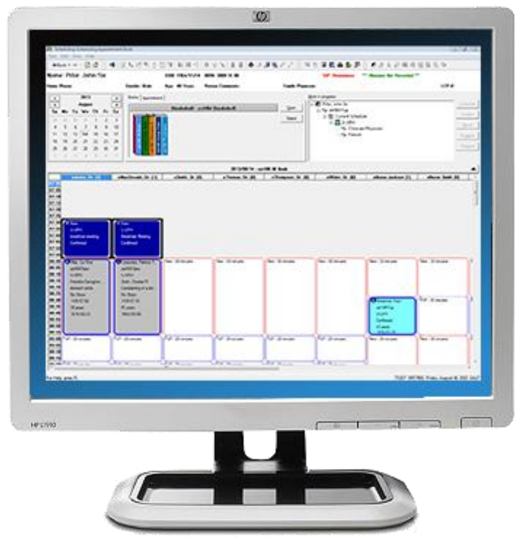
London Health Sciences Centre

St. Joseph's Health Care London

User Guide

Scheduling



CLINICAL INFORMATICS

Version: V2 | Date: July 30, 2014

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PATIENT ASSISTANCE AND PRIVACY

Audits

- All patient system access is stamped with your electronic signature. Regular audits are conducted to ensure that patient privacy has not been breached. Remember to access only the patient data you require to perform your job.
- Privacy Office staff are always willing to come to departments for discussion or in-service on any privacy-related topic. To request an in-service, call ext. 32996.

To look up information to help visitors or family find patients

Outpatients

- The **Scheduling Appointment Inquiry** is an appropriate tool to use for providing patients with information about the time and place of their appointment

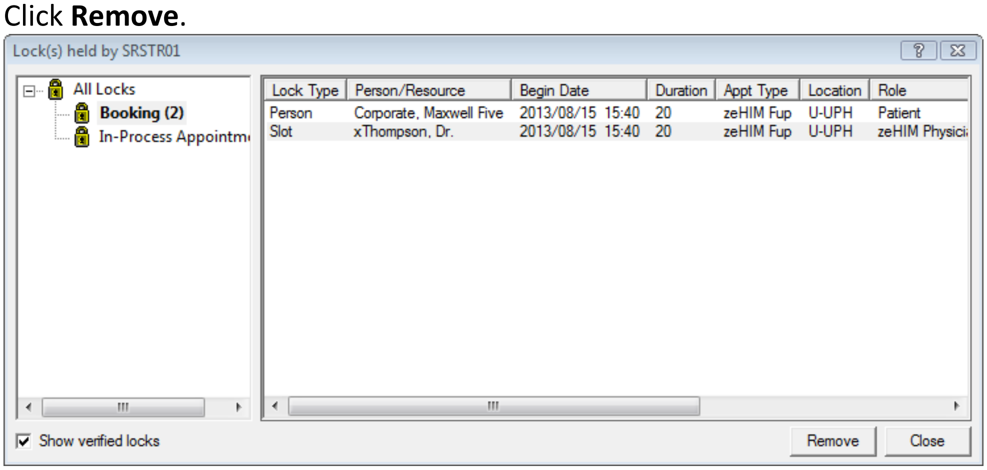
Inpatients / Emergency / Urgent Care / One Day Stays

- The **Patient Locator** is an appropriate tool to use for giving directions (way finding) to family and visitors to locate patients who are currently registered.

REMOVING SCHEDULING LOCKS

If you see a **Lock(s)** dialog when you open the **Scheduling and Appointment Book**, you can simply remove the lock:

1. Click on one of the rows in the right hand column.
1. Click **Remove**.



Completing a Proper Patient Search

Performing a proper patient search is critical to ensure that only one record exists for each patient.

To find a patient record, perform the three searches in the following order:

1. Ontario health card number (10 digits)
2. Last Name and the first 3-4 characters of the First Name. (If the Last Name is a common Last Name, you may need to enter the full First Name)
3. Hospital PIN specific to your site or Hospital RMRN (LRCP Only)

Important:	You must perform the FIRST TWO searches to ensure that all person records for the patient are found because: *Many patients are currently scheduled without a health card number, so you need to complete this search to be sure that the patient is not in the database.* *OR* *Many old records do not have complete information and therefore duplicates do exist.* Call Health Records to combine duplicates BEFORE scheduling and/or registering these patients whenever possible.

If you still cannot find your patient

If you cannot find your patient after performing the first three searches described above, complete as many of the following searches to ensure that the patient does not exist before you click **Add Person** to create the new patient record.

1. Last Name, first 3-4 letters of the Middle Name field
2. Last Name, sex and age range of 10 years (based on given date of birth)
3. Other Last Name (e.g. maiden, previous), first 3-4 letters of the First Name
4. Last Name, legal form of abbreviated First Name (e.g., Elizabeth from Betty)
5. If the patient was born in one of our hospitals, then search Last Name, First Name “Baby”, and sex

Important Notes to Remember when Searching

- Searches performed with too much information limit the number of names found. If the result of a search is "too many persons found", add a limited amount of information to the search screen so that the search is narrowed and results can be displayed.
- Once results are displayed, use additional patient demographic information to verify that the selected patient is correct.

- The search automatically filters out all punctuation (e.g., hyphens, quotation marks) and equalizes upper and lower case letters. Spaces in the Last Name do not affect the search (e.g., Smith Jones) providing the Last Name is entered in a separate field.
- An age range search does not find matches on the minimum and maximum age specified.
- Soundex searching does not find matches on Middle Name.

Important	Never include a PIN or HCN with any other search filters (e.g., name, sex). This slows down your search performance as well as all other system users and may cause your computer to freeze. Remember to use the patient's FULL legal name when registering and make any necessary modifications if a patient is found registered under their preferred name rather than legal name. This helps to eliminate duplicate registrations for the same patient.

EDITING PATIENT RECORD INFORMATION

Follow these guidelines when creating or editing a Patient Record.

Patient Name

The patient's full legal name must be used. The legal name is defined as the first or given name, Middle Name (if applicable) and the surname as is entered on the patient's birth certificate or as altered via a legal name change event such as marriage, adoption or court approved name changes.

Legal names will be entered with proper punctuation, i.e., periods, commas, hyphens etc., as well as upper and lower case letters when applicable. For patients with only ONE legal name, the name is entered into the Last Name field, and NONE is entered into the First Name field.

Abbreviations of a First Name will not be used unless this is the patient's legal First Name. If a patient prefers to be called something other than their legal name, enter this into the preferred name field.

The following exceptions may apply to naming convention:

- Newborns are entered using the mother's Last Name (unless otherwise informed) and the First Name will be 'Baby'. In the case of multiple births, use letters to distinguish between babies. For example, Baby A Smith and Baby B Smith.
- Titles such as Dr. or Reverend and name suffixes such as Junior are recorded ONLY in the preferred name field unless documented as a legal name.
- Last Names that include Saint will be entered as St.

Telephone Contact Information

The main or primary telephone number for the patient is to be entered in the **Primary Phone Number** field.

The **Primary Phone Extension** field should not contain alpha characters or symbols; only numeric digits. Do not type the term “cell#” in this field.

Ensure the patient provides you with the correct selection for the **Call Instruction** field. This field is used for all departments and services who need to contact the patient. The options for the **Call Instruction** field are:

- Alternate Phone
- Do Not Contact
- Primary Phone

SHORTCUTS AND DEFAULTS

When typing information into fields, or selecting a drop-down option, use the following shortcuts.

Shortcut	**Result**
t	for today’s date
Unknown age	1875/01/01
n	for current time
s	to add self to a drop-down field
pat	to fill in patient demographics in other tabs after it is initially entered in the patient tab
“”	enter double quotes in the preferred name field to delete a previous entry
nok	next of kin
Unknown postal code	X9X9X9
nfa	no fixed address-will add all necessary information
clr	clear all associated fields
unk	unknown address-will add all necessary information
Autofill	enter intial keystrokes into a drop-down field and system will autofill
FUP	Follow up appointment with auto chart request
Follow Up	Follow up appointment without chart request
Alt + Underlined letter	To select a menu item

Shortcut	Result
TAB	Tab between fields to enter data
Use the following in the Family Physician field	• walkin (brings up a list of family clinics) • nofam (no family doctor) • unk (unknown family doctor)

TYPES OF PIN NUMBERS

The table below lists the various PIN formats for area hospitals.

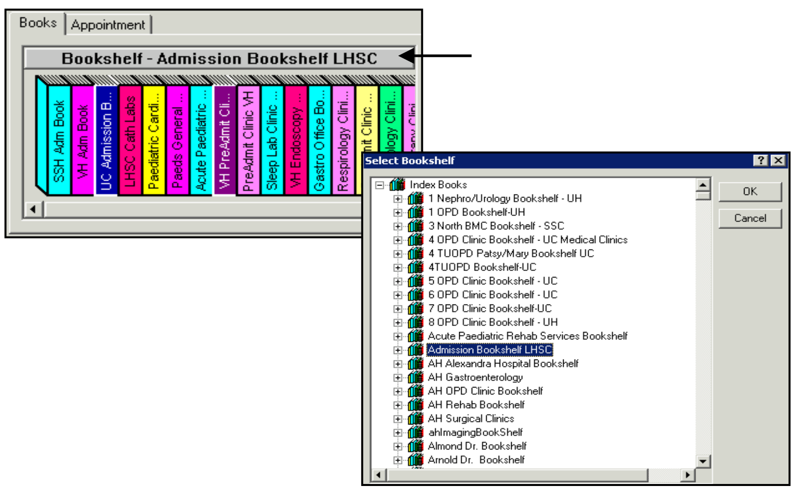
Prefix	Number of Digits	Site
No PIN		DOB exists – Valid Patient Record – Must Use
900	6	Referred-in Lab Work
London Hospitals		
No Prefix *3000,* *3100*	8	London Health Sciences Centre ***Downtime PIN***
LCP	6	London Regional Cancer Program
M	5	Mount Hope, London
P	5	Parkwood Hospital, London
RS	5	Southwest Centre for Forensic Mental Health Care
RL	5	Regional Mental Health London
J *J3*	6 or 7	St. Joseph's Health Centre, London ***Downtime PIN***
Historic PINS – no longer being issued		
U or V	6	University Hospital, London or Victoria Hospital London
Regional Hospitals		
AH	6	Alexandra General Hospital, Ingersoll
FC	6	Four Counties Hospital, Newbury
LM	6	Listowel Memorial Hospital
SH	5	South Huron Hospital, Exeter
SE	6	St. Thomas Elgin General Hospital
SM	6	Strathroy Middlesex General Hospital
TG	6	Tillsonburg District Memorial Hospital

Prefix	Number of Digits	Site
WD	6	Wingham & District Hospital
WH	6	Woodstock General Hospital

Schedule an Appointment

Select your bookshelf

1. If your bookshelf is not displayed, click the **Bookshelf Bar**.
2. Click the bookshelf name.
3. Click **OK**.



Enter appointment details

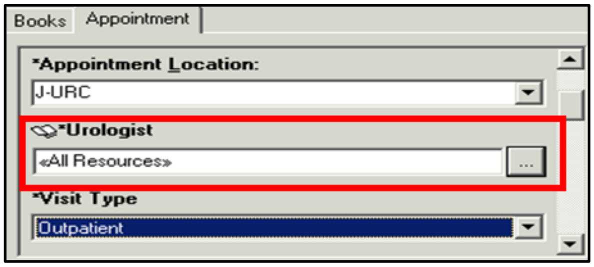
1. Click the Appointment tab.
2. Click the ellipses button beside the Patient Name field.
3. Conduct a proper patient search to select your patient.
   The Future Appointments/Requests window is displayed for you to review future appointments.
4. Click OK.
5. Enter the appointment details.

Resource Selection

Resource (or Physician/Clinician) selection is clinic and appointment type-dependent and may not exist for some appointment types.

1. Type in the first few letters of the appointment type. Click on the Ellipses button to select the appropriate appointment type from the list.

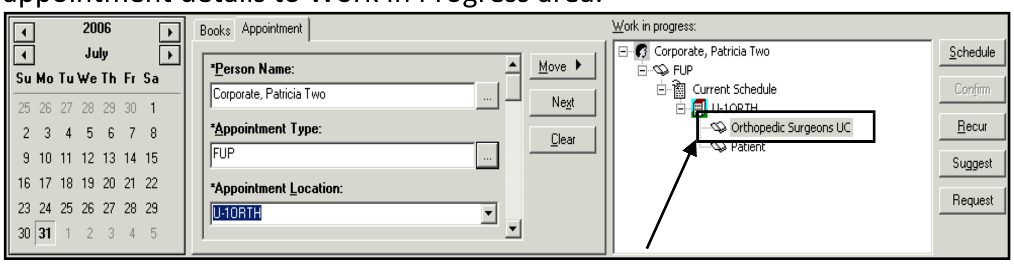
2. Enter the appointment location or select from drop down list by clicking on the arrow
3. Press TAB to move to the Physician/Clinician Field



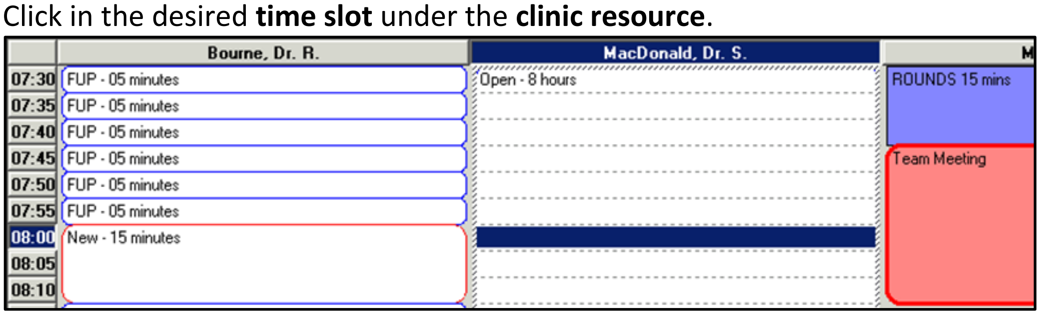
4. Click on the Ellipses button to select Resource

Move the appointment to the Work in progress area for Scheduling and Confirmation

1. After you have entered all appointment details, click **Move** to transfer the appointment details to Work In Progress area.



2. The Resource's book will automatically display below.
3. **Note**: Other resources (e.g., room, dietician, nurse, chair, educator, procedure) may prompt for selection, depending upon the appointment type/clinic selected.
4. Ensure appropriate resource is highlighted.
This is the first resource listed in the appointment.
5. Select a date on the calendar.
6. Click in the desired **time slot** under the **clinic resource**.



7. Click **Schedule**.
8. Review resource, time and select duration of appointment.
9. Click **OK**.

10. If all the book icons in the **Work-In-Progress** area are red and closed, click **Confirm**.

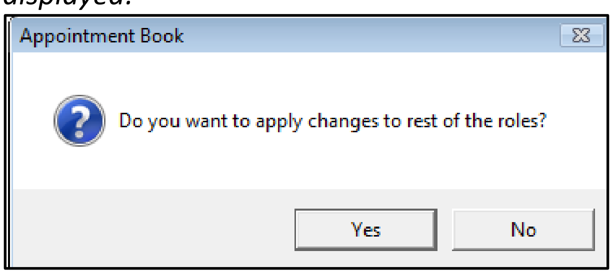
Appointment Confirmation

1. Review details on **Confirmation** Screen.
2. Print appointment for patient (if needed).
3. Click **OK**.

Changing the appointment time after you click Schedule

On occasion, after you have clicked **Schedule** and before you click **Confirm**, you may want to change the scheduled time of the appointment.

1. To do this you simply select a new time and click **Schedule** again.
   *After you click **OK** on the **Schedule** dialog box, the following message is displayed:*



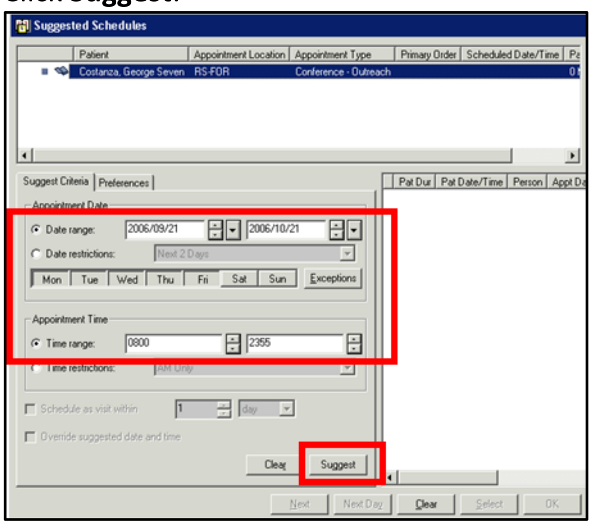
2. Click **Yes** to confirm that you want to accept the new time for the appointment.
   *If you click **No** the patient will not be properly scheduled with the resource.*

Schedule an Appointment using Suggest

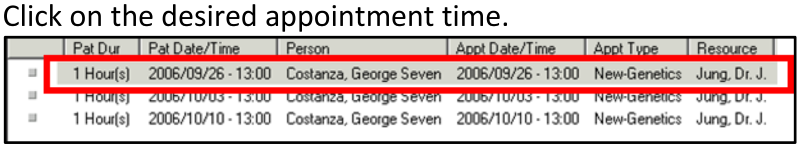
Use Suggest to automatically find the next available open slot for an appointment.

Note	The Suggest feature only works when the Appointment Type has corresponding empty Slots in the book. If an available slot does not exist for the Appointment Type, then Suggest will not recommend appointment times.

1. Enter appointment details and move the appointment to the **Work in progress** area.
2. Click **Suggest**.
3. Click the **Preferences** tab and select the number of **suggested appointments to return**.
4. Click the **Suggest Criteria** tab, indicate days of the week and time ranges to search for available times.
5. Click **Suggest**.



6. A list of possible appointment times will appear.
7. Click on the desired appointment time.

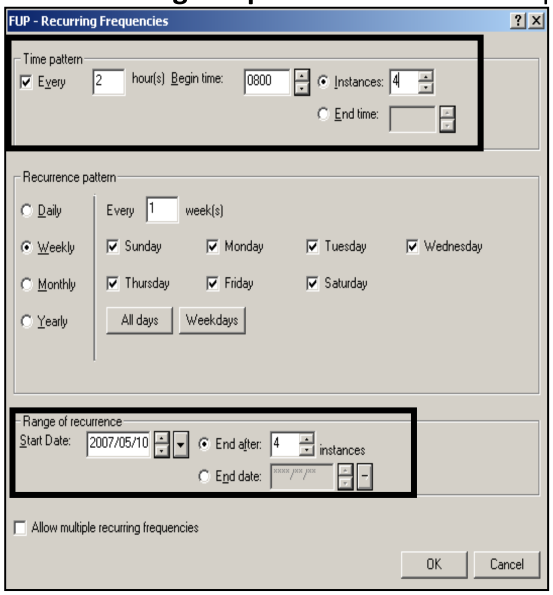


8. Click **Select**.
   A red checkmark appears next to the appointment in the top window.
9. Click **OK**.
   *The appointment is displayed in the **Work in progress** area on the **Scheduling** screen*
10. Click **Confirm**.

SCHEDULE RECURRING APPOINTMENTS

Use Recurring Appointments to select the recurring pattern for multiple appointments.

1. Enter appointment details and move the appointment to the **Work in progress** area.
2. Click **Recur**.
   The **Recurring Frequencies** window will open.



Time pattern

- Select the number of hours required between appointments.
- Enter the start time.
- Select the number of appointments required for the day or the end time for the appointments.
- Enter the start date under the Range of Recurrence section.
- Enter the number of instances (number of appointments required) or the end date.

Recurrence pattern

- Click on the radial button next to the appropriate option.
- Select the number of days you want the pattern to repeat i.e., every day or every 2 days etc.
- If selecting the weekly pattern, select the required days of the week.
- There are two options available for selecting the monthly pattern, once you select the **Monthly** radio button:

  - Select a certain date of the month for a defined number of months (i.e., the 15th day of each month for 6 months).
  - Select a certain week and day of the week for each month for a defined number of months (i.e., the second Tuesday of each month for 6 months)
- There are two options available for selecting the yearly pattern, once you select the **Yearly** radio button:
  - Select a certain month of the year as well as a particular day of the month for a defined number of years (i.e., the 12th of February for 2 years).
  - Select week, day of week and month for a defined number of years (i.e., the third Monday in March for 2 years).

Range of Recurrence

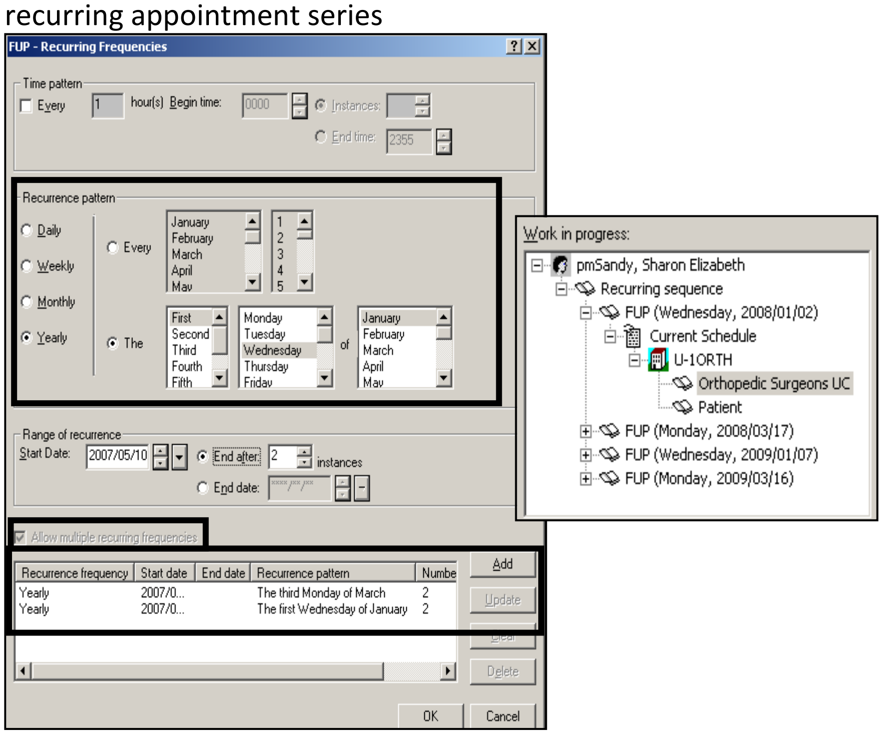
The Range of recurrence section must include:

- Start Date
- and either an end date or the number of instances (which is equal to the total number of appointments) desired for the patient

Allow multiple recurring frequencies

To combine more than one type of recurring pattern for the appointment:

1. Place a check mark in the box beside Allow multiple recurring frequencies. The window will expand to allow the use of the Add button to start a new recurring appointment series



2. Click Add to save the current recurring sequence and start another.
3. Follow steps 1 – 2 above and repeat this process as many times as necessary.
4. Click **OK** for the information to be transferred into the **Work in progress** area.
   *If there are any necessary changes or deletions to the information entered, click on the **Recur** button to reopen the **Recurring Frequencies** window*
5. Right-click on the patient's name.
6. Click **Expand Branch**.
7. Click on the first resource for each appointment.
8. Click **Schedule** to select the resource, time and duration for each appointment.

CREATE MULTIPLE APPOINTMENTS

You can use the **Work in progress** area to copy and edit multiple appointments.

1. Enter appointment details on the **Appointment** tab.
2. Click **Move** to transfer appointment details to the **Work-In-Progress** area.
3. Click **Next**.
4. Change appointment criteria, if necessary.
5. Click **Move**.
6. Repeat the steps above to create as many appointments as needed.
   Each appointment is copied to the **Work-In-Progress** area.

To edit one of the appointments:

1. Click on the appointment's first resource.
2. Make edits to the appointment details as needed.
3. Click **Move** to transfer the edited appointment details to the appointment.

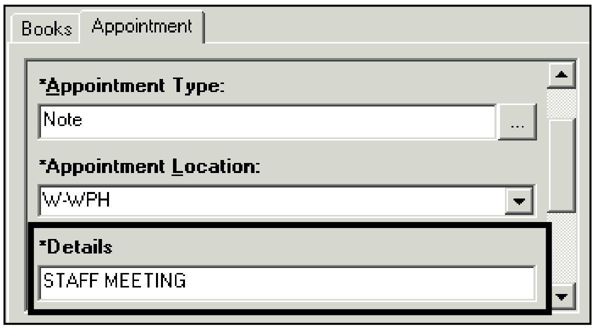
REMOVE APPOINTMENTS FROM THE WORK IN PROGRESS AREA

1. To remove all of the patient's appointments, right-click on the **patient's name** in the **Work in progress** area.
   To only remove one appointment, right-click on that appointment's first resource.
2. Click **Remove**.

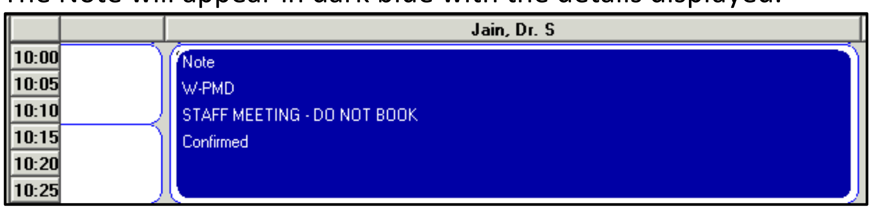
CREATING NOTE APPOINTMENTS

You create Note Appointment types to block off time in a book so patients cannot be scheduled during that time.

1. Click on the **Appointment** Tab.
2. DO NOT enter a Patient Name.
3. Select the appointment type as Note.
4. Select the appointment location.
5. Type a comment in the **Details** field (example: staff meeting).



6. Click **Move** to transfer appointment criteria to **Work-In-Progress** area.
7. Click **Confirm** to confirm all notes simultaneously.
8. The Note will appear in dark blue with the details displayed.



PRE-REGISTRATION

A Pre-Registration is created to allow Cerner users to activate orders on a patient's chart when that patient is not currently registered as an inpatient or outpatient.

This allows hospital staff to activate orders or place documentation on the patient's chart before the patient arrives at the hospital for registration.

It can be used for Inpatient, OR patients, or Ambulatory care. (Inpatient, Outpatient or One Day Stay patient types) It is also used when orders need to be placed on a patient who is New to your facility and does not have an encounter in the system.

Manually adding a Pre-Registration to an existing appointment

Note	In order to manually create Pre-Registrations, your **Add Encounter** flex form settings have to be changed from **Registration** to **Pre-Registration** for the **PM Toolbar** and **Appointment** flex forms.

To add a Pre-Registration to an existing appointment:

1. Click on the appointment in the **book** or in the **Appointment Inquiry** list of appointments.

2. Click **Person Management** head icon.
   *The **Encounter Search** window will open with the patient name highlighted.*
3. Click **Add Encounter** button to launch the **Pre Registration** conversation.
   *The **Pre-Registration** conversation will launch.*
4. Select the appropriate Pre-Reg patient type and complete the required fields.
5. Click **OK** to save the **Pre-Registration**.
   The Pre-Registration is now created. The patient now has a visit number and a PIN if they did not have one before. Orders can be activated at any time and documentation added.

Scheduling an Appointment with an Automatic Pre-Registration

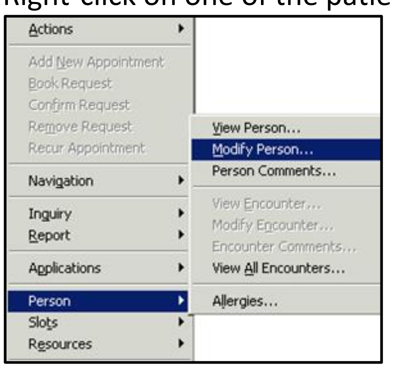
There are certain appointments that will always require that a **Pre-Registration** be created. For example, Pharmacy has to create the medications for an IV therapy infusion before the patient arrives at the hospital. In these cases, Pharmacy will document their orders using a Pre-Registration a day before the patient's visit while preparing the medication.

When scheduling these types of appointments you are always prompted to complete the **Pre-Registration** conversation after you **Confirm** the appointment. The **Pre-Registration** conversation is automatically displayed for you to complete.

MODIFY A PATIENT RECORD

You can modify a patient's record from the book.

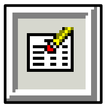
1. Right-click on one of the patient's appointments > Person > Modify Person.



2. Update the patient's demographics.
3. Click OK to update the patient's record and save the changes.

MODIFY DETAILS OF A SCHEDULED APPOINTMENT

Button icon:

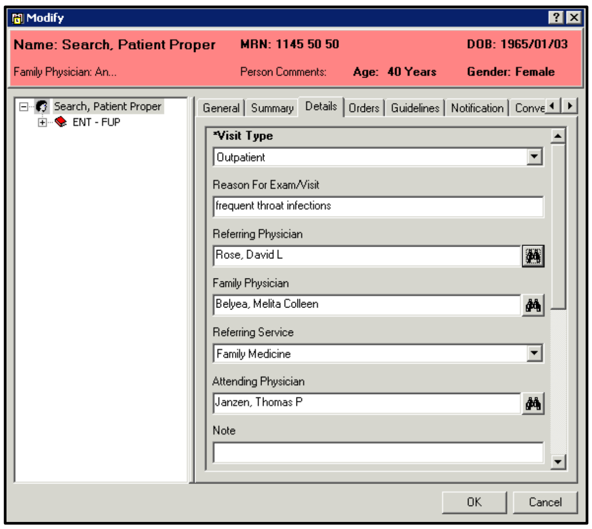


To modify appointment details of a scheduled appointment:

1. Right-click on the existing appointment you wish to modify > **Actions > Modify**.
   *The **Modify** window appears with all of the information entered for the appointment.*

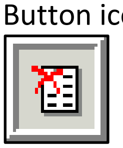
2. Click the **Details** tab to change any of the appointment details.

3. Click **OK** to save the edits.



CANCEL AN APPOINTMENT

Button icon:



To cancel an appointment:

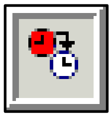
1. Right-click on the Patient Appointment > **Actions** > **Cancel**.

*The **Cancel** screen is displayed.*

2. Select a reason for cancelling from the list; add any comments if necessary and click **OK**.

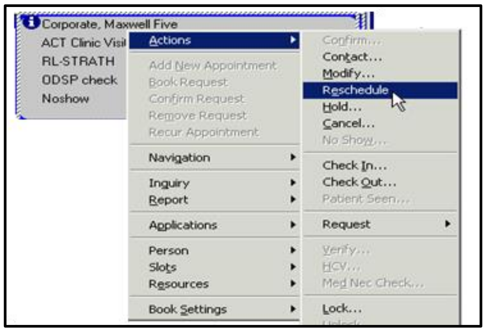
RESCHEDULE AN APPOINTMENT

Button icon:



To reschedule an appointment:

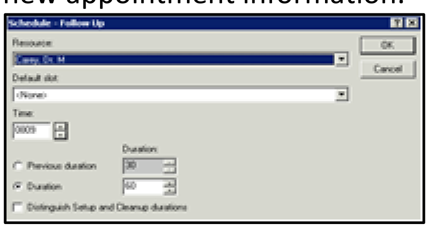
1. Right-click on the appointment > **Actions** > **Reschedule**.



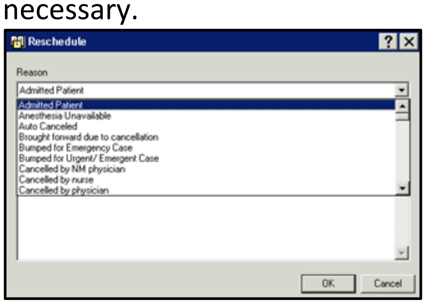
*The appointment information appears in the **Appointment** tab and **Work-In-Progress** area.*

2. If necessary, make changes to the appointment's details, click **Move** to transfer the changes to **Work-In-Progress** area and then click **Schedule**.

3. Select the appropriate resource, time and duration and click **OK** to accept the new appointment information.



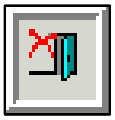
4. Select the most appropriate reason for rescheduling from the **Reason** drop-down list, e.g., Scheduled in Error. Type comments in the **Comments** text area if necessary.



5. Click **OK**

No Show an Appointment

Button icon:



To make an appointment a No Show:

1. Right-click on the Patient Appointment > **Actions** > **No Show**.

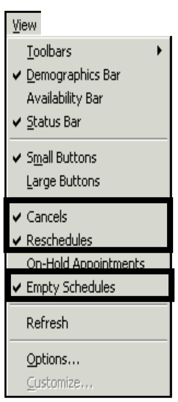
*The **No Show** screen is displayed.*

2. Enter an optional comment and click **OK**.

View Cancelled, Rescheduled Appointments, and Empty Schedules

Displaying of Cancelled and Rescheduled appointments and Empty Schedules can be toggled ON/OFF.

When you click the **View** menu, a check mark to the left indicates the item will be displayed.

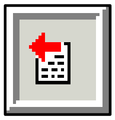


Appointments can still be scheduled to an empty schedule by viewing **Empty Schedules** and clicking on the resource.

Once an appointment has been scheduled to this resource, it will appear in the resource window.

VIEW APPOINTMENT HISTORY

Button icon:



To view all activities associated with an appointment and to read notes left by other staff, you can view appointment history with Appointment History View.

1. Right click on the appointment > **Inquiry** > **Appointment History View**
2. In the left column, expand the appointment schedule to see all actions associated with the appointment.
3. On the right column click the **Action Details** and **Action History** tabs for more information on the appointment.

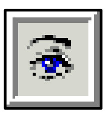
Appointment View

To quickly view who booked the appointment:

- Double-click the appointment to see the **Appointment View** dialog box.

APPOINTMENT INQUIRY

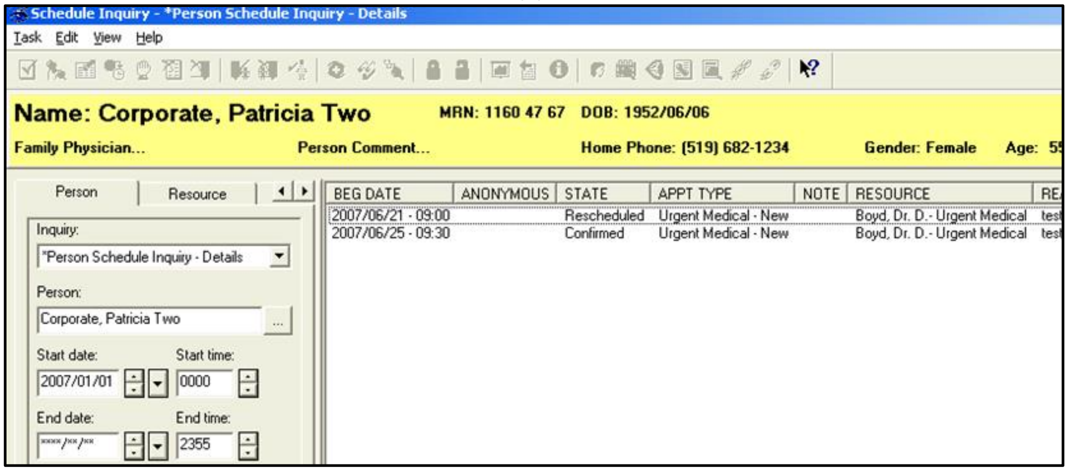
Button icon:



To view a list of scheduled appointments for a patient:

1. Click on the **Appointment Inquiry** icon, .
2. Click the **Person** tab.
3. Click the **Ellipses** button beside person and search for the patient.
4. Click on the appropriate patient and click **OK**.
5. Set the **start date** for the search.
6. Do not enter an end date or time.

7. Click the **Find** button to search for the appointment.



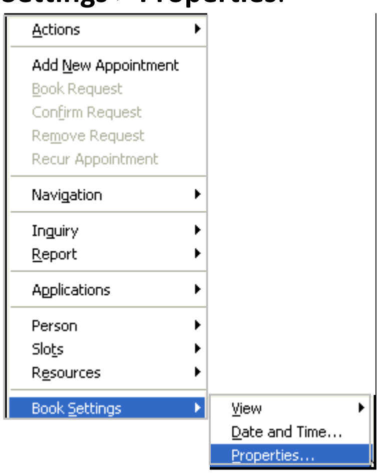
8. Once the appointment list appears in the screen, you can print the list by left clicking on **Task** > **Print**.

9. You may also right-click on the appointment to see a list of options for that patient. For example, you can reschedule an appointment from the appointment inquiry.

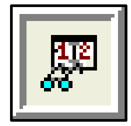
Book Settings

To change the settings of how the book is displayed:

- Right-click in the bottom section of the **scheduling book** and select **Book Settings** > **Properties**.



Book Settings- Resource Views

To change the display of the Book, click the **Change View** button 

The default view is **Proportional, Single-day**.

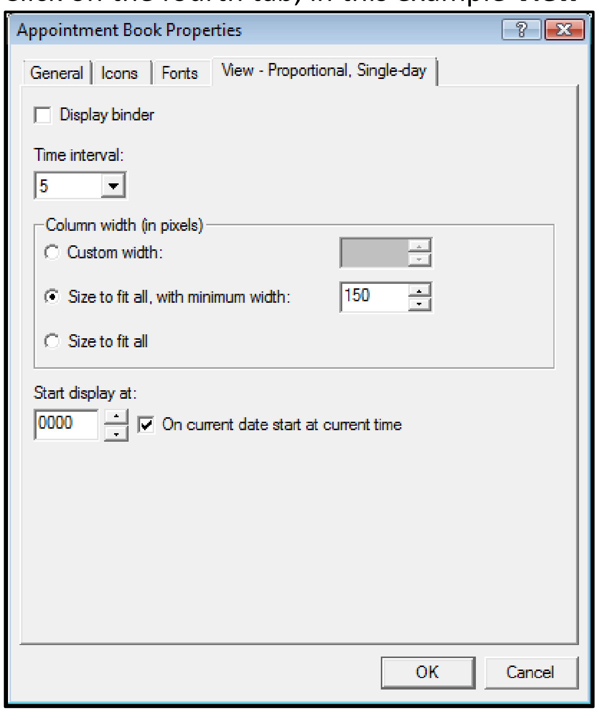
The other two view are:

- **Non-proportional, Single-day**
- **Proportional, Multiple-day**

Book Settings Properties

To further customize the book view:

1. Right-click in the bottom section of the scheduling book and select **Book Settings** > **Properties**.
   *The **Appointment Book Properties** dialog box is displayed.*
2. Click on the fourth tab; in this example **View – Proportional, Single-day**



- **Time interval** - changes the displayed time increments
- **Column width (in pixels)** – sets width of resource columns

SETTING YOUR DEFAULT BOOKSHELF

To set your default Bookshelf:

1. Click **View** > **Options.**
   The Options dialog box is displayed.
2. Click the **Navigation** tab.
3. Click the **Default bookshelf:** list and select your bookshelf.
4. Once you have selected your default bookshelf, you can select your default book by clicking the **Default book:** list and selecting your default book.

ADVANCED SCHEDULING SET UP AND PREFERENCES

Click HERE to view the **Registration & Scheduling User Setup & Preferences Guide.**