ORMA

Operating Room Management Application

Surgeon /Scheduler
Quick Reference Guide
Scheduling

Need more help?

Look in your area for a Super User or call the ORMA Project Office

253-968-5562
Pager: 253-591-2301

Application Logon

1. Double-click the desktop shortcut icon.
2. Enter your username and password.
3. Click OK.

Changing Your Password

1. Open application.
2. Click Task, and then select Change Password.
3. Enter your old password.
4. Enter your new password, and then retype your new password.
5. Click OK.

Scheduling an Appointment

Searching for a Patient

1. Open the Scheduling Appointment Book.
2. Click Bookshelf bar to select either MAMC or NHB Bookshelf and click OK.
3. Double-click the book listing your facility's Main OR.
4. Review currently scheduled cases using the calendar.
5. Click Appointment tab.
6. If the correct appointment type is not displayed, delete the entry. Hit the ellipsis button and select the correct appointment type.
7. Type patient's last name, first name in the Person Name and press enter. Note: if you get a pop-up screen displaying either Future scheduled or Request List case for the person you are scheduling. Double click on the name and see if your patient is either already scheduled or on a request list. If your patient is already scheduled, just cancel your action if your patient is on the request list, complete the scheduling through the request list action screen. If you have problems with these instructions contact your ORMA SA.
8. Person Search window displays. A list of patients will display.
9. Locate patient by verifying the SSN and FMP/SSN.
10. Select patient and correct encounter, and then click OK.
11. If an exact match does not display, delete name and search by FMP/SSN or patient's SSN using the search fields.

Entering Appointment Information

1. Fill out required fields (highlighted in yellow) in scheduling entry format.
2. Review defaulted fields and modify if appropriate.
3. Click Move to move appointment into Work In-Progress window.

Completing Appointment Attributes

1. The Appointment Attributes window displays. .
2. In the Search field, type M or N and the first letters of the surgical specialty.
3. Review the list of procedures.
4. Double-click the correct procedure name.
5. Complete the required fields in the Order Accept Format.
6. Select the CPT code associated to the procedure using the Drop Down arrow in the CPT Code screen or use the ellipsis button and search for the code using the nomenclature search tool.
7. Click OK.

Selecting and Confirming the Appointment

1. Review the information in the Work in Progress window (WIP).
2. Click correct room and time in the grid and click Schedule.
3. Verify the resource and the time.
4. Click OK.
5. All books display in WIP window; red means no conflict (if there is a book open, there are conflicts).
6. Click Confirm.

7. Read notice.
8. Click Close.
9. The Confirm window displays.
10. Click OK.

Request

Searching for Patient
1. Open the Scheduling Appointment Book.
2. Double-click the OR Rooms book.
3. Review currently scheduled cases using the calendar.
4. Click Appointment tab.
5. Type patient's last name, first name in the Person Name.
6. Press enter.
7. Person Search window displays. A list of patients will display.
8. Locate patient by verifying the SSN and FMP/SSN.
9. Select patient and correct encounter, and then click OK.

Entering Appointment Information
1. Fill out required fields (highlighted in yellow) in scheduling entry format.
2. Review defaulted fields and modify if appropriate.
3. Click Move to move appointment into Work In-Progress window.

Completing Appointment Attributes
1. In the Search field, type specialty abbreviation to which the procedure belongs and press Enter.
2. Double-click the correct procedure name.
3. Complete the required fields in the Order Accept Format
4. Click OK.

Requesting an Appointment
1. Review information in the Work in Progress window (WIP).
2. Click Request.
3. Indicate Request Criteria (AM/PM, days of week, date range) and Request Queue.
4. Click OK.

Customizing Your View

Setting Default Resource Book and Location
1. Open the Scheduling Appointment Book.
2. Click View, and then select Options.
3. Under the User defaults tab, set Default Book to either MAMC or NHB
4. Set Default Location to the corresponding Main OR.
5. Check Default Appointment Type Synonym and enter the desired appointment type.
6. Select the Appointment Tab, check: display future requests/appointments and check: display extended conflict details.
7. Click OK

Setting Appointment Book Properties
1. Right-click in the grid and select Book Settings, View, and then Proportional Single Day.
2. Right-click in the grid and select Book Settings, and then Properties.
3. Set Begin time to 0000.
4. Set End time to 0000.
5. Deselect the all fields except Person in the Display Fields list.
6. Select Primary order, Surgeon 1, Surgeon 2, Surgeon 3, Surgeon 4, Surgeon 5, Surgical Case Number, Appointment state, Person age, requesting provider, and person home phone. Use the Up and down arrows to move highlighted selection up or down in order of personal preference.
7. Click the Icons tab. Select Comments, Allergies and Information in the Appointment icons list.
8. Click the View-Proportional Single day tab.
9. Uncheck binder
10. Change time interval to 15.
11. Select Size to fit all.
12. Start display 0700
13. Click OK.
14. Select from tool bar "View">Demographics bar.
15. Select from tool bar "View">Empty Schedule.
16. Exit the application.
17. Your settings will remain the same on any ORMA computer unless you change them.
18. If you need assistance setting up your defaults, please come by and see the ORMA Functional Administrator in the Surgical Services Center Admin area and we can customize your setting while you wait.