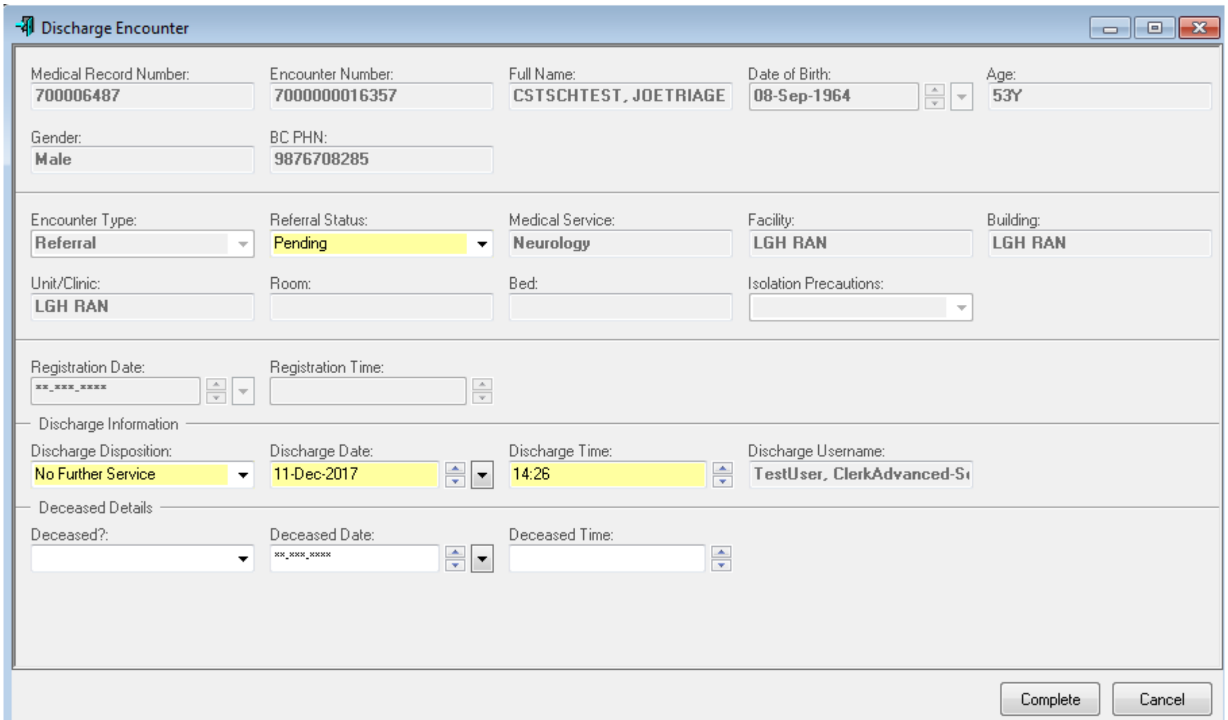
10. Find the patient on the list and right click to select **Discharge Encounter.**




11. Enter the below fields to complete the discharge of the encounter

**Discharge Disposition:** no further service

**Discharge Date:** type "T" for today's date
**Discharge Time:** type "N" for current time




12. Click **Complete** to close the "Discharge Encounter" window and the patient drops off the **Referral Encounter Worklist**.
13. Notify the Referring Provider of the error and have them send it to the appropriate clinic.

# External Referral without Triage

The "External Referral without Triage" process involves receiving a new referral on a WQM queue, booking or wait-listing the request in SchApptBook (depending on clinic practice) and completing the indexing of the document in WQM with the appropriate encounter.

Refer to the "Open a Document in WQM" section to open the faxed Referral form. If the patient can be scheduled right away, refer to the steps in **Option A** below. If the patient has to be added to a waitlist, refer to the steps in **Option B** below.

## Option A: Schedule an Appointment

i. Keep the Referral form open for reference and open the **SchApptBook**.

ii. Follow the steps in the "Appointment Scheduling**"** section to book an appointment using any of the scheduling methods with a "Pre-Outpatient" encounter.

   a. **NOTE**: Similar to External Referral with Triage process, the clerk still has the ability to create a "Referral" Encounter in WQM, link it to a patient/encounter, index it, book an appointment with that Referral Encounter and flip it to Pre-Outpatient Encounter. However, it is recommended that clinics that do not triage and book appointments directly, after receiving a referral in WQM, should go to SchApptBook to book an appointment with a "Pre-Outpatient" encounter. Then they will go back to WQM to index the referral, linking it to that Pre-Outpatient. This will save some unnecessary steps in processing referral requests for these particular clinics.

**Process the Referral in WQM**

iii. With the referral open in the "**Add/Modify Work Item**", click on the **Select Patient** icon. 

iv. 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).

v. If you have found the correct patient, click only ONCE on their name to select, then select the existing "**Pre-Outpatient**" encounter from the Encounter List and click **OK**.

vi. Refer to the "Index a Document in WQM" section to specify the document type and status.

## Option B. Add Patient to the Waitlist

i. Follow the steps in "Link a Document to a Patient/Encounter" to create a Referral Encounter in WQM.

ii. Follow the steps in "Index a Document in WQM" to complete indexing of the referral request.

iii. Follow the steps in "Manually Create a Request" to move the request to waitlist queue in SchApptBook.

# Internal Referral Triage - Orders to Scheduling

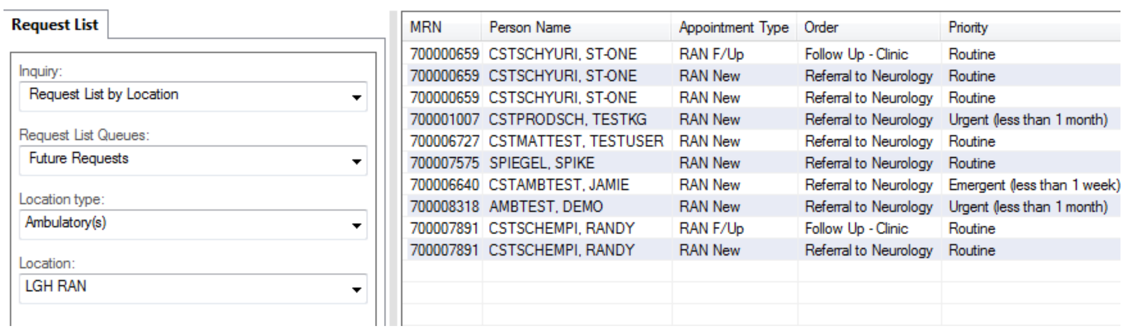
The Internal Referral Triage process is initiated when a Provider/Clinician enters a referral order in PowerChart. The referral order will automatically generate a request that will fall onto the selected clinic's "Future Requests" queue.

The clerk in the receiving clinic will find the new referral on their Request List, create an encounter and move them to a "Triage List" queue until they receive instruction from the Triaging Provider/Clinician.

Follow the steps below to process an internal referral that must be triaged.

## Open the Future Requests List

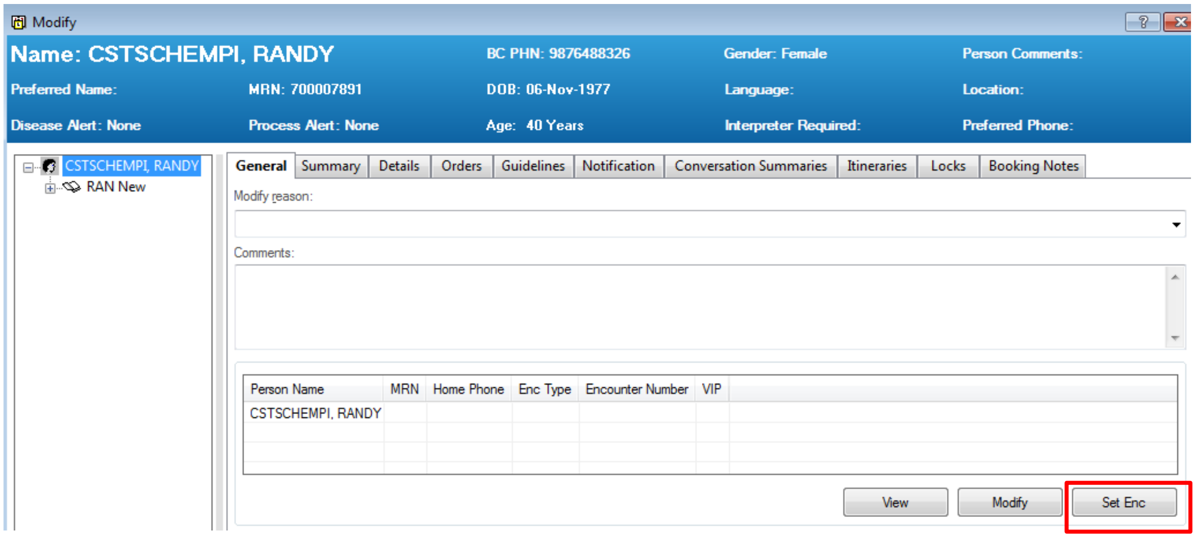
1. Refer to the "Request Lists - Open a Request List" section to open the Future Requests list for your clinic.



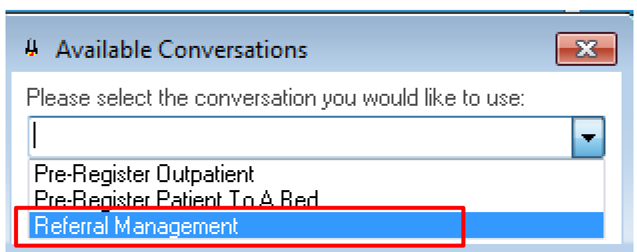

## Link Request to a Referral Encounter

2. Right-click on the request and select **Modify**.


3. The **Modify** window opens.




4. Click the **Set Enc** button.
5. The “Encounter Selection” window opens. Click the **Add Enc** button.
6. Select “Referral Management” conversation from the **Available Conversations** list and click **OK**.




7. The “Organization” window opens. Select the appropriate **Facility Name** and click **OK**.
8. The “Referral Management” conversation window opens up. Complete the mandatory fields in Encounter Information tab:

   **Encounter Type:** Referral (pre-populated)

   **Medical Service:** Select one from the list

   **Referring Provider:** Select one from the list

9. Complete the mandatory fields in Referral Info tab and click **Complete**:

   **Referral Received Date:** Date the request was received

   **Referral Status:** Ready for Triage

**NOTE 1**: Selecting “Referral Status: Ready for Triage” drops the patient to the Triaging Provider’s Dynamic Worklist in the PowerChart to review.

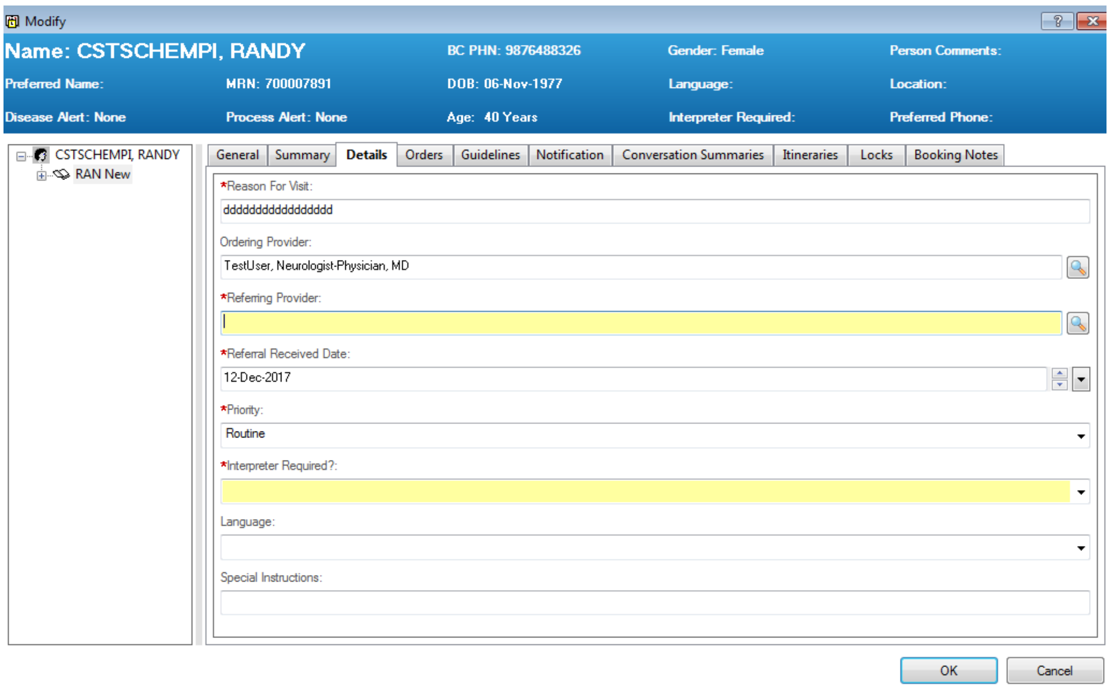
**NOTE 2**: If there are additional steps needed to be completed before sending the referral to Triage, set the Referral Status to "Referral Received."

10. Click **OK** to close "Referral Management window."

11. Click the **Details** tab in the "**Modify"** window and complete the mandatory fields.

    **Referring Provider:** Copy and paste the Ordering Provider

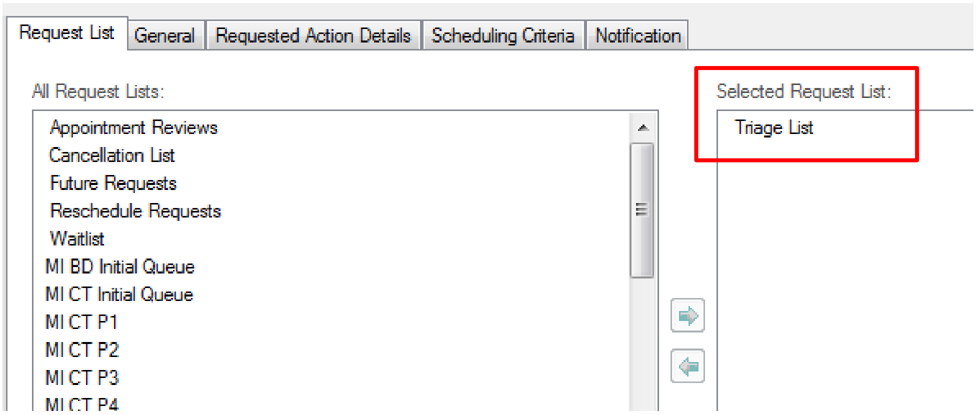
    **Interpreter Required:** Select one from the available options




**NOTE:** Some fields are pre-populated from the order placed in the PowerChart.

## Move a Request to the Triage List Queue

12. Follow the steps in the "Request Lists - Move a Request" section to move the request to the **Triage List** queue.




## Manage Multi-Patient Task List in PowerChart

The patient will remain on the Triage List until the Triaging Provider/Clinician reviews the referral and decides if/when the patient will be seen. The Scheduling Clerk will be notified of the decision via an Accept/Reject/Information Request order. When the order is entered it will drop a task to the clerk's Multi-Patient Task List.

Follow the steps in "Managing the MPTL" section to open the MPTL and view the open tasks.

13. Assuming the Provider places an Accept Order request, the scheduler can book an appointment in SchApptBook.

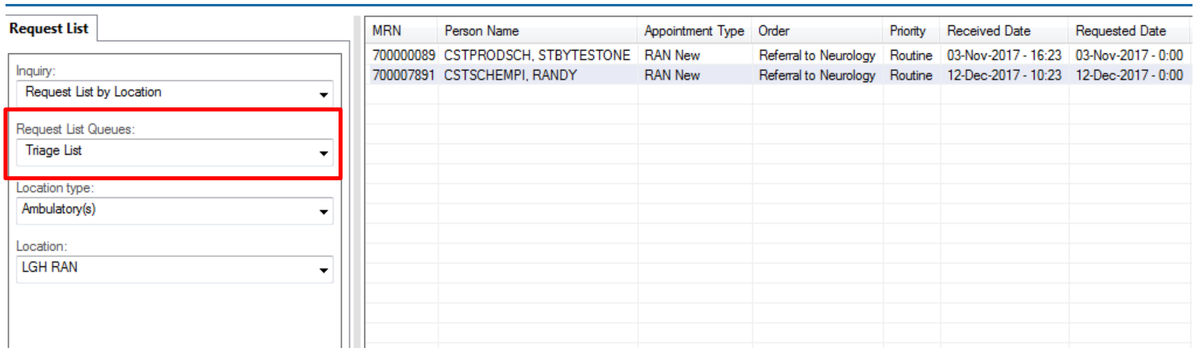
    **NOTE 1:** If a patient must be put on a Waitlist, follow the steps in the "Move a Request" section to move the request to the Waitlist queue.

    **NOTE 2:** If the referral is rejected, follow the steps in the "Cancel a Request" section to remove the request from the Triage queue. The schedulers must also follow-up with the Referring Provider (clinic dependent) and discharge the referral encounter with an appropriate discharge disposition.

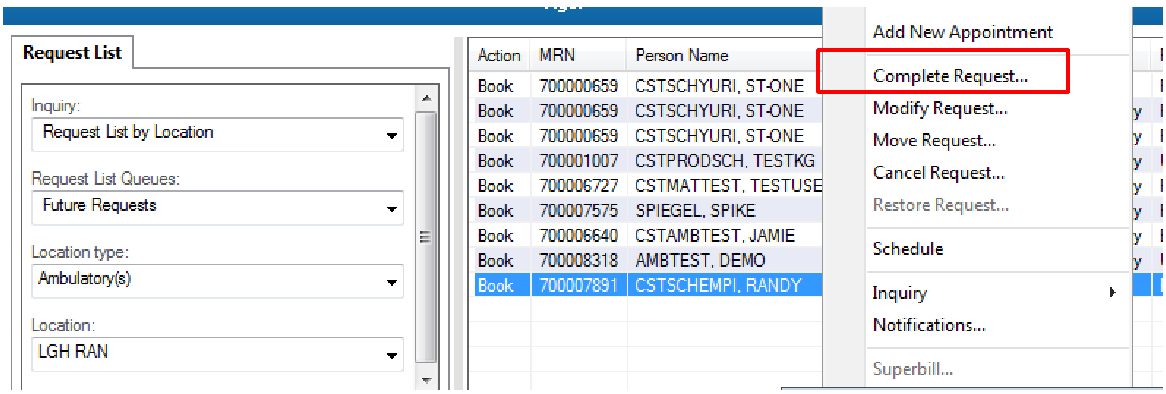
14. Once the appointment is booked, mark the task in MPTL as **Chart Done (Date/Time)**.

## Completing a Request from Request List

15. Follow the steps in "Requests Lists – Open a Request List" to open the Triage List queue.




16. Right-click on the request and select **Complete Request.**




17. Click **OK** to close the "Future Requests/Appointment" window.

18. The appointment request moves to the WIP area.

19. From this point, any of the scheduling methods can be used to complete the booking. However **Suggest** is recommended because the date range will default to the dates entered by the ordering Provider.

20. Once the appointment is scheduled in a pending status, click on the **Confirm** button.

21. Confirm the appointment details and click **OK**. The window will close and the confirmed appointment will be linked to the existing Referral encounter.

## Update Referral Encounter to Pre-Register Outpatient

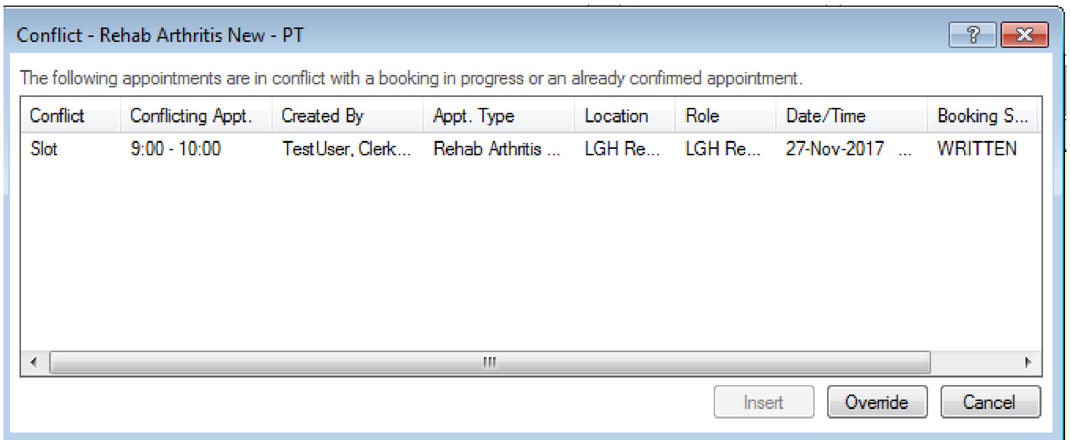
22. Follow the steps in the **"**Change Referral Encounter to Pre-Register Outpatient**"** section (under **Referral encounter Worklist in PMOffice)** to flip the Referral encounter to Pre-Outpatient.

    **NOTE:** If it is important to your clinic to capture the date/time the appointment was booked, update the **Referral Status** field to "Booked" when updating the encounter.


ALERTS
Patient Information
Encounter Information
Insurance
Insurance Summary
Additional Contacts
Encounter Type:
Pre-Outpatient
Medical Service:
Neurology
Reason for Visit:
TEST
Referral Source:
Referral Status:
Booked
Location

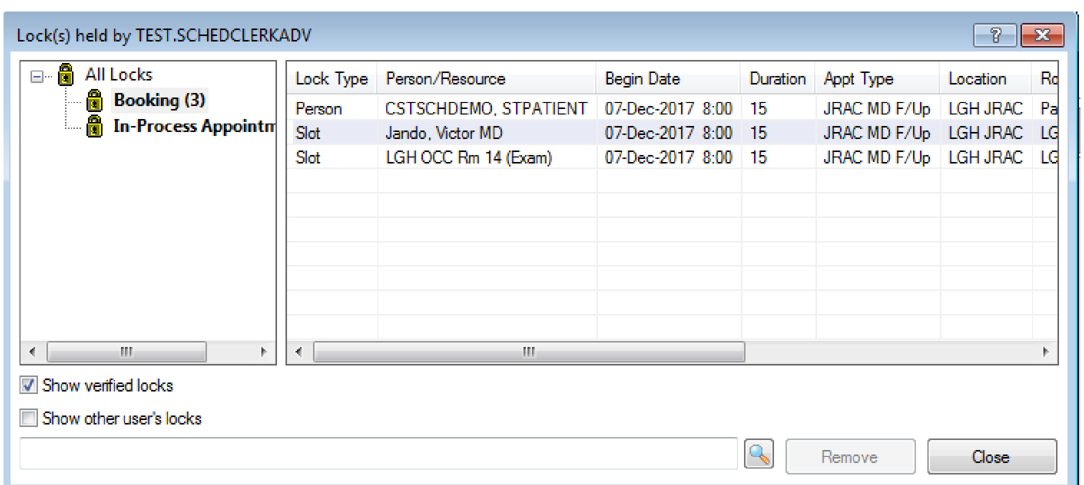
# Locks

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




If the user that holds the lock is already logged into SchApptBook, the user can remove their lock(s) by completing the following steps.

Locate the lock by clicking the "View Locks" icon.  A window will display listing all locks created by the account you are signed in with.



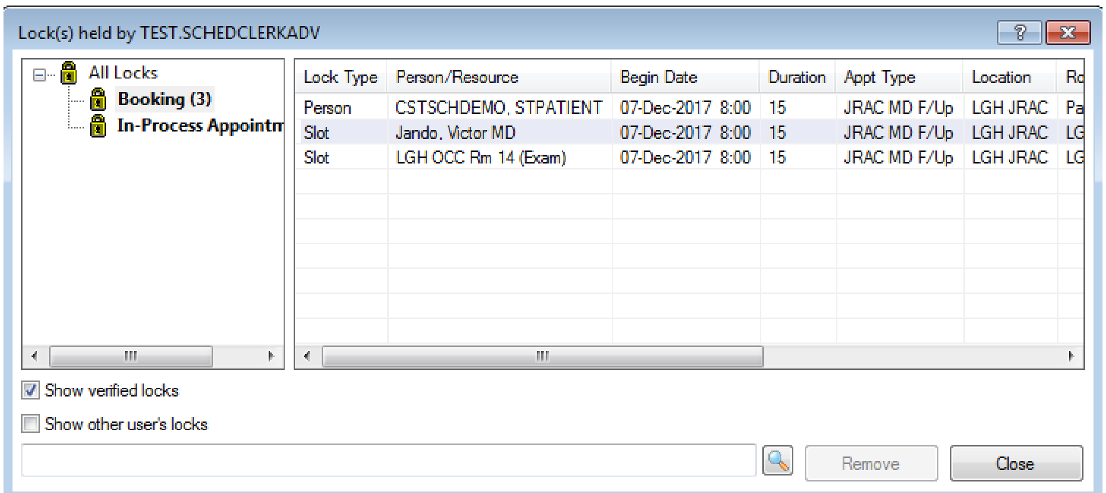

Click **Booking** to see if the slot was a booking lock. If there are locks which you would like to remove, highlight them and press the **REMOVE** button.

If you don't see a lock in Booking, click **In-Process Appointments** to see if there is a lock in there. Highlight any "In Progress" locks and press the **REMOVE** button.

You may also need to release any verified locks. To accomplish this, click the checkbox next to Show Verified Locks in the bottom left corner of the window.

## Checking Locks on Startup and Removing Other Users Locks

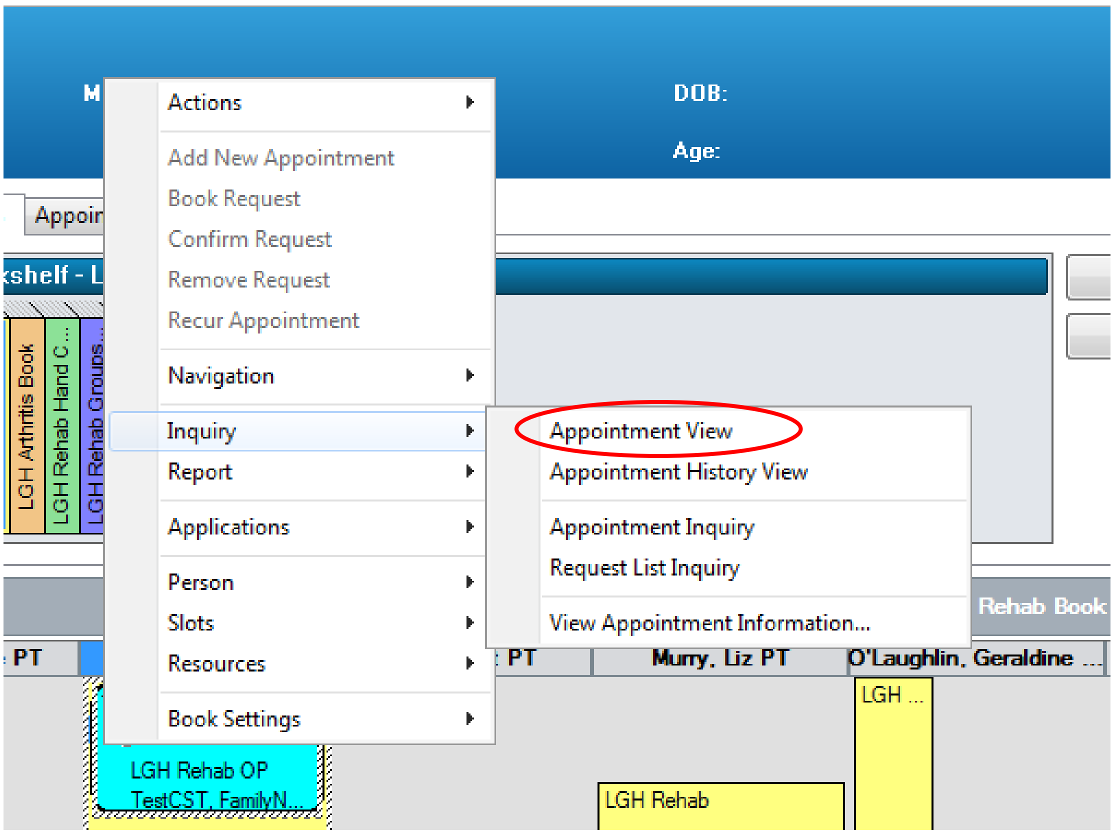
When you log into SchApptBook, the Locks window will display immediately if you hold any locks. You can remove the locks following steps 2-4 listed above.

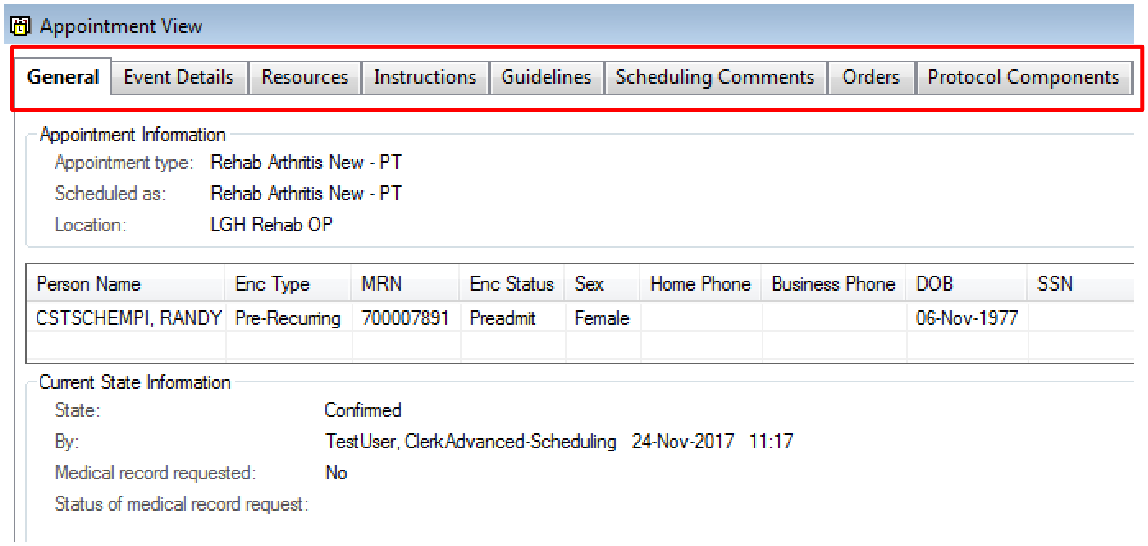



If you are unable to book an appointment because a lock has been created by another user, try to contact the user directly or call Helpdesk to have the lock removed.

# Viewing Appointment Details

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



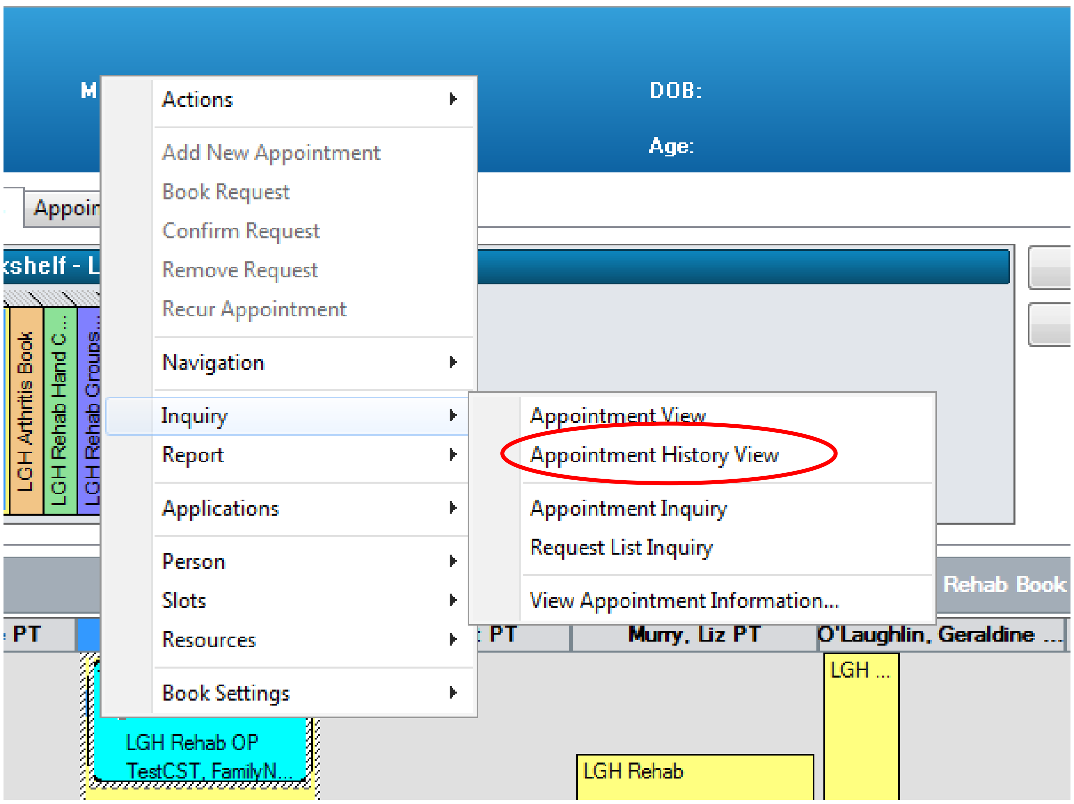



Click on the different tabs to view the detailed information about the appointment.

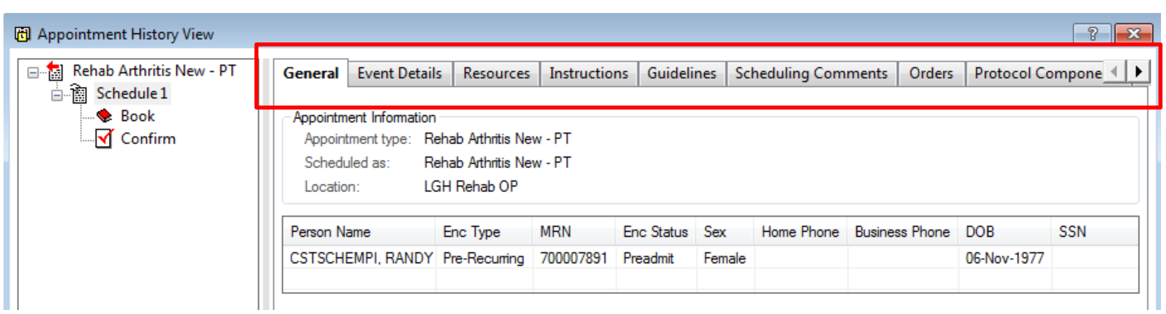
# Viewing Appointment History

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

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




The "History View" window will display.



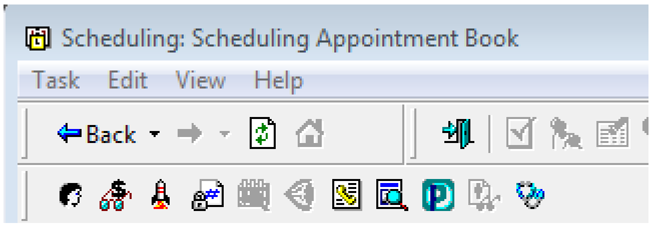

Click on the different tabs to view detailed information about the appointment.

# Hot Keys

In Appointment Book, there are several places where hot keys can be used.

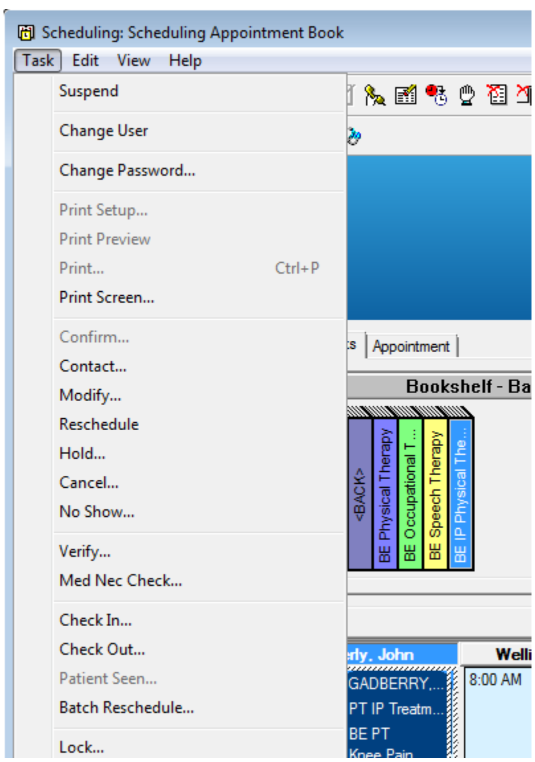
Pressing **ALT + any underlined letter** will perform that action the same as clicking with the mouse. Below are several examples of actions that can be performed using hot keys.

**ALT+T:** Opens the Task menu.




From here it is possible to navigate through various actions like modify by using **Shift+M** or by pressing the up and down arrow keys. Pressing **TAB** will move to the next menu, Edit, then to View and then to Help.

**NOTE:** Actions will be available only if the user has clicked on an appointment in the appointment grid.



When scheduling an appointment, pressing ALT+A will move the cursor to the Appointment Type prompt, pressing ALT+P will move the cursor to the Person Name prompt, and so on.

**Within an Accept Format Field or an Order Entry Format:**

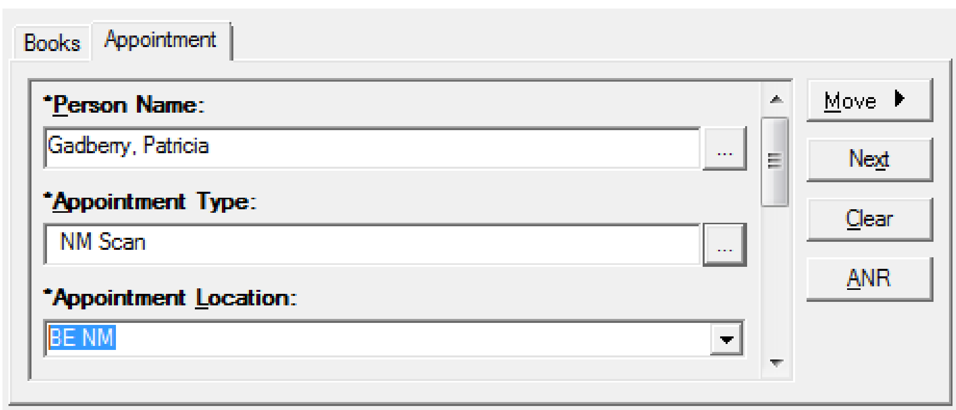
The TAB key will move the cursor to the next prompt.

SHIFT+TAB will move the cursor back one prompt.

Pressing ENTER with the pointer on an ellipsis, or any button is the same as clicking with the mouse.

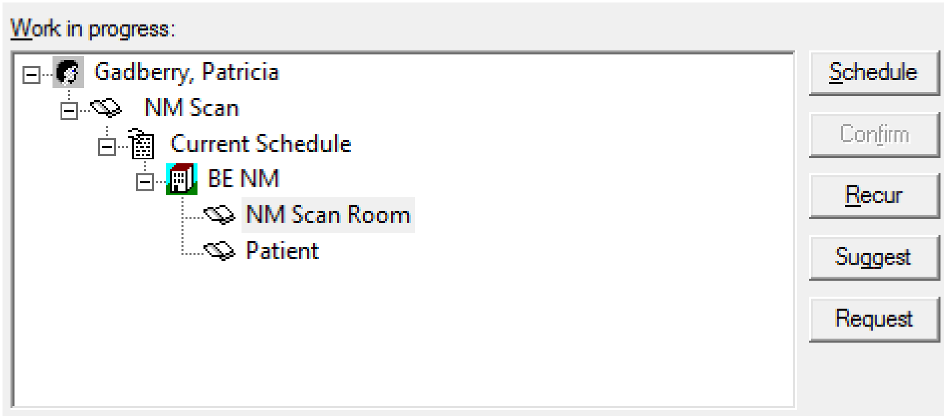
With the pointer on a prompt containing a list, the up and down arrows will scroll though the available options.

ALT+M will perform the same action as clicking **Move**. ALT+C will clear.




Pressing ALT+W at any time will take the cursor to the WIP. The up and down arrow keys navigate up and down the tree.

Pressing ALT+S functions the same as clicking **Schedule** when ready to schedule.




### Selecting Multiple Items

There are several instances when selecting multiple items at the same time is necessary, such as selecting multiple appointments in the suggest window.

Complete the following steps to select multiple items from a list:

Highlight the first item to be selected in the list, hold down the SHIFT key, and press the down arrow key.  This will select one additional item at a time.

Highlight the first item to be selected in the list, hold down the SHIFT key, and click another item in the list.  This will select the first item selected, the last item selected, and all items in between.

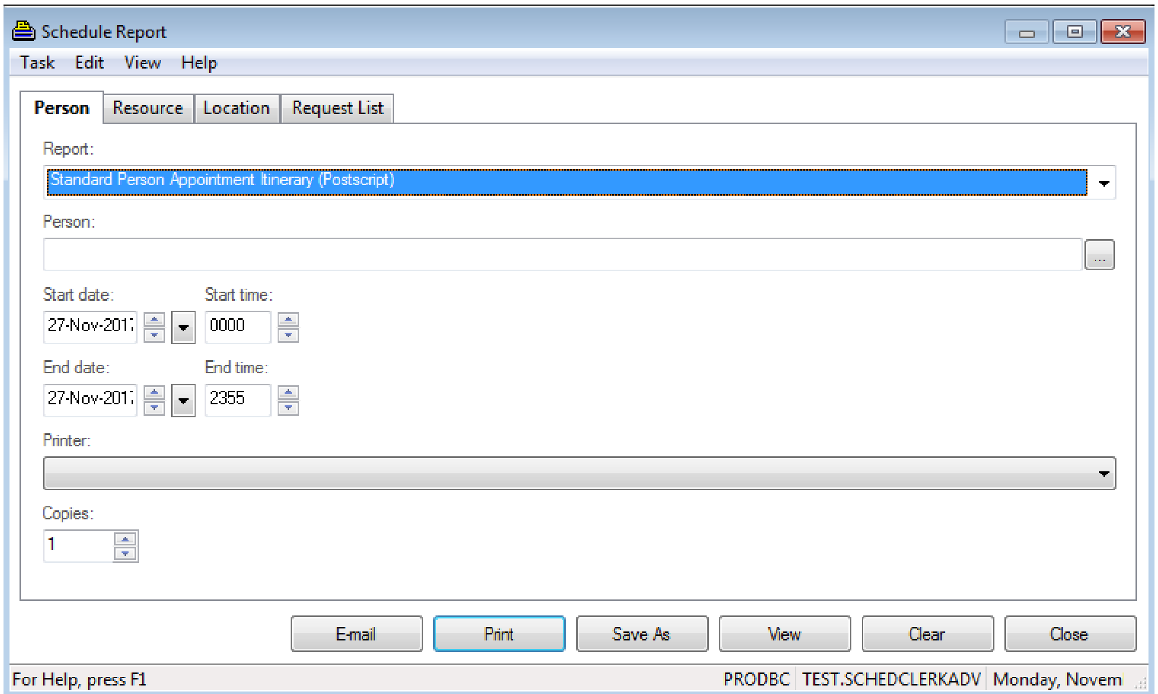
Highlight the first item to be selected in the list, hold down the SHIFT key, and press the END key.  This will select the first item highlighted and all subsequent items all the way to the end of the list.

Highlight the first item to be selected in the list, hold CTRL, and click any other items to be included.  This will select only the values that were clicked on while holding down the CTRL key.

# Reports

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

1. Click on the **Appointment Report** Icon in the Toolbar. 
2. The Screen Below will appear:



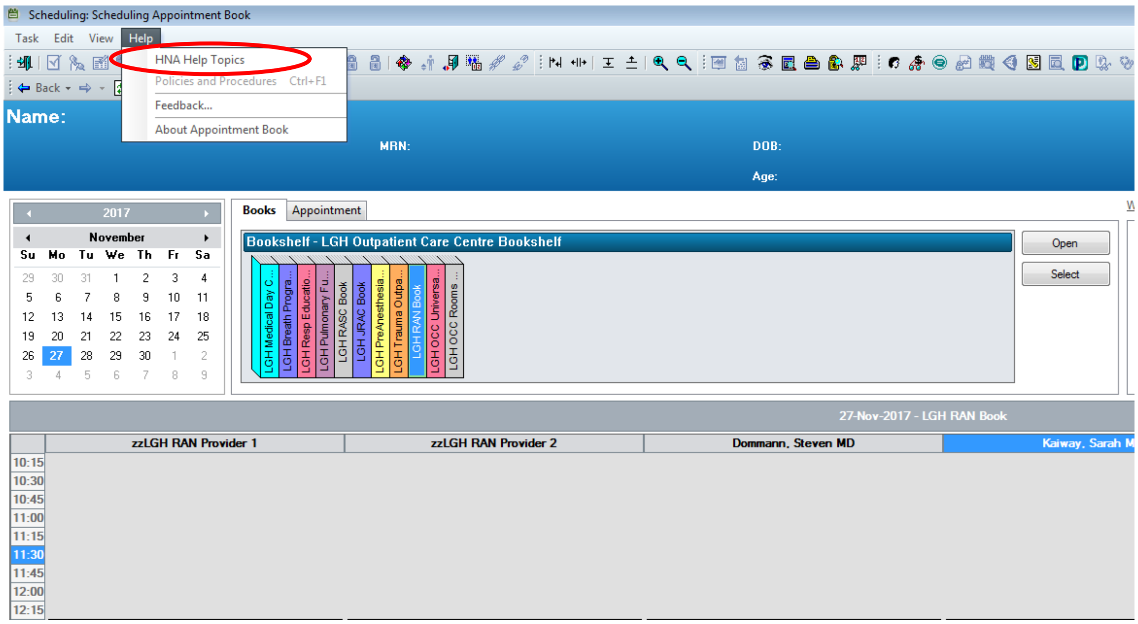

3. Select the appropriate tab (Person, Resource, Location or Request List).
4. Select the desired report from the drop down box.
5. Set filters of resource, person or location.
6. If appropriate, set start and end date of report.
7. Select the number of copies to print.
8. Select printer from drop down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

**TIPS**: To set default printer in all screens, right click on the selected printer and select **"Set as Default."** This will stick for the time that the user is logged onto the application.

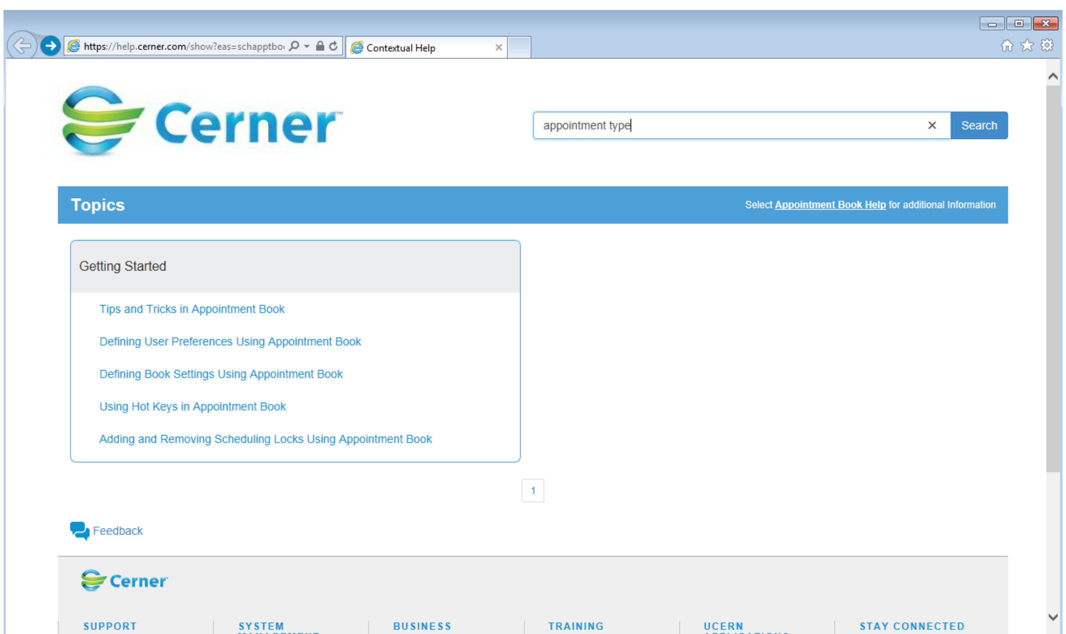
# Help Files

When you have a question about how to use something in the scheduling appointment book, or you see a message or error that you don't recognize, you can use your Help Files to search for the answers.

The Help Files are accessed in the scheduling book by clicking Help in the Task Bar. Then click HNA Help Topics.



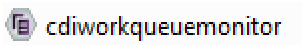

A Cerner Help Topics window will open. Look for the topic by typing in the Search box.




When you find the topic you are interested in, click on the link to read it.

# Appendix A - Tips & Tricks

### Beginning of the day

- Open “CDI Work Queue Monitor” and review/update work items
  
  
- Open the “Future Requests” Request List Inquiry to see if there are any new referrals that you can Schedule (or move to a Waitlist/Triage list).
- Open the Appointment Inquiry “Appt Check-In by Location” to prepare for checking-in patients.
- Check “Past Due Arrivals” Worklist in PMOffice to cancel/discharge encounters linked to No Shows.
- Check Deceased Report to review potential new vacant appointment slots (Weekly)

### Before You Leave For the Day

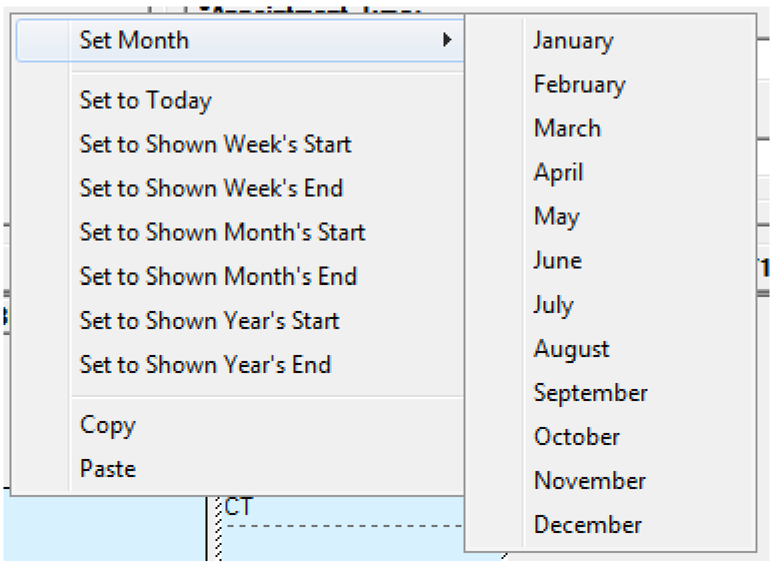
- Check your locks, and remove all locks by clicking the Lock Inquiry Icon.
- Review the Scheduling Grid to and see if you need to No Show any patients that were not Checked In.
- Check the “Future Requests” Request List to see if there are any requests that can be Scheduled.
- Check the “Reschedule Requests” to see if there are any appointments that should be rescheduled.
- Check your Displaced Appointment list and see if there are any appointments that need to be shuffled back into slots.
- Make sure you are logged out of all applications before leaving for the day.

### Bolded Calendar Days

- Calendar days are displayed in bold type to indicate availability for the selected resource.
- Remember that the appointment MUST be in the Work in Progress (WIP) in order for the system to determine available days.
- This is set by clicking **View > Options** on the Appointment tab and selecting **Mark Qualifying Days on Calendar**.

## Set Calendar

- To quickly set the calendar, right-click anywhere on the calendar and choose the desired option from the drop down menu that is displayed.
- You may set the calendar to a specific month, to the current day, the week's start, week's end, month's start, month's end, year's start, or year's end.
- You may also use quick keys (noted under the screen shot below) to accomplish these settings.
- These keystrokes may also be used within any date/time fields found within Scheduling Management.




**Quick Date Keys**

Use the **T** key to denote today's date in any date field.
Press the **N** key to denote the current time in any time field.
Use the **W** key to denote the beginning of the current week.
Use the **K** key to denote the end of the current week.
Use the **M** key to denote the beginning of the current month.
Use the **H** key to denote the end of the current month.
Use the **Y** key to denote the beginning of the current year.
Use the **R** key to denote the end of the current year.

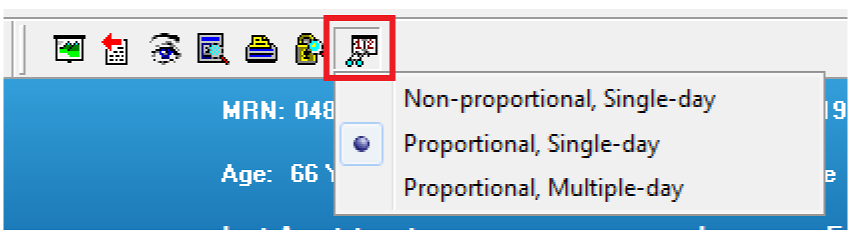
## Sizing Resources to the Screen

- To display these buttons, select the Action menu >Toolbars and select the Size toolbar.

- On the toolbar are the sizing buttons that allow users to quickly expand or reduce the sizing of the resources and slots without clicking **Book Settings > Properties**.
- Users can decrease column width, increase column width, increase slot size and decrease slot size.
- When you exit and re-enter the application, the settings revert back to the default.
- If you want the settings to be saved for the next time you enter the application, change the size options in the **Book Settings > Properties View** tab.

**Change View**

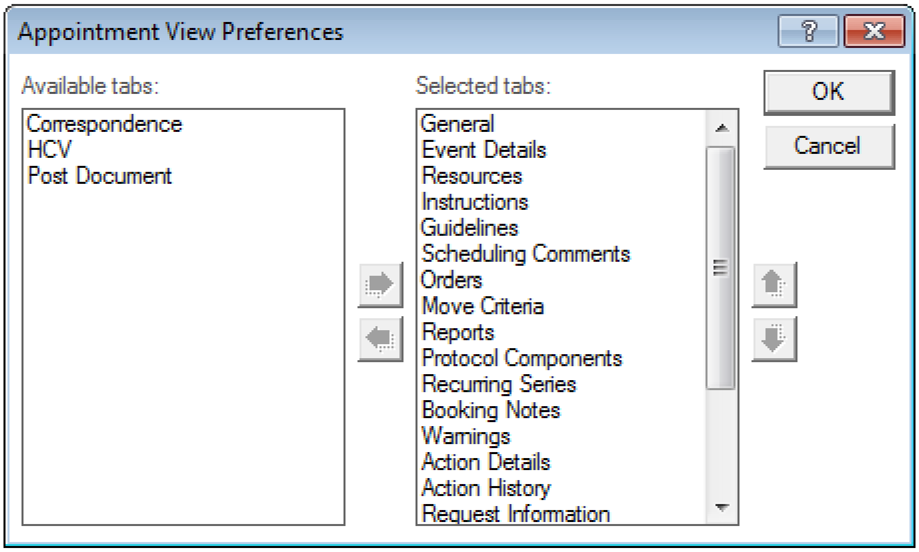
- You can change your view quickly by selecting the Change View icon on the toolbar without going into Book Settings > Properties.
- You must have the View toolbar selected from the Action menu.
- When you exit and re-enter the application, the setting is saved.

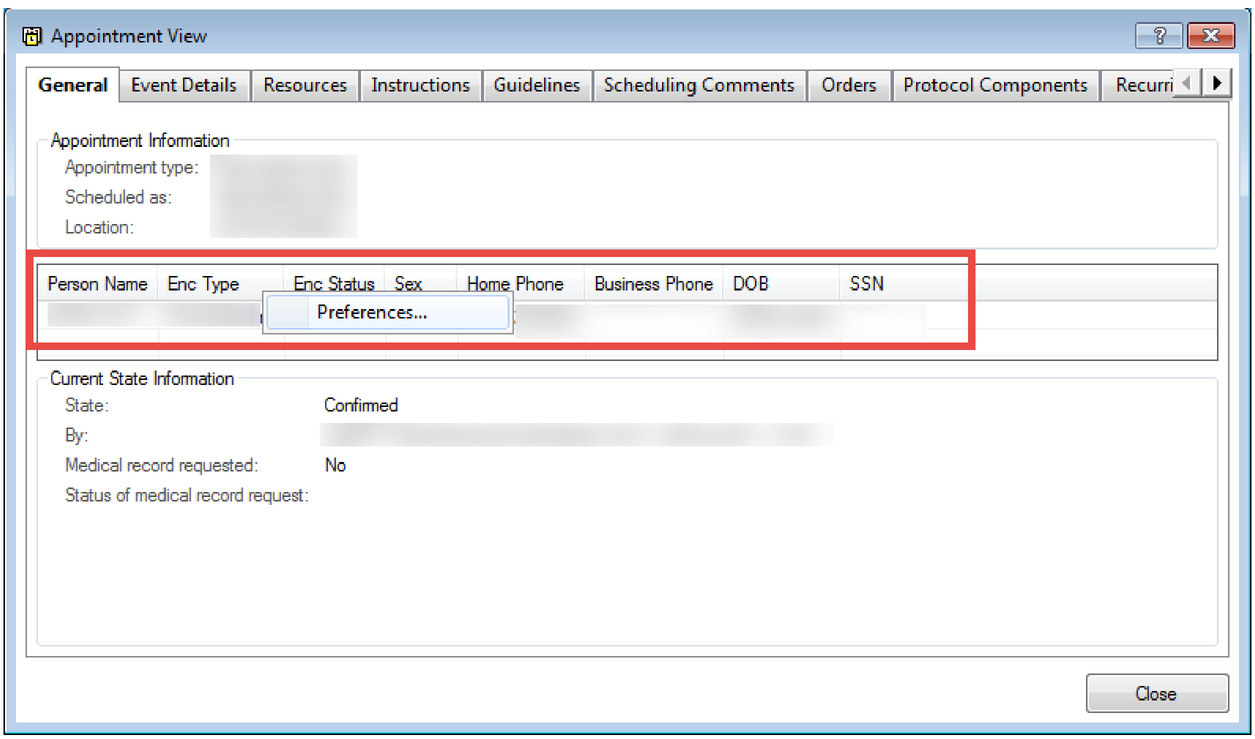



**View Patient Demographics**

- Double-click any appointment, and click the **General** tab.

You also have the ability to customize the fields that display within the General tab. To modify this, right-click on any of the headers and select Preferences. From the Column Preferences window, you have the ability to select and reorder columns as appropriate.



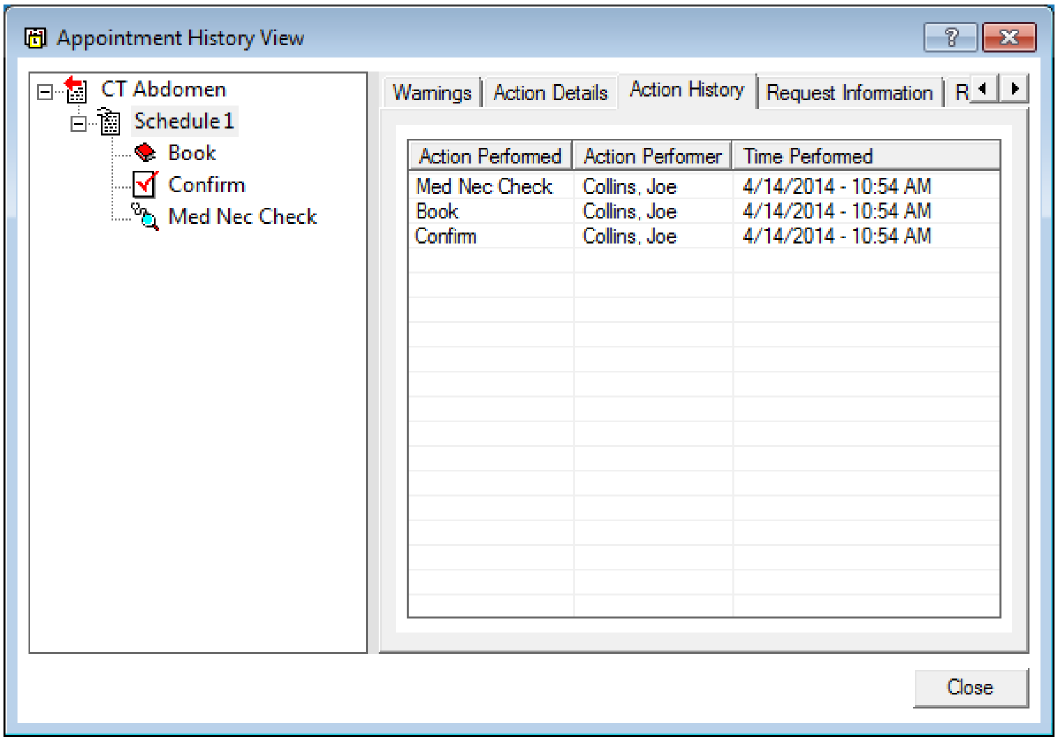




## Who Did What Concerning the Appointment (Appointment History View)

If you would like to find out why a certain appointment was scheduled or canceled (or any action) this information is available at a click.

Complete the following steps to access the Appointment History View:

- Find your appointment in the book or inquiry and right-click and select **Inquiry > Appointment History View**. This window lists actions performed on the appointment.
- Click the **Action History** tab to see who performed which actions on the selected appointment.
- If you would like to see the reason the action was performed, and any comments, click the **Action Detail** tab.

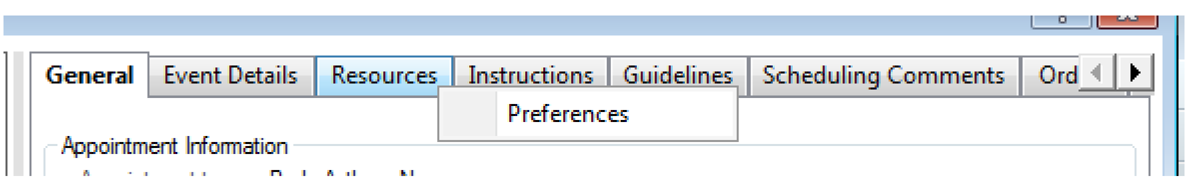



### Configuring the Tabs in Scheduling Appointment Book

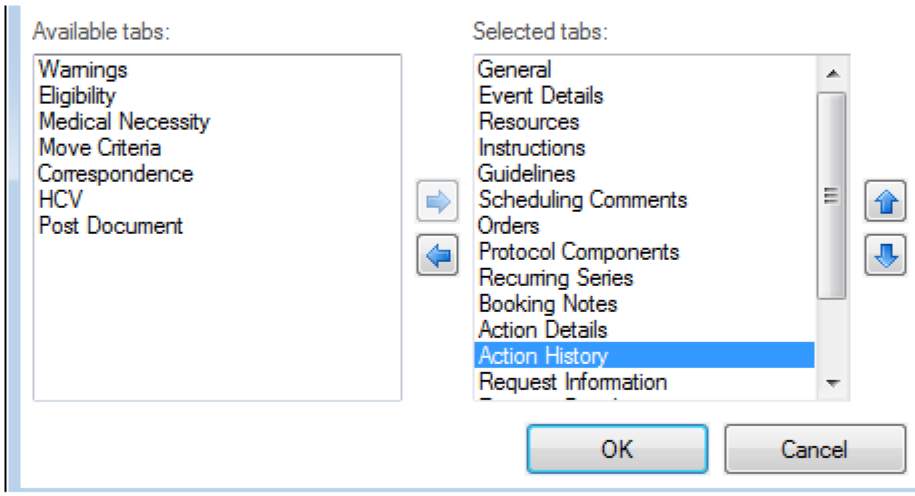
In Appointment Book, there are multiple places where you can configure the display and order of tabs.

Complete the following steps to change tabs:

- Right-click near the tabs and select **Preferences**.



- In the Preferences window, use the right and left arrows to select the tabs you want visible, and the up and down arrows to determine the order you want them to display. For example, if you want the Action History tab to display first, click **Action History** and press the **up arrow** until it shows first in the list.

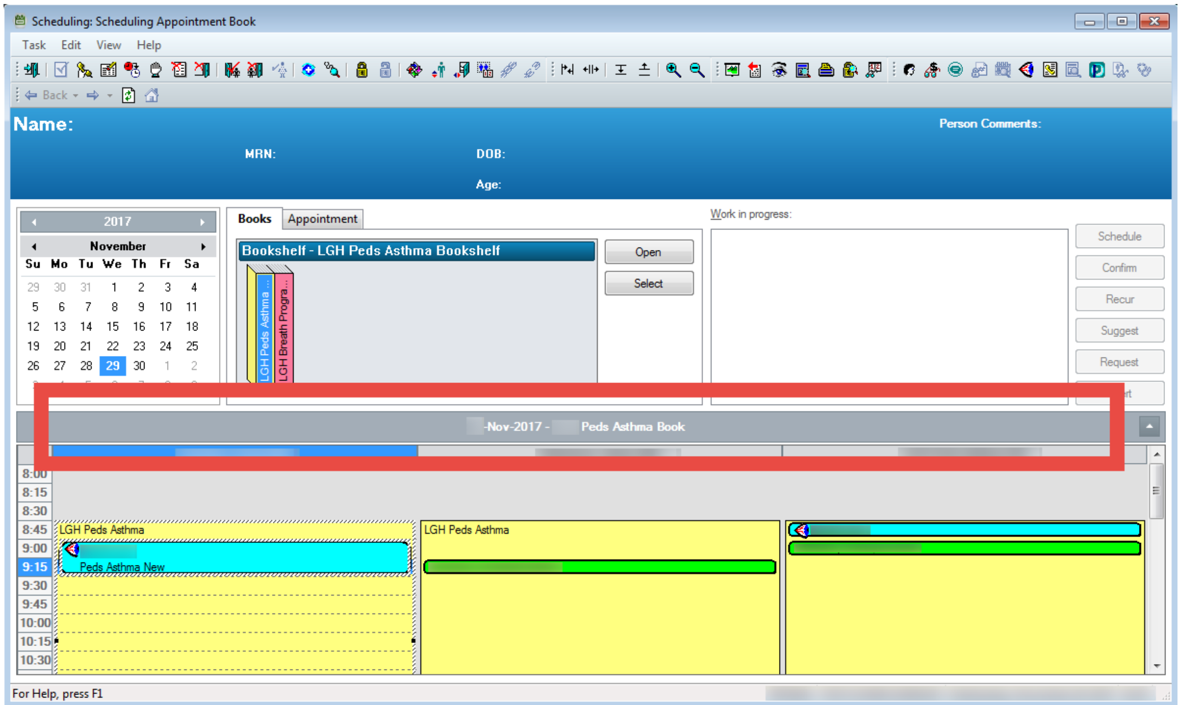



**NOTE:** This change is specific to only your username.

### Increase Viewing Size of the Grid

Complete the following steps to increase the viewing size of the grid:

To temporarily increase the viewing size of the Grid and hide the calendar, Appointment tab and WIP, click the date and resource time bar in the middle of the screen. Click the bar again (now at the top) to return to original settings.




## See a Resource's Week or Month Schedule

Highlight the resource you want to view and right-click, and select **Book Settings > View** > Week or Month*. A calendar-like view is displayed for that resource. The ability to change resources and dates are at the top of that window.

## Print Screen

In any screen in the Appointment Book, you have the option to click **Task > Print Screen** and print that screen. Keep in mind that you have the ability to expand or collapse the Grid view.

## Scheduling an Additional Appointment for a Current Patient

- From the Scheduling inquiry, right-click the patient appointment and select **Add New Appointment**. Appointment Details display with the patient name field pre-populated with the patient's name.
- From there you can fill in the remaining fields and complete the scheduling process.

# Appendix B – Advanced Tips & Tricks

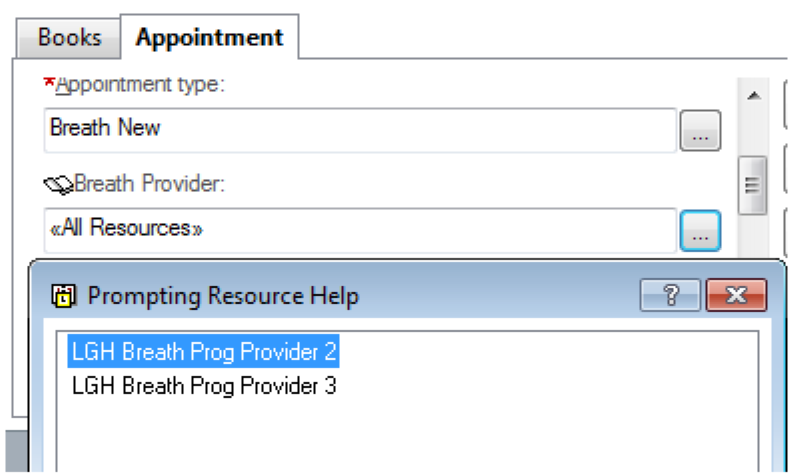
### Performing Actions from the Toolbar, Task Menu, Grid, or Inquiry

Within the Scheduling Appointment Book, there are multiple ways to perform actions on appointments:

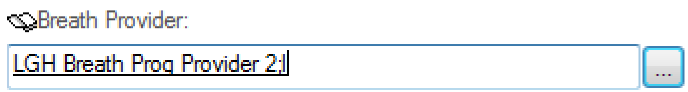
- Utilize the action icons located on the menu at the top of the screen. In order to see the action icons on the toolbar, you must have the Action toolbar selected from the Action menu.
- Position the pointer over the icons to see what action they are used for. The information is displayed in a tooltip near the icon and also in the status bar at the bottom of the screen.
- Use Task menu at the top of the screen
- Right-click the appointment in the book and select **Action**.
- Open Schedule Inquiry and search for appointments, then right-click the appointment.

### Selecting Multiple Resources When Using Resource Prompting

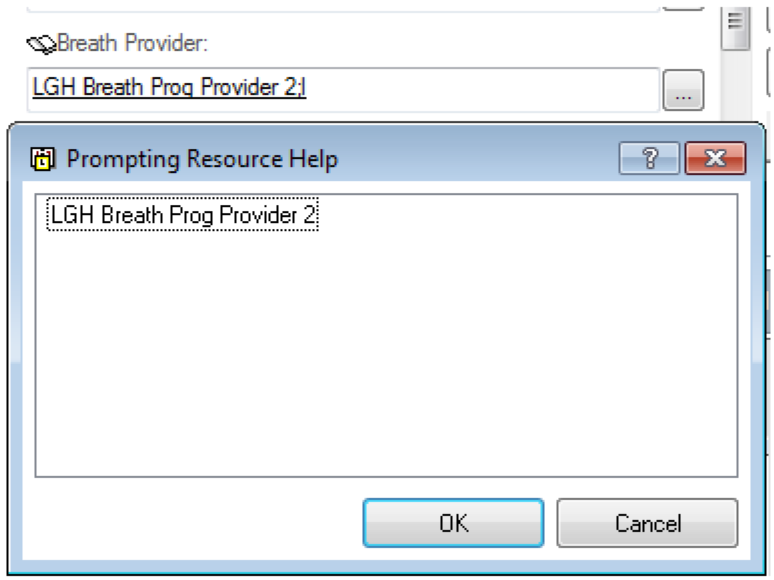
- If Resource Prompting is being utilized, multiple resources can be selected through the prompt. To begin, select the first resource in the Prompting Resource Help box and click **OK**.



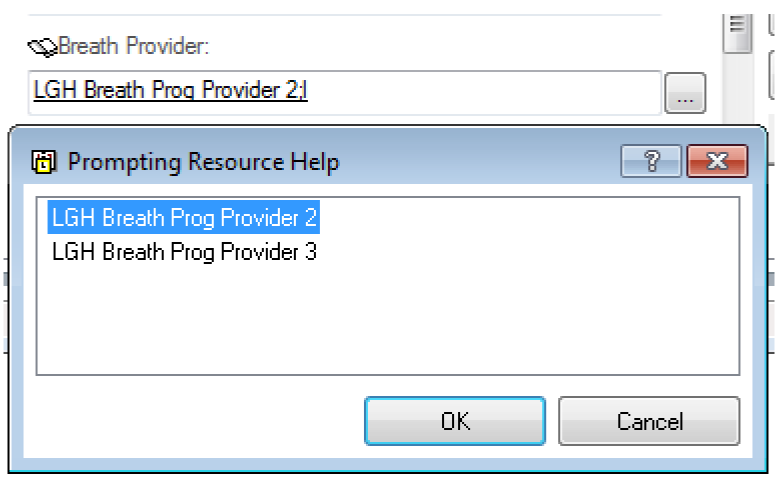

- Your resource is defaulted into the field. Next, enter a semi-colon and the first letter of your next resource and press **ENTER**.




- The Prompting Resource Help window is displayed with your original resource. Click **OK**.




- Next, an additional Prompting Resource Help box is displayed containing the resources from your Resource List with the letters entered. Select the needed resource and click **OK**.




- Both resources are now are defaulted to the field.

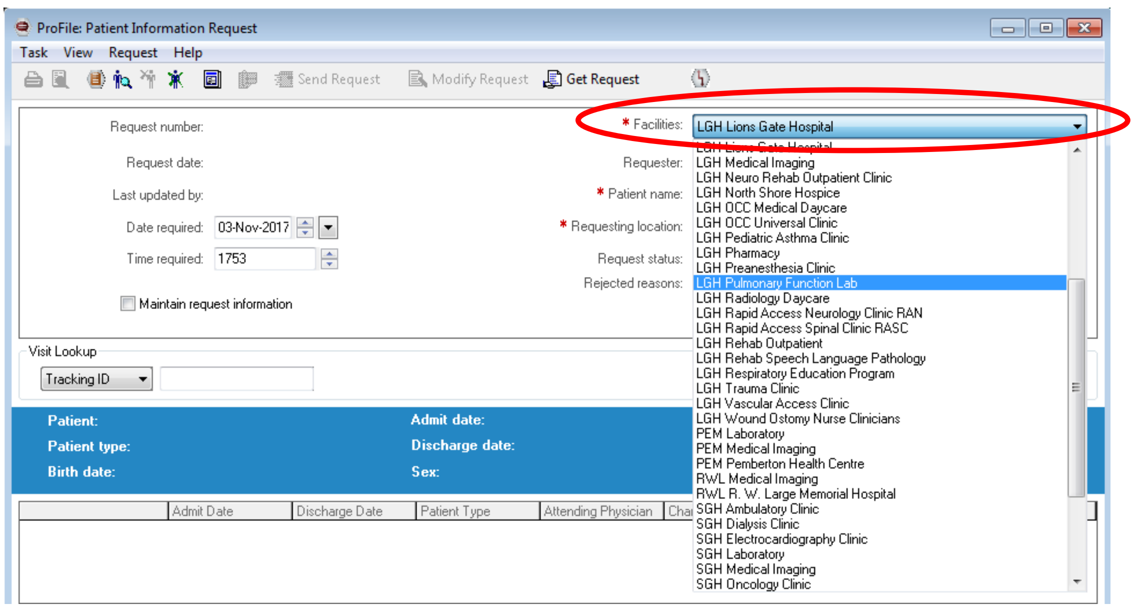
## Create List of Favorite Printers

- For those that routinely print to more than one printer, a list of favorite printers can be created so that a single printer can be selected from a short list rather than from all that are built in the domain.
- Printers added to a list of favorites in the Appointment Report window (and application), the Notification Report window, or the Report tab within the Itineraries tab of an action window can be accessed in all of those locations.
- To add a printer to your list of favorites, ensure that the filter type is set to All by right-clicking the printer list, and selecting **Filter Type > All**. Select the printer you want to add as a favorite, right-click it and select **Add to Favorites**. Continue selecting additional printers in this manner to add to your favorites list. After all desired favorite printers have been selected, right-click the printer list and select **Filter Type > Favorites**. The list displays only those that have been selected as favorites.

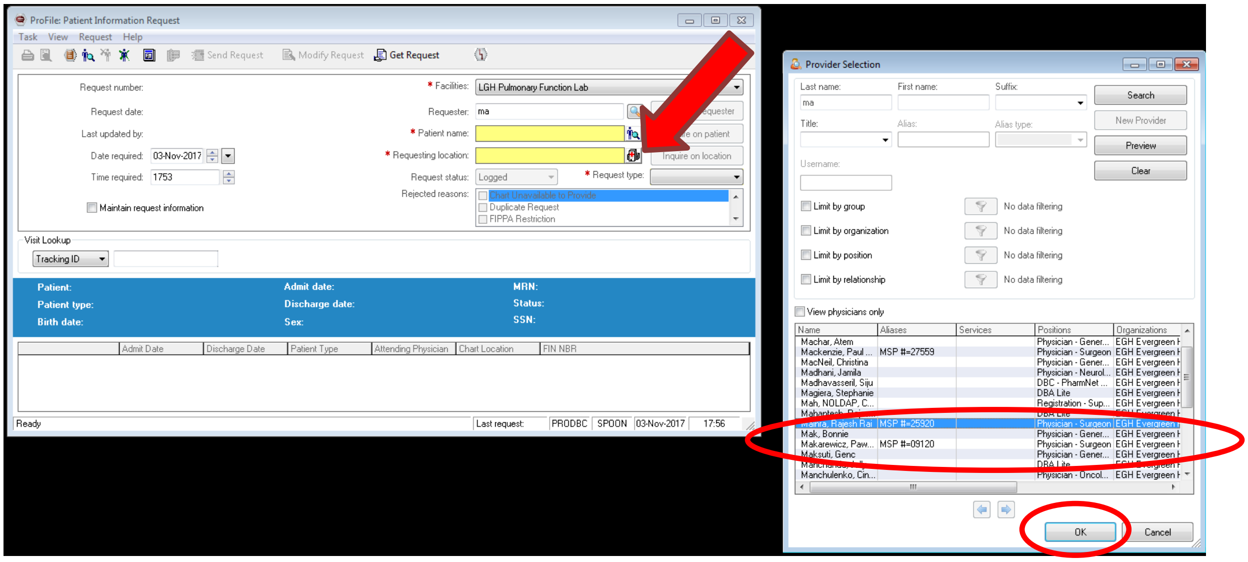
# Appendix C – Patient Information Request (PIR)

## Create / Send a Patient Information Request

1. Click the ***'Patient Information Request'*** icon  from your AppBar.
2. The **'Profile: Patient information Request"** window will appear.
    a. Note that the fields marked with a red asterisks * are mandatory fields.
    b. In the **'Facilities'** field, select the facility requesting the chart(s) from the drop-down list.



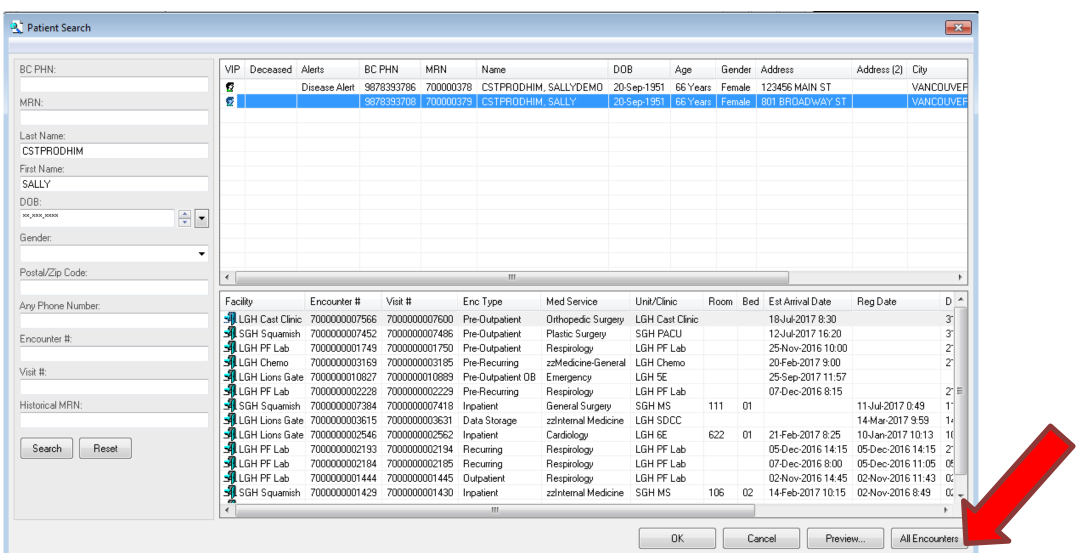

3. In the 'Requester' field, type the requester's name (last name, first name), then click the Search button . The Provider Selection window will pop-up. When you find the correct requester name, click on it to select it and click 'OK'.



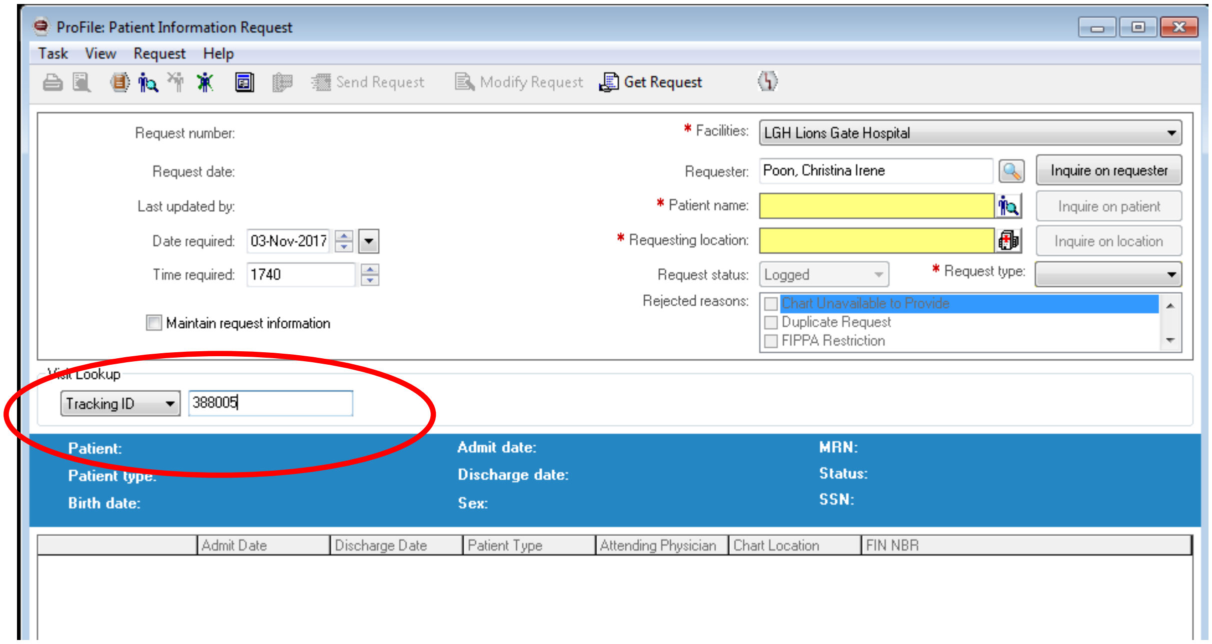

**Note**: The 'Requester' field may autopopulate if you have the used this name in the past.

4. In the **'Patient name**' field, type the patient's name (last name, first name), then click the Patient Search button . The Patient Search window will pop-up, select the appropriate patient and encounter, then click ***'OK'.***

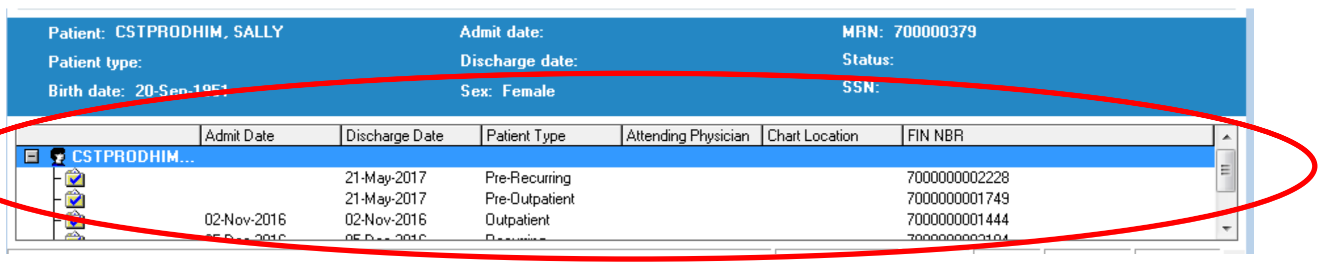
**Note:** If all encounters are required, click the button at the bottom of the screen that says ***'All Encounters'***.




**Note:** If you have the chart with a Cerner barcode label, you can scan the barcode in the "Visit Lookup' field under 'Tracking ID" to identify the patient.

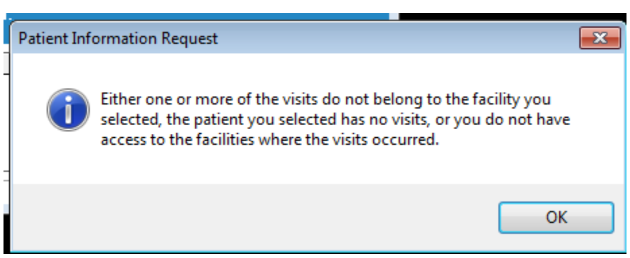


The patient's record will display at the bottom.

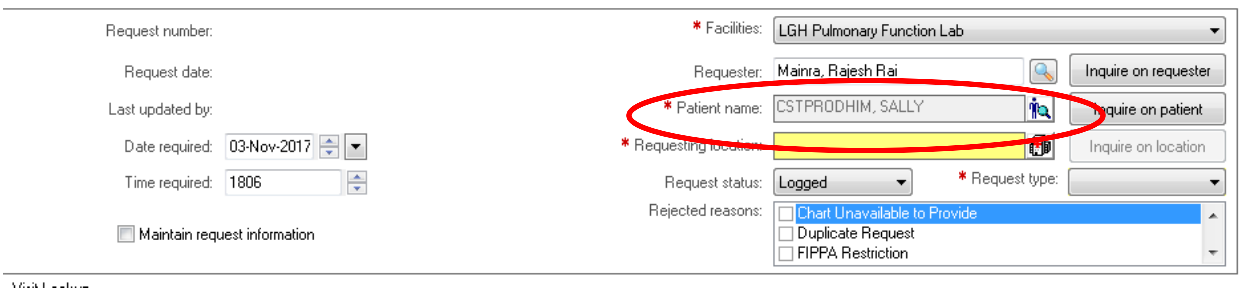


If the patient was seen at more than one facility (i.e. LGH and SGH), you will get this warning pop-up.

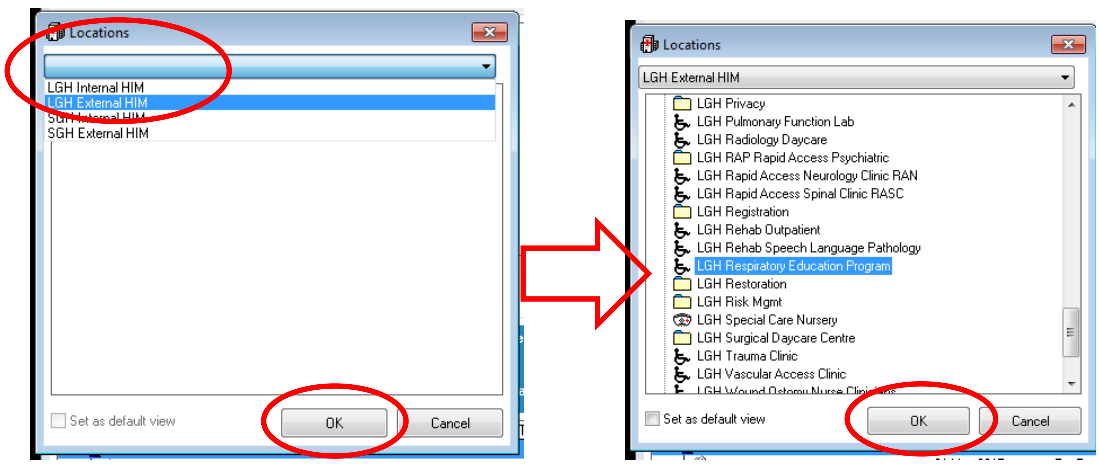
Click 'OK' to bypass.



5. In the **'Requesting location'** field, click the Requesting Location button 

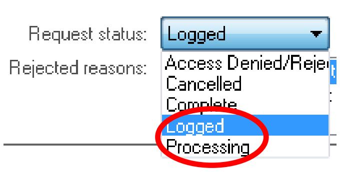



6. The **'Location'** window will pop-up, click the appropriate location, and click ***'OK'***.

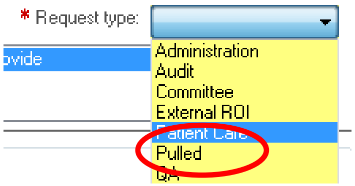



**Note**: To save this location as your default, click in  option.


7. In the ***'Request status:'*** field, select the appropriate request status (i.e. ***'Logged'***) from the drop-down box.

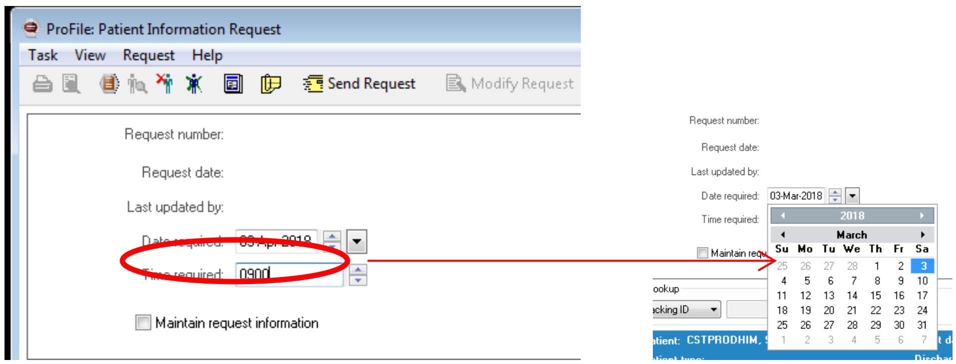


8. In the ***'Request type:'*** field, select the appropriate request type (i.e. ***'Patient Care'***) from the drop-down box.

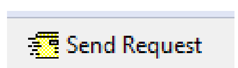



9. Enter the date/time the chart(s) are required.

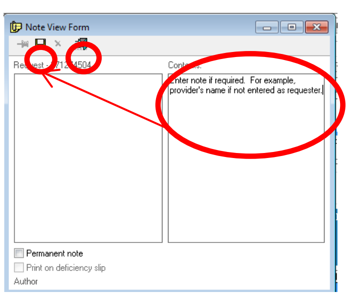
Note: To view a calendar, select the drop-down arrow button next to the date.




Note: If you are entering multiple requests, you can check the 'Maintain Request Information" box, which will hold the requesting location and requester for you.

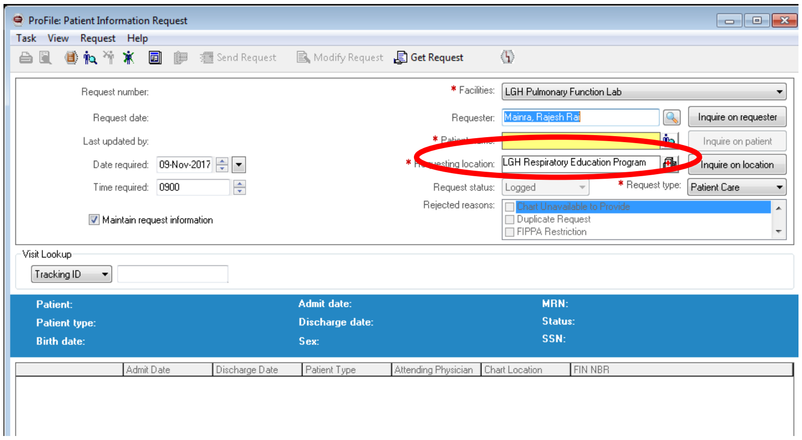
10. Click '**Send Request**' toolbar button 


11. The ***'Note View Form'*** window will pop-up, enter a note if required and click the Save button . If no note is required, click the Exit button 




12. If you checked the **Maintain request information** box, the PIR Request window will continue to appear and you can continue to request more patient charts (batch

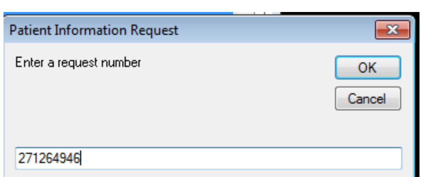
request) by populating the **Patient name** field and clicking the **Send Request button** until all your charts you need are requested.



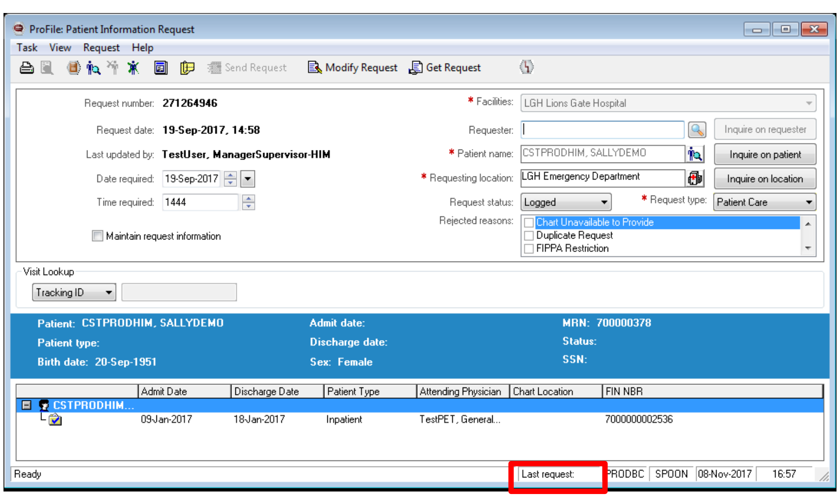

## Retrieve and Modify a Request

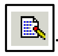
1. In the PIR Request window, click the **Get Request** button  on the toolbar
2. Type a **request number.**

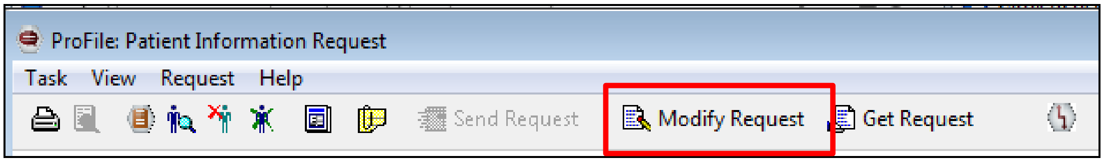





**Note:** The last request number can be found on the bottom of the screen.



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




5. The ***'Note View Form'*** opens, enter a note or click Exit .

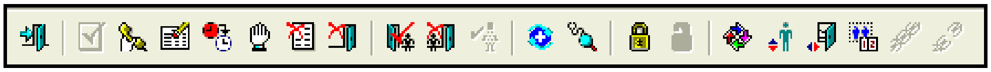
**NOTE:** Chart Request cut off time in 3Pm the day prior to the appointments

# Appendix D – Single Document Scanning

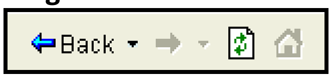
Work in progress

# Appendix E – Appointment Book Icon Glossary

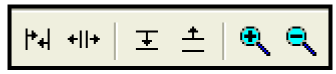
**Action Toolbar:**



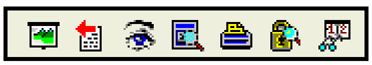
**Navigation Toolbar:**



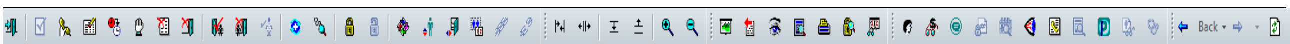

**Size Toolbar:**

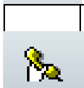
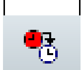
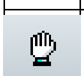
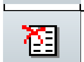
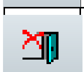
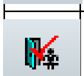
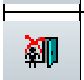
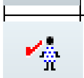


**View Toolbar:**



**Application Toolbar:**




| Icon | Label | Description |
|---|---|---|
|  | **Exit** | Closes the Appointment Book. |
|  | **Contact** | Records date and time of contact made with patient and is also a place to enter applicable comments concerning the contact. |
|  | **Modify** | Opens the Modify dialog box so you can modify the details associated with the appointment type. |
|  | **Reschedule** | When this option is chosen, the selected appointment is moved to the Work In Progress to be rescheduled to appropriate time and resource. |
|  | **Hold** | Changes the status of the appointment to hold so it can be completed at a later time. |
|  | **Cancel** | Cancels a scheduled appointment. |
|  | **No Show** | Indicates that a patient did not show up for their appointment. |
|  | **Check In** | Checks in the patient scheduled for the appointment. When this option is selected, the Check In dialog box opens. |
|  | **Check Out** | Checks out the patient to indicate that they have left the clinic. |
|  | **Patient Seen** | Marks the patient as seen in order to track the wait time for a patient's appointment. |
|  | **Lock** | Locks the appointment so others cannot perform actions on it. |
|  | **Unlock** | Unlocks the appointment so others can perform actions on it. |

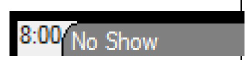
| | | |
|---|---|---|
| | **Shuffle** | Opens the Appointment Shuffle Criteria box to move appointments on the same day, without having to go through all rescheduling steps. |
| | **Swap Resources** | Moves all of the appointments from one Resource to another for a specified day. |
| | **Create Group Session** | Creates a group session to be used for group appointments |
| | **Link** | Links two or more appointments together for a patient to warn user if any action is performed on one of the linked appointments |
| | **Unlink** | Unlinks appointments that were linked. |
| | **Decrease Column Width** | Decreases the width of the columns within the scheduling grid. |
| | **Increase Column Width** | Increases the width of the columns within the scheduling grid. |
| | **Decrease Slot Size** | Decreases the slot size by modifying the time interval. |
| | **Increase Slot Size** | Increases the slot size by modifying the time interval. |
| | **Zoom In** | Increases the size of the scheduling grid. |
| | **Zoom Out** | Decreases the size of the scheduling grid. |
| | **Appointment View** | Opens the Appointment View dialog box so user can view details associated with the appointment. |
| | **Appointment History View** | Opens a dialog box so user can view details associated with the appointment. |
| | **Appointment Inquiry** | Opens the Schedule Inquiry window so user can launch a person, resource, or location inquiry. |
| | **Request List Inquiry** | Opens the Request List tab of the Schedule Inquiry window so the user can launch a request list inquiry. |
| | **Appointment Report** | Opens the Schedule Report window so the user can view or print person, resource, or location schedule reports. |
| | **View Locks** | Opens the Locks Held By dialog box to display pending appointment information, which is locked in the system by the user. |
| | **Change View** | Changes the view of the scheduling grid. |
| | **Person Management** | Opens the Person Management application to search for a person in the database or to add a person to the database. |
| | **Launches PMLaunch** | Opens the PMLaunch application and user selects the conversation you want to launch from the list in the Available Conversations dialog box. |
| | **Show Allergies** | Opens the Allergy window so users can view allergy information for the selected patient. |

| | | |
|---|---|---|
| | **Patient Information Request** | Opens the Patient Information Request window so user can request paper chart from Health Records. |
| | **Launch PowerChart** | Opens PowerChart, where user can view orders and documentation. |
| | **Back** | Takes user Back to the previous screen. |
| | **Forward** | Takes user Forward to the previous screen. |
| | **Refresh** | Updates the displayed information to reflect any changes. |
| | **What's This** | Takes the user to a contextual help page. |
| | **Request Information** | When in the Request List with an order selected, it displays details about the request. |

# Appendix F – Appointment Book Button Glossary

| | | |
|---|---|---|
| **BOOKS TAB:** | | |
| Open | **Open** | Will **Open** the highlighted book on the bookshelf (double clicking the book performs the same task). |
| Select | **Select** | Allows user to **Select** a new Bookshelf. |
| **APPOINTMENT TAB:** | | |
| Move | **Move** | Once all mandatory fields are completed in the accept format, the **Move** button places the event details in the WIP. |
| Next | **Next** | The **Next** button is used to proceed to the next appointment to be scheduled. |
| Clear | **Clear** | The **Clear** button is used to clear the information displayed. |
| NKA | **No Known Allergies** | If a person has no allergies recorded, the **NKA** button will be displayed. |
| Allergies | **Allergies** | If a person has allergies recorded, the red button with the word **Allergies** is displayed. |
| **WORK IN PROGRESS:** | | |
| Schedule | **Schedule** | Rather than drag and drop or suggest, a dialogue box appears for the user to **Schedule** the appointment. |
| Confirm | **Confirm** | Once the appointment is scheduled, select **Confirm** in the WIP box in order to confirm the request. |
| Recur | **Recur** | Appointments can be scheduled to **Recur** by setting up a recurrence frequency. |
| Suggest | **Suggest** | Will **Suggest** times the appointment could be scheduled without requiring user to locate available slots manually. |
| Request | **Request** | Does not schedule appointment and instead adds it to a **Request** list. |
| **PERSON SEARCH:** | | |
| Search | **Search** | Once the required search criteria are entered, select **Search** to find the patient in question. |
| Reset | **Reset** | Select in order to **Reset** the entered criteria. |
| Preview... | **Preview** | To **Preview** a quick view of the patients registration information. |
| Add Encounter | **Add Encounter** | Select **Add Encounter** to create a new encounter when scheduling an appointment. |
| Modify | **Modify** | To **Modify** and existing encounter, the Add/Modify Person conversation will open. |
| MPI Search | **MPI Search** | The **MPI Search** is used to ensure the user has the most up-to-date demographic data for the patient. |

# Appendix G – Appointment Types Display Schemes

| APPOINTMENT TYPES DISPAY SCHEMES | | | |
|---|---|---|---|
| **Appointment Status** | **Definition** | **Color** | **Example** |
| **Cancelled** | The appointment is cancelled and a cancellation reason is required. | Red |  |
| **Checked In** | Checked in appointment. | Green |  |
| **Checked Out** | Checked out appointment. | Purple |  |
| **Confirmed** | An appointment that has been confirmed. | Light Blue |  |
| **Hold** | An appointment that is on hold. | Orange |  |
| **No Show** | Patients who did not present to their scheduled appointment | Grey |  |
| **Pending** | A pending appointment. | Yellow |  |
| **Rescheduled** | An appointment that has been rescheduled. | Blue |  |
| **Scheduled** | The spot is held, but the appointment is not yet confirmed | Dark Green |  |
| **Secured** | User does not have the required security rights to view any information related to this appointment. | Grey |  |

# Appendix H – Scheduling Demographic Bar


| Term | Definition |
|---|---|
| **Name** | The name that is supported by documentation such as birth certificate, passport or SIN (also known as Legal name). |
| **Preferred Name** | Name a person wishes to be addressed by or additional names the patient is known by. |
| **Disease Alert** | Disease Alerts are patient information around a disease process that should be quickly conveyed to users to prevent possible transmission of disease. It may not otherwise be easily discovered and may harm the patient, care Provider, and/or the general population if not know. (E.g.: Could include TB, MRSA, etc.) |
| **MRN** | Medical Record Number - Unique Clinical Information System number to represent a single client. Also known as chart number. |
| **Process Alert** | An alert placed at the person level in registration - information that should be quickly conveyed to care Providers to prevent critical physical or mental harm to the patient or care Providers. This information may not otherwise be easily discovered and may negatively affect the patient, care Provider, or others if not known. |
| **BC PHN** | BC Personal Health Number - Numerical lifetime identifier used in the specific identification of an individual client or patient who has any interaction with the BC health system. |
| **DOB** | Date of Birth - The calendar date on which a person was born as reported upon registration and displayed using the 'Day-Month-Year' format. |
| **Age** | Age is a derived variable that represents how old the patient is at the time of admission and is calculated using the Birthdate. |
| **Gender** | Gender is the patient's identification as either male or female upon registration. |

| | |
|---|---|
| **Language** | The language that patient speaks, if not English. |
| **Interpreter Required** | Identifies whether client requires an interpreter for communication. If “No” is selected in the Interpreter Required field, staff must determine and enter in the Primary Language field what language the client is most comfortable discussing their medical condition in. |
| **Person Comments** | Non Clinical information is communicated to the scheduler. |
| **Location** | The location that the patient is registered to. |
| **Preferred Phone** | The preferred phone number to be contacted at. |

# Appendix I – Definitions

| Term | Definition |
|---|---|
| **Accept Format** | Data fields specific to an Appointment Type, to assist in the collection of information at the time of appointment scheduling. Accept formats are additional questions (required or optional) to be asked and answered at the time an appointment is scheduled. |
| **Adding Slots** | To add slots for a day, right click on the scheduling appointment book, select slots and the Add Slots. |
| **Admitting Provider** | The Admitting Provider is a member of the medical staff who has inpatient admitting privileges and has primary responsibility for the care of the patient at time of an inpatient admission. Recording the Admitting Provider is mandatory as per the Hospital Act and the information is reported to CIHI. |
| **Age** | Age is a derived variable that represents how old the patient is at the time of admission and is calculated using the Birthdate. |
| **Appointment** | A period of time booked for a patient or resource during which a specific activity will take place. Activities can be described by the selected appointment type or the textual appointment description. |
| **Appointment Book** | Provide schedulers a logical grouping of resources. As a user, they can access an Appointment Book which will present all the resources within the book to provide a quick and easy view of the resource availability and scheduled appointments. |
| **Appointment Details** | In order to view specific details associated with an appointment, click the appointment and select Inquiry, Appointment View from the menu. This will open the Appointment View dialog box that displays specific information associated with the appointment. |
| **Appointment History** | In order to view specific details associated with the history of an appointment, right click the appointment, and select Inquiry, then Appointment History View from the menu. This opens the Appointment History View Box that displays specific information associated with the states that have been associated with the appointment. |
| **Appointment Link** | Allows a user to manually tie two unrelated appointments together for a particular patient situation. Like with Protocols or Recurring appointments, the system will recognize these appointments are linked and warn the user if any action is performed on one of the linked appointments. You have two options for linking appointments: 1) Link to an existing (previously confirmed) appointment or 2) Link to a new appointment. |
| **Appointment** | Schedule Inquiry window allows you to enter the parameters required to |

| | |
|---|---|
| **Inquiry** | 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. |
| **Appointment Location** | The physical facility, building or ambulatory location where the appointment will take place. |
| **Appointment Request** | A request to book an appointment for one or more resources. |
| **Appointment Schedule** | A list of booked appointments for a person or resource. |
| **Appointment Scheduling Range** | Within the View tab in options, it allows the user to select the time frame that the system will allow the user to schedule - by setting at 0 and 0, there is no restriction (changing the default setting is not recommended). |
| **Appointment Synonym** | Within the View tab in options, it allows the user to select a single appointment type that they consistently schedule so that it defaults into the appointment type field (changing to the default setting is not recommended). |
| **Appointment Type** | Definable reasons for patients to visit the clinic or location. Depending on the clinic or department, multiple resources may need to be booked within the same booking. |
| **Attending Provider** | The Attending Provider has primary and legal responsibility for the care of the patient during the patient's inpatient admission or outpatient visit. In addition, the Attending Provider assumes responsibilities for placing tests, procedures, or exam orders, which can directly impact the patient's continuity of care. |
| **Auto Discharge** | Outpatient Encounter Types will be automatically discharged (auto-discharged) by the system. The discharge date and time will be set to registration date at 23:59h. |
| **Availability Bar** | Can graphically depict conflicts or available times during appointment scheduling. |
| **Availability Conflict** | A system-detected difficulty in scheduling one or more requested appointments, which could be the result of person or resource availability checking. |
| **Batch Reschedule** | Simultaneously reschedules multiple appointments while by-passing the Work-In-Progress window. |
| **BC PHN** | BC Personal Health Number - Numerical lifetime identifier used in the specific identification of an individual client or patient who has any interaction with the BC health system. |
| **Block Scheduling** | With scheduling blocks, you can determine a release time for that slot or block of time to expire into a different slot. Reports can be run that analyze the data to determine the efficiency and utilization of the resources reserved in these blocks. |
| **Book Properties** | Properties accessed by right clicking on the book, selecting book settings |

| | |
|---|---|
| | and then properties. |
| **Book Settings** | Determine the view of the appointment book. They can be accessed by right clicking in the appointment book and selecting "Book Settings." |
| **Bookshelf** | This contains the Scheduling Appointment Books that are used to schedule and manage appointments. |
| **Cancel** | If this option is selected in the View tab, cancelled appointments for all resources will appear on the appointment grid. |
| **Canceled State** | A previously scheduled appointment type that has been removed from both resource and patient schedules and no longer occupies time for the originally booked patient and resources. |
| **Cancelling Appointments** | The process to change the appointment's status when a patient or resource calls to cancel an appointment. |
| **Check In** | A way to keep track of which patient has shown up for their appointments and which have not. It's also an easy way for a tech, nurse, or someone else in the department to know which patients have arrived. |
| **Check Out** | A way to track when the patient's appointment is completed and when they have left the clinic/unit. (The majority of clinics will not use this feature). |
| **Client** | A Client is an individual consumer of healthcare services. A Client can be a patient, resident or tenant. |
| **Client Identifier** | A Client Identifier is a data element that is used to identify a Client (e.g. Medical Record Number, Unique Record Number, and Personal Health Number). |
| **Clinical Documentation** | Clinical Documentation is the creation of a digital or analog record detailing a medical treatment, medical trial or clinical test.<br>Clinical documents must be accurate, timely and reflect specific services provided to a patient. |
| **Consulting Provider** | Some hospitals may have the option to include consulting Provider information to record multiple or secondary Providers that are involved in the care of the patient. Depending on the hospital, physicians may or may not require hospital specific privileges to be a recorded as a consulting Provider. The consulting Provider also refers to physicians who are in a specialty and who have been asked to give an opinion or provide additional care to the patient. |
| **Conversation** | A Cerner Conversation is an electronic form designed to perform Admission, Discharge and/or Transfer (ADT) functions, tasks or activities. Conversations can use Rules to enforce mandatory entry of data elements, to conditionally show or hide data elements, or to format entry within data elements in order to support data quality or business practice. Conversations may be accessed from different Cerner modules, |

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| | including but not limited to: PMOffice, PMLaunch or PowerChart |
| **Date Field Type** | Date field types allow you to capture date information. |
| **Date of Birth** | The calendar date on which a person was born as reported upon registration. |
| **Default Location** | Within the View tab in options, it allows the user to select a specific location if they consistently schedule to that one location. |
| **Default Schedule** | One or more slot types that are used to predefine the use of time for a resource. |
| **Demographics** | Information defined for the person or encounter. Demographic information includes elements such as the current location, alias identification values, age, birth date, gender, and maiden name. |
| **Demographics Bar** | A colored bar that spans across the top of the scheduling appointment book displaying patient demographic information such as name, MRN, date of birth, gender, age, etc. |
| **Disease Alert** | Patient information around a disease process that should be quickly conveyed to users to prevent possible transmission of disease. It may not otherwise be easily discovered and may harm the patient, care Provider, and/or the general population if not know. (E.g.: Could include TB, MRSA, etc.) |
| **Displaced Appointments** | In situations where default schedule templates are modified and reapplied, or where slots are manually removed, use of a request list at the action of Displaced can be used to better accommodate the rescheduling process of displaced appointments. When appointments are displaced, the system automatically generates a request for the action of Reschedule.<br><br>Once the appointments have been displaced, it is necessary for the appointments to be placed back into a slot. Compare each of the appointments on the request list to the displaced appointments displayed on the grid area of Scheduling Appointment Book. This allows you to see if the appointments can be shuffled back to the same time and resource from which they were originally displaced. Once the appointments are shuffled back into slots, they are removed from the Displaced Request Queue. Any remaining appointments on the request queue need to be rescheduled by contacting the patients. |
| **Display Binder** | An option to make the binder on the left side of the appointment book visible or not. |
| **Display Scheme** | Display schemes enable users to define the display attributes of the following visual objects: appointment types, appointment slots and appointment books. |

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| **Display State** | Defines the color of the appointment type as it appears on the scheduling grid and changes as the appointment type state changes. |
| **DOB** | Date of Birth - The calendar date on which a person was born as reported upon registration and displayed using the 'Day-Month-Year' format. |
| **Downtime** | Any period of time during which the system is unavailable to users. The cause is not relevant. |
| **Drag-and-Drop** | Selecting the primary resource from the Work in Progress window and dragging it down to a desired date and time within the scheduling grid. |
| **Drop-Down List** | A list box that displays a list of selectable values (drop-down list) when you click the attached down arrow button. |
| **Ellipsis** | A symbol resembling three periods (...) indicates that another window or dialog box containing additional information will be displayed. An ellipsis can be used on a button, usually beside a box, or displayed beside a menu command. |
| **Empty Schedules** | If this option is selected in the View tab, it gives you the ability to view Providers that do not actually have a template or schedule applied for that day selected. |
| **Encounter** | A single patient interaction and/or a specific visit. In Cerner, an encounter is required before orders can be entered; results attached; and documentation dictated or attached. In scheduling, every scheduled appointment must be linked to a pre-encounter. |
| **Encounter Number** | An internal number assigned by the system for each encounter. |
| **Encounter Type** | Each encounter is assigned an Encounter Type to indicate the client's current level of care, or the client's visit type - the two main Encounter Types are Inpatient and Outpatient. |
| **EMPI** | External Master Patient Index (AKA: Enterprise Master Patient Index) - A Ministry of Health Services database containing demographic information and personal health numbers of all clients of the publicly funded health system in BC. It stores in its own database, client demographic attributes such as name, address, gender, date of birth, to determine which records in different systems refer to the same client. |
| **Follow Up Appointment** | A secondary meeting between a health care professional and a patient for diagnostic, therapeutic, or consultative reasons, usually a scheduled appointment in a professional office. The meeting can be first time with the specific health care professional but must be related to an existing chief complaint. |

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| **Free Text Field** | Free-text field types allow you to specify a free-text response. |
| **Gender** | Gender is the patient's identification as either male or female upon registration. |
| **Group Appointment** | Used to book multiple patients for the same appointment at the same time. This is typically used in settings where group sessions or classes are offered and the instructor only has one appointment on their calendar instead of one appointment per patient. |
| **Group Session** | Prior to scheduling a Group Appointment Type, a Group Session must be created. |
| **Guideline** | Provide the scheduler with information regarding the appointment being scheduled. A guideline window is displayed to alert the user; however, this does not prevent the user from continuing with the scheduling process. |
| **Help Files** | When you have a question about how to use something in the scheduling appointment book, or you see a message or error that you don't recognize, you can use your Help Files to search for the answer. |
| **Hot Keys** | Pressing **ALT + any underlined letter** will perform that action the same as clicking with the mouse. |
| **Instructions** | Used to communicate to the patient instructions that should be followed prior to the procedure. Schedulers can review the instructions and provide them to the patient. |
| **Interpreter Required** | Identifies whether the patient requires an interpreter for communication. If "No" is selected in the Interpreter Required field, staff must determine and enter in the Primary Language field what language the client is most comfortable discussing their medical condition in. |
| **Language** | The language that patient speaks, if not English. |
| **Large Buttons** | If this option is selected in the View tab, the icons in the tool bar will appear larger in size. |
| **Location** | The location that the patient is registered to. |
| **Location Group** | A group of locations by which you can filter a list of tasks to be performed. For example, if you work in the locations 2N and 3N and these are defined together as a group, you could select this group when |

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| | requesting your list of tasks. |
| **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 Scheduling Appointment Book. |
| **Locks** | Sometimes a slot will become locked when a user has tried to schedule an appointment to the slot, but for whatever reason it was not completed. The slot may appear open, but it will not allow you to book an appointment. If you get a warning that a slot is locked, look to see who the conflict was created by, then have that person unlock the slot. |
| **Medical Service** | Used to specifically define the patient's encounter according to which service is being rendered to the patient at that time. This field may be updated throughout the duration of the encounter. This information is a required field in Cerner, but is not required for billing. |
| **Medical Service Code** | A code that classifies patients according to the type of medical treatment they are receiving at your institution. |
| **Most Responsible Provider (MRP)** | Except for day surgery cases, this must be a physician who is responsible for the care and treatment of the patient for the majority of the visit to the health care facility (for example, longest length of stay). The most responsible physician assumes responsibility for any treatment provided resulting from his or her written or verbal orders. |
| **MRN** | Medical Record Number - Unique Clinical Information System number to represent a single client and is also known as chart number. |
| **MSP** | Refers to the Medical Services Plan. The MSP insures medically-required services provided by physicians and supplementary health care practitioners, and diagnostic services. |
| **Multiple Appointment Type Scheduling** | The ability to schedule more than one appointment for a patient without entering in all of the same information twice. Once all of the information for the first appointment has been entered, select the Next button. |
| **Name** | The name that is supported by documentation such as birth certificate, passport or SIN (also known as Legal name). |
| **New Appointment** | A first time meeting between a health care professional and a patient for diagnostic, therapeutic, or consultative reasons for a new chief complaint, usually a scheduled appointment in a professional office. A referral from another health care professional needs to be received by the clinic. |
| **No Show** | If a patient does not appear for their scheduled appointment, the appointment status can be changed to No Show as a way to track patients who did not present to their scheduled appointments. |
| **On-Hold Appointments** | If this option is selected in the View tab, all appointments that have not been confirmed but also not cancelled for a resource will appear on the appointment grid. |
| **Orders to** | Orders to Scheduling is the process that has an order (which is placed in |

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| **Scheduling** | PowerChart) automatically generate an appointment request on a Request List in the Scheduling application. A scheduler can then view the requests and schedule them according to the Provider's request. |
| **Outpatient** | An individual who receives services from a hospital, diagnostic and treatment centre, clinic or dispensary for medically-necessary diagnosis and/or treatment but who is not admitted as an inpatient and does not occupy an inpatient hospital bed. |
| **Override Suggested Date and Time** | Selecting this option tells the system to ignore the requested date range. This option is only available when scheduling multiple appointments where at least one of those appointments has a requested range defined. |
| **Patient Demographics** | Patient-level information that carries forward from one encounter to another. Patient demographic information includes data such as name, age, date of birth, gender and address. |
| **Peer Mentors** | Hospital staff that have been trained for a longer duration than general end-users. They have a good understanding of the system and hospital workflows and are great resources to pair up with. |
| **Person Comments** | Non Clinical information is communicated to the scheduler. |
| **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 Scheduling Appointment Book. |
| **Personal Health Number (PHN)** | The Personal Health Number is a numerical lifetime identifier used in the specific identification of an individual client or patient who has any interaction with the BC health system. It is assigned by the Client Registry System to one client and may not be assigned to any other client at any time. |
| **Physician** | A registrant of the College of Physicians and Surgeons of British Columbia entitled under the Health Professions Act to practise medicine and to use the title "medical practitioner". |
| **PowerChart** | The Cerner Millennium solution that is the enterprise clinician's desktop solution for viewing, ordering and documenting the electronic medical record. |
| **Preferred Name** | Name a person wishes to be addressed by or additional names the patient is known by. |
| **Preferred Phone** | The preferred phone number to be contacted at. |
| **Preparations** | Used to communicate to the patient preps that should be followed prior to the procedure. Schedulers can review the instructions and provide them to the patient or referring physician office. |
| **Pre-Registration** | Clients who are scheduled for a future appointment may be Pre-Registered. This will allow documentation and orders to be attached to the encounter prior to the client presenting. If patient information has not been validated directly with the patient, these pre-registrations will |

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| | be placed on an incomplete status. Once the patient has validated their information, the pre-registration status may be updated to complete. Once complete, the pre-registration will be sent up to EMPI. |
| **Pre-Reg Status** | An incomplete registration status is when the patient is not there in person and you are not able to reach them by phone. |
| **Priority** | The priority is the level of importance assigned to the appointment requiring scheduling. |
| **Primary Care Provider (PCP)** | A Primary Care Provider (AKA: Family Provider) is a provider who organizes and provides continuing care within the community to ensure a patient’s health is maintained. A Primary Care Provider can be, but is not limited to, a medical caregiver, a general practitioner, a nurse practitioner, or a fellow. |
| **Process Alert** | An alert placed at the person level in Registration - information that should be quickly conveyed to care Providers to prevent critical physical or mental harm to the patient or care Providers. This information may not otherwise be easily discovered and may negatively affect the patient, care Provider, or others if not known. |
| **Proportional View** | The default and recommended view is Proportional View that allows the user to see all of the breaks in the day on the scheduling grid; the times are at the left hand side of the book. |
| **Protocol Appointment Types** | Enables you to schedule one appointment type that includes multiple appointments with<br><br>Pre-defined time ranges separating them. An example would be when a specific amount of time must elapse between appointments. |
| **Provider** | Anyone who can prescribe, or could be selected as a referring, admitting, or other Provider. This includes Physicians, Midwives, Nurse Practitioners, Clinical Pharmacists, etc. |
| **Reason For Exam** | Only the actual reason for the visit should be entered here by the scheduler. |
| **Recurring Appointments** | Designed to help in situations where an appointment needs to be scheduled multiple times over a specified time period. This type of appointment is most commonly used in the Rehab area where a patient |

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| | needs to come for therapy multiple times. |
| **Removing Slots** | To remove slots from a schedule, right click on the slot to be removed and select Remove slots. |
| **Referral** | Request from one practitioner to another practitioner to render a service for a specific patient; typically the service is one or more a consultation, diagnostic test, specific surgical or medical treatment. All referral orders will occur as outpatients only. |
| **Referral Encounter Type** | Used when a patient is referred for an appointment or service, and intake and/or triage is required. This will allow documentation to be associated to the referral encounter, and could be transitioned to the appropriate encounter type if the referral is accepted. |
| **Referring Provider** | The Referring Provider is the caregiver who referred the patient to the facility. This is usually a physician but may also be another type of Provider (e.g. nurse practitioners, midwives) as long as they are recognized by, and are licensed by their respective college. |
| **Referral Received Date** | The date the referral to the clinic was received for appointment management purposes. Depending on the clinic, the actual date that the referral was written by the physician may also be the same as the date received in clinic. |
| **Referral Source** | Indicates the person or agency that referred the client. |
| **Registration** | The act of creating, verifying, or modifying a client's record or encounter(s) in order to ensure accurate capture of the client's identity as well as record high-level information about where and when they are receiving service. Within Cerner, this is achieved through the use of Conversations. |
| **Re-Referral Appointment** | A meeting between a health care professional and a patient for a chief complaint that the patient was previously referred to for and discharged by with the same health care professional. A referral from another health care professional needs to be received by the clinic. |
| **Resource Inquiry Tab** | Use this inquiry to view information (such as displaced appointments, opens slots available, booked outside of slot) associated with a specific resource in Scheduling Appointment Book. |

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| **Request List** | Work queues that hold requests for a scheduling action to occur. The request list queues are associated with an action for the appointment type and then the location. Because the request list queues are associated at the location level, each location may have different or similar request list queues.<br><br>The appointment request can be initiated automatically or manually in the scheduling appointment book or from an order in a clinical system such as PowerChart. |
| **Request List Inquiry Tab** | Use this inquiry to view information (such as request list by location, request by appointment type, request by queue) associated with a specific request list in the Scheduling Appointment Book. |
| **Reschedule** | To reschedule an appointment. There are multiple methods for rescheduling appointments. You can right-click on the appointment within an Appointment Inquiry, right click on the appointment within the scheduling grid area, or click on the Reschedule icon on the toolbar. |
| **Reschedule Reason** | When an appointment is rescheduled, the Reschedule box will open and a mandatory reschedule reason will be required. |
| **Resource** | Any item with limited availability for which a schedule needs to be kept, such as a physician or an examination room. Resource is a term that covers a wide range of meanings and can be applied to location, people or equipment. |
| **Scheduling Grid** | This contains Resource (person, equipment, room/place) schedules. This is where appointments are scheduled and managed. |
| **Schedulable Item** | Any item that can be scheduled to a resource or person appointment schedule. |
| **Schedule** | The process of creating an appointment request, booking the request to one or more persons or resources, and confirming the booked requests. |
| **Schedule Button** | Allows the user to view the default selections such as duration and slot. Within one window, the user can verify or change the resource, duration, slot, and time using the drop down boxes that display available options. This option is recommended for booking outside the slot (overbooking) only. It is the least recommended method for booking regular appointments as users can accidentally book appointments outside the slot and allow for potential double booking. |
| **Schedule as Visit Within** | This option allows you to combine more than one appointment type as a single visit. This option is only available when more than one appointment is highlighted in the appointment window. After selecting |

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| | the check box, indicate the time range that the appointments should occur within. For example, if you set this option to 7 hours the system will search for times when both appointments begin times are no more than 7 hours apart. This setting is retained and will default the next time the suggest dialog window opens. |
| **Slot** | Time in which appointments can be scheduled for a given resource; it defines the specific time on a resource's schedule for which certain appointment types can be scheduled. Slots are associated to a resource to visually indicate when certain types of appointments can or cannot be scheduled. |
| **Small Buttons** | If this option is selected in the View tab, the icons in the tool bar will appear smaller in size. |
| **Source ID** | A source application Client Identifier, typically an MRN or URN for clinical information systems, assigned by a source system and cross-referenced in the EMPI. Also known as local ID |
| **Special Instructions** | A field that will provide any pertinent Notes to Scheduling. |
| **Status Bar** | If this option is selected in the View tab, a horizontal bar will appear at the bottom of the screen displaying Help, Domain presence, user login, Day, Date and time. |
| **Shuffle** | The shuffling feature is used to move around appointments on the same day, without having to go through all of the rescheduling steps. For example, if appointments are scheduled for a particular examination room, and that room is no longer available, you can display the Appointment Shuffle dialog box and drag the appointments from the unavailable resource to the available resource. |
| **Suggest Scheduling** | The system can suggest available times at which an appointment can be scheduled based on date and time parameters that you enter. This provides you with date and time options from which you can select without requiring you to locate available slots manually. This method is recommended for those areas where available appointment times are limited and also for more complicated appointments. |
| **Telehealth** | Health care services administered remotely via videoconferencing technology over a secure and private network, whereby the patient is seen off-site by a Provider. |
| **Time Interval** | An option that determines the increments of time in the slots and is shown in minutes. |
| **Toolbar** | A window element containing buttons or other window elements to facilitate accomplishing a task. |
| **Tooltip** | A description displayed when you move the cursor over a button in the toolbar. |

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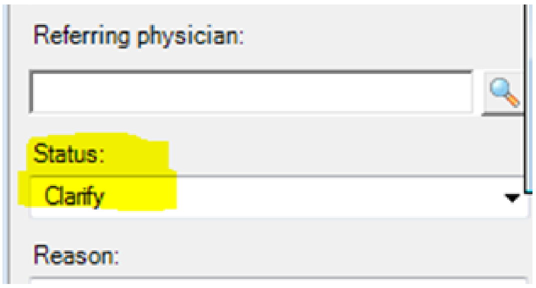
| **Triage** | Prioritizing patients based on the severity of their condition. |
| **VIP Indicator** | Designates a patient who, for some site-defined reason, requires heightened security and/or privacy. The VIP Indicator enables registration clerks to flag high profile clients or encounters. This functionality is for clients who request additional privacy and includes clients other than celebrities, such as victims of abuse, incarceration or someone well known within the health organization. The VIP Status can be entered at the Person Level. Once a client is flagged as a VIP, their identity is masked in certain Cerner applications (e.g. in FirstNet, the client's name is masked with asterisks on public-facing tracking boards). Setting the VIP Status to Yes will automatically default the Visitor Status to No Visitors. |
| **Waitlist** | There are times in the scheduling process that after all accept format and order information has been entered into the system, an appointment time cannot be agreed upon. In these cases a request list can be used to store the information in the system for a time when the scheduling process can be completed. In this situation schedulers may select any request list queue. Once the request list queue has been selected, the information is stored and available for the scheduler to complete the scheduling process at a later time. |
| **Wildcard** | A character that allows a search over a wide range of related data elements (e.g. * and %). |
| **WIP** | Work in Progress - the accept format questions are completed and moved into the WIP before being scheduled into the desired date and time in the scheduling grid. |
| **Worklist** | A list of orders that need to be completed. |
| **Worklist Name** | The worklist name is the name assigned to a predefined set of selection criteria for the worklist. |
| **Work Queue Monitor (WQM)** | A document management solution that enables scanned/faxed documents to be routed to specific queues for review. From WQM, you can associate documents to patients and visits, making them available with the patient's chart. This will streamline departmental processes by automatically populating work queues for processing and also eliminate the need to print and scan documents. All paper referrals and documentations will need to be faxed into WQM with CST implementation. |
| **7/24 Access** | An application which allows designated computers to provide a snapshot of patient data for use during a downtime (e.g. Cerner applications/network is unavailable). Selected information from the previous 30 days (current inpatient encounter specific) will be available for staff to view during downtime. Appointments scheduled within the next 4 days will be viewed in 724Access. |

# Appendix J – Work Queue Monitor (WQM)

**Status Updates**

CPDI Work Queue Monitor allows user to select a status on a work item. Status can drive workflow from rule based routing. You cannot add or remove values from this field.




The Various Statuses are listed below:

a. New: Only new items entering WQM are displayed in a new status.
b. In Process: This status is generated by the system when a work item is opened in Work Queue Monitor or Scheduling.
c. Available: The system automatically changes a status from New to Available when the work item has been opened by the End User. End Users can also select this status in the Add/Modify dialog box.
d. Clarify: This status can be selected in the Add/Modify dialog box, but it requires a status reason.
e. Faxed: The system generates this status when a work item is faxed outbound.
f. Complete: Once this status is selected in the Add/Modify dialog box, and you clock OK, the item is released to the patient's record. The item is no longer viewable in WQM.
g. Canceled: When you select this status, a status reason is required.