

User Manual

Patient Scheduling – Maternity Clinic

Version Control

Revision History

Version	Date	Summary of Changes	Author (Last, First Name)
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Table of Contents

OVERVIEW	5
Learning Objectives.....	5
Course Audience	5
Prerequisites	5
GETTING STARTED	6
Logging In	6
Logging Out	6
OVERVIEW OF SCHAPPTBOOK INTERFACE.....	7
USER PREFERENCE SETUP	8
BOOK SETTINGS.....	11
View 11	
Appointment Book Properties	11
OPENING A BOOKSHELF/BOOK	15
APPOINTMENT INQUIRY	16
APPOINTMENT SCHEDULING	18
Pre-requisite Steps for Booking an Appointment.....	18
Three Methods of Booking an Appointment.....	19
A. Drag and Drop Method.....	20
B. Suggest Scheduling Method	21
C. Schedule Button Method.....	22
Confirming an Appointment	23
Inpatient Scheduling (not applicable for Group 1)	26
Blocking Schedules.....	28
APPOINTMENT MANAGEMENT.....	29
Modifying Information.....	29
Appointment Cancellation	32
Option 1: Right-click on the appointment within the Appointment Inquiry.....	32
Option 2: Right click on the appointment within the scheduling grid area	34
Option 3: Click on the Cancel icon on the toolbar	34
Appointment No Show	35
Appointment Reschedule	39
Option 1: Right-click on the appointment within an Appointment Inquiry	39
Option 2: Right click on the appointment within the scheduling grid area	41
Option 3: Click on the Reschedule icon on the Toolbar	42
Option 4: Drag-and-Drop into WIP	42
APPOINTMENT CHECK IN	43

Option 1: Right-click on the appointment within an Appointment Inquiry	43
Option 2: Right click on the appointment within the scheduling grid area	44
Option 3: Click on the Check-In icon on the Toolbar	45
WORK QUEUE MONITOR (WQM)	46
Open a Document in WQM	47
Print a Document from WQM.....	47
Link a Document to a Patient/Encounter	47
Index a Document in WQM	49
Scan a Paper Document to a Patient Chart	50
Delete a Document in WQM.....	51
Split a Document in WQM	52
Re-Routing a Document to another Clinic in WQM	53
UPDATE REFERRAL ENCOUNTER IN PMOFFICE	55
Change Referral Encounter to Pre-Register Outpatient.....	55
Discharge Referral Encounter	56
EXTERNAL REFERRAL TRIAGE	57
Process a Referral in WQM.....	57
Accepted Referrals.....	57
Schedule Appointment	57
Rejected Referrals.....	58
Referrals Requiring More Information	59
Process Additional Documents in WQM.....	59
Additional Referral/Triage Scenarios.....	59
Scenario 1: Fax is sent to the incorrect queue.	59
EXTERNAL REFERRAL WITHOUT TRIAGE	62
Schedule an Appointment	62
VIEWING APPOINTMENT DETAILS.....	63
VIEWING APPOINTMENT HISTORY	65
HOT KEYS	66
REPORTS	69
HELP FILES	70

Overview

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

Learning Objectives

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

- Navigate the Scheduling application
- Run Inquiries on Patient, Resource and Location schedules
- Schedule single appointments
 - Use three different methods (Drag & Drop, Suggest and Schedule) to schedule appointments
- Cancel and reschedule appointments
- Check-in appointments
- View appointment details and history
- Manage Referral Triage

Course Audience

OB clinic Nurses and clerical staff are the target audience for this course.

Prerequisites

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

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

- Computer basics
- Microsoft Windows



Getting Started

Logging In

Double-click on the **SchApptBook** icon  to open the application.

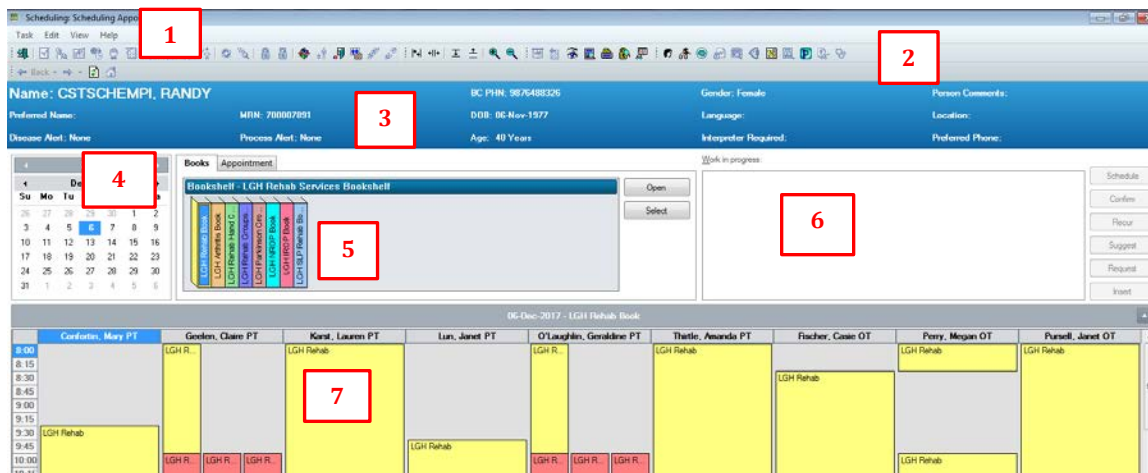
Logging Out

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

1. From the Toolbar, you may select the **Exit** icon (recommended to avoid locking the patient record). 
2. You may also click the  in the upper right hand corner of your screen.

Overview of SchApptBook Interface

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



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

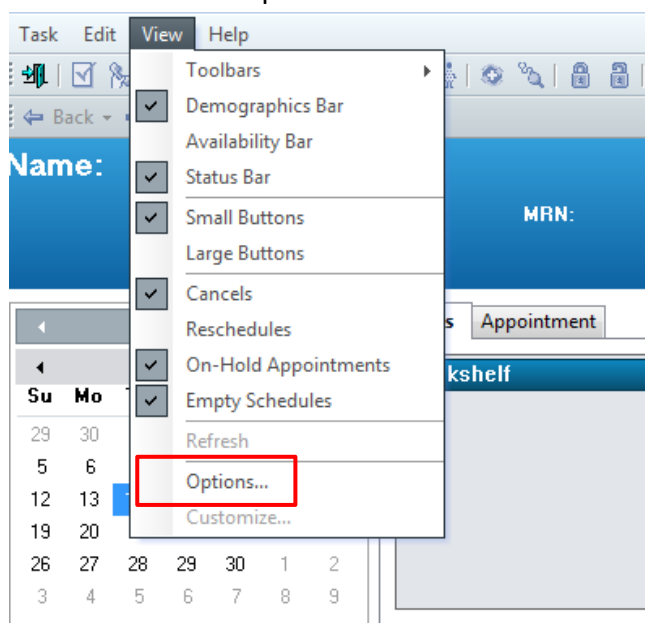
User Preference Setup

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

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

Setting Default Location/Book

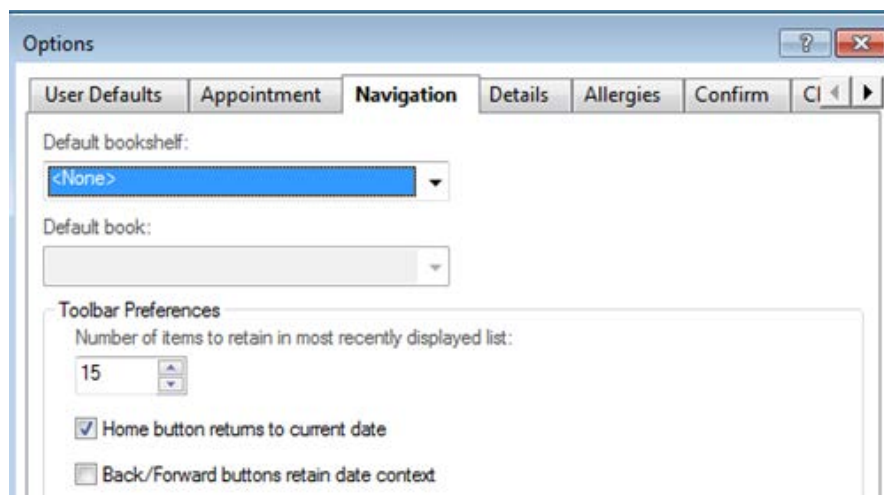
1. Click **View** in the Toolbar and select “Options.”



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

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

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



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

Default Book: Enter the name of the **Book** that you would like to open when you log into the SchApptBook application. There is a list available to assist you in selecting a predefined book.

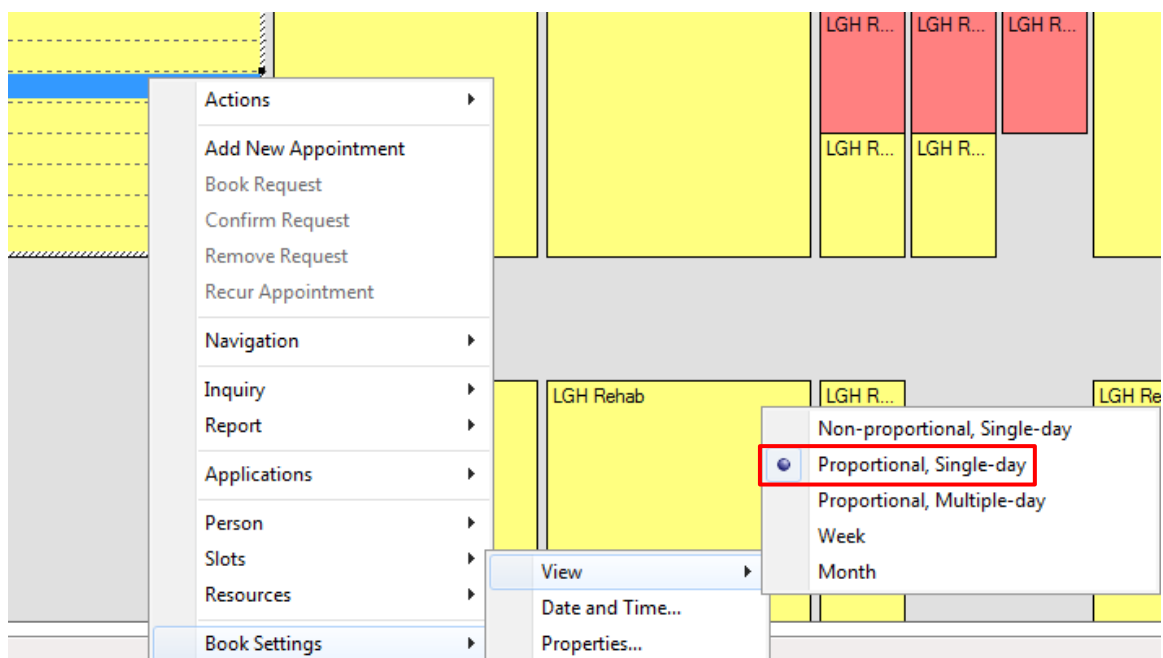
In the example below, the default Bookshelf is the “**LGH Outpatient Care Centre Bookshelf**” and the default Book is the “**LGH RAN Book.**”

20-Dec-2017 - LGH RAN Book						
	Dhawan, Priya MD	Dommann, Steven MD	Kaiway, Sarah MD			
12:30						
12:45	LGH RAN	LGH RAN	LGH RAN			
13:00						

Book Settings

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

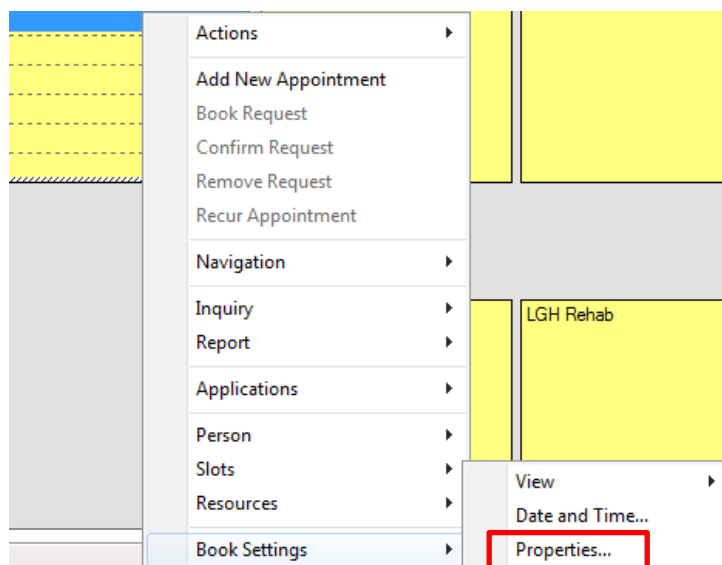
View



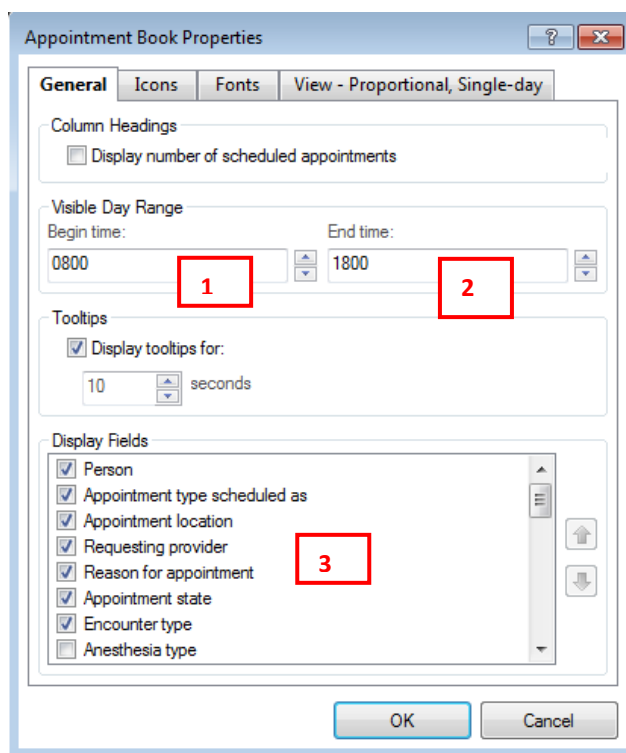
Proportional, Single-day View: This is the default and recommended view that allows the user to see all of the breaks in the day. The times are at the left-hand side of the book.

Appointment Book Properties

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



General Tab



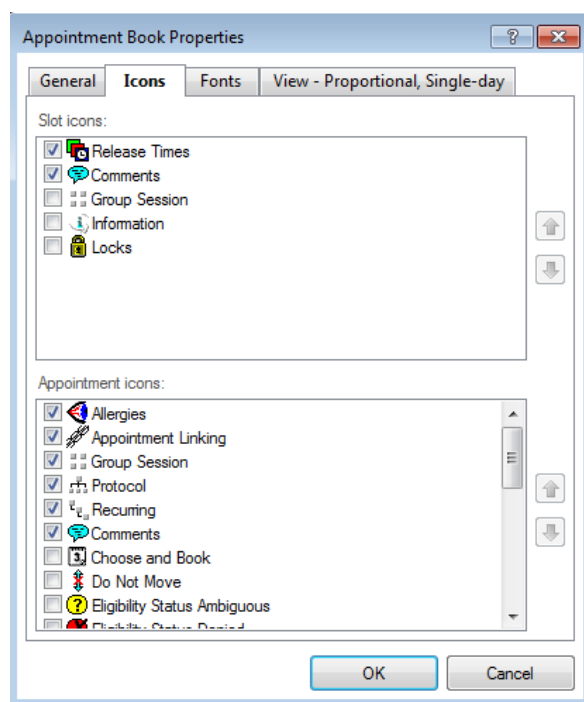
1. **Begin Time:** In military time, this determines the time that the appointment book will start, this crosses all books and bookshelves.
2. **End Time:** In military time, this determines the time that the appointment book will end; this crosses all books and bookshelves

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

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

Icons Tab

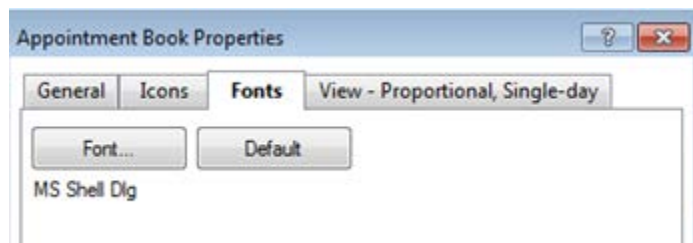
By selecting any of the icons listed, a symbol will appear if the criteria are met. Example: if the Slot Icon “Comments” is checked a bubble will appear on the slot if any comments are entered.



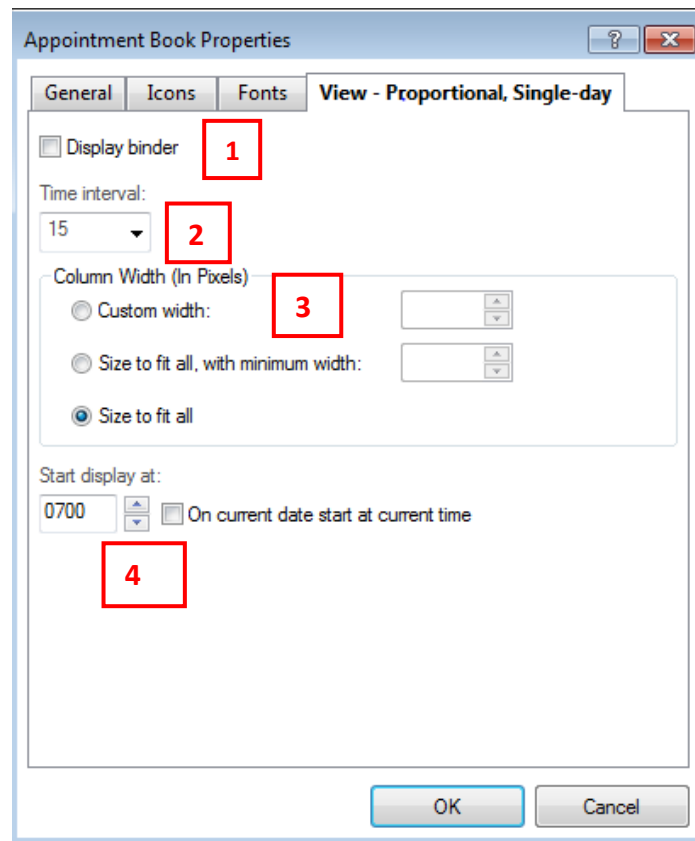
NOTE: Making changes to the default setting is not recommended.

Fonts Tab

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



View Proportional Single-day

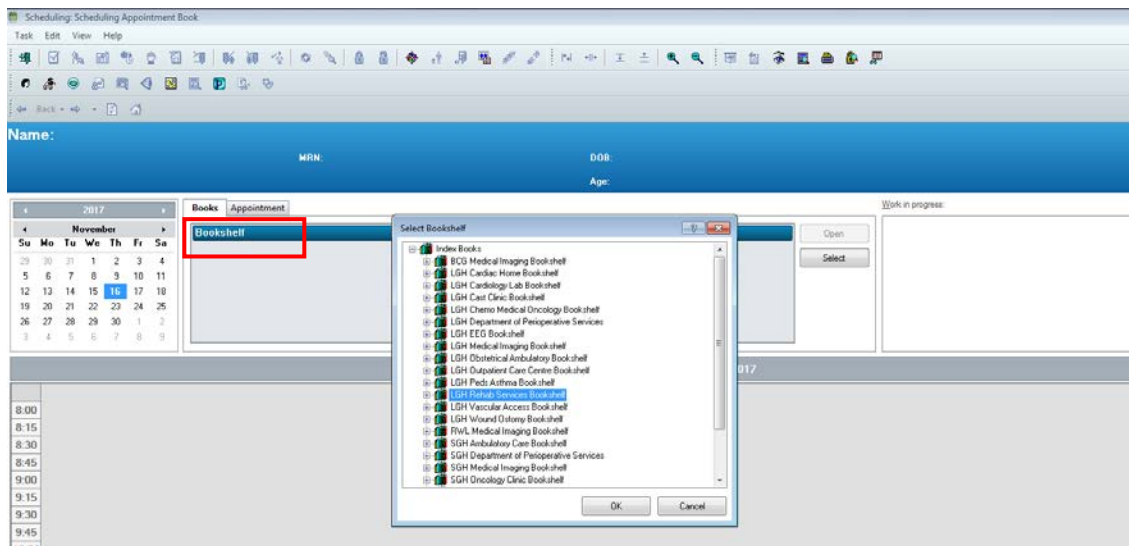


1. **Display binder:** By checking or un-checking this option, the binder on the left side of the appointment book will be visible or not.
2. **Time interval:** This option determines the increments of time (in minutes) for the slots.
3. **Custom width:** This option determines the width of the slots under the resources.
4. **Start Display at:** You can set the time and day that you wish to display when you first log on to the application.

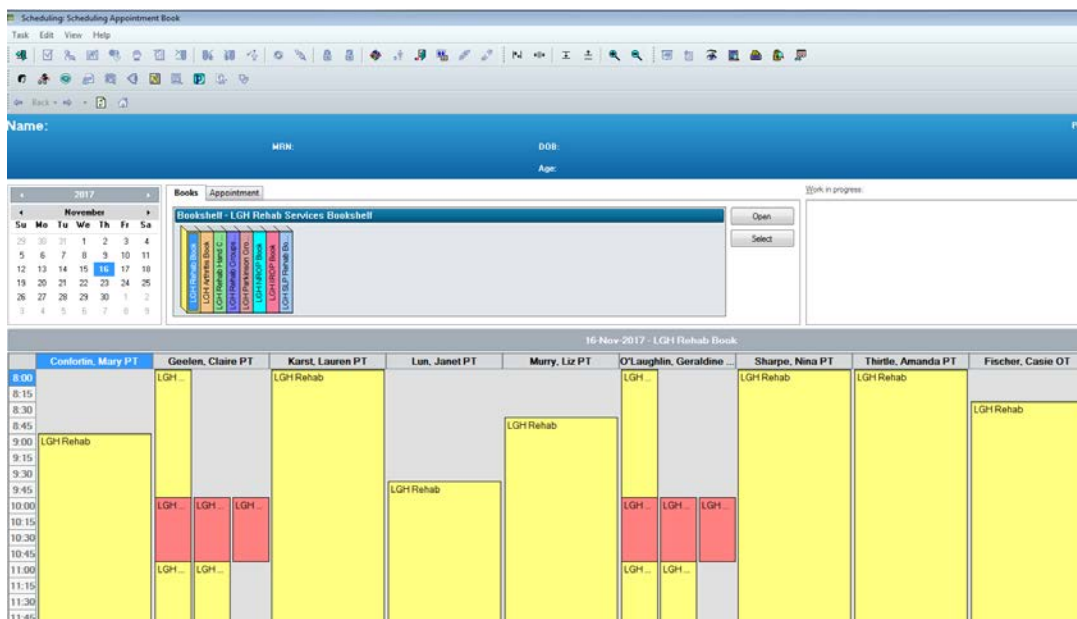
Opening a Bookshelf/Book

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

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



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



Appointment Inquiry

The Appointment Inquiry allows the users to view appointments in a list format.

“Schedule Inquiry” window allows you to enter the parameters required to view the schedule associated with a specific person or resource.

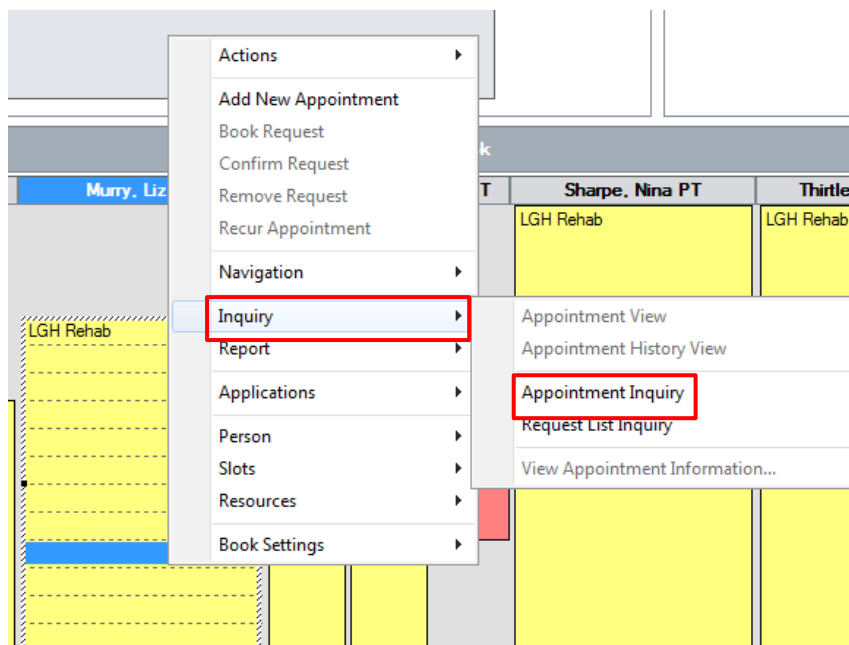
There are four available options for using the “Schedule Inquiry” window: Person tab, Resource tab, Location tab and Request List tab. Each of these is described below, along with the available elements for each tab.

The Appointment Inquiry can be accessed in two different ways.

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



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



3. The Appointment Inquiry window appears on your screen.

Name: **MRN:** **DOB:**

A **B** **C** **D** **Age:**

Person **Resource** **Location** **Request List**

Inquiry:
Person Schedule Inquiry - Standard

Person:

Start date: 28-Nov-2017 Start time: 0000

End date: xxx-xxx-xxxx End time: 2355

Find Clear Close

For Help, press F1

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

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

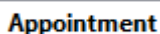
Appointment Scheduling

There are several different methods for scheduling an appointment within the Scheduling Appointment Book application. This section will discuss each of these methods and explain when one method should be used over the others.

Pre-requisite Steps for Booking an Appointment


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

1. Click the **Appointment** tab.

A button labeled "Appointment" with a blue border and a small icon to its left.

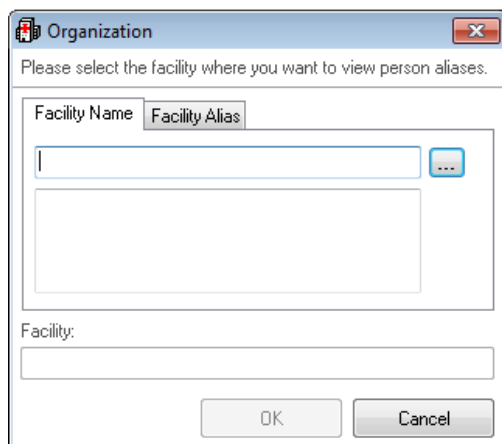
2. The first few fields for the required information appear in the window. You may begin to schedule the appointment.

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

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

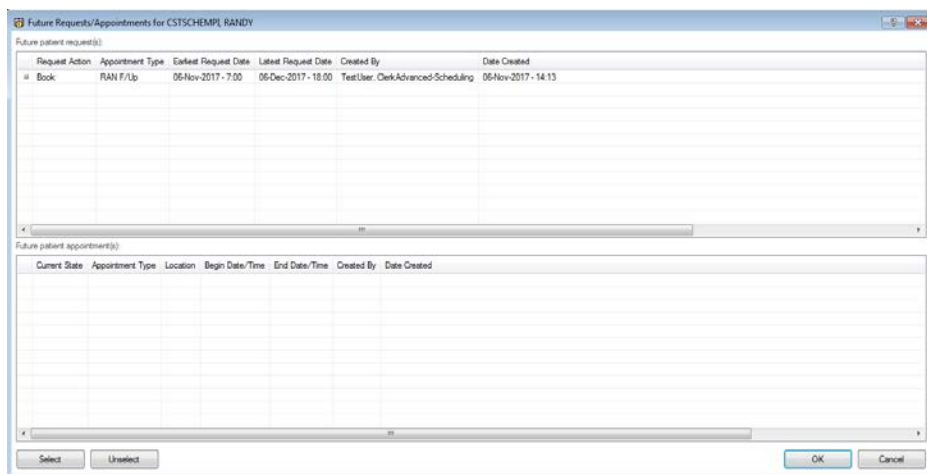
NOTE: Refer to Registration's EMPI Reference material to learn about requesting a new PHN for a brand new patient. Approximately 99% of all **BC** Residents are registered in the EMPI.

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



7. Scroll down through the list of the clinics until you see **LGH Lions Gate Hospital**, click on it to select it, then click **OK**.

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



10. The patient's name will now display in the **Person Name** field.
11. Click the **Ellipsis** button beside the **Appointment Location** field and double click on your clinic location name to select as the appointment location.
NOTE: The Appointment Location and Appointment Type may be defaulted based on user preferences.
12. Select the **Ellipsis** beside the **Appointment Type** field and double click on an appointment type to select.
13. Once an Appointment Type is selected, additional fields will appear.
NOTE: This list of fields is referred to as “Accept Format Fields.”
14. Complete any mandatory fields and click the **MOVE** button to move the appointment into the **Work In Progress (WIP)** area.

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

Three Methods of Booking an Appointment

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

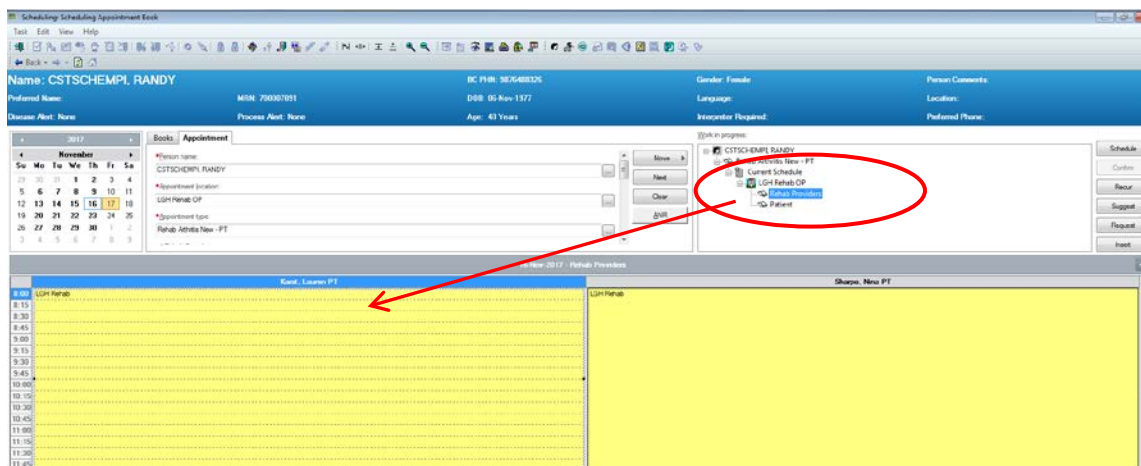
A. Drag and Drop Method

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

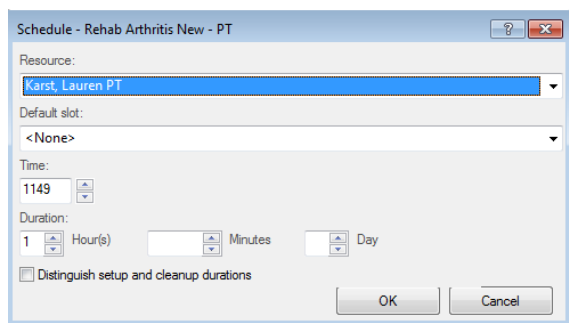
Highlights:

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

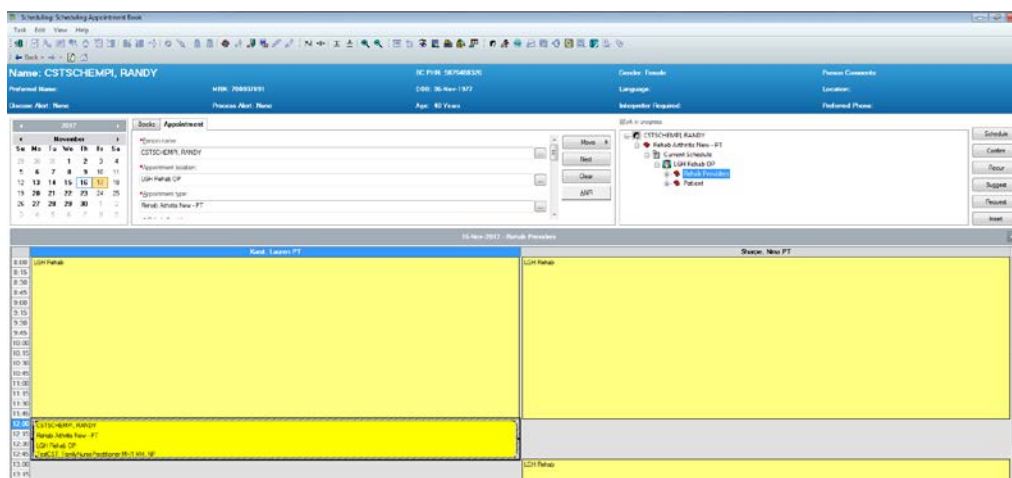
- I. Use the calendar to find the appropriate date. Left click on the Primary resource (the resource directly below the clinic name) and drag the cursor to the appropriate resource and start time.



- II. Once the mouse button is released, the Schedule window will display on the screen. Verify that the Resource and the time slot fields are correct. After reviewing the information, click **OK**.



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



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

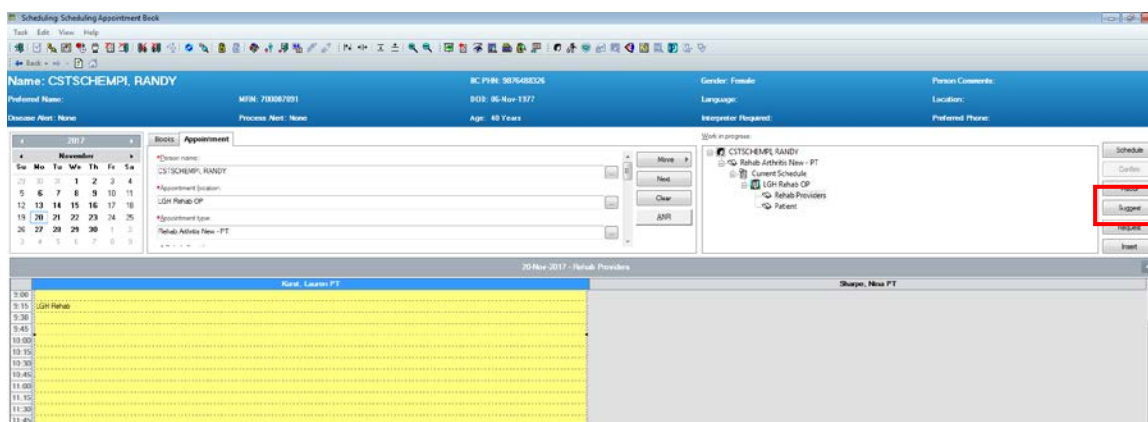
B. Suggest Scheduling Method

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

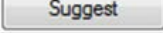
Highlights:

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

I. With your appointment in the Work In-Progress area, click the **Suggest** button to open the Suggested Schedules window.



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

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

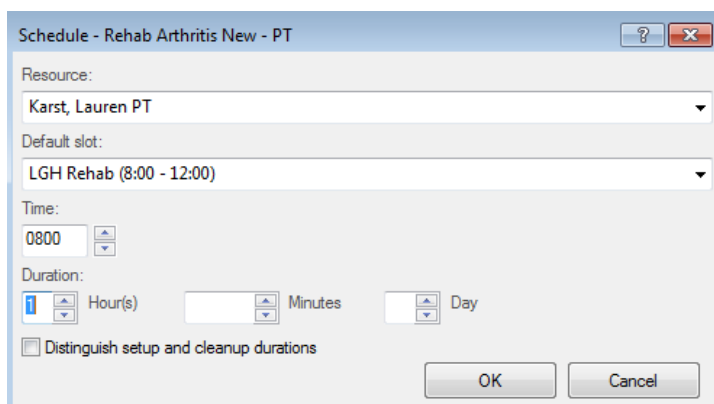
C. Schedule Button Method

The **Schedule** button allows the user to view the default selections such as duration and slot. Within one window, the user can verify or change the resource, duration, slot, and time using the dropdown boxes that display available options. It is the **least** recommended method for booking regular appointments as users can accidentally book appointments outside the slot resulting in double-booking.

Highlights:

- Allows you to pre-select the time slot you would like to schedule to.
- Allows you to view/modify the appointment Resource, Slot, Start time and Duration.
- Allows you to book appointments outside of slots when required.


- I. With the appointment in the WIP, select the preferred time and resource in the scheduling grid and click the **Schedule** button.



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

Confirming an Appointment

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

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

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

Confirm

Name: CSTSCHEMPI, RANDY **BC PHN:** 9876488326 **Gender:** Female **Person Comments:**

Preferred Name: MFIN: 700007891 **DOB:** 06-Nov-1977 **Language:** **Location:**

Disease Alert: None **Process Alert:** None **Age:** 40 Years **Interpreter Required:** **Preferred Phone:**

Summary | General | Resource View | Guidelines | Notification | Conversation Summaries | Itineraries | Locks | Eligibility | Booking Notes

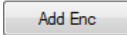
CSTSCHEMPI, RANDY **Med Rec Nbr: 700007891**

Allergies:
Allergies Not Recorded

16-Nov-2017 - 11:49 1 Hour(s) Rehab Arthritis New - PT LGH Rehab OP Karst, Lauren PT

Preparations:
Location: Lions Gate Hospital
Address: 231 15th St E, North Vancouver, BC V7L 2L7

Options Print... Print ABN... OK Cancel

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

18. The Available Conversations window pops-up. Select **Pre-Register Outpatient** from the drop-down list and click OK.

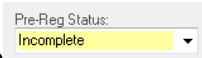
Available Conversations

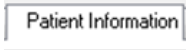
Please select the conversation you would like to use:

Pre-Register Outpatient
Pre-Register Patient To A Bed
Surgery Waitlist

19. The "External MPI" window appears momentarily to ensure you have the most up-to-date demographics on the patient.

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

21. If you are not in contact with the patient to confirm the information, leave the Pre-Reg Status as Incomplete . If you are in contact with the patient to verify all the information, update the Pre-Reg Status to **Complete**.

22. In the Patient Information tab  verify the demographic information on every visit.

23. Click on the Encounter Information tab.

24. In the Location section, the Facility is auto-populated. Verify that the Building and Unit/Clinic are correct.

25. In the Current Encounter Information section, complete any mandatory fields such as:

Encounter Type: Pre-Outpatient in a Bed or Pre-Outpatient OB

Medical Service: Obstetrics

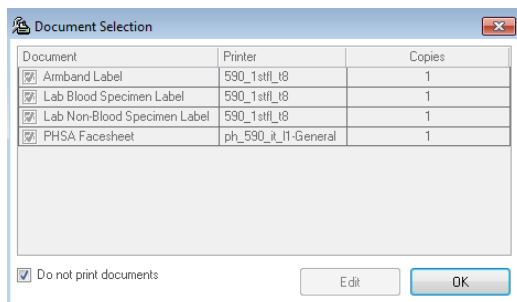
NOTE: Pre-Outpatient in a Bed encounter type is for Inductions. Pre-Outpatient OB encounter is for NSTs, ECVs, Iron Infusions, and Outpatient Betamethasone Injections

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

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

27. Click **Complete** to finish.

28. The “Document Selection” window displays. Uncheck the “Do not Print Documents” checkbox to print any relevant documentation. Click **OK** to complete.



29. The “Pre-Register Outpatient” window displays. Verify and click **OK**.



Inpatient Scheduling (not applicable for Group 1)

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

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

Books Appointment

Person name:
CSTSCHEMPI, PAUL-JOSEPH

*Appointment location:
LGH RAN

*Appointment type:

Move

Next

Clear

ANR

- Complete the below mandatory fields and click **Move** button:

Appointment Type: Inpatient

Comments: add any applicable comments

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

Books Appointment

Person name:
CSTSCHEMPI, PAUL-JOSEPH

*Appointment location:
LGH RAN

*Appointment type:
Inpatient

Move

Next

Clear

ANR

Work in progress:

- CSTSCHEMPI, PAUL-JOSEPH
- Inpatient
- Current Schedule
- LGH RAN
- Pending
- Patient

13-Dec-2017 - LGH Rehab Book

	Confortin, Mary PT	Geelen, Claire PT	Karst, Lauren PT	Lun, Janet PT	Munry, Liz PT	O'Laughlin, Geraldine PT	Sharpe, Nina PT	Thistle, Amanda PT
9:30	CSTSCHEMPI, PAUL-JOSEPH	LGH R...	LGH Rehab	LGH Rehab		LGH R...		LGH Rehab
9:45	Inpatient	LGH R...				LGH R...		
10:00	LGH RAN	LGH R...				LGH R...		
10:15	Inpatient coming for an appo...	LGH R...				LGH R...		
10:30	Pending	LGH R...				LGH R...		
10:45		LGH R...				LGH R...		
11:00						LGH R...		
11:15								
11:30								
11:45								

- Click **OK** to close the “Confirm” window.
- Select the existing “Inpatient” encounter and click **OK**.

Encounter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name	Reg Date	Arrive Date
7000000016566	Inpatient		Elective	LGH Lions Gate	LGH ASC	Attending Provider	Plisva, Rocco, MD	13-Dec-2017 - 9:22	13-Dec-2017 - 9:22
7000000012227	Outpatient	18-Oct-2017 - 23:59		LGH JRAC	LGH JRAC	Attending Provider	Jando, Victor Tibor	18-Oct-2017 - 10:27	18-Oct-2017 - 10:27
7000000012917	Referral			LGH Rehab OP	LGH Rehab OP	Referring Provider	Baggo, Alan Kieth		
7000000012425	Pre-Outpatient			LGH JRAC	LGH JRAC	Attending Provider	Jando, Victor Tibor		

6. The appointment is booked with an Inpatient encounter.

CSTSCHEMPI, PAUL-JOSE...

Inpatient

LGH RAN

Inpatient coming for an appo...

Confirmed

Inpatient

Blocking Schedules

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

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

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

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

Appointment Management

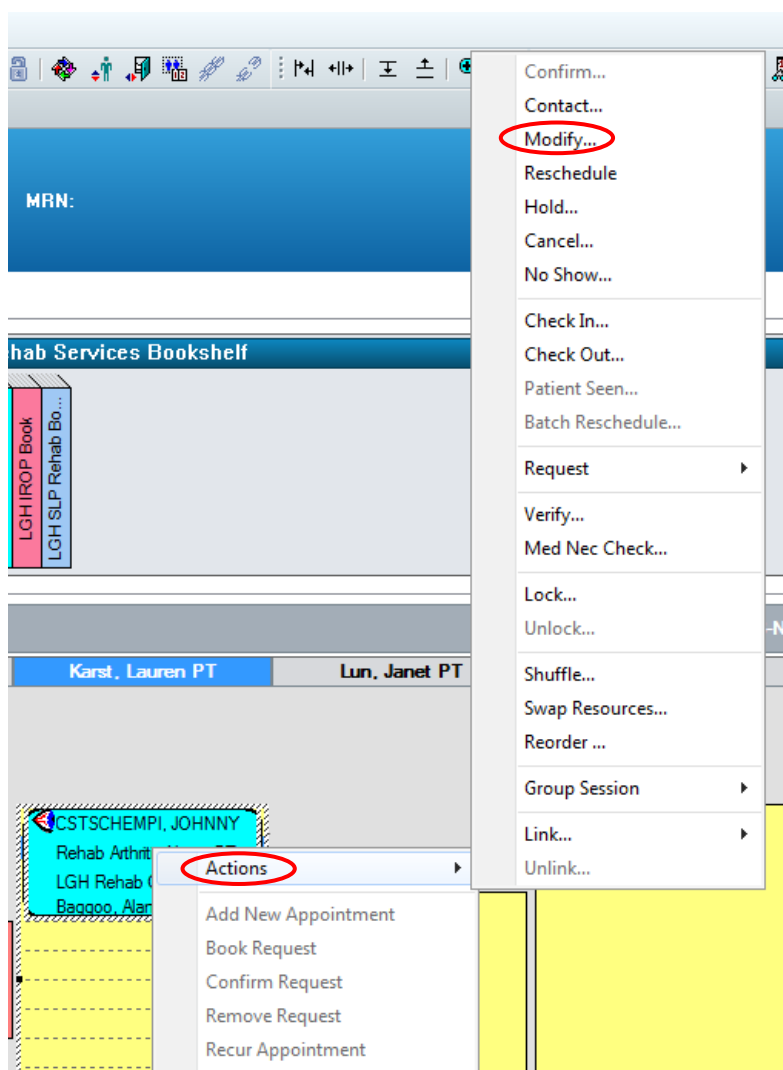
Modifying Information


There are two different types of modifications that can be made. You can modify Appointment information such as the Referring Provider, Referral Received Date, Reason for Visit, and Special Instructions, etc. You can also modify Patient information such as their Date of Birth, Last Name, and Phone Number, etc.

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

Appointment information can be modified in two ways.

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



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



Modify

Name: CSTSCHEMPI, JOHNNY **BC PHN:** 9876706228 **Gender:** Male **Person Comments:**

Preferred Name: **MRN:** 700006538 **DOB:** 01-Sep-1999 **Language:** **Location:**

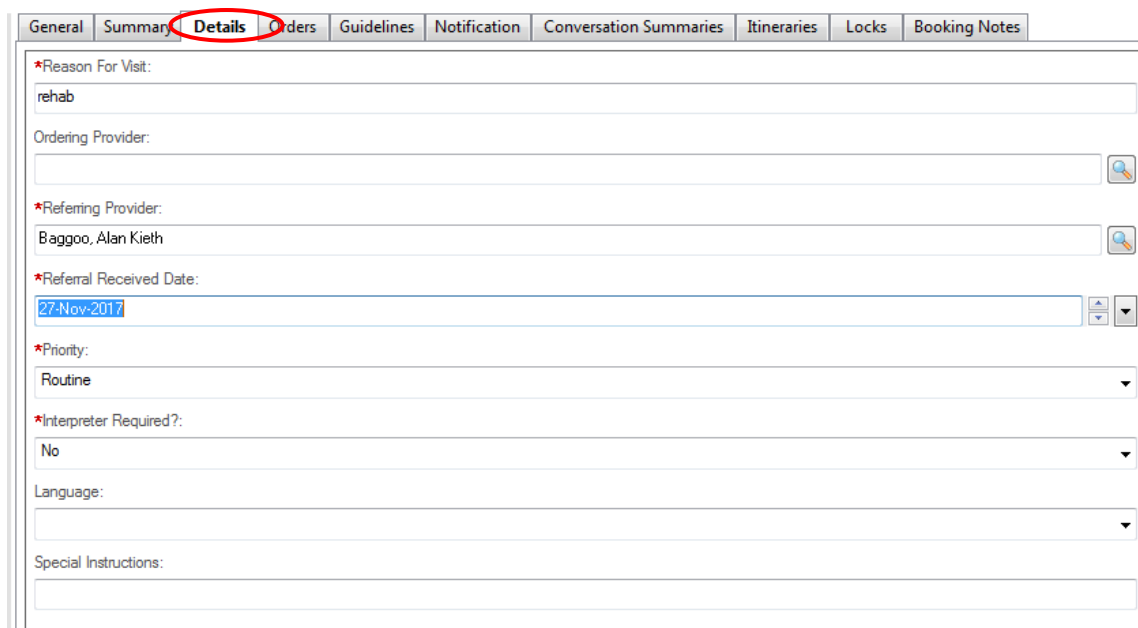
Disease Alert: None **Process Alert:** Falls Risk, Commu... **Age:** 18 Years **Interpreter Required:** **Preferred Phone:**

General | Summary | Details | Orders | Guidelines | Notification | Conversation Summaries | Itineraries | Locks | Booking Notes

Modify reason:

Comments:

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



General | Summary | **Details** | Orders | Guidelines | Notification | Conversation Summaries | Itineraries | Locks | Booking Notes

***Reason For Visit:**

rehab

Ordering Provider:

***Referring Provider:**

Baggio, Alan Kieth

***Referral Received Date:**

27-Nov-2017

***Priority:**

Routine

***Interpreter Required?:**

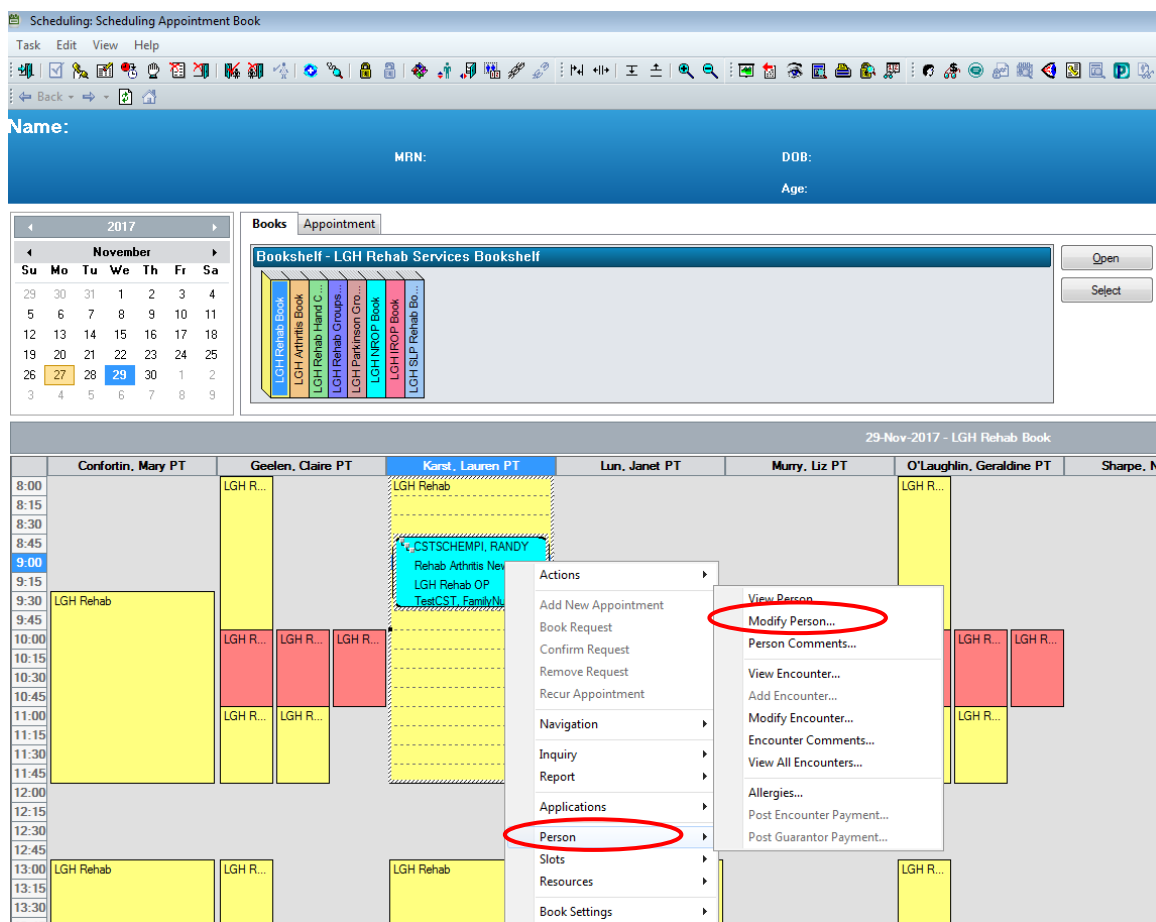
No

Language:

Special Instructions:

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

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



7. Select **LGH Lions Gate Hospital** in the “Organization” window. The EMPI window briefly launches.
8. On your screen you will see the system loading patient information, and opening the Modify conversation. When the “Add Person” window opens, you can make any changes that are required.

The screenshot shows the 'Add/Modify Person' window. The 'Additional Contacts' tab is active. Fields include: Medical Record Number (700007891), Last Name (CSTSCHEMPI), First Name (RANDY), Middle Name, Preferred Name, Previous Last Name, Maiden Name, Date of Birth (06-Nov-1977), Age (40Y), Gender (Female), BC PHN (9876489326). The 'Additional Contacts' section has tabs for Address and Contact Information, Insurance, and Alerts. The 'Address and Contact Information' tab is selected, showing fields for Previous Address, Mailing Address, Temporary/Secondary Address, Permanent Address, Previous Permanent Address, Mailing Address, Temporary/Secondary Address, Preferred Phone, Home Phone Number, Mobile Phone Number, Work Phone Number, Work Extension, Alternate Phone Number, Email Address, Personal Information, Marital Status, Religion, Interpreter Required, Language, VIP - Person Level, Primary Care Provider (PCP), Deceased Details, Do you identify as an Aboriginal/Indigenous person?, BC Cancer Agency, and Dual Modality. At the bottom right are 'Complete' and 'Cancel' buttons.

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

Appointment Cancellation


There are multiple options for canceling appointments:

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

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

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

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

1. To cancel an appointment from an Inquiry, first open the **Schedule Inquiry** window by clicking on the eyeball icon in the Toolbar. 
2. Use one of the many available Inquiries to find the appointment:
 - Search by the patient name using a **Person Inquiry** such as “Person Schedule Inquiry – Standard”

- Search for the appointment by the Resource name using a **Resource Inquiry** such as “Resource Schedule Inquiry – Standard”
 - Search for the appointment by the appointment’s scheduled location using a **Location Inquiry** such as “Location w/Person Name”
3. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the **FIND** button.
 4. Highlight the appointment you wish to cancel, right click and choose **Cancel**.

BEG DATE	DURATION	STATE	APPT TYPE	REQ DOCTOR	RESOURCE
11-Dec-2017 - 8:00	20	Confirmed	Rehab F/Up	Baggo, Alan Kieth	Confortin, Mary PT
12-Dec-2017 - 8:45	20	Confirmed	Rehab F/Up	Baggo, Alan Kieth	Bom, Megan OT

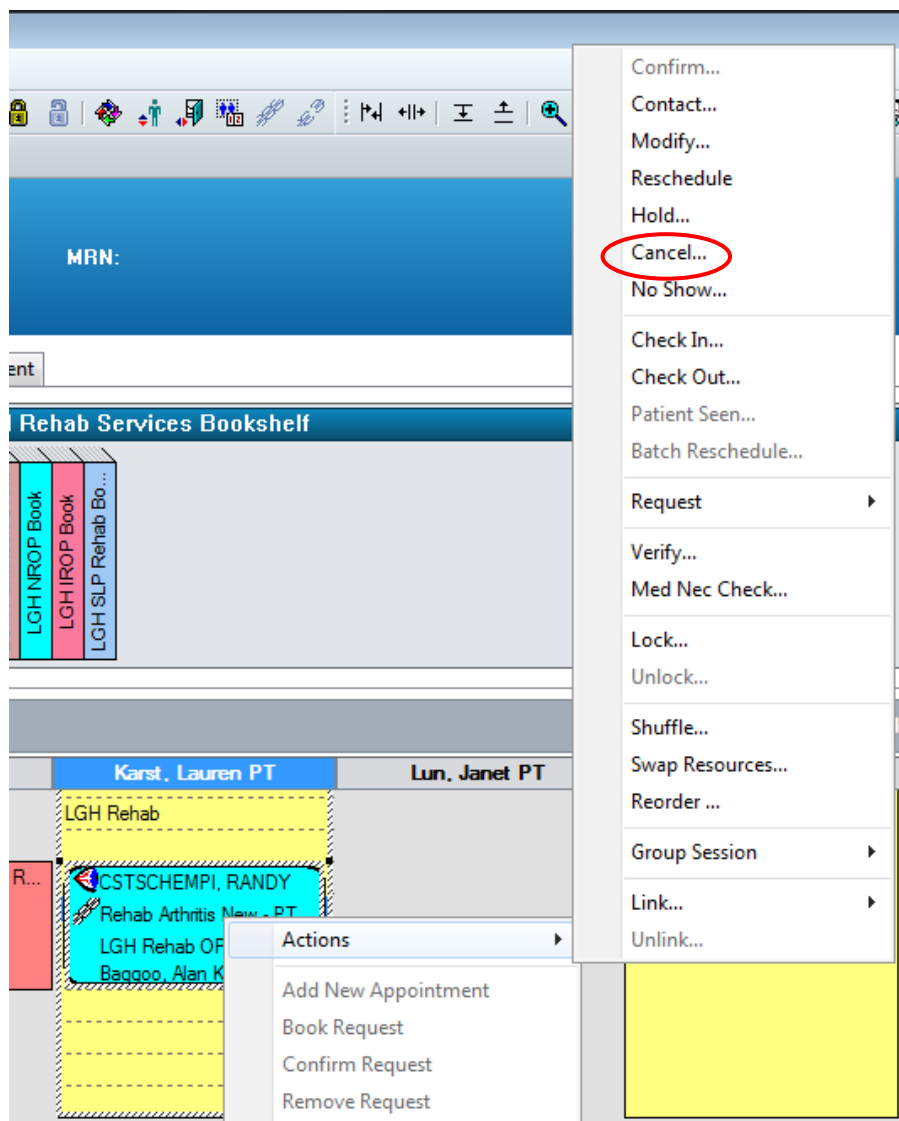
5. If the “Interpreter Required?” field was set to “Yes” when the appointment was scheduled, an Appointment Guideline will appear reminding the clerk to cancel the interpreter request.
6. The Cancellation window will display. Select an appropriate reason in the **Cancel Reason** dropdown and press the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

7. The appointment is now in a cancelled state. If there is an order associated to the appointment, the order will get auto-cancelled.
8. The next step is to Cancel or Discharge the encounter which is covered in Registration’s Foundation training.

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


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

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



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

Option 3: Click on the Cancel icon on the toolbar

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

Appointment No Show

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

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

Name: CSTSCHDEMO, STLAURENCE **BC PHN:** 9878119764 **Gender:** Male **Person Comments:**

Preferred Name: **MRN:** 700002678 **DOB:** 18-Apr-1967 **Language:** **Location:**

Disease Alert: None **Process Alert:** None **Age:** 50 Years **Interpreter Required:** **Preferred Phone:** (604) 558-3426

General | Summary | Details | Orders | Guidelines | Notification | Conversation Summaries | Itineraries | Locks | Booking Notes

Comments:

Person Name	MRN	Home Phone	Enc Type	Encounter Number	VIP
CSTSCHDEMO, STLAURENCE	700002678		Pre-Outpatient	7000000010353	Yes


View Modify Cancel Enc

OK Cancel

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

The screenshot shows the Patient Scheduling interface. At the top left is a calendar for December 2017. To its right is a 'Books' tab with a 'Bookshelf - LGH Outpatient Care Centre Bookshelf' containing various appointment types like 'LGH Medical Day C...', 'LGH Breath Progra...', 'LGH Pulmonary Fu...', 'LGH RASC Book', 'LGH JRAC Book', 'LGH Pre-Anesthesia...', 'LGH Trauma Outpa...', 'LGH RAN Book', 'LGH OCC Universa...', and 'LGH OCC Rooms ...'. Below these are 'Open' and 'Select' buttons. The main area displays a schedule grid for '06-Dec-2017 - LGH RAN Book'. The grid is divided into columns for 'Dhawan, Priya MD', 'Dommann, Steven MD', and 'Kaiway, Sarah MD'. A red circle highlights the appointment for 'CSTSCHEMPI, JOETRIAGE' at 12:30, which is marked as 'RAN New'.

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

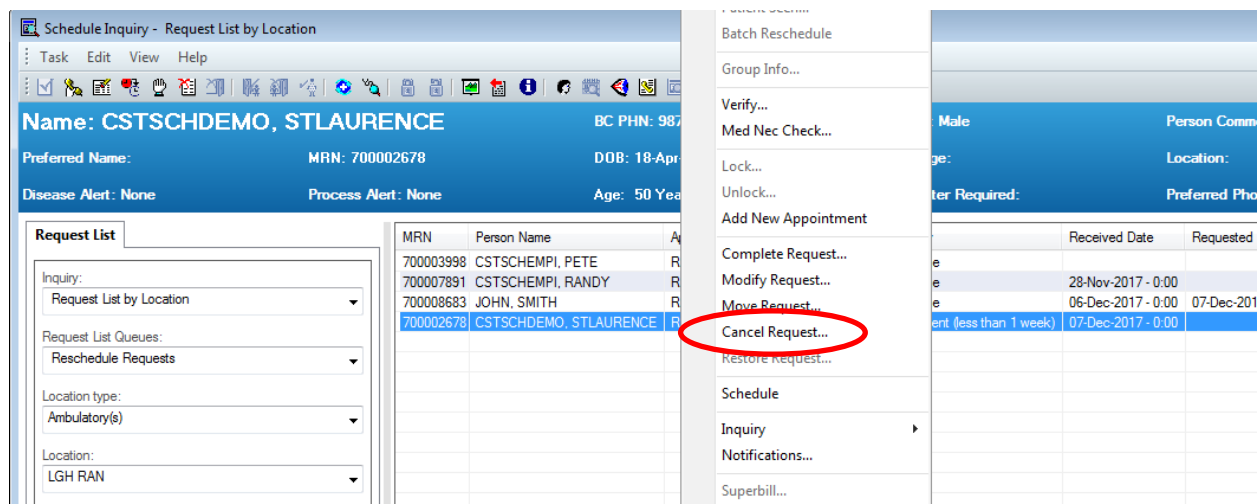
4. Click on the **Request List Inquiry** icon. 
5. In the “Schedule Inquiry” window, the Inquiry should be “Request List by Location.” From the “Request List Queues” dropdown, select “Reschedule Requests.”
6. Enter the appropriate **Location Type** (i.e. Ambulatory) and **Location** (i.e. LGH RAN) and click the **Find** button. All appointment requests that meet the search criteria are displayed.

The screenshot shows the 'Schedule Inquiry - Request List by Location' window. It has a menu bar (Task, Edit, View, Help) and a toolbar. Below the menu bar are fields for 'Name:', 'MRN:', 'DOB:', 'Age:', and 'Person Comments:'. The main area is divided into two sections. On the left is a 'Request List' section with dropdowns for 'Inquiry:' (set to 'Request List by Location'), 'Request List Queues:' (set to 'Reschedule Requests'), 'Location type:' (set to 'Ambulatory(s)'), and 'Location:' (set to 'LGH RAN'). Below these are 'Find', 'Clear', and 'Close' buttons. On the right is a table of appointment requests.

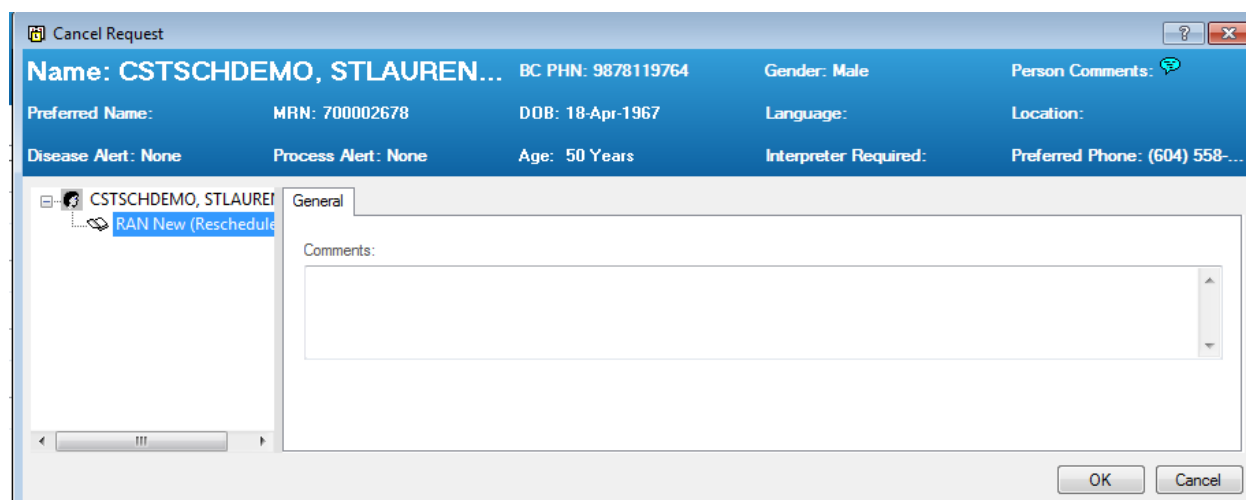
MRN	Person Name	Appointment Type	Order	Priority	Received Date	Requested Date
700003998	CSTSCHEMPI, PETE	RAN F/Up	Follow Up - Clinic	Routine		
700007891	CSTSCHEMPI, RANDY	RAN New		Routine	28-Nov-2017 - 0:00	
700006487	CSTSCHEMPI, JOETRIAGE	RAN New		Emergent (less than 1 week)	06-Dec-2017 - 0:00	
700008683	JOHN, SMITH	RAN New		Routine	06-Dec-2017 - 0:00	07-Dec-2017 - 7:00
700002678	CSTSCHEMPI, STLAURENCE	RAN New		Emergent (less than 1 week)	07-Dec-2017 - 0:00	

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

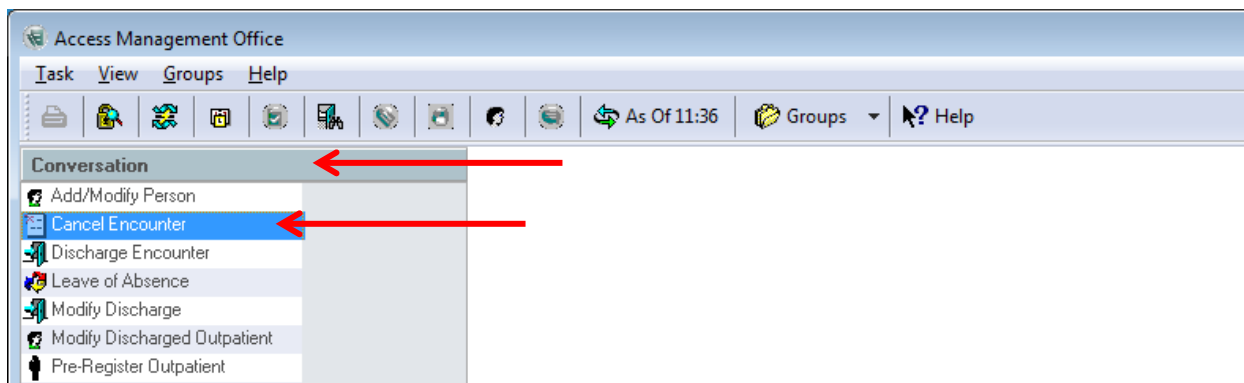
NOTE: It is important you select “**Cancel Request**” and not “**Cancel**”.



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

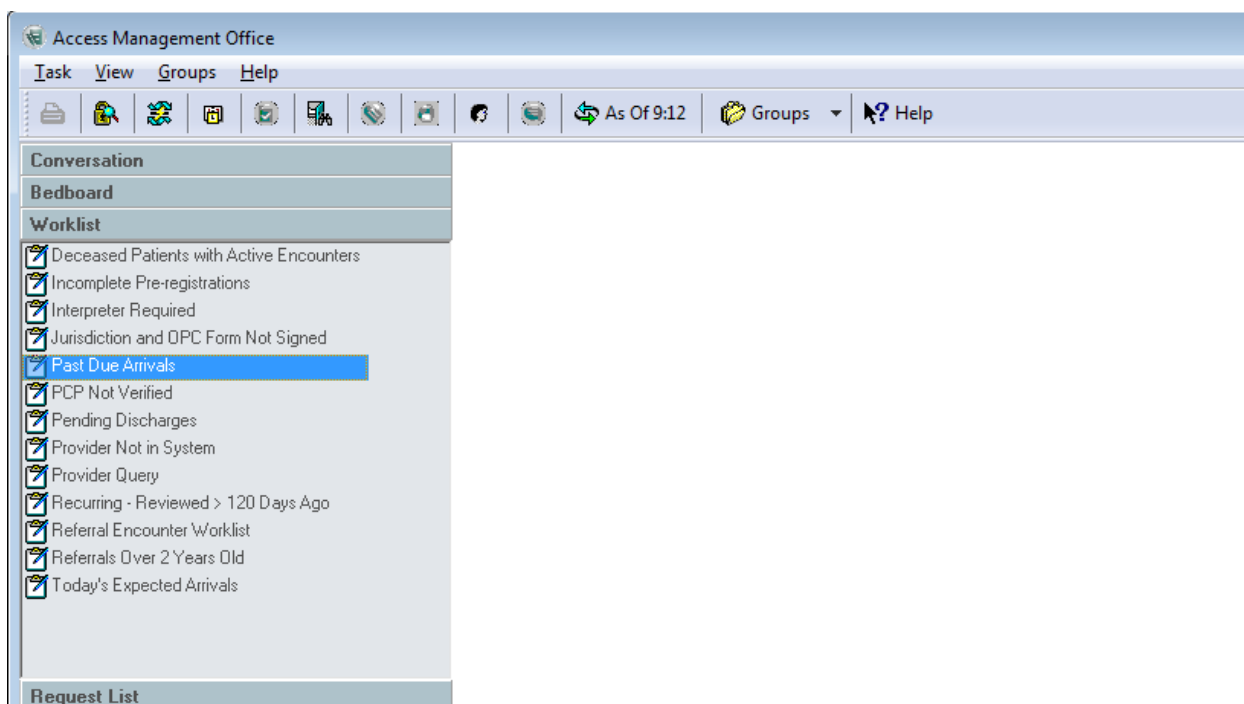


- c. Log into **PMOffice** to cancel the Pre-Outpatient encounter.
- d. Click on the **Conversation** tab and double-click on the **Cancel Encounter** conversation.



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

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



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

The screenshot shows a patient record for CSTSCHDEMO, STLAURENCE. A right-click context menu is open over a table listing appointments. The menu options include: 'Verify...', 'Med Nec Check...', 'Lock...', 'Unlock...', 'Add New Appointment', 'Complete Request...' (circled in red), 'Modify Request...', 'Move Request...', 'Cancel Request...', 'Restore Request...', 'Schedule', and 'Inquiry'. The table lists appointments with MRN and Person Name.

MRN	Person Name
700003998	CSTSCHEMPI, PETE
700007891	CSTSCHEMPI, RANDY
700008683	JOHN, SMITH
700002678	CSTSCHDEMO, STLAURENCE

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

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

Appointment Reschedule

There are multiple methods for rescheduling an appointment.


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

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

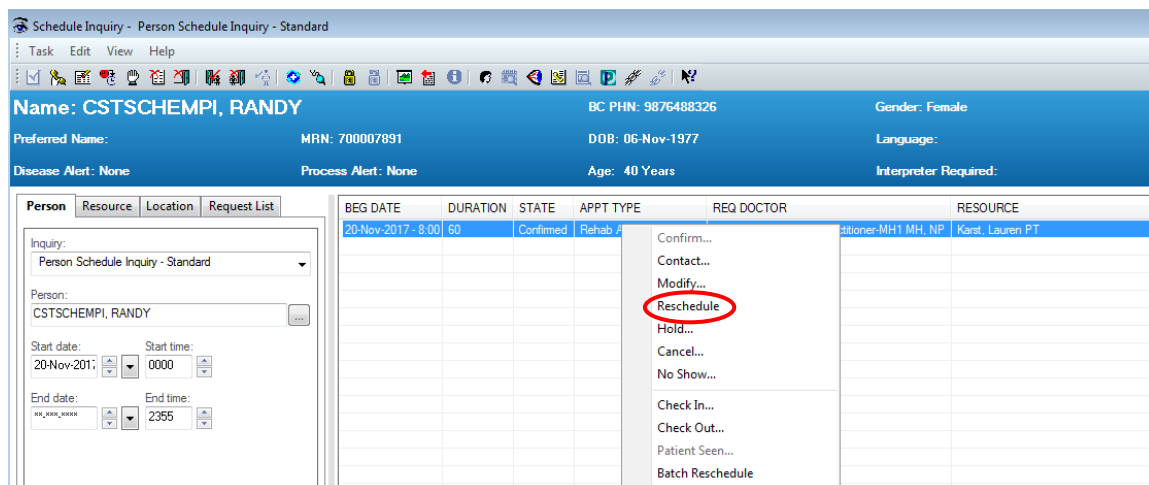
Option 3: Click on the **Reschedule** icon on the Toolbar

Option 4: Drag-and-Drop into WIP

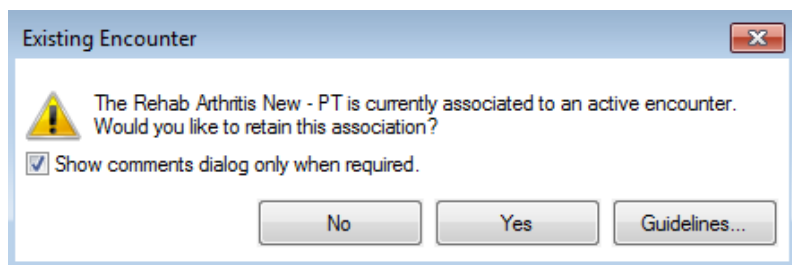
Option 1: Right-click on the appointment within an Appointment Inquiry

- To reschedule an appointment from an Inquiry, first open the “**Schedule Inquiry**” window by clicking on the eyeball icon in the Toolbar. 
- Use one of the many available Inquiries to find the appointment:
 - Search by the patient name using a **Person Inquiry** such as “Person Schedule Inquiry – Standard”

- Search for the appointment by the Resource name using a **Resource Inquiry** such as “Resource Schedule Inquiry – Standard”
 - Search for the appointment by the appointment’s scheduled location using a **Location Inquiry** such as “Location w/Person Name”
3. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the **FIND** button.
 4. Highlight the appointment you wish to reschedule right click and choose **Reschedule**.

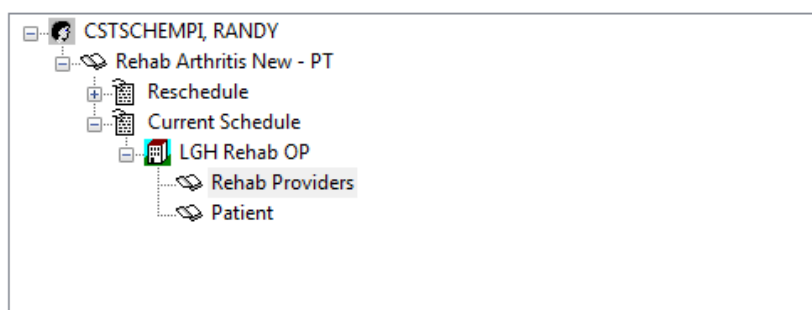


5. The “Future Requests/Appointments” window may display. Press **OK** to move to the next step.
6. The Existing Encounter warning may display if your appointment currently has an active encounter associated. Press the **YES** button to retain the encounter association.



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

Work in progress:



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

*Reason:

_Patient Requested

Comments:

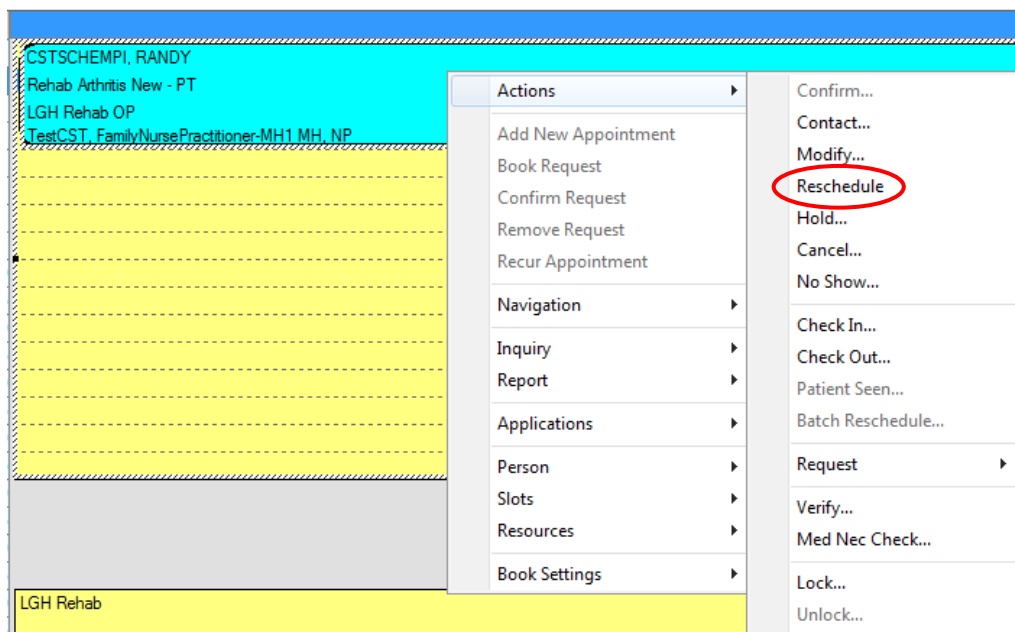
OK Cancel

12. Your appointment will now appear in a Confirmed status in the new appointment time.

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


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

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



- From the WIP, continue to reschedule the appointment following the same steps as [Option 1](#) (refer to steps 5-10).

Option 3: Click on the Reschedule icon on the Toolbar

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

Option 4: Drag-and-Drop into WIP

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



- From the WIP, continue to reschedule the appointment following the same steps as [Option 1](#) (refer to steps 5-10).

Appointment Check In

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


There are multiple options for Checking-In appointments:

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

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

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

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

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

Inquiry: "Appointment Check-In by Location"

Start date: add a valid start date

Start time: add a start time, if appropriate

End date: add a valid end date

End time: add an end time, if appropriate

Location type: select a location type

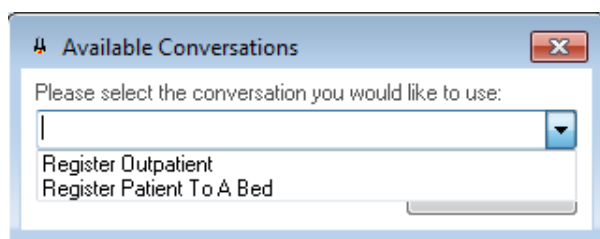
Location: select from the drop-down list

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

VIP	PHN	Est Arrival	Encounter Number	Patient Type	MRN	Patient Name	Appt Date
	9878213221		7000000011240		700001789	CSTSCHPROD, TESTLYNDA	
Yes	9878213221	03-OCT-2017 12:30	7000000011240	Pre-Outpatient	700001789	CSTSCHPROD, TESTLYNDA	04-DEC-2017 13:30
	9897000022		7000000016206		700000942	DOE, JANE ELIZABETH	
	9876703319		7000000016245		700006605	JOHN, SMITH	

Confirm...
 Contact...
 Modify...
 Reschedule
 Hold...
 Cancel...
 No Show...
Check In...
 Check Out...
 Patient Seen...
 Batch Reschedule

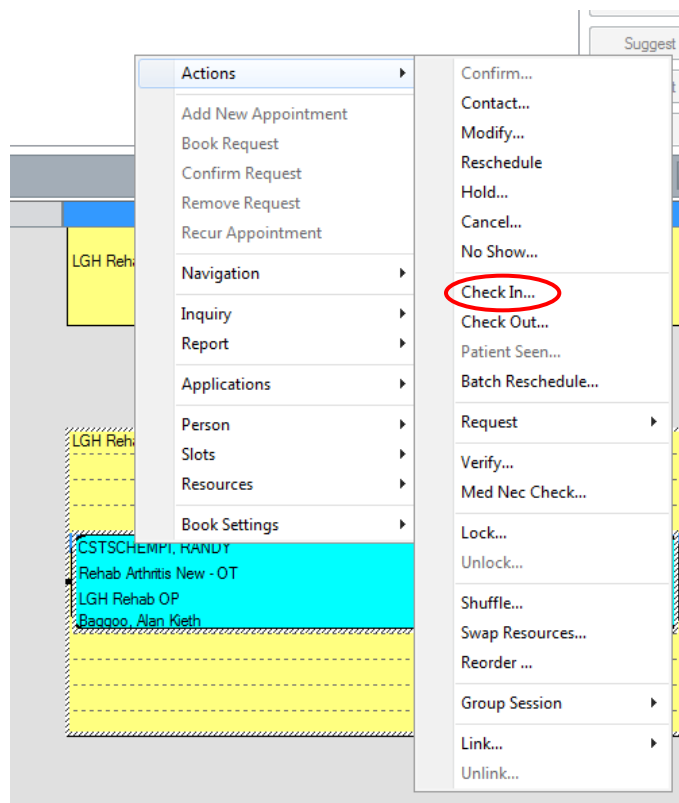
- The “Check In” window will display.
- Press the **OK** button select an option from “Available Conversations” window.




- Select “Register Outpatient” from the drop-down list and click **OK**.
- The EMPI window briefly launches and opens the Register Outpatient Conversation window.
- All the available mandatory fields will display in yellow. In order to Check-In a patient for an appointment, a full registration of the patient information is needed.
NOTE: If a patient checks in at the Central Registration prior to arriving at the clinic, these mandatory fields will already be filled.
- In the **Encounter Information** tab select “Outpatient in a Bed or Outpatient OB” for Encounter Type and complete any mandatory fields.
- Click on **Complete** button. The appointment is now in a Checked In status.

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

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



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

1. You can also highlight the appointment in the grid area, and then click the **Check-in** icon  at the top of your screen.
2. The Check In window will display and you will follow the same steps as in the above methods of Check In.

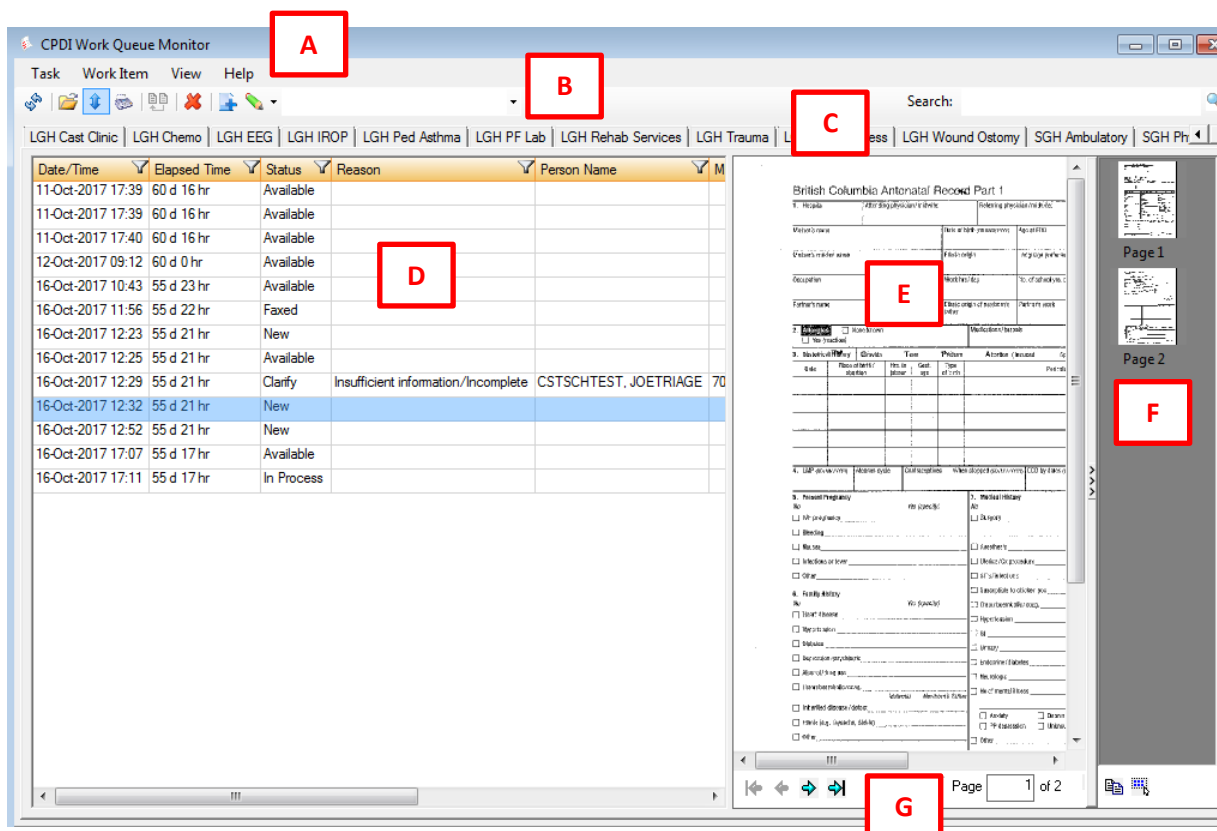
The Outpatient in a Bed or Outpatient OB encounter will need to be manually discharged by the OB Clerks.

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.

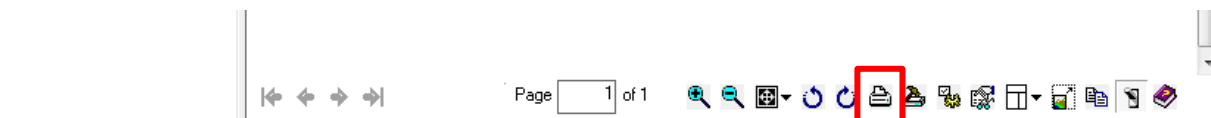
Open a Document in WQM

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).

- 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.

Close

You have not entered a valid combination to search on the foreign system.

BC PHN:

MRN:

Last Name:

First Name:

DOB:

Gender:

Postal/Zip Code:

Any Phone Number:

Encounter #:

Visit #:

Historical MRN:

Search Reset MPI Search

VIP	Deceased	Alerts	BC PHN	MRN	Name	DOB	Age	Gender	Address
<input checked="" type="checkbox"/>	No	Interpreter Required	9878263312	700001660	CSTSCHEMPI, NANCY	01-Jan-2012	5 Years	Female	2454 Highgh
<input checked="" type="checkbox"/>		Interpreter Required	9876874312	700003998	CSTSCHEMPI, PETE	02-Feb-2000	17 Years	Male	105 E Kent A
<input checked="" type="checkbox"/>		Process Alert	9876788282	700005017	CSTSCHEMPI, MICKEY	01-Jul-1997	20 Years	Male	11111 Howe S
<input checked="" type="checkbox"/>			9876706228	700006538	CSTSCHEMPI, JOHNNY	01-Sep-1999	18 Years	Male	11111 homer
<input checked="" type="checkbox"/>		Interpreter Required	9876541429	700007353	CSTSCHEMPI, JRAC	11-Oct-1943	74 Years	Male	590 West 8th
<input checked="" type="checkbox"/>			9876527087	700007576	CSTSCHEMPI, PAUL-JOSEPH	02-May-1950	67 Years	Male	9846 HIGHLA
<input checked="" type="checkbox"/>			9876504373	700007682	CSTSCHEMPI, JEFF	23-Oct-1985	32 Years	Male	5588 Donald I
<input checked="" type="checkbox"/>			9876488326	700007891	CSTSCHEMPI, RANDY	06-Nov-1977	40 Years	Female	900 E. 29th A
<input checked="" type="checkbox"/>			9876487578	700007926	CSTSCHEMPI, WALKER ONE	07-Nov-2010	7 Years	Undifferentiated	3355 Zombie

Facility	Encounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	Bed	Est Arrival Date	Reg Da
LGH Rehab OP	7000000015175	7000000015175	Pre-Outpatient	Occupational Therapy	LGH Rehab OP			24-Nov-2017 14:00	
LGH RAN	7000000013132	7000000013199	Referral	Neurology	LGH RAN				
LGH Rehab OP	7000000015494	7000000015494	Pre-Recurring	Occupational Therapy	LGH Rehab OP			27-Nov-2017 8:00	
LGH Chemo	7000000015242	7000000015242	Referral	Medical Oncology	LGH Chemo				
LGH RAN	7000000013101	7000000013168	Referral	Neurology	LGH RAN				06-Nov-

OK Cancel Add Person **Add Encounter** All Encounters

- The “Organization” window appears.
- Enter the “LGH Lions Gate Hospital” in Organization window and click **OK**.
- The EMPI window briefly launches to open the “Referral Management” conversation window.
- Click the Encounter Information tab to complete the below mandatory fields:
 - Encounter Type:** Referral (auto-defaults)
 - Medical Service:** Obstetrics
 - Reason for Visit:** Add a reason for visit
 - Referring Provider:** Select a Referring Provider
- 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
- Click the **Complete** button to close the “Referral Management” conversation.
- The “Referral Management” window opens with an Encounter Number and Visit ID.
- 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.

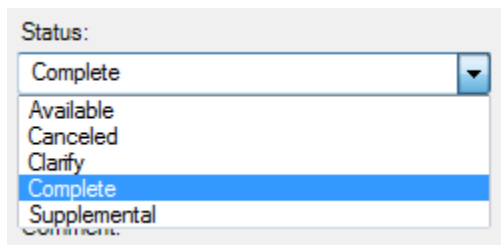
1. If sufficient information is provided to link the document to a patient/encounter, it is appropriate to "Complete" the document. This will take it off the queue and save it in the patient's chart.
 - i. In order to complete indexing, enter the below fields in "Add/Modify Work Item" window and click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

Document Type: Referral Other

Subject: Enter an appropriate name for the referral document (for example, "NST Request Form") (Note this is a free text box; if you do not manually enter a Subject name, it will default to the Document Type)

Status: "Complete"

Performing Provider: Document, Scanned



The screenshot shows a 'Status:' label above a dropdown menu. The dropdown is open, displaying a list of status options. The 'Complete' option is highlighted in blue. The options listed are: Complete, Available, Canceled, Clarify, Complete, and Supplemental.

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"

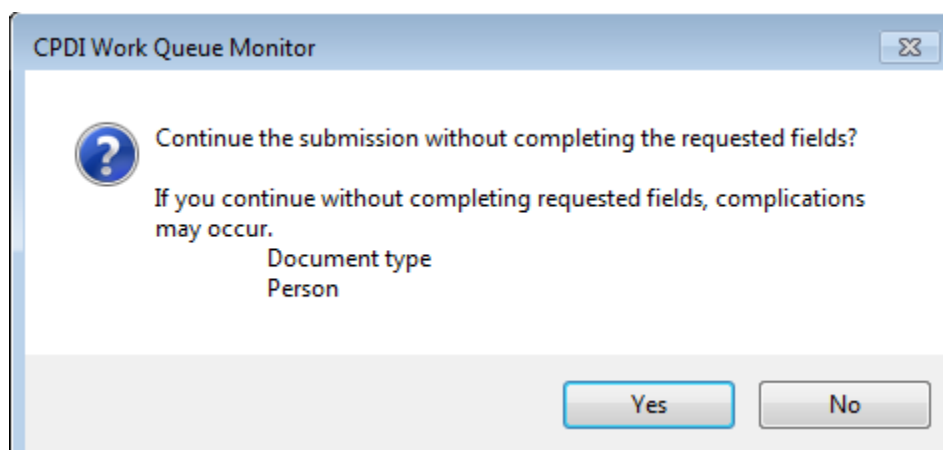
Reason: Choose the appropriate reason [for example: select "insufficient information/Incomplete" if the patient's name is not listed, select "missing pages" if an order is missing, or select "poor quality" if the reports are illegible etc.]

Status:
 Clarify

Reason:
 Insufficient information/Incomplete

Insufficient information/Incomplete
 Missing pages
 Multiple report
 Poor quality
 Translation required



- 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).

- 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.

- 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”

Performing Provider: Document, Scanned

- 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.

- Right-click on the document that you would like to delete.
- 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.

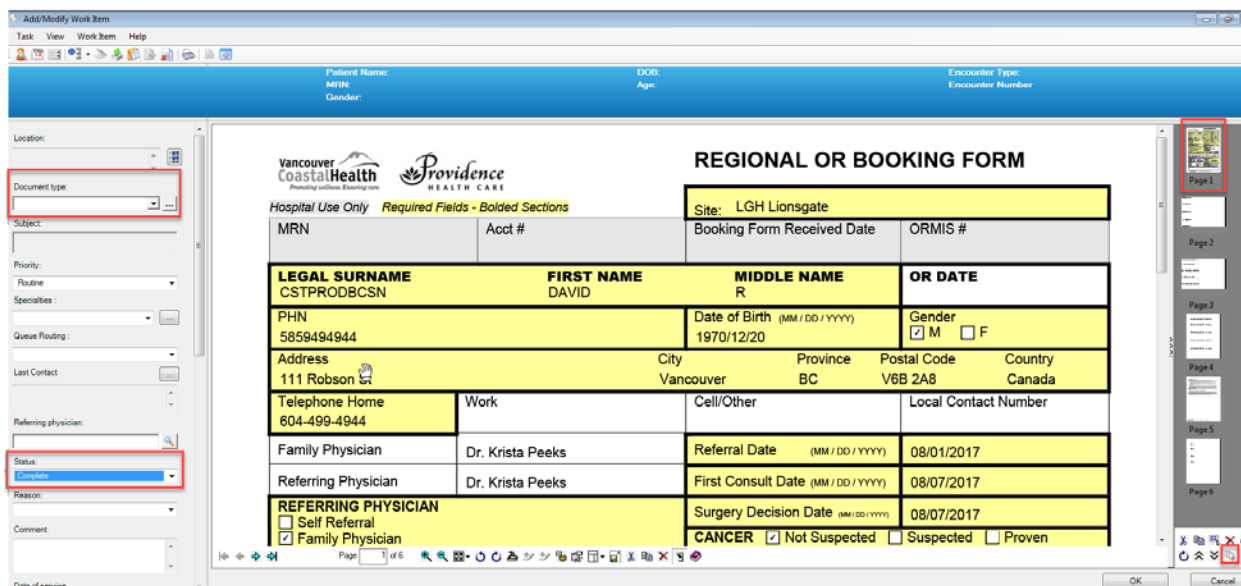
NOTE: Another reason why you may need to split the document is that multiple referrals have been sent in one package for multiple patients. You would need to split out each patient’s referral and link it to the appropriate patient and encounter.

Follow the steps below to split a document into WQM:

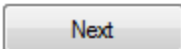
1. Follow the steps in the [Link a Document to a Patient/Encounter](#) section to link all pages of the received fax to a patient/encounter.

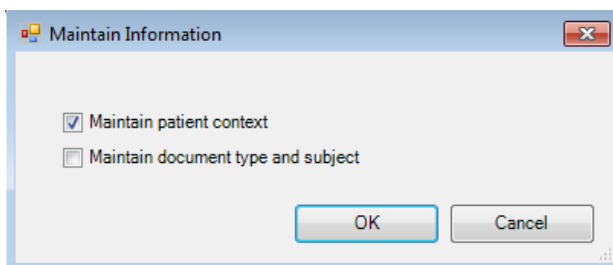
In order to finish the indexing & splitting of the documents, complete the below steps in the “Add/Modify Work Item” window:

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.



The screenshot shows the 'Add/Modify Work Item' window with a 'REGIONAL OR BOOKING FORM' for a patient named David R. The form includes fields for MRN, Acct #, Site (LGH Lionsgate), Booking Form Received Date, ORMIS #, Legal Surname, First Name, Middle Name, OR Date, PHN, Date of Birth, Gender, Address, City, Province, Postal Code, Country, Telephone Home, Work, Cell/Other, Local Contact Number, Family Physician, Referring Physician, Referral Date, First Consult Date, Surgery Decision Date, and checkboxes for Self Referral, Family Physician, and Cancer status.

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.

Location:
 LGH Joint Replacement Access Clinic
 JRAC/LGH Joint Replacement Access

Document type:
 [Redacted]

Subject:
 [Redacted]

Priority:
 Routine

Specialties :

Queue Routing :
 [Redacted]

Last Contact

British Columbia Antenatal Record Part 1

1. Hospital		Attending physician/midwife:		Referring physician/midwife:	
Mother's name			Date of birth (dd/MM/YYYY)		Age at EDD
Mother's maiden name			Ethnic origin		Language preferred
Occupation			Work hrs/day		No. of school yrs. con
Partner's name		Age	Ethnic origin of newborn's father		Partner's work
2. Allergies <input type="checkbox"/> None known <input type="checkbox"/> Yes (reaction)			Medications/herbals		
3. Obstetrical History		Gravida	Term	Preterm	Abortion (Induced _____ Spontaneous _____)
Date	Place of birth/	Hrs. in	Gest.	Type	Perinatal r

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.

CPDI Work Queue Monitor

Task Work Item View Help

[Icons: Refresh, Print, Add, Delete, Edit, etc.]

CST Test Queue [Unknown Queue] LGH Breath Prog | LGH Cardiology | LGH Cast Clinic | LGH Chemo | LGH EEG | LGH IROP | LGH Ped Asthma | LGH PF Lab | LGH Rehab

Date/Time	Elapsed Time	Status	Reason	Priority	MRN	Person Name	Encounter Number	D
02-Jun-2017 15:22	180 d 0 hr	Available		STAT	700006534	CSTSCHDEMO, NEWPATIENT	7000000010741	zz

Update Referral Encounter 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.

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 Pre-Register Outpatient Conversation.

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.

- Open the **Pre-Register Outpatient** Conversation and search for the Person.
- Select the patient **AND** the Referral encounter before clicking **OK**.

Person Search

You have not entered a valid combination to search on the foreign system. [Close](#)

BC PHN: VIP ☐ Download ☐ Alerts ☐ BC PHN: MRN: Name: DOB: Age: Gender: Address: Ac:

MRN:

Last Name: cstschempi

First Name: randy

DOB:

Gender:

Postal/Zip Code:

Any Phone Number:

Encounter #:

Visit #:

Historical MRN:

VIP	Download	Alerts	BC PHN	MRN	Name	DOB	Age	Gender	Address	Ac
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9876489326	700007891	CSTSCHEMPI, RANDY	06-Nov-1977	40 Years	Female	900 E. 29th Ave.	

Facility	Encounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	B
LGH Breath Prog	7000000017170	7000000017172	Outpatient	Respirology	LGH Breath Prog		
LGH RAN	7000000017139	7000000017141	Pre-Outpatient	Neurology	LGH RAN		
LGH Rehab OP	7000000015175	7000000015175	Pre-Outpatient	Occupational Therapy	LGH Rehab OP		
LGH Med Imaging	7000000016785	7000000016785	Pre-Outpatient	Medical Imaging	LGH Med Imaging		
LGH RAN	7000000016864	7000000016866	Pre-Outpatient	Neurology	LGH RAN		
LGH Vasc Access	7000000016931	7000000016933	Pre-Outpatient	Vascular Surgery	LGH Vasc Access		
LGH Lions Gate	70000000200733	70000000200734	Pre-Outpatient OB	Family Practice	LGH LD		
LGH Rehab OP	7000000015484	7000000015484	Pre-Recurring	Occupational Therapy	LGH Rehab OP		
LGH Chemo	7000000016096	7000000016096	Pre-Recurring	Medical Oncology	LGH Chemo		
LGH RAN	7000000013132	7000000013133	Referral	Neurology	LGH RAN		
LGH Chemo	7000000015242	7000000015242	Referral	Medical Oncology	LGH Chemo		
LGH Rehab OP	7000000015735	7000000015735	Referral	Occupational Therapy	LGH Rehab OP		

- The EMPI window briefly launches.
- Click **Encounter Information** tab to select the appropriate Pre-Outpatient encounter (Pre-Outpatient in a Bed or Pre-Outpatient OB) in **Encounter Type** drop-down list and update **Referral Status** to Accepted.

Pre-Register Outpatient

Medical Record Number: 700007891 | Encounter Number: 7000000013132 | Last Name: CSTSCHEMPI | First Name: RANDY | Middle Name: | Preferred Name: | Previous Last Name: |

Maiden Name: | Date of Birth: 06-Nov-1977 | Age: 40Y | Gender: Female | BC PHN: 9876488326 | Pre-Reg Status: Incomplete | Images

ALERTS | Patient Information | Encounter Information | Insurance | Insurance Summary | Additional Contacts

Encounter Type: Pre-Outpatient OB | Medical Service: Neurology | Reason for Visit: reason for visit | Referral Source: | Referral Status: Accepted

Location: Facility: LGH RAN | Building: LGH RAN | Unit/Clinic: LGH RAN | Accommodation Reason: | Patient Accom Requested: | Accom Form Signed: |

Care Providers: Attending Provider: | Primary Care Provider (PCP): Baggoo, Alan Kieth, MC | PCP Verified?: | Referring Provider: Baggoo, Alan Kieth, MC |

Patient Privacy: Visitor Status: |

Comment: |

Previous Comments: |

Account Data: |

Complete Cancel

Ready P0783 TEST.SCHEDCLERKADV 07-Feb-2018 10:12

NOTE: Pre-Outpatient in a Bed encounter type is for Inductions. Pre-Outpatient OB encounter is for NSTs, ECVs, Iron Infusions, and Outpatient Betamethasone Injections

- Click **Complete** button and the “Document Selection” window pops-up.
- Click **OK** to close the “Document Selection” window.

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.

- Open the **Discharge Encounter** Conversation and search for the Person.
- Select the patient **AND** the Referral encounter before clicking **OK**.
- Update Referral Status, Discharge Disposition, Discharge Date and Discharge Time.

Discharge Information

Discharge Disposition: No Further Service | Discharge Date: 04-Dec-2017 | Discharge Time: 10:18

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

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 by the Provider. At this point the referral can be scheduled 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.
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 verbally to OB Nurse or OB Unit Clerk.

Accepted Referrals

4. When a Referral is accepted the Triaging Provider/Clinician will notify the clerk, 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.

Person Search

BC PHN:

MRN:

Last Name:

First Name:

DOB:

Gender:

Postal/Zip Code:

Any Phone Number:

Encounter #:

Visit #:

Historical MRN:

VIP	Deceased	Alerts	BC PHN	MRN	Name	DOB	Age
		Interpreter Required	9878171163	700002133	CSTSCHEST, NATE REFREG	01-Jan-1980	37 Y
	No		9878103913	700002315	CSTSCHEST, BARRY	01-Jan-1980	37 Y
				700002337	CSTSCHEST, ALEXIS SCHEDEXPERT	01-Jan-1990	27 Y
			9878174628	700002376	CSTSCHEST, STEATHER	22-Mar-1976	41 Y
			9878173285	700002395	CSTSCHEST, BJORN	01-Jan-1970	47 Y
	Yes		9876747739	700005708	CSTSCHEST, DECEASED	01-Jan-1980	37 Y
	Yes		9876747721	700005709	CSTSCHEST, ZOMBIE	01-Jan-1980	37 Y
			9876714508	700006322	CSTSCHEST, JRAC	07-Aug-1963	54 Y
			9876712894	700006386	CSTSCHEST, NATERECURRING	01-Jan-1980	37 Y
			9876708285	700006487	CSTSCHEST, JOETRIAGE	08-Sep-1964	53 Y
			9876504105	700007708	CSTSCHEST, BABY	19-Jan-2017	10 M
	No		9876501955	700007784	CSTSCHEST, ARLENE	18-Oct-1965	52 Y
			9876487704	700007915	CSTSCHEST, ABIGAIL	06-Nov-1994	23 Y

Facility	Encounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	Bed	Est A
LGH PF Lab	7000000010025	7000000010079	Referral	Respirology	LGH PF Lab			
LGH RAN	7000000010367	7000000010429	Pre-Outpatient	Neurology	LGH RAN			18-S
LGH RASC	7000000010581	7000000010643	Pre-Outpatient	Neurology	LGH RASC			22-S
LGH RASC	7000000010586	7000000010648	Pre-Outpatient	Neurology	LGH RASC			25-S
LGH RASC	7000000010621	7000000010683	Pre-Outpatient	Neurology	LGH RASC			25-S
LGH RASC	7000000010634	7000000010696	Pre-Outpatient	Neurology	LGH RASC			25-S
LGH RAN	7000000016357	7000000016357	Referral	Neurology	LGH RAN			
LGH RAN	7000000010906	7000000010968	Pre-Outpatient	Neurology	LGH RAN			02-O
LGH Breath Prog	7000000015761	7000000015761	Pre-Outpatient	Respirology	LGH Breath Prog			30-N
LGH OCC MDC	7000000013593	7000000013660	Pre-Outpatient	Infectious Diseases	LGH OCC MDC			16-N
LGH RAN	7000000016124	7000000016124	Outpatient	Neurology	LGH RAN			06-D
LGH OCC Univer	7000000013265	7000000013332	Outpatient	Cardiology	LGH OCC Univer			08-N
LGH OCC Univer	7000000013169	7000000013236	Outpatient	Cardiology	LGH OCC Univer			07-N

- 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.

Rejected Referrals

6. When a Referral is rejected the Triaging Provider/Clinician will notify the clerk, 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 Triage Provider/Clinician requests for any additional information, 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.

Process Additional Documents in WQM

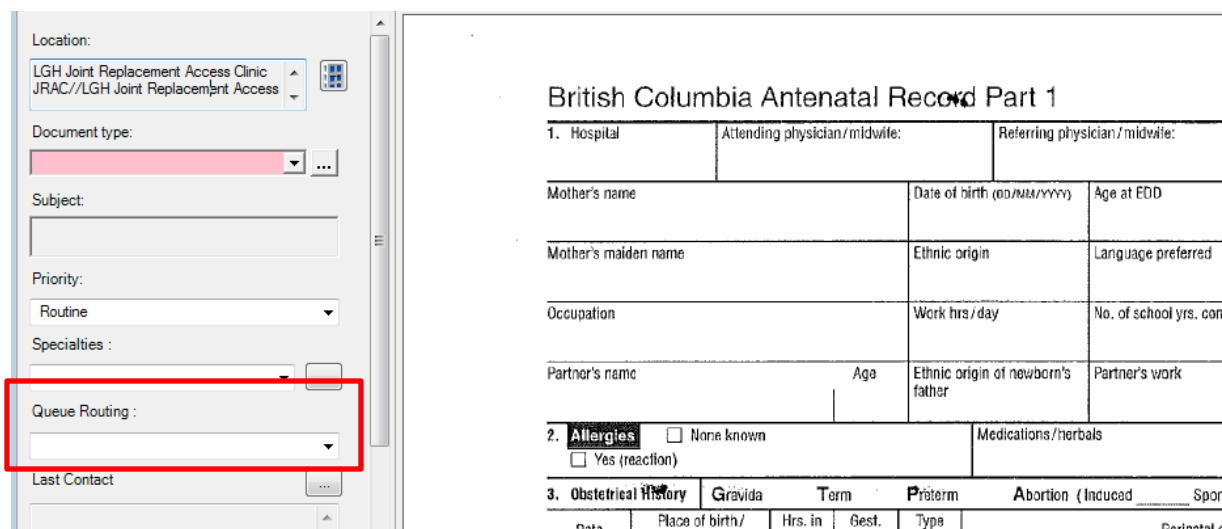
- i. Additional information should be sent in via fax so an electronic version can be linked to the patient's chart. If the additional information is received on paper, follow the steps in "[Scan a Paper Document to a Patient's Chart](#)" to get the document into WQM.
- ii. When the requested information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

Additional Referral/Triage Scenarios

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



Location:
 LGH Joint Replacement Access Clinic
 JRAC/LGH Joint Replacement Access

Document type:
 [Redacted]

Subject:
 [Redacted]

Priority:
 Routine

Specialties :

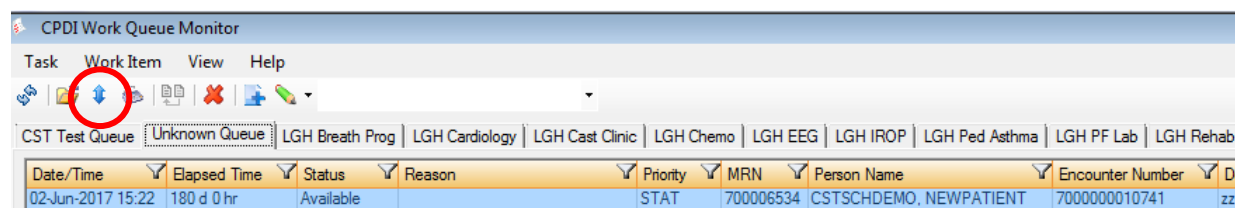
Queue Routing : [Redacted]

Last Contact

British Columbia Antenatal Record Part 1

1. Hospital		Attending physician/midwife:		Referring physician/midwife:	
Mother's name			Date of birth (dd/mm/yyyy)		Age at EDD
Mother's maiden name			Ethnic origin		Language preferred
Occupation			Work hrs/day		No. of school yrs. com
Partner's name		Age	Ethnic origin of newborn's father		Partner's work
2. Allergies			Medications/herbals		
<input type="checkbox"/> None known <input type="checkbox"/> Yes (reaction)					
3. Obstetrical History		Gravida	Term	Preterm	Abortion (Induced _____ Spontaneous _____)
Date	Place of birth/	Hrs. in	Gest.	Type	Parinatal /

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



CPDI Work Queue Monitor

Task Work Item View Help

[Route Icon]

CST Test Queue [Unknown Queue] LGH Breath Prog LGH Cardiology LGH Cast Clinic LGH Chemo LGH EEG LGH IROP LGH Ped Asthma LGH PF Lab LGH Rehab

Date/Time	Elapsed Time	Status	Reason	Priority	MRN	Person Name	Encounter Number	D
02-Jun-2017 15:22	180 d 0 hr	Available		STAT	700006534	CSTSCHDEMO, NEWPATIENT	7000000010741	zz

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

- Follow the steps (1 to 7) from the “[Link a Document to a Patient/Encounter](#)” section.
- 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

- Click the **Complete** button to close the **Referral Management** conversation.
- “Referral Management” window opens with Encounter Number and Visit ID.
- Click **OK** to close the “Referral Management” window.
- 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”

Performing Provider: Document, Scanned

7. Log into PMOffice and open the **Discharge Encounter Conversation**.
8. Search for the patient, select the patient AND the Referral Encounter. Click **OK**.
9. 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
10. Click **Complete** to close the “Discharge Encounter” window.
11. 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 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 below.

Schedule an Appointment

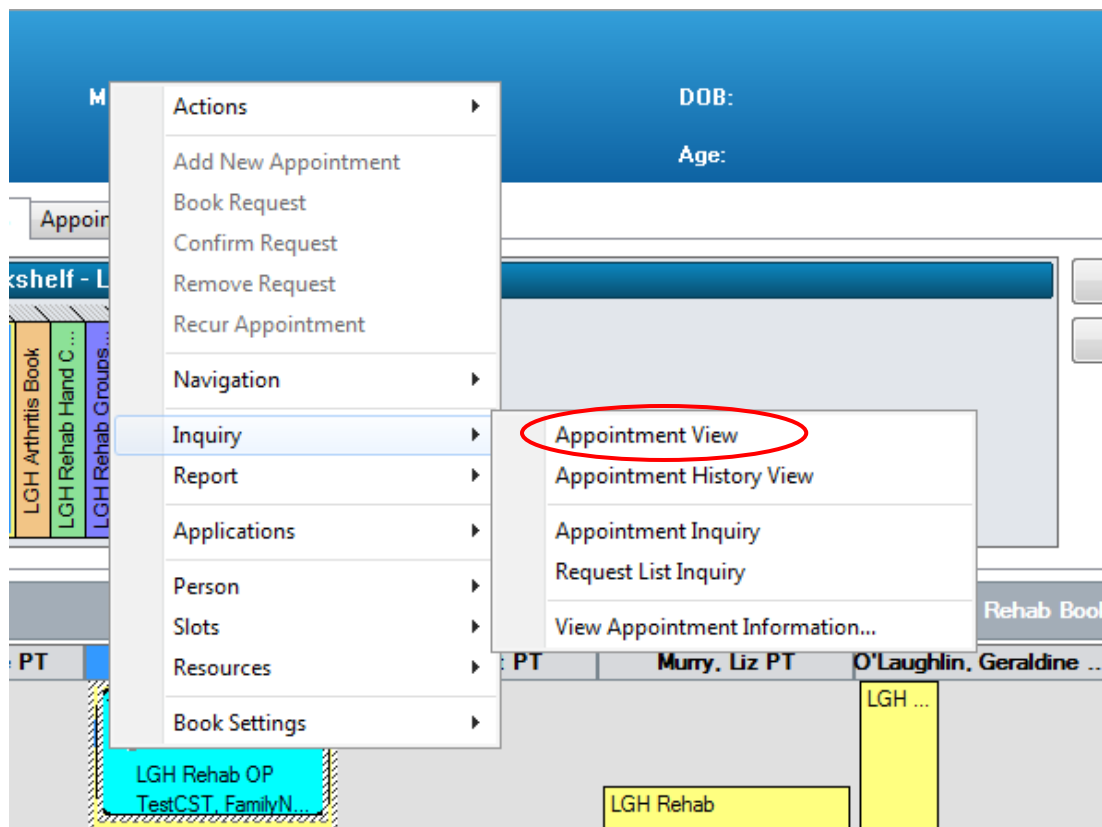
- i. Keep the Referral form open for reference and open the **SchApptBook**.
- ii. Follow the steps in the “[Appointment Scheduling](#)” section to book an appointment using any of the scheduling methods with a “Pre-Outpatient Outpatient in a Bed or Pre-Outpatient OB” encounter.


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 Outpatient in a Bed or Pre-Outpatient OB” 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.

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.



 Appointment View

General | Event Details | Resources | Instructions | Guidelines | Scheduling Comments | Orders | Protocol Components

Appointment Information
Appointment type: Rehab Arthritis New - PT
Scheduled as: Rehab Arthritis New - PT
Location: LGH Rehab OP

Person Name	Enc Type	MRN	Enc Status	Sex	Home Phone	Business Phone	DOB	SSN
CSTSCHEMPI, RANDY	Pre-Recuring	700007891	Preadmit	Female			06-Nov-1977	

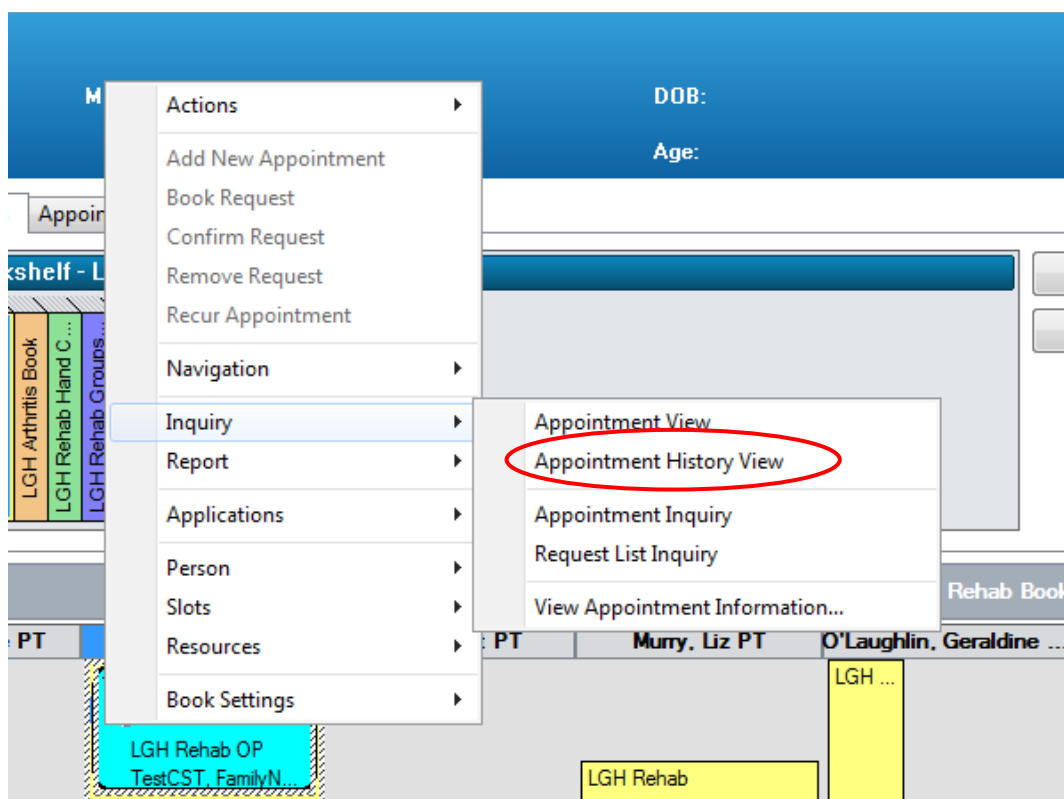
Current State Information
State: Confirmed
By: TestUser, ClerkAdvanced-Scheduling 24-Nov-2017 11:17
Medical record requested: No
Status of medical record request:

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

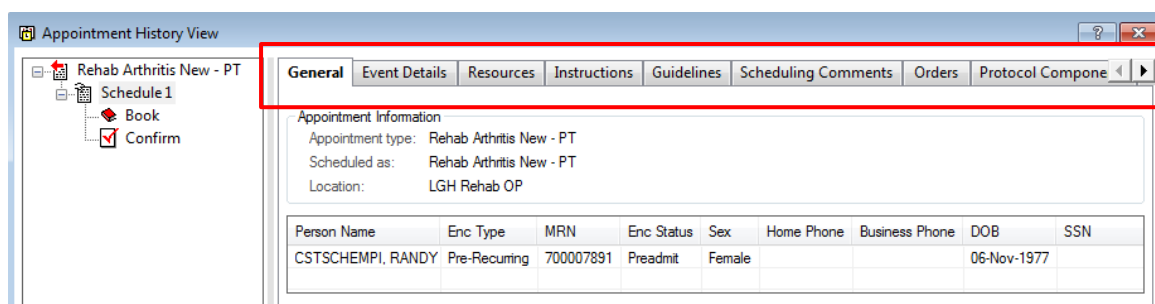
Viewing Appointment History

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.



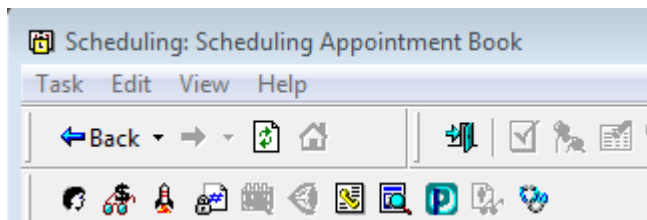
Click on the different tabs to view detailed information about the appointment.

Hot Keys

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

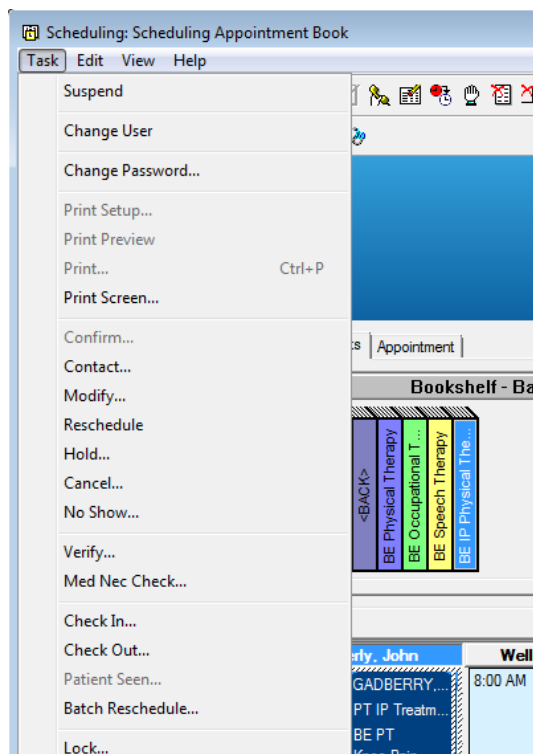
Pressing **ALT + any underlined letter** will perform that action the same as clicking with the mouse. Below are several examples of actions that can be performed using hot keys.

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 so-on.

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:

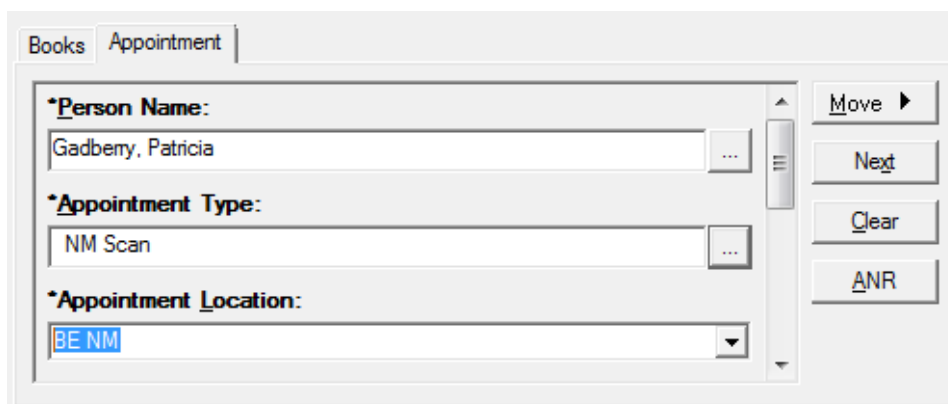
The TAB key will move the cursor to the next prompt.

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 through the available options.

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



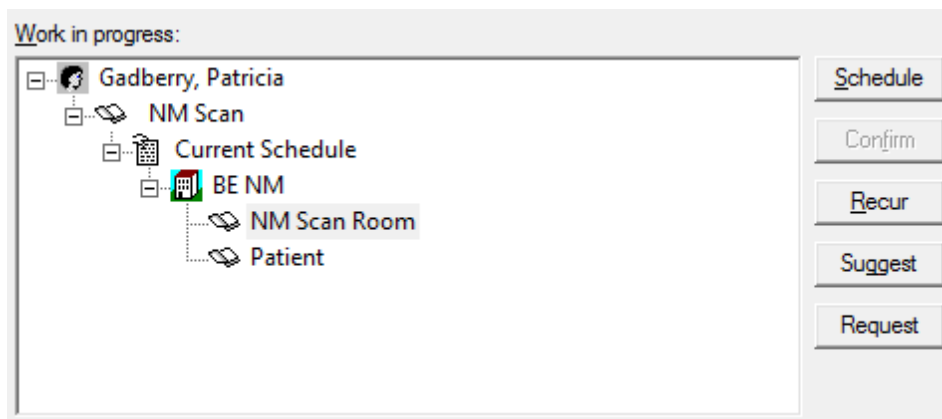
The screenshot shows a software window titled "Appointment" with a tab labeled "Books". Inside the window, there are three prompts, each with a text field and an ellipsis button (...):

- *Person Name:** The text field contains "Gadberry, Patricia".
- *Appointment Type:** The text field contains "NM Scan".
- *Appointment Location:** The text field contains "BE NM".

To the right of these prompts is a vertical scroll bar. Further to the right are four buttons: "Move" (with a right-pointing arrow), "Next", "Clear", and "ANR".

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.

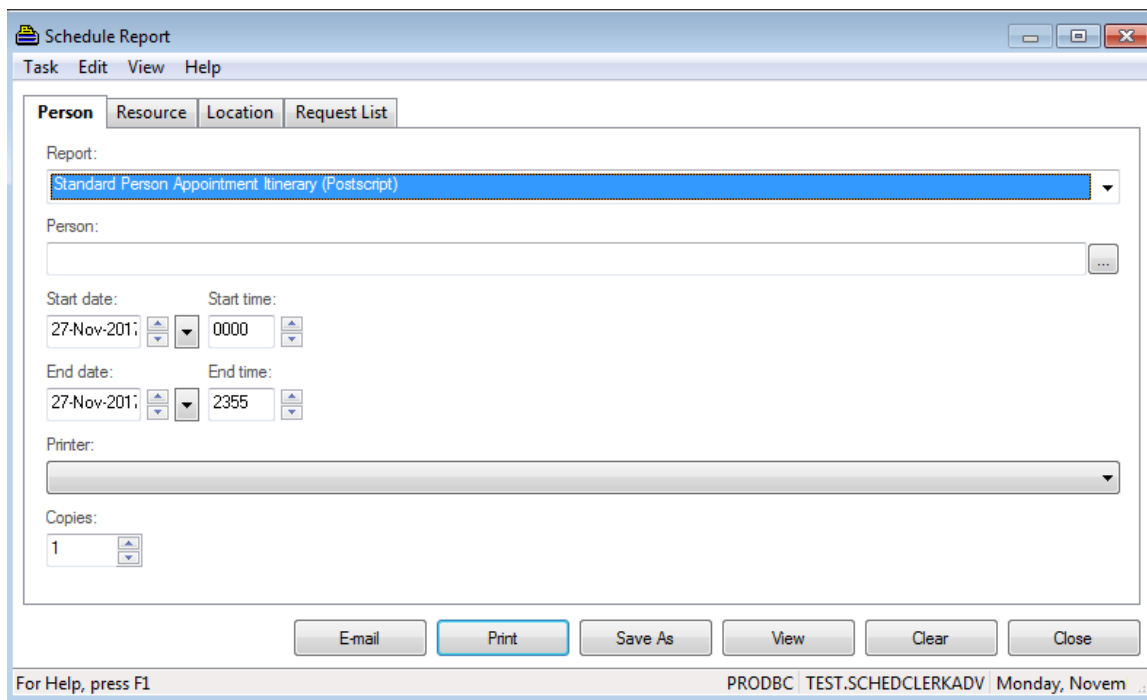
Highlight the first item to be selected in the list, hold down the SHIFT key, and press the END key. This will select the first item highlighted and all subsequent items all the way to the end of the list.

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:



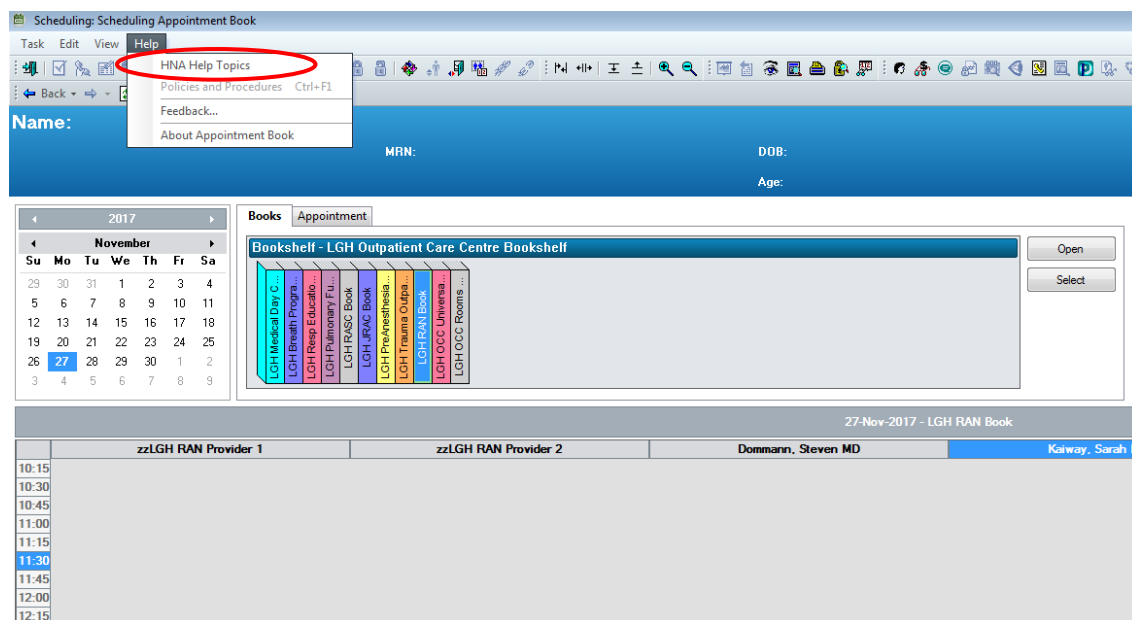
3. Select the appropriate tab (Person, Resource, Location or Request List).
4. Select the desired report from the drop down box.
5. Set filters of resource, person or location.
6. If appropriate, set start and end date of report.
7. Select the number of copies to print.
8. Select printer from drop down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

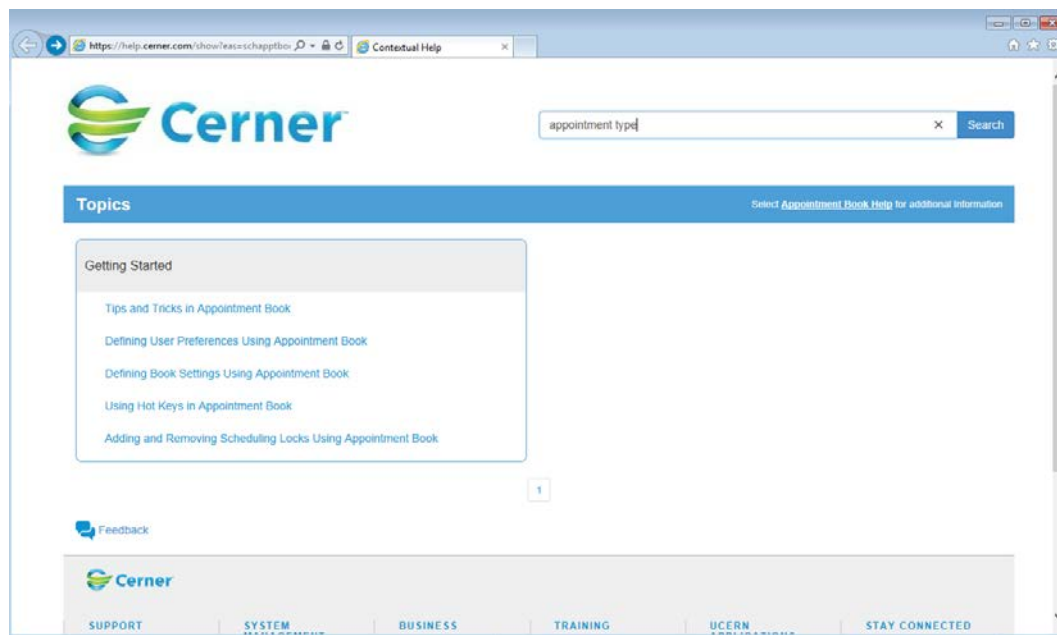
Help Files

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.