Section 2

SCHEDULING

End User Guide

For
Operating Room Management Application
(ORMA)

Table of Contents

Scheduling

Important Note to First Time Users:

If this is the first time you are using the Schapptbook, please refer to sections 2.17 and 2.18 to set up your user preferences.

2 Scheduling

2.1 Basic Entry and Screens

Application Used: SCHAPPTBOOK.exe

- Open **SCHAPPTBOOK.EXE** and enter you **Login ID.** Press **<Tab>** or click on the password field and enter your password in lower case. Press **<Enter>** or click on the "**OK"** button at the bottom of the screen.
- Select the appropriate bookshelf.
- Click on the **Books** tab in the upper left corner of the Scheduler screen.

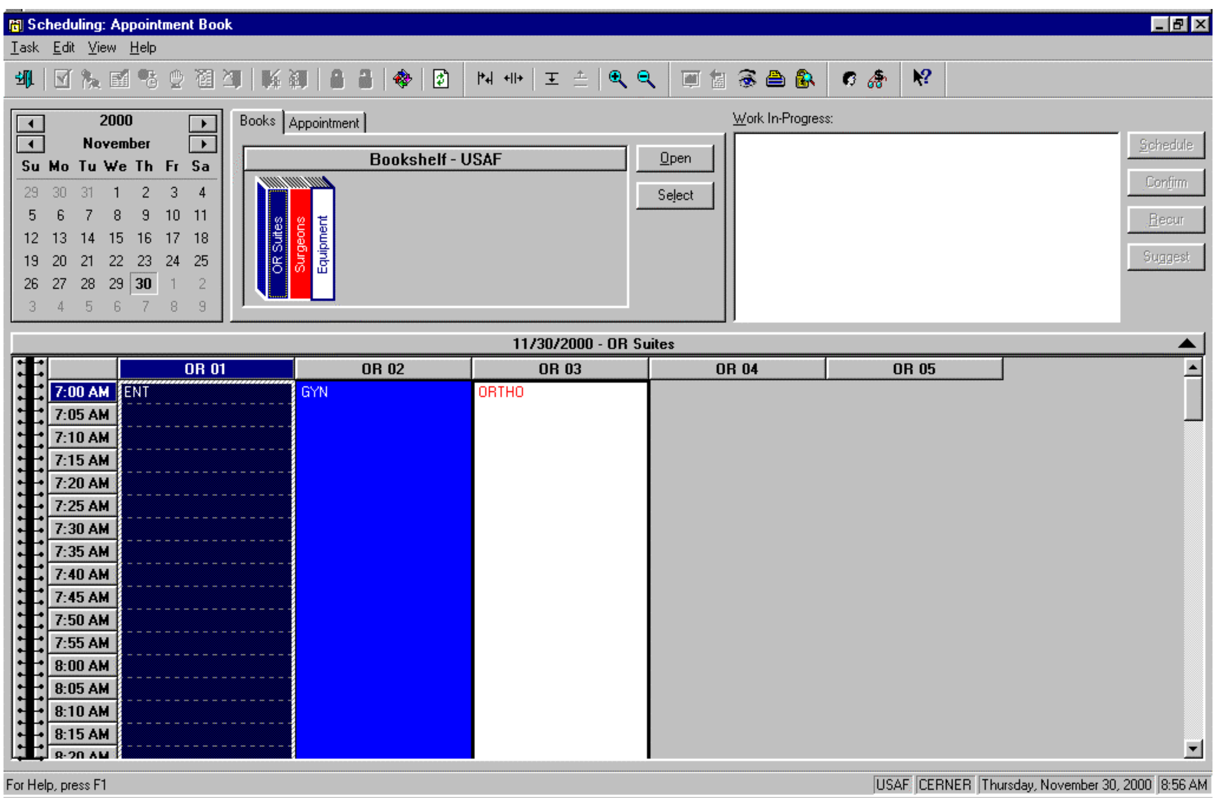


Figure 2-1

- To open the appropriate scheduling book, double-click the selected book.
- Go to the requested date.
- Click on the Calendar to select and view the requested day.
- Find an available room and time

2.2 Setting up the Demographics Bar

Application used: SCHAPPTBOOK.exe

To select the preferences for screen display:

- Launch **Scheduling Appointment Book** (Schapptbook.exe). Log in as yourself.
- To view Demographics Bar, click on **View** tab and select **Demographics Bar**
- Right-click on the yellow demographics bar and select **Properties**
- From the Attributes box, select the field you want to add/update to the demographic bar
- Click the **add/update/delete** tab based on your preference
- To update: Click on the drop down arrow and select the quadrant you want the field displayed. If you want to change the font, click on the font tab and select your choices. Click **OK**
- To add: Click on the drop down arrow and select the quadrant you want the field displayed. If you want to change the font, click on the font tab and select your choices. Click **OK**
- To delete: Click on **Delete** tab. Click **OK**.
- To add/remove rows on the demo bar, click on the up/down arrows to the right of the demo bar
- To add/remove columns on the demo bar, click on the right/left arrows below the demo bar

To select additional preferences for screen display:

- Launch the **Scheduling Appointment Book Application**. Log in as yourself.
- Double-click on the **OR scheduling** book
- Click on the **Appointment** tab
- Right-click anywhere on the appointment book, select **Book Settings>View>**and select how you want to view the appoinment book (weekly, monthly, proportional, non-proportional)
- Right-click anywhere on the appointment book, select **Book Settings>Data/Time**, and set up how you want to view the appt book based on date and time.
- Right-click anywhere on the appointment book, select **Book Settings>Properties**, and setup visible day range, display tooltips, appt icons, binder display

NOTES

2.3 Scheduling an Appointment

Application used: SCHAPPTBOOK.exe

To enter an appointment for that day, click on the **Appointment** Tab. This will bring up the "Appointment Accept Format" (a list of information that must be gathered for each appointment).

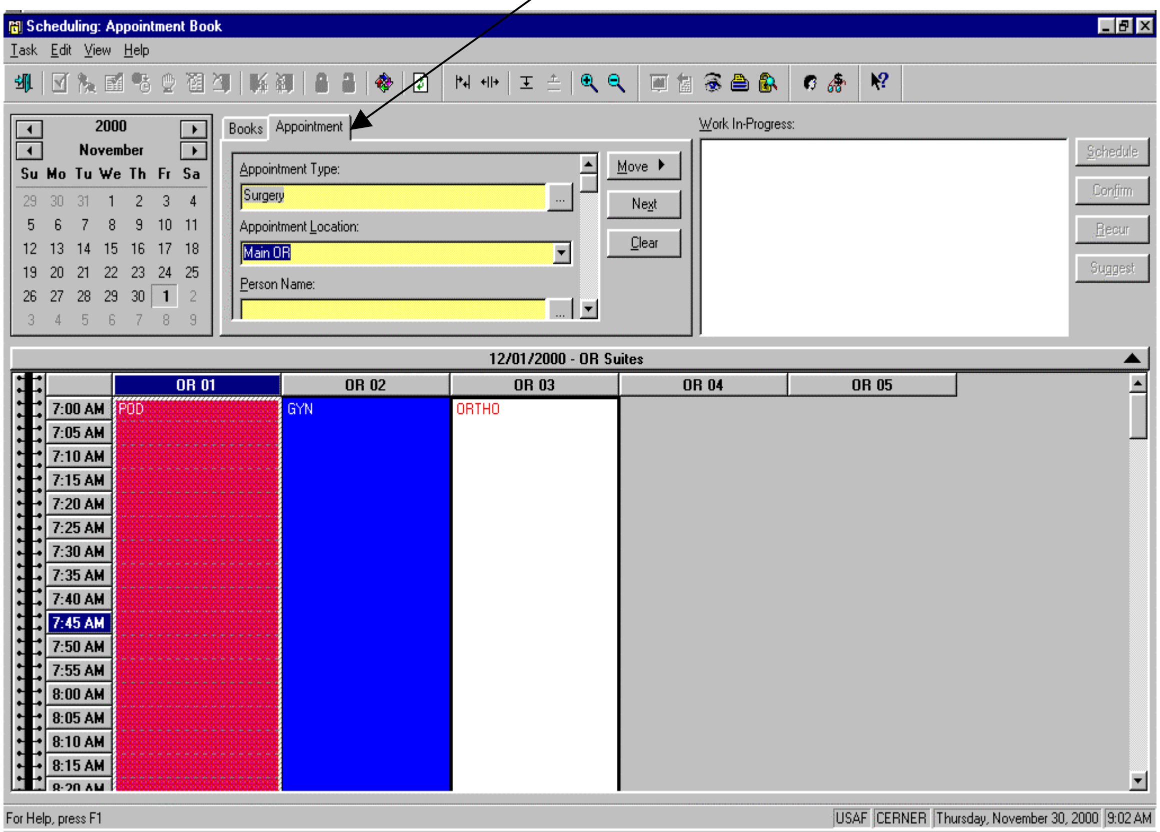


Figure 2-2

NOTE: Fields displayed in yellow are required and must be completed.

- ***Appointment Type***: Surgery (required field)
- ***Appointment Location***: (required field)
- ***Person Name***: Type in name and enter. (required)

NOTE: You can set a default to desired location by going to **View > Options > appointment tab > default location.** Otherwise enter by typing the location name or choosing from dropdown box.

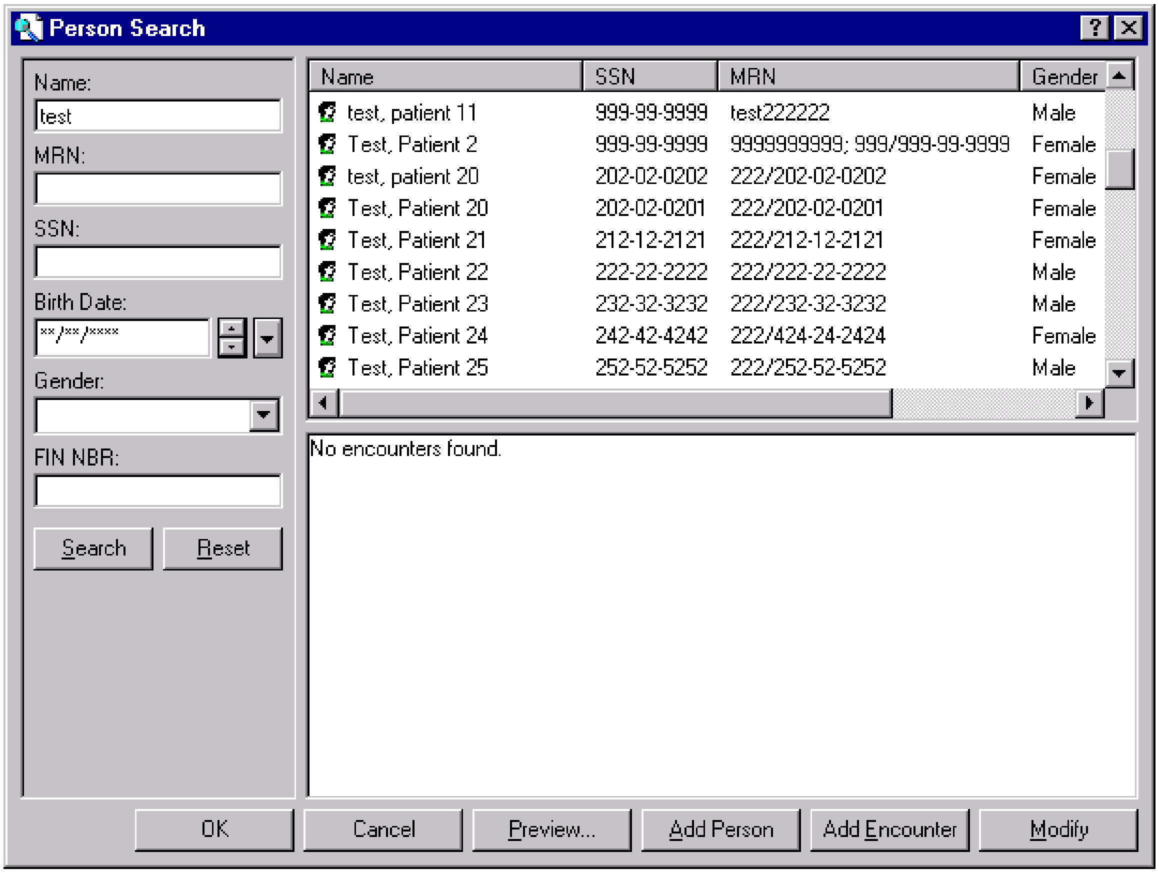


Figure 2-3

A person search box will display with names that match. If the name of the person is listed, click on it. Click on the **Modify** box to enter additional information if needed. Click the **OK** button at bottom of search box when finished.

If the name is not found, click on **ADD PERSON**. A Scheduling Quick Reg window will appear.

Complete the required fields (shown with a white background). Optional fields will be in grey. Once the pertinent information is filled out, click **OK.**

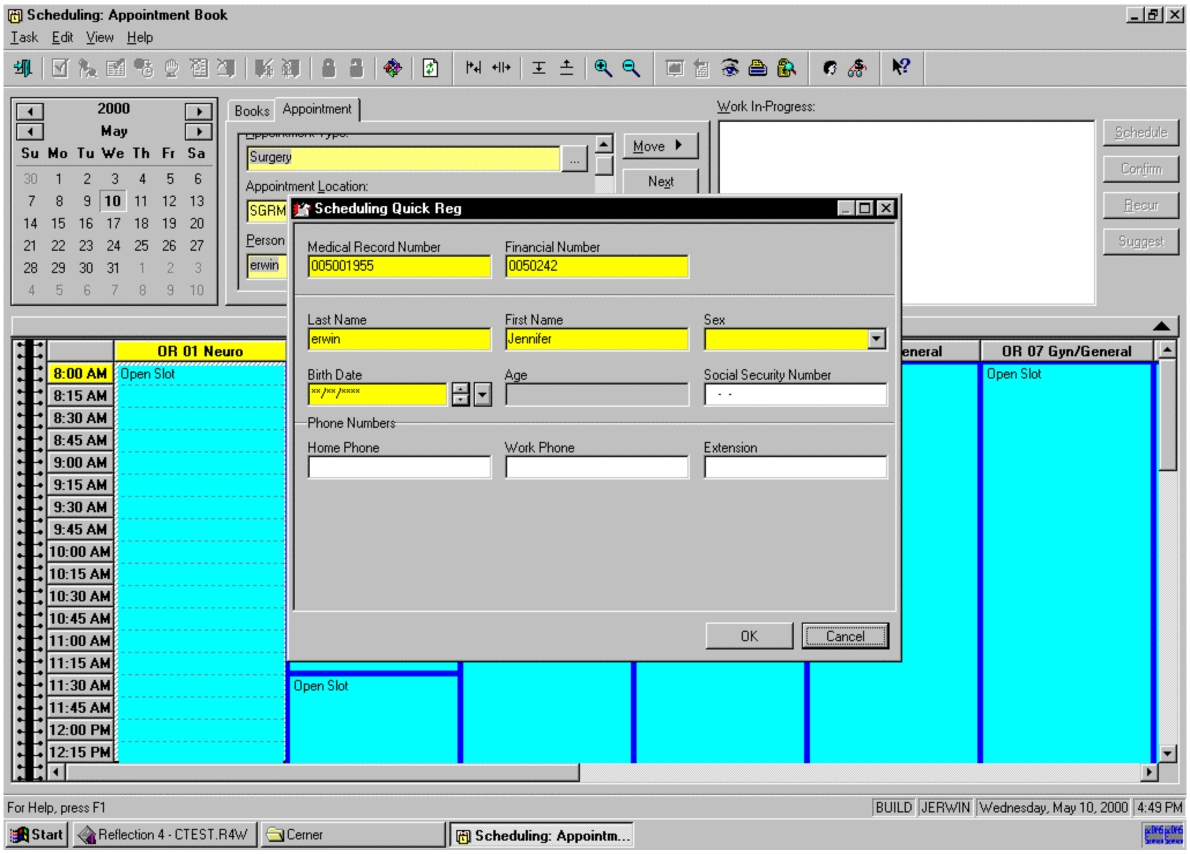


Figure 2-4

- ***Primary Surgeon**: (required)* In the **Name** field, begin typing the surgeon's last name. The name will default into the field if there is only one person that matches the first few letters typed. The more letters typed, the more narrow the search. If nothing matches what you've typed, press 'enter' and a provider search window as seen below will appear. This will display in alphabetical order, the names that are around the letters you typed in the field.

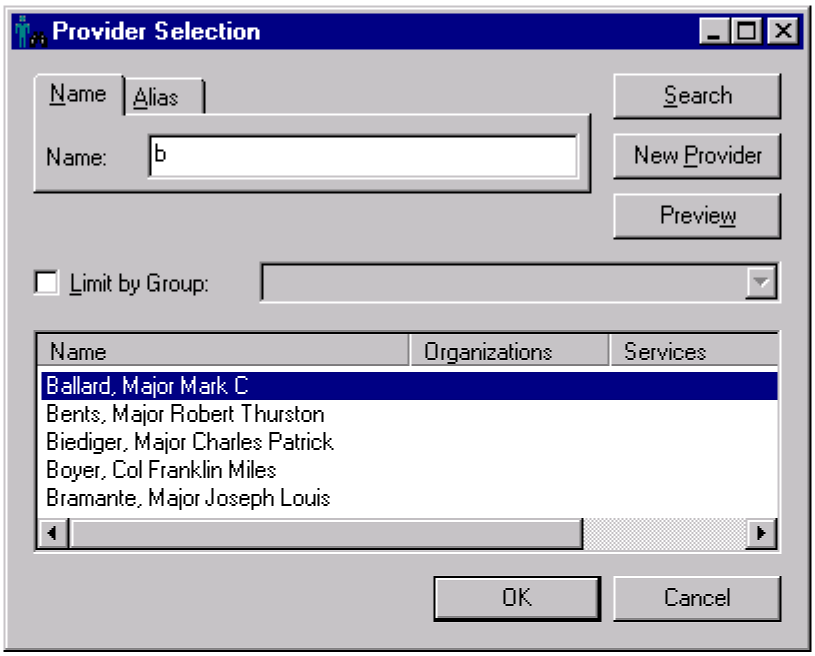


Figure 2-5

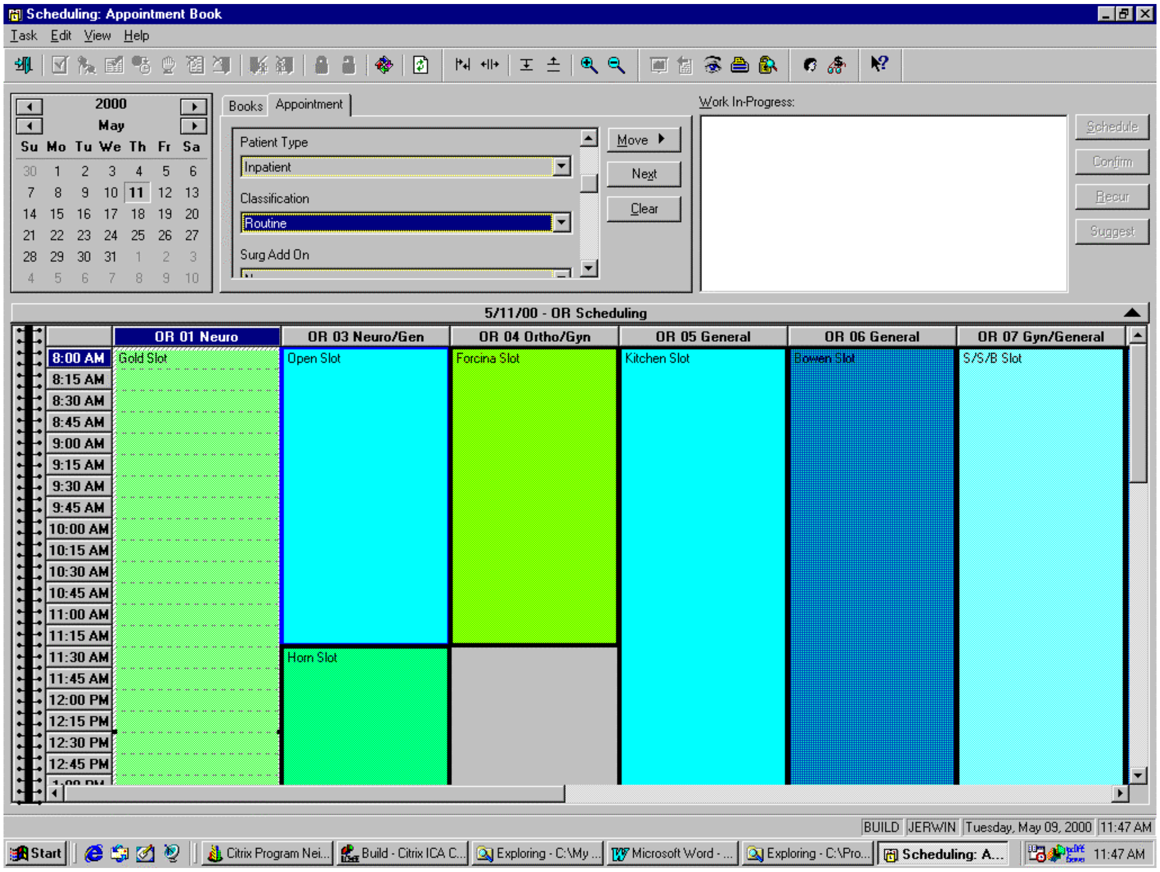


Figure 2-6

- ***Patient Type: (required)*** Choose <u>ONLY ONE</u> of the following*: Inpatient, Outpatient, Observation, or OP/Admit*. There will be other options, but DO NOT choose them.
- ***Classification*: *(required)*** Enter one of these options: *OR Elective, OR Urgent, OR Emergency*
- ***Surg Add on***: In the event there is an add-on case, this will need to be documented. Enter "**Y**" for yes or "**N**" for no and the value will auto populate.
- ***Surgeon 2, 3, 4****: Enter* the surgeon's last name for any surgeons who are scheduled for a case in addition to the primary surgeon.
- ***Anesthesiologist: (required)*** 'To perform conflict checking for the anesthesiologist role, enter the either Anesthesiologist, SEGA' or 'Anesthesiologist, CMC'. If the surgeon will be the anesthesiologist for the case, choose 'Anesthesiologist/Surgeon, A. This latter selection will not perform conflict checking.

- ***Diagnosis**:* This field is not required, but will default into nursing documentation if entered here.

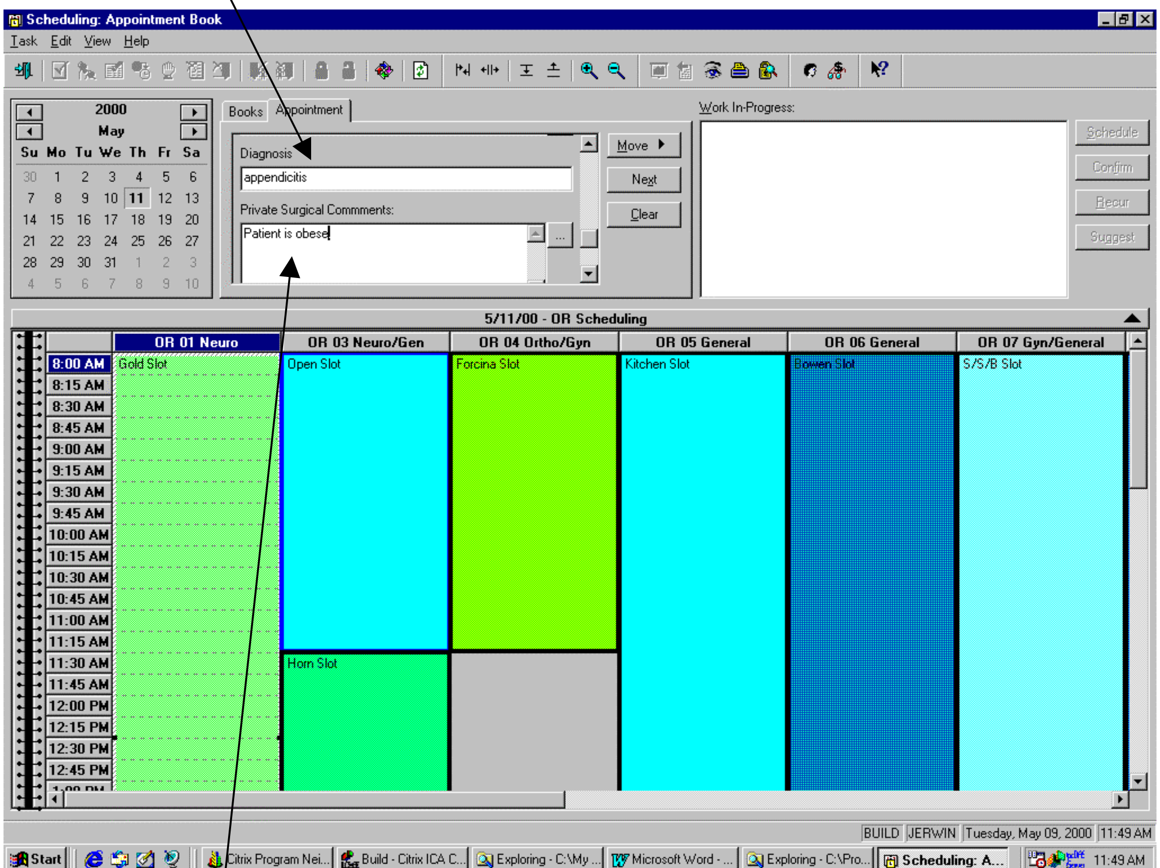


Figure 2-7

- ***Public Surgical Comments**:* These may be comments such as Request MD Anesthesia, Latex Allergic, etc. These comments will be published on the externally distributed
- ***Private Surgical Comments**:* This may be used for information that will not be distributed externally. For example, patient is morbidly obese, or patient is HIV positive.

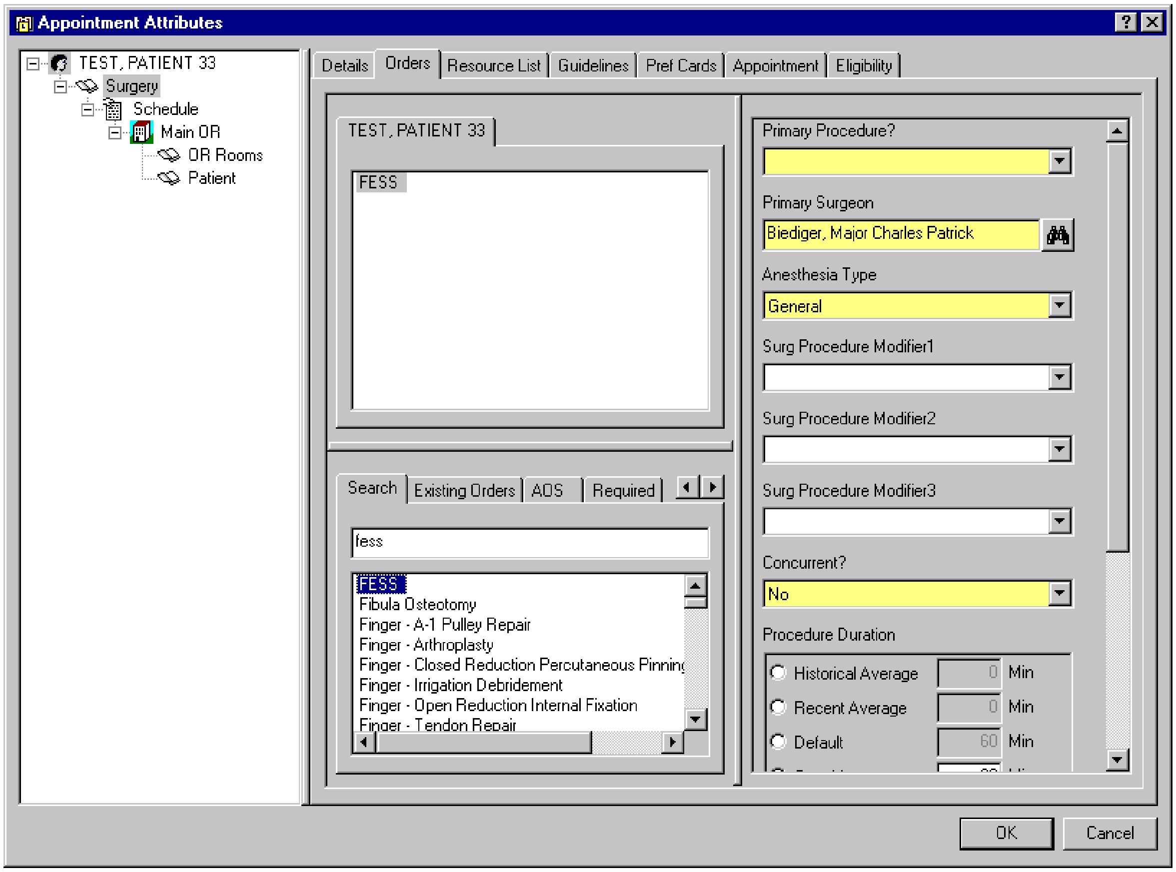


Figure 2-8

- Under the **Orders** tab, in the middle box (free text field), type in the first few letters of the surgery procedure, and press enter. Pressing enter will initiate the database search. Please refer to the your standard procedure list if you have difficulty finding the surgery procedure.
- This will display a list of procedures from which to select.
- Double-click on the appropriate procedure. Double-clicking on the procedure is the **ONLY** way to add the order to the surgery case.
- The box on the right will populate with the **Procedure Accept Format** (fields to complete).
- ***Primary Surgeon***: (required) Defaults in from Appointment Accept Format
- ***Anesthesia Type***: (required) Defaults in from Appointment Accept Format (required). This field is populated with the Anesthesia type most commonly associated with the procedure. You may need to modify this field.

- ***Surg Procedure Duration***: (required) historical average or recent average data for surgeon/procedure. Click on the default duration radio button. Once a case has been completed with the surgeon and procedure there will be historical data in which you may select the radio button of historical or recent average. Notice the historical/recent/default duration are dithered, you cannot modify these duration. If none of the duration times are appropriate for this case, you may select the Override radio button and enter the number of minutes in the duration field. Note: The duration will always be in the unit of minutes.

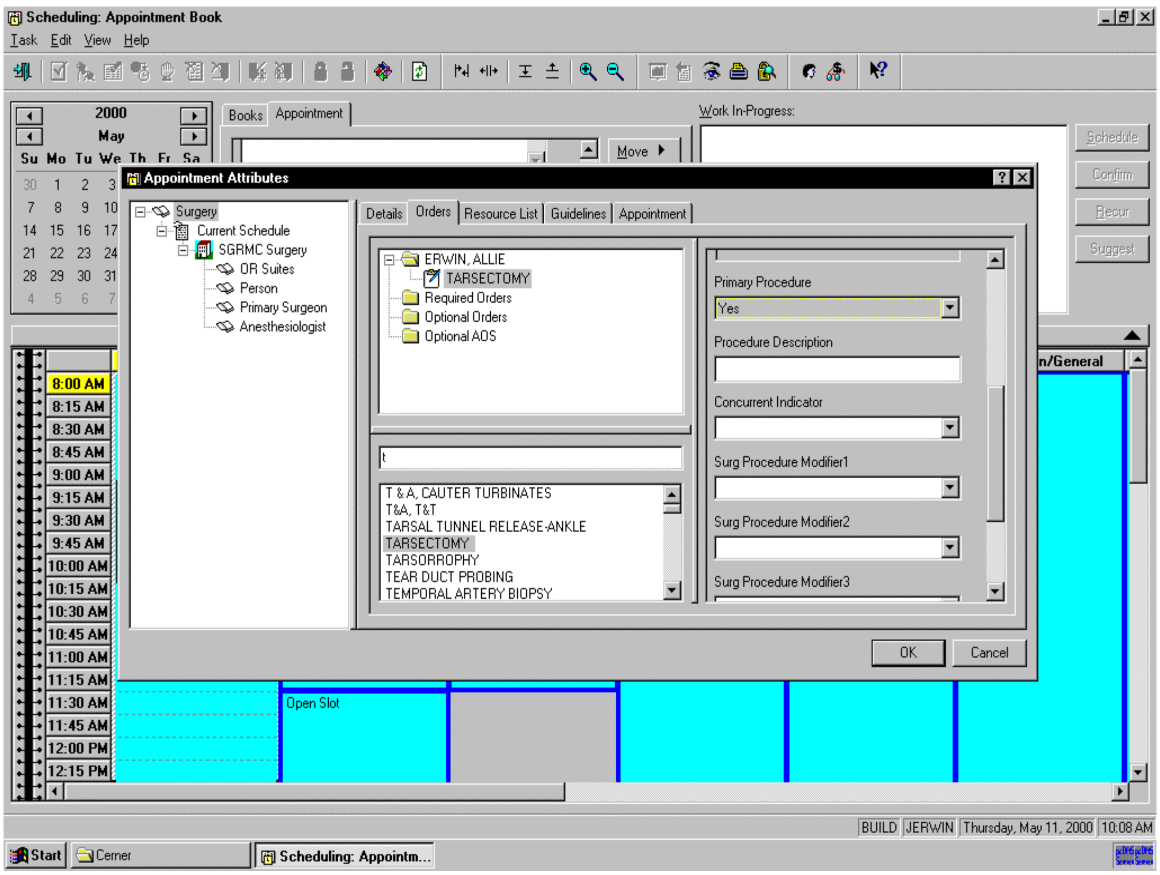


Figure 2-9

- ***Primary Procedure***: (required) Type a "**Y**" for Yes or "**N**" for No

Note: There MUST be one and ONLY one primary procedure scheduled for a case. Make sure and verify that there is one procedure that is indicated as primary.

- ***Procedure Description**:* This is a free text field. Type in the description exactly as you accept it in the scheduling conversation, i.e. Left Total Hip *Osteonics, or Excision Lesion Right Forearm.
- ***Concurrent Indicator**: This* will be used for multi-procedure cases only. Click on the down arrow in the box labeled Concurrent, and select YES, in order for the system to except the longest of the two duration values for these cases. Otherwise choose NO, and the system will add the two duration values together. You may also override a duration, by clicking on the Override radio button, and entering a duration time.
- **Surg Proc Modifier** 1: This is where the procedure modifier may be scheduled. The field for surg proc modifier 1 will be associated to the primary procedure. The field for surg proc modifier 2 will be associated with the second procedure that was added to the case and so on.
- **Setup Time/Cleanup Time**: This will default the setup time from the procedure. You may change this duration if necessary. Note, if you keep the setup and clean up times, you are scheduling the duration of the procedure as well as the setup and cleanup times.
- For multi-procedure cases, enter the additional procedure(s) in the search box and press enter.

- Double-click on the appropriate procedure. Again, the Procedure Accept Format will be populated with the default values (Surgeon, Anesthesia Type, Procedure Duration, Setup and Cleanup, etc.)
- After you have entered all the information for the procedure(s), Click **OK**

The information should now be displayed in the Work In Progress window.

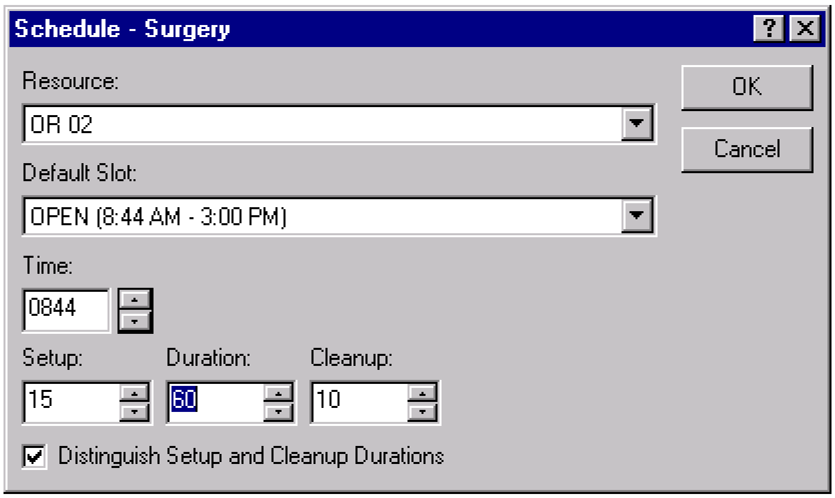


Figure 2-10

All of the Available Room Resources will now display for you to schedule.

There are a couple of ways to schedule the case.

- Find the slot and the time you want to schedule the case and click on it. Click on the **"Schedule"** button.
- First click on the schedule button and enter the time and room information manually.

- Find the slot and the time you want to schedule the case, right click on it, and select 'Book Request'.
- Once the information has been entered, click **OK**.
- The appointment will appear in yellow with a red outline in the slot in pending status until you confirm.
- The Books that appear next to each resource in the work in progress window will change to red if there are no booking conflicts
- Click **OK.**

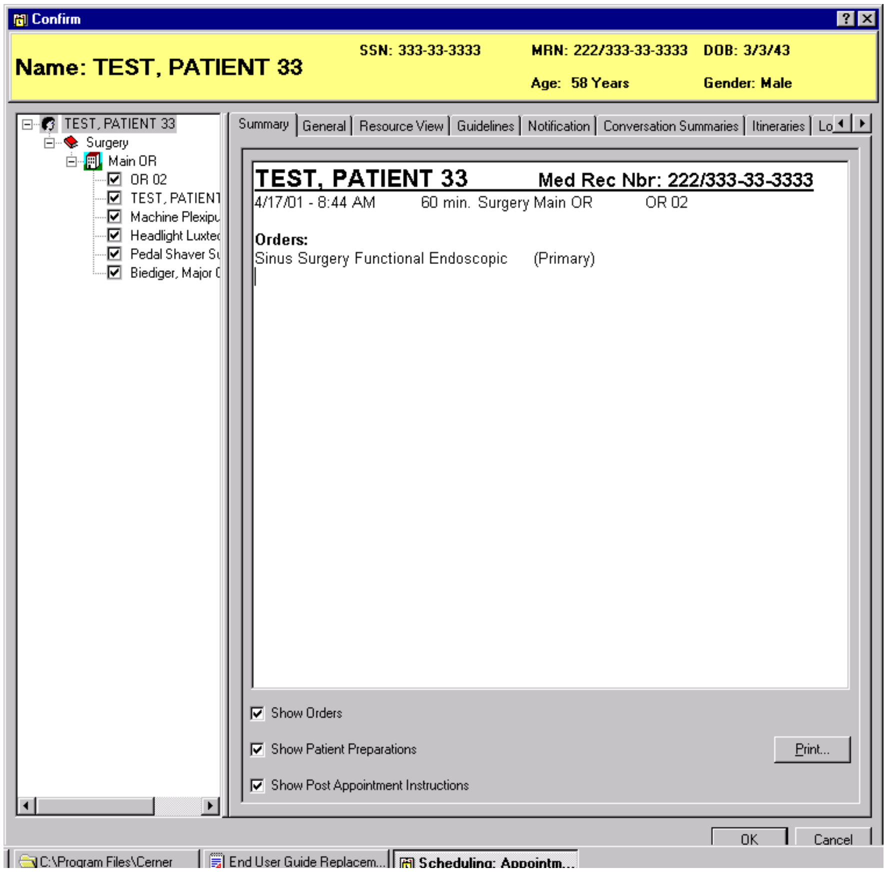


Figure 2-11

- Check to make sure that all the information is correct. Each case should show a date, time, duration, area and the surgical room. Below, the Orders should be displayed always noting the primary procedure. To the left, you should always have a surgical area a room, a patient and a surgeon.
- Click on the Confirm button when you are done.
- When the appointment is in the confirmed state it will appear in the designated colors for a confirmed case at your hospital.

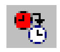
NOTES

NOTES

2.4 Rescheduling an Appointment

Application Used: SCHAPPTBOOK.EXE

You can Reschedule an Appointment two different ways:

- Select the patient's appointment.
- Click the Reschedule button  on the toolbar. The system displays the appointment in the Work-In-Progress window. (It will also continue to be displayed in its currently scheduled location.)
- Click the Schedule button.
- The Schedule window opens. Verify that the default scheduling information is correct.
- Reschedule the case as desired.
- Click OK.

> **Note:** If a message is displayed saying the system is unable to schedule the surgeon or person at the same time due to lack of availability, select each of these components and schedule them individually for the same date and time**.**

- Click the Confirm button to open the Summary Dialog of the scheduled appointment. The scheduled resources (including the patient) for the appointment, along with its corresponding start date, time, duration, and location are displayed.
- Click OK to confirm the appointment.

- A Reschedule combo box opens.

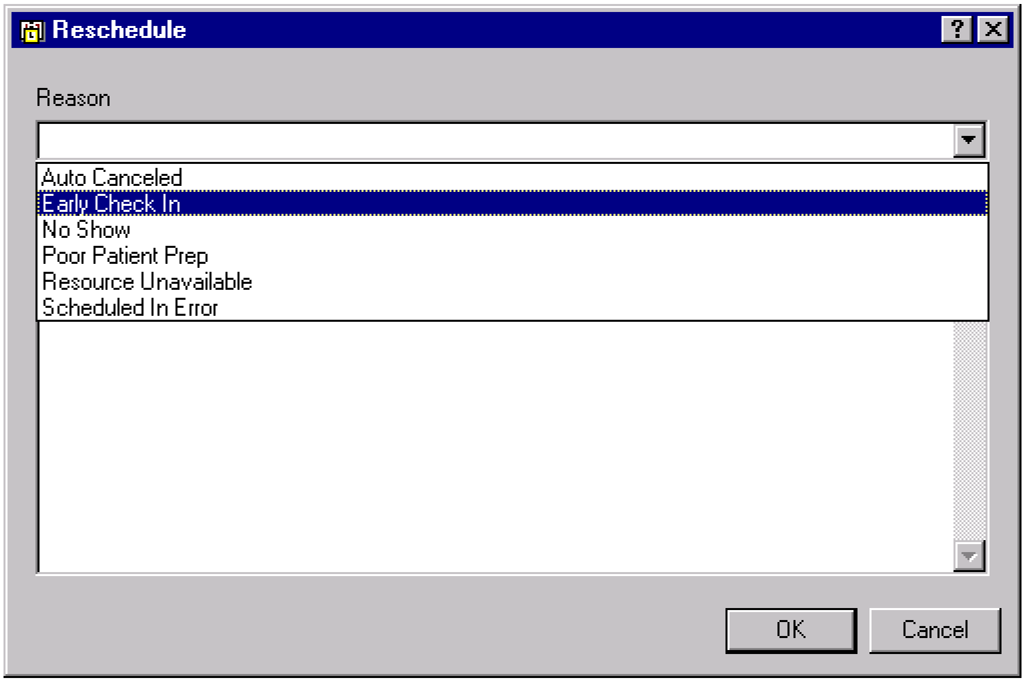


Figure 2-12

- Select the appropriate reason from the list in the Reschedule Reason dialog box.
- Click <OK>. The appointment is rescheduled.

Note: To view the original appointment in the book on the original day, click the menu option of View and select Reschedules. Repeat this step to deselect Reschedules and turn this off.

The Other Way to Reschedule a Case is to:

- Double click on the OR Rooms book, or the book your site has named.

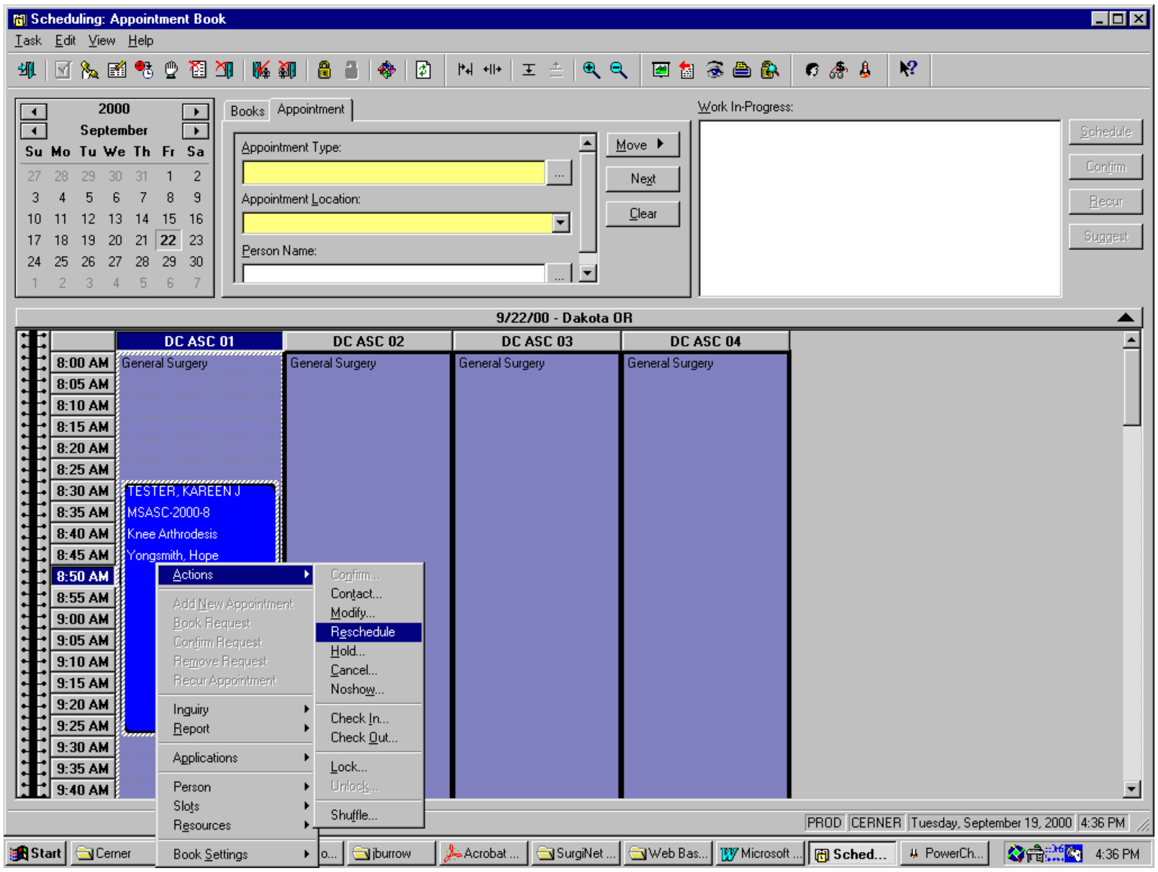


Figure 2-13

- On the calendar in the Appointment book, select the date originally scheduled. You should see an appointment scheduled for that date/time.
- Right click on that appointment and select Action→Reschedule. This pulls the appointment into the Work in Progress Window.
- Left click in the desired specified time and block.
- Click the Reschedule button. The Schedule Case window appears.
- Click the Confirm button. A Reschedule Reason window comes up. Select the appropriate reason and click OK.

NOTES

2.5 Canceling an Appointment

Application Used: SCHAPPTBOOK.EXE

Cancel Case: There are two ways to cancel a case:

If you know the date and time for the case you wish to cancel then go to it in the appointment book and click on it. Right click and a window will display. Click on Action and another window will display with a list of options. Click on cancel

OR

- Click the case you scheduled for the patient in the scheduling grid.
- Click the Cancel button  on the toolbar.
- Select the Cancel Reason of Physician Request from the list.
- Enter any additional information in the Comments field.
- Click OK

> **Note:** Modifications and Reschedules may also be accomplished from this window.

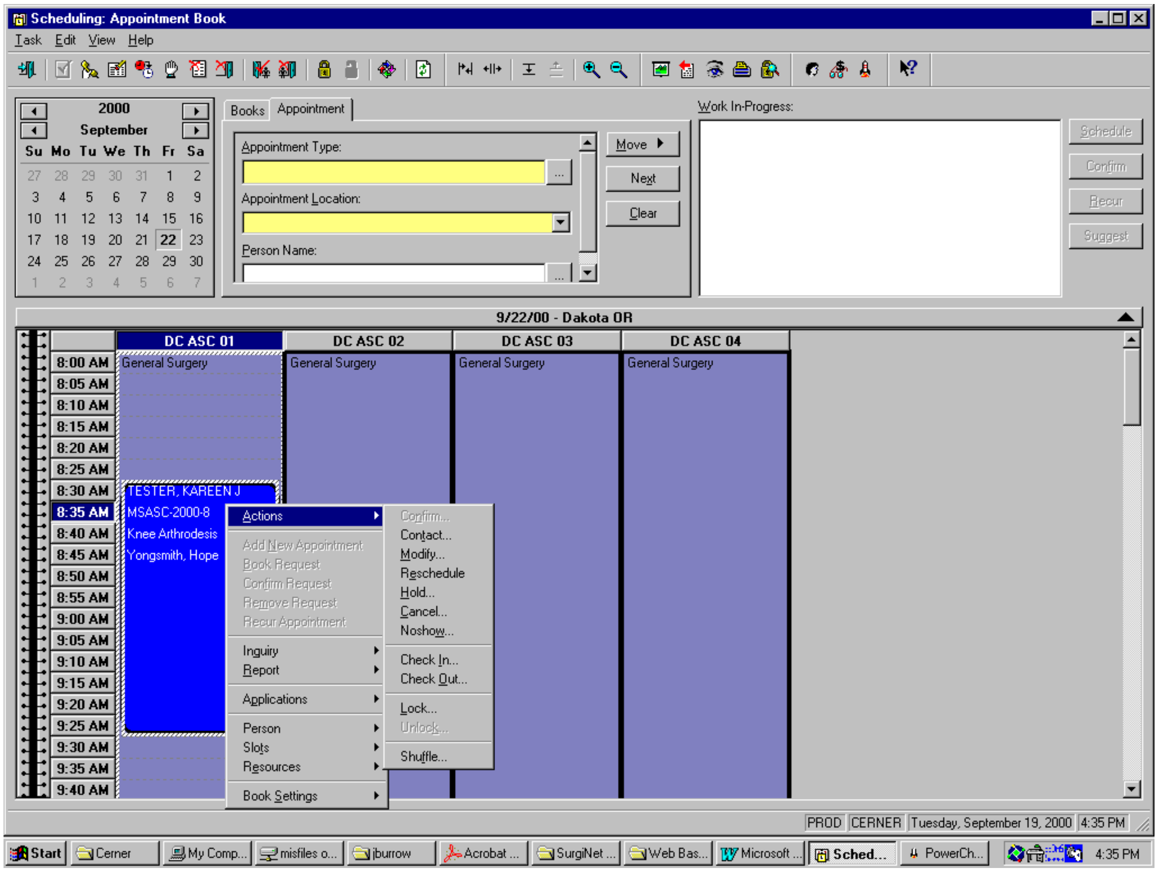

Scheduling: Appointment Book
Task Edit View Help
2000
September
Books Appointment
Appointment Type:
Appointment Location:
Person Name:
Move
Next
Clear
Work In-Progress:
Schedule
Confirm
Recur
Suggest
9/22/00 - Dakota OR
DC ASC 01
DC ASC 02
DC ASC 03
DC ASC 04
General Surgery
TESTER, KAREEN J
MSASC-2000-8
Knee Arthrodesis
Yongsmith, Hope
Actions
Add New Appointment
Book Request
Confirm Request
Remove Request
Recur Appointment
Inquiry
Report
Applications
Person
Slots
Resources
Book Settings
Confirm...
Contact...
Modify...
Reschedule
Hold...
Cancel...
Noshow...
Check In...
Check Out...
Lock...
Unlock...
Shuffle...
PROD CERNER Tuesday, September 19, 2000 4:35 PM

Figure 2-14

Provide a Cancellation reason from the drop down box, and type any necessary or helpful comments, such as who cancelled the case, or additional helpful information for future review.

Click on OK.

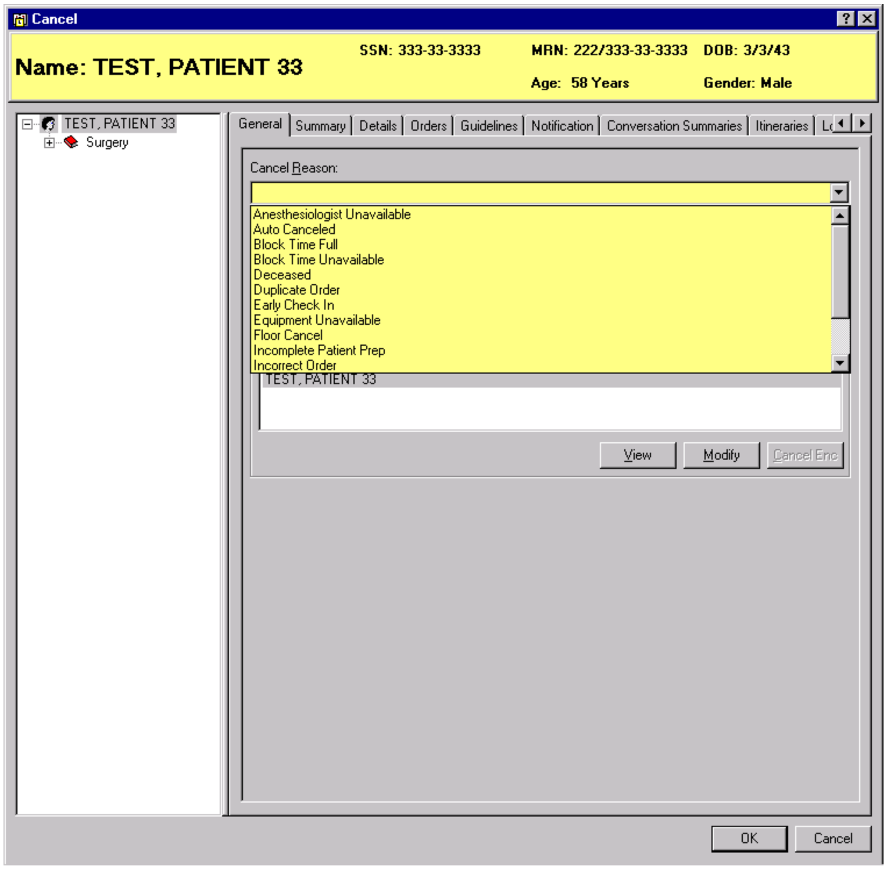


Figure 2-15

Frequently, the case being cancelled is not currently displayed, or you might not know on which date and time it was scheduled. In such instances, it is easier to locate the necessary case by performing the following steps:

- Click the Appointment Inquiry button  on the toolbar.
- Under the Person tab, accept the default of Person Schedule Inquiry for the Inquiry Type.
- Enter the person's name in the Person field and accept the defaults for the date and time fields.
- Press the Find button and locate the person's appointment that was scheduled earlier.
- Right click the confirmed appointment and select Cancel.

- Select the Cancel Reason of Patient Request and click OK. The appointment is now updated with the status of Cancel and is removed from the Appointment Book.
- Press the Close button to exit the Appointment Inquiry window. Do not close the Appointment Book.

Note: To view the original appointment in the book on the original day, click the menu option of View and select Reschedules. Repeat this step to deselect Reschedules and turn this off.

2.6 To Shuffle Cases

Application Used: SCHAPPTBOOK.EXE

Shuffling cases is an easy way to quickly reschedule multiple cases. Any changes in case duration must still be done by rescheduling cases individually.

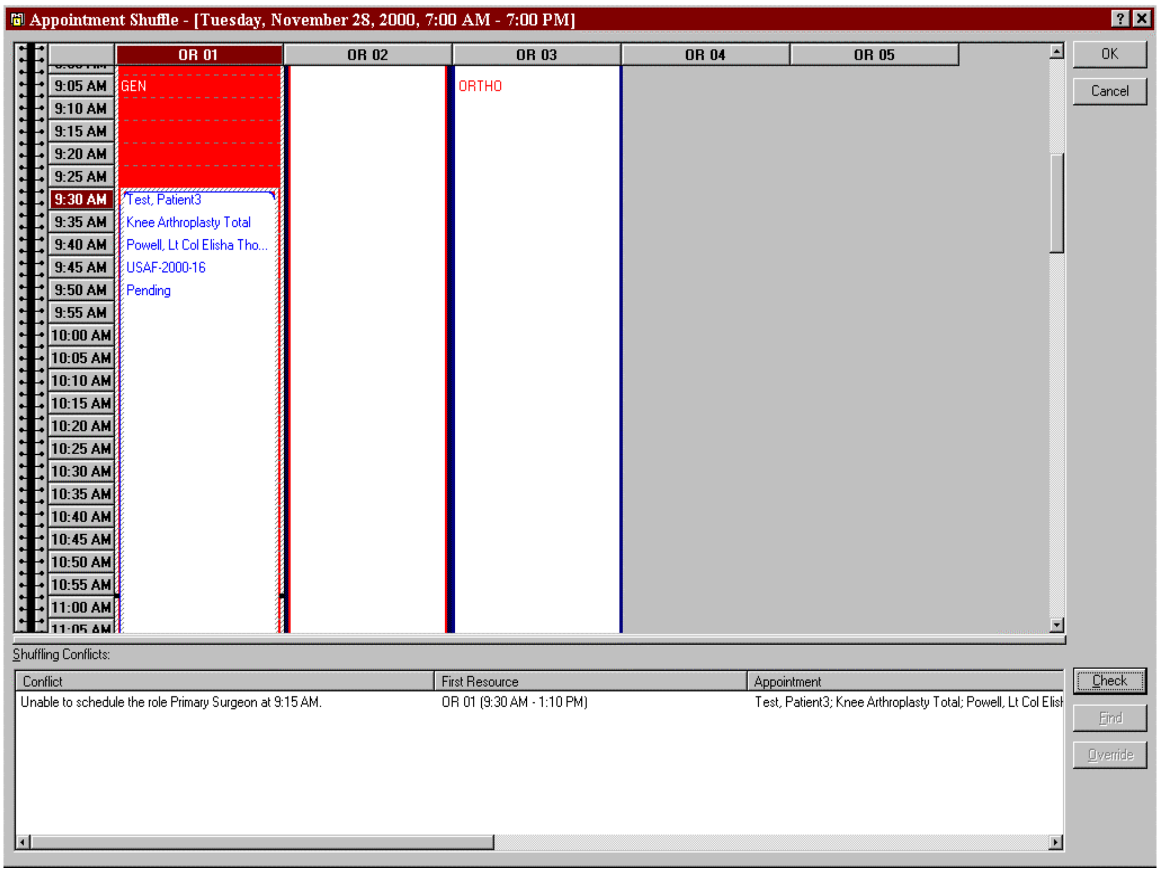


Figure 2-16

- Select the date on which you want to shuffle cases.
- Push the Shuffle Icon on the tool bar or right-click in the scheduling grid and select Action → Shuffles.
- The “Appointment Shuffle Criteria” window will come up and verify the resources (rooms), date, begin time, and end time of cases to shuffle (the room values will default to all rooms in the appointment book that you have open). Click on the “OK” button.
- Use the scroll bars to locate the cases that you want to shuffle.

- Left- click and hold down on the case that you want to move and drag it to the new room and start time. As you move each case it will turn a color your hospital team has determined to help you keep track of which cases will be moved.

> **Note:** When changing the order of multiple cases in a single room it may be necessary to move the first case to an adjacent room or empty spot to make space to move other cases to that location.

- When finished moving all cases click on the "OK" button. All moved cases will have a conflict check performed on them. You may get conflicts on the SSISNOPERSON, XX if you shuffle those cases. You will need to resolve any patient conflicts before you can continue.
- Select a shuffle reason and click on "OK".

NOTES

2.7 Adding Appointment Instructions

Application Used: SCHTOOLS.EXE

Building Instructions are useful because they act as an information guide for the scheduler. The scheduler can use the Instructions to give the patient or physician's office information about the procedure, directions to the hospital, patient preparations, etc.

Expanding that branch displays text types Post Appointment Instructions and Preparations. Expanding the Preparations branch could show the subtext types of Patient Instructions, Directions to Location, Procedure Descriptions, and so on.

2.7.1 Building Instructions:

- Open SchTools.exe

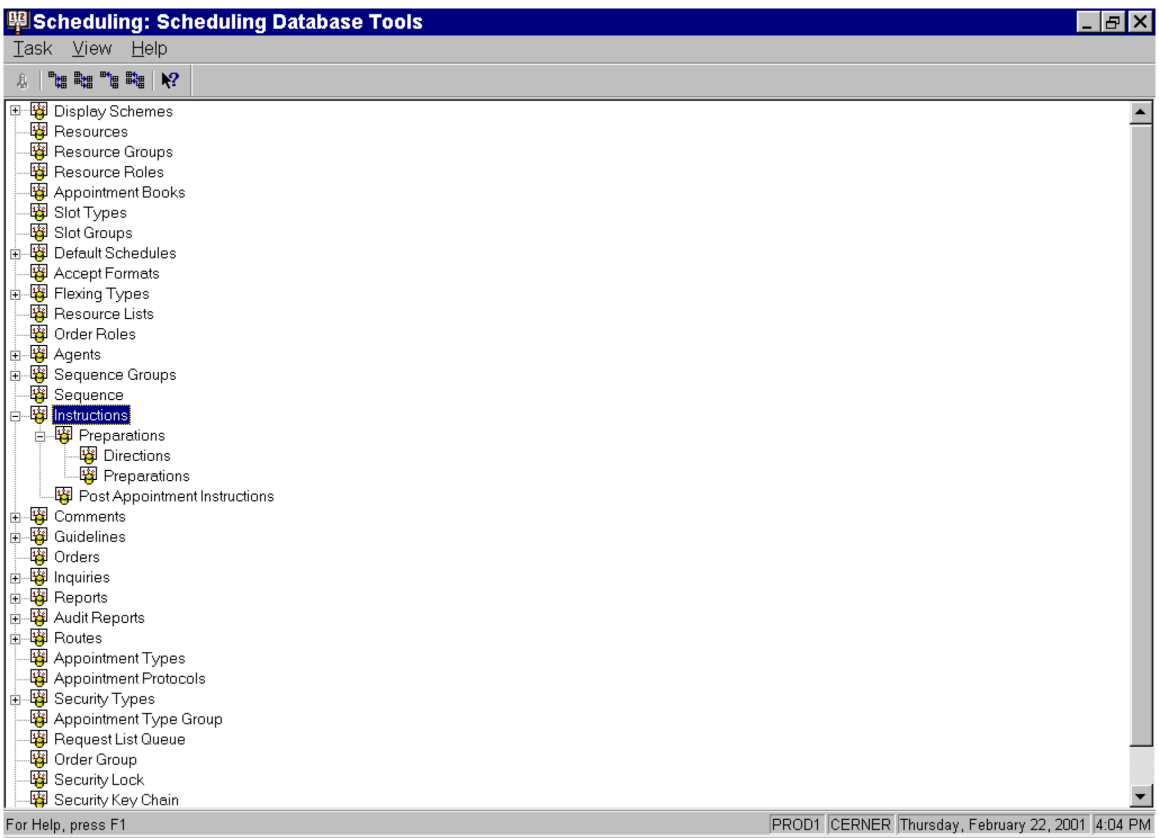


Figure 2-17

- Expand the Instructions tool
- Expand the Preparations level until you see Directions & Preparations.
- Double-click Directions to open the below window.

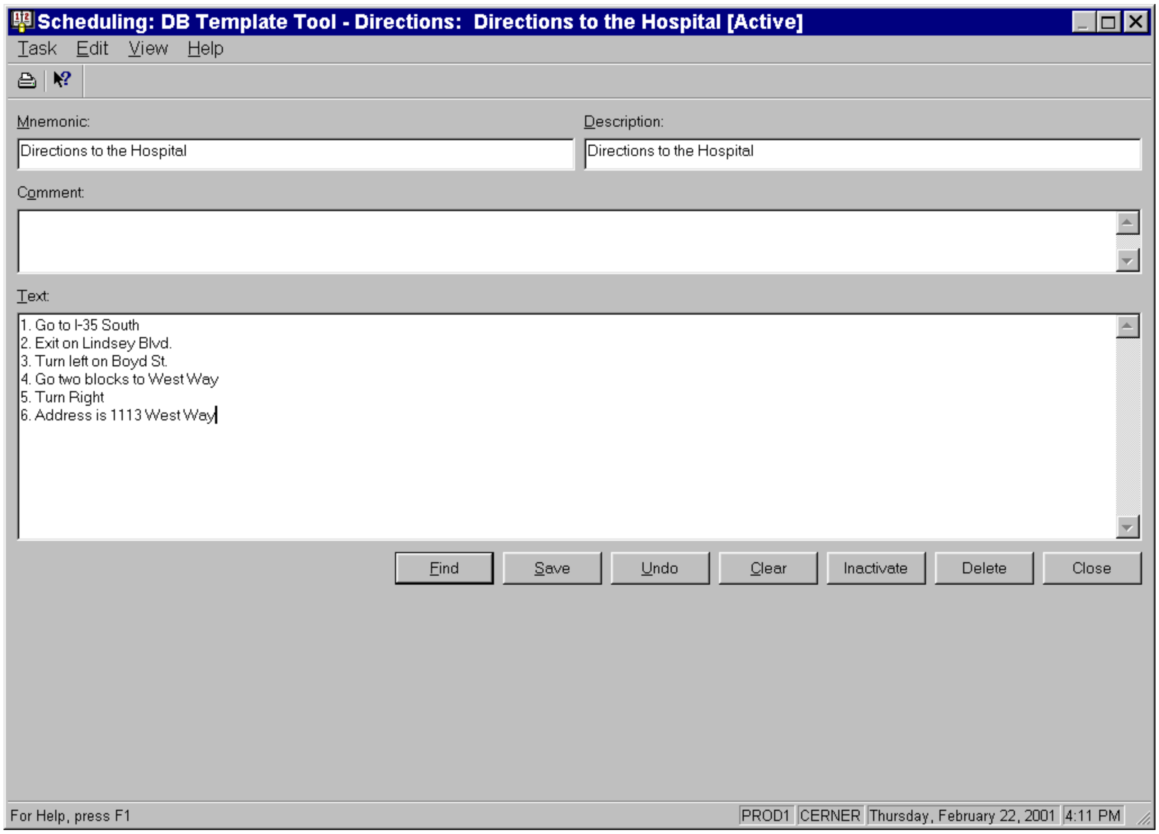


Figure 2-18

- In the Mnemonic field, enter the free text name of these particular directions.
- In the Text field, enter in any information that you want to display as directions in the Appointment Book.
- Click Save button
- Click Close button
- Repeat process for Preparations using the Preparations tool.
- Repeat process for Post Appointment Instructions using the Post Appointment Instructions.

2.7.2 Associating Instructions to the Appointment Type

- In SchTools.exe, open the Appointment Type tool and locate the appointment type you want to associate the Instructions to.

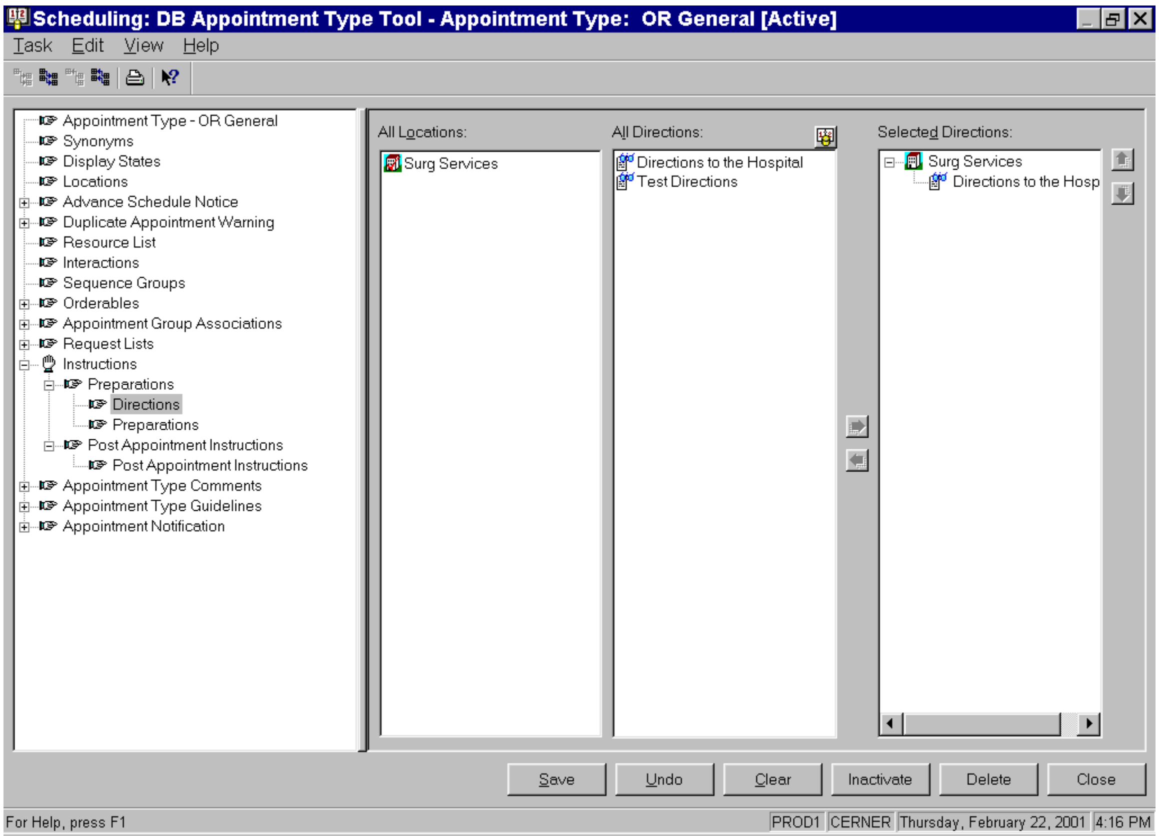


Figure 2-19

- On the left side of window, find Instructions and expand until you see Directions, Preparations and Post Appointment Instructions.
- Highlight Directions
- In the first column called All Locations, select the appropriate surgical area.
- In the second column called All Directions, select the appropriate directions.
- Click the → to move the location and directions to the last column called Selected Directions.
- If more than one direction is associated, you can arrange the appearance order of the directions by utilizing the up and down arrows next to the last column.
- Repeat the process for preparations by clicking Preparations.

- Repeat the process for post appointment instruction by clicking Post Appointment Instructions.
- Click Save.
- Click Close.
- All Instructions can be viewed in SchApptBook.exe upon case confirmation as well as post case confirmation.

NOTES

2.8 Viewing Appointment Instructions

Application Used: SchApptBook.exe

2.8.1 Viewing Instructions at confirmation

- Schedule and confirm case

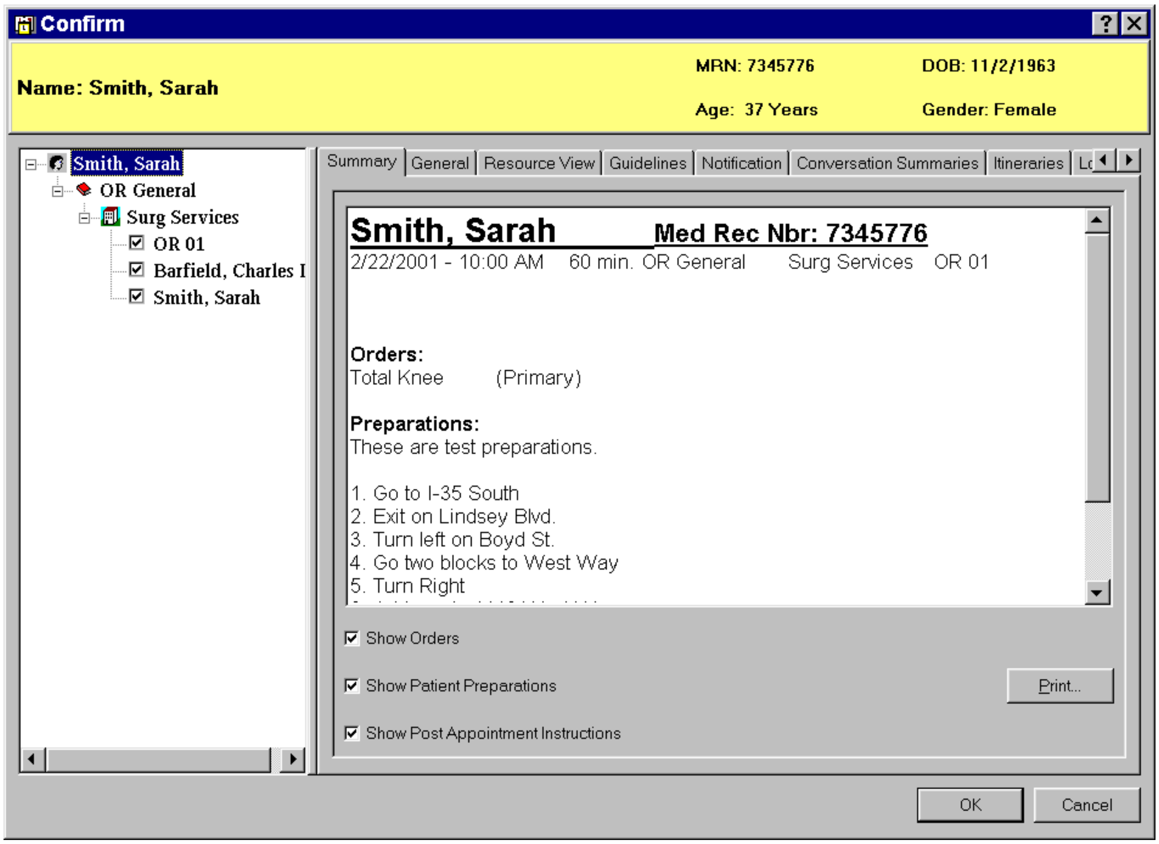


Figure 2-20

- In the confirm dialog window, Preparations appear under the Orders section.

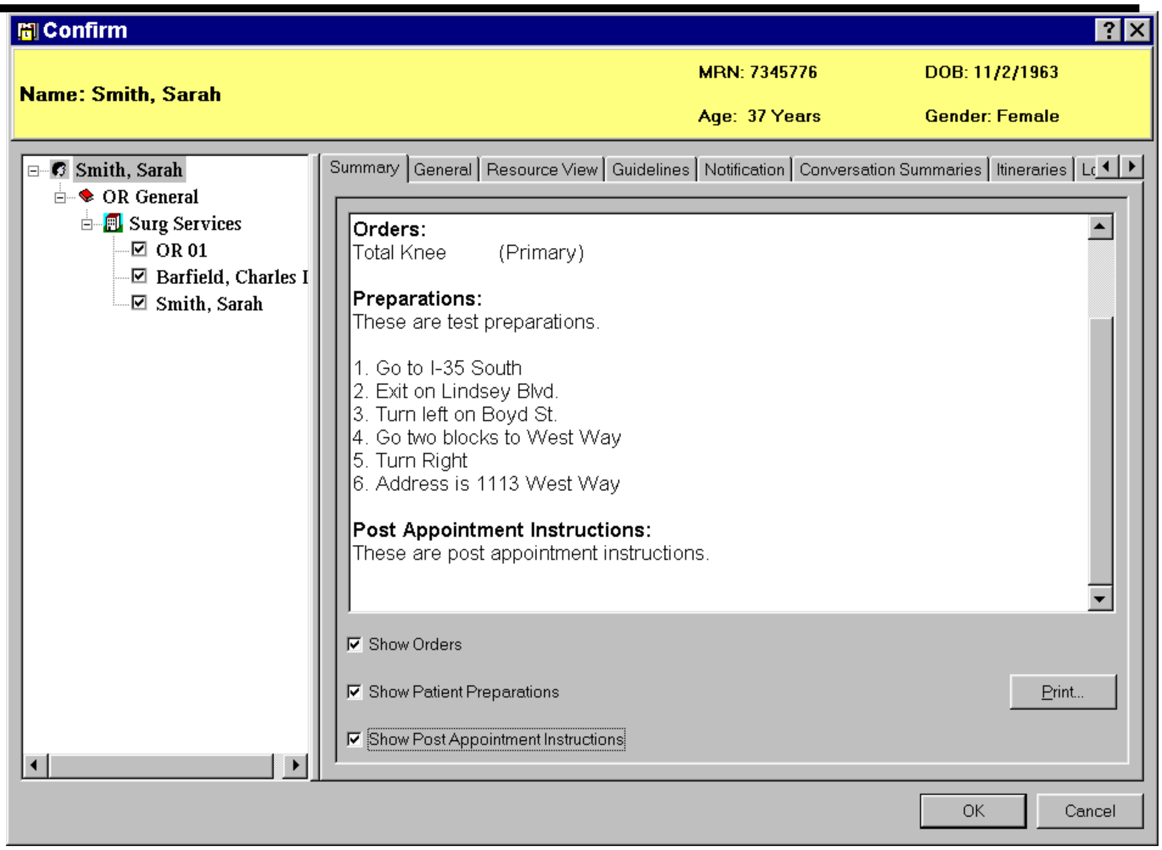


Figure 2-21

- Scroll down to view the Post Appointment Instructions.
- If you choose not to view Preparations or Post Appointment Instructions, un-select the "Show Patient Preparations" and "Show Post Appointment Instructions" checkboxes.
- User can print these instructions by clicking the Print button.
- Click OK to close window

2.8.2 Viewing Instructions after the case has been confirmed

- Right click on case > Inquiry > Appointment View

OR

- Right click on case > Inquiry > Appointment History View

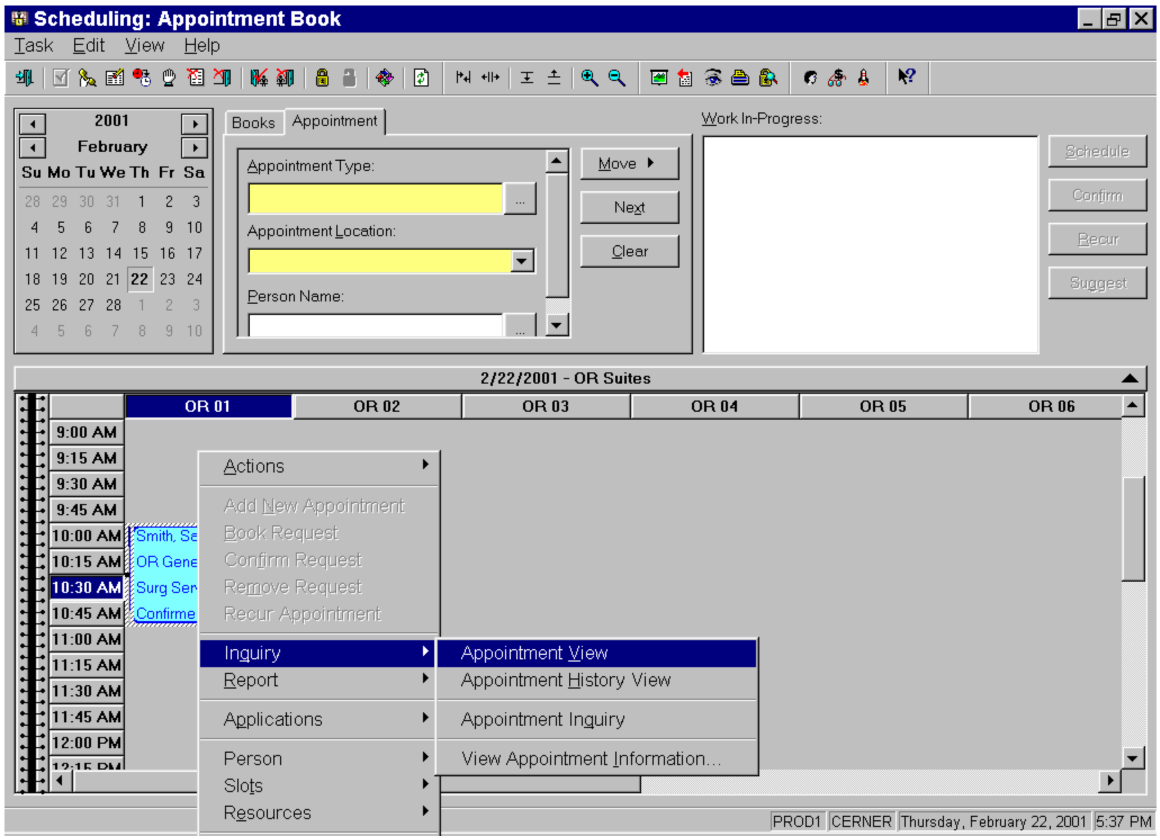


Figure 2-22

- In the Appointment View/Appointment History View window, go to the Instructions tab.

- In the Instructions Type field, select Preparations or Post Appointment Instructions from the list to view the appropriate instructions.

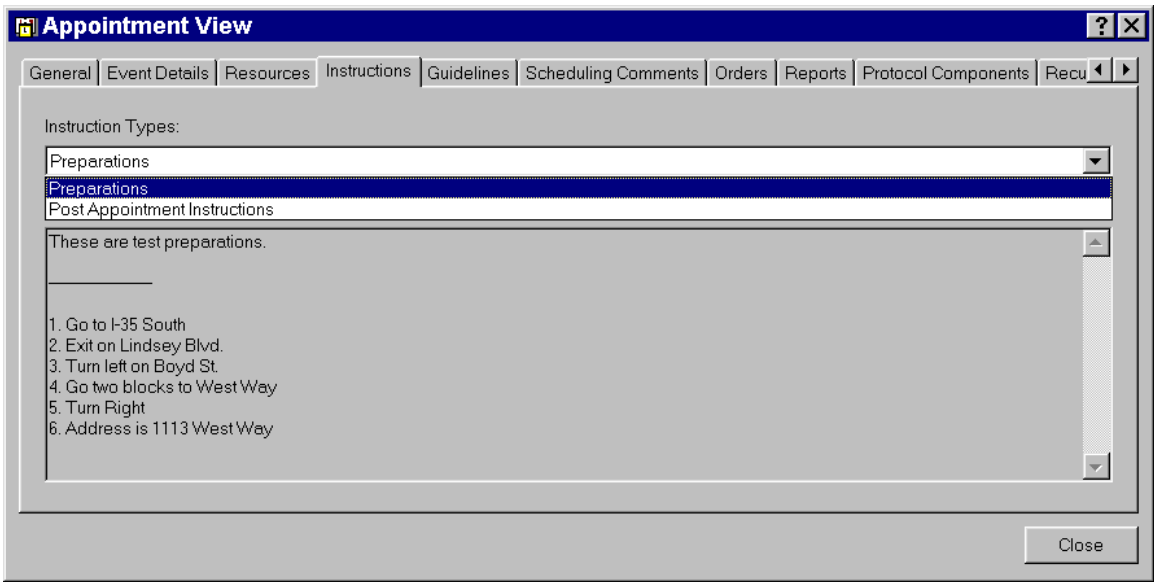


Figure 2-23

- Click Close to exit window.

2.9 To Find an Appointment

Application Used: SCHAPPTBOOK.EXE

- Open the SchApptBook.exe.
- Click the Appointment Inquiry Icon (the eye).
- To search for a case by case number, click the resource tab.

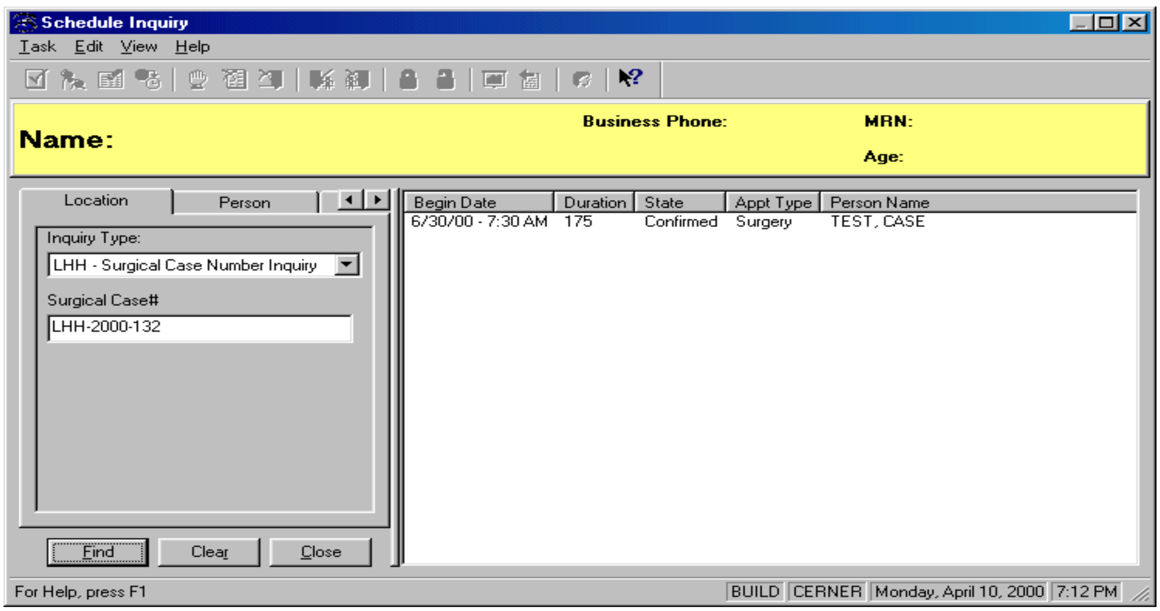


Figure 2-24

- Type in the Surgical Case #. You will be able to put wildcards (*) in your search. Click find.
- The possible cases appear in the right screen.
- Right-click on the case to perform any scheduling action on it (reschedule, cancel, etc.) without going into the appointment book.

- You can also search by person (click the person tab), surgeon, OR Room, etc.

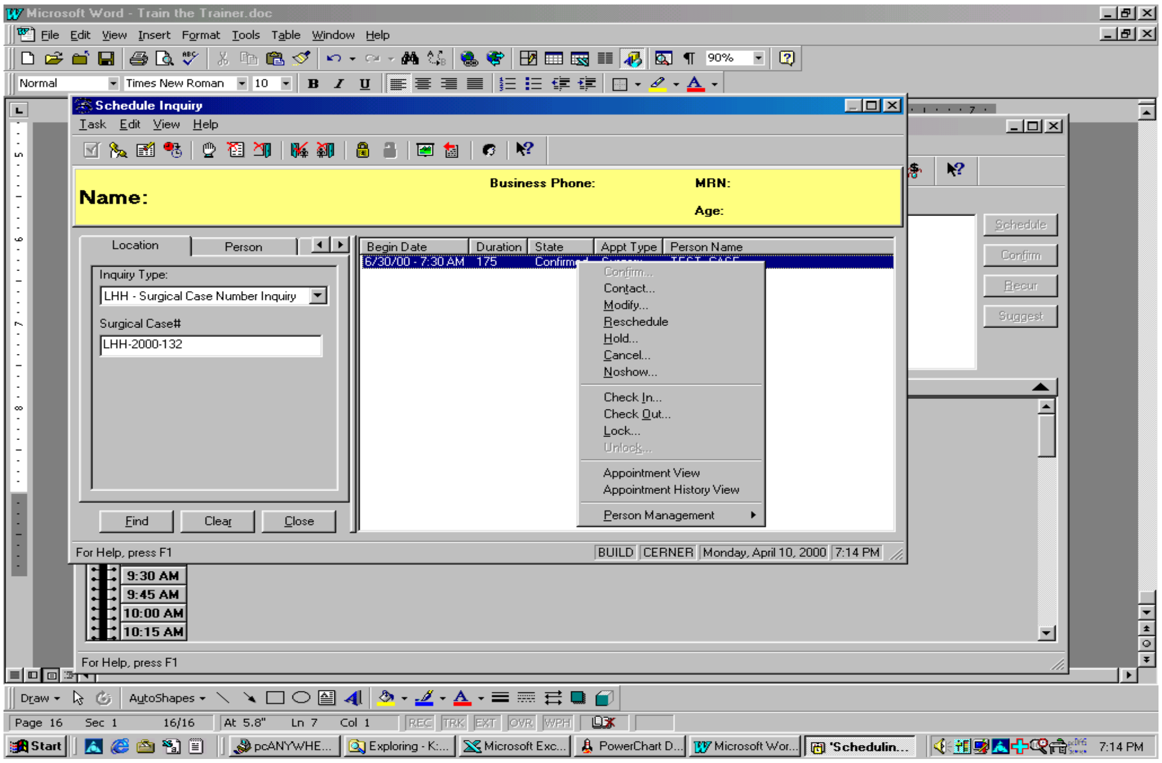


Figure 2-25

2.10 Case Inquiry

Application Used: SCHApptBook.exe

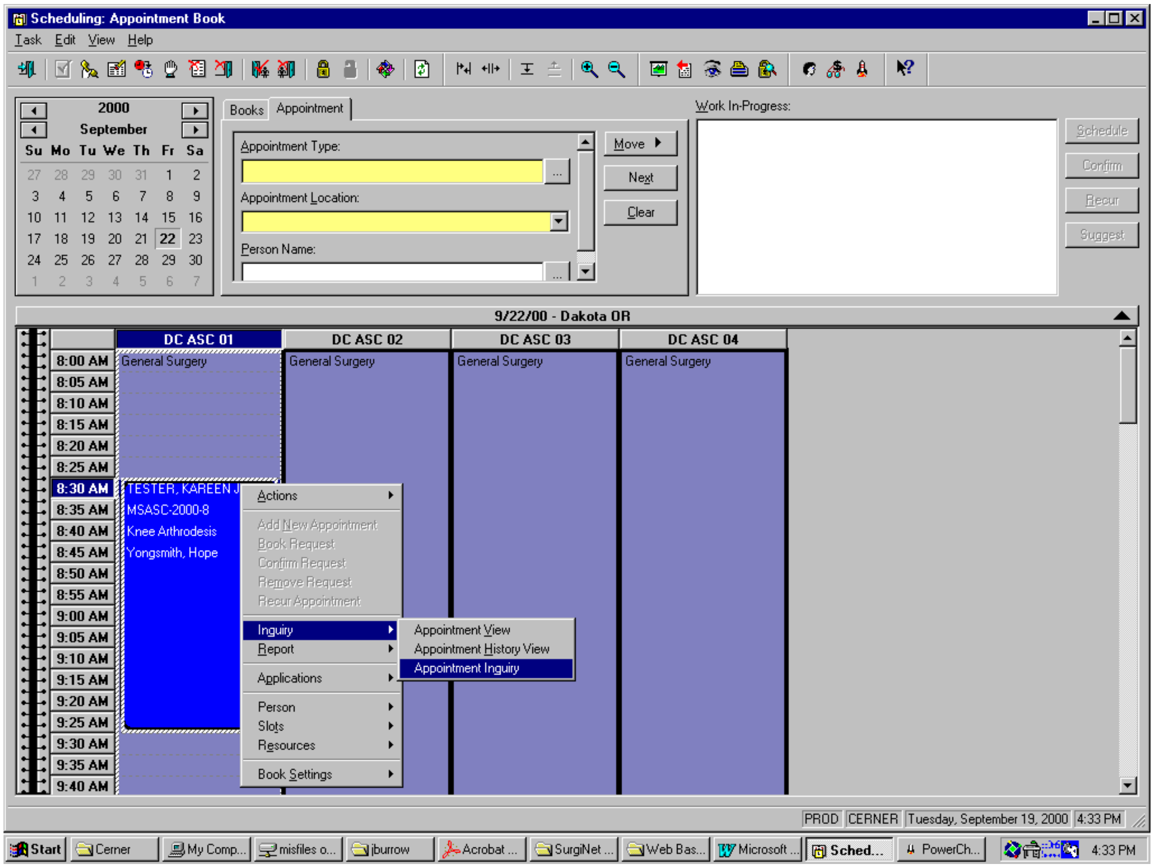


Figure 2-26

- On the appointment book, click inside the room. Right click anywhere on the book and a box will appear, select inquiry, then appointment inquiry.

- At the top of this screen you have three tabs to choose from. Person, location, resource, if all tabs do not appear click on the arrows next to them to display.
- If selecting person, type portion of name on Person and press enter to find. Double-click on the person name. Enter a date range you wish to search. Click on Find.

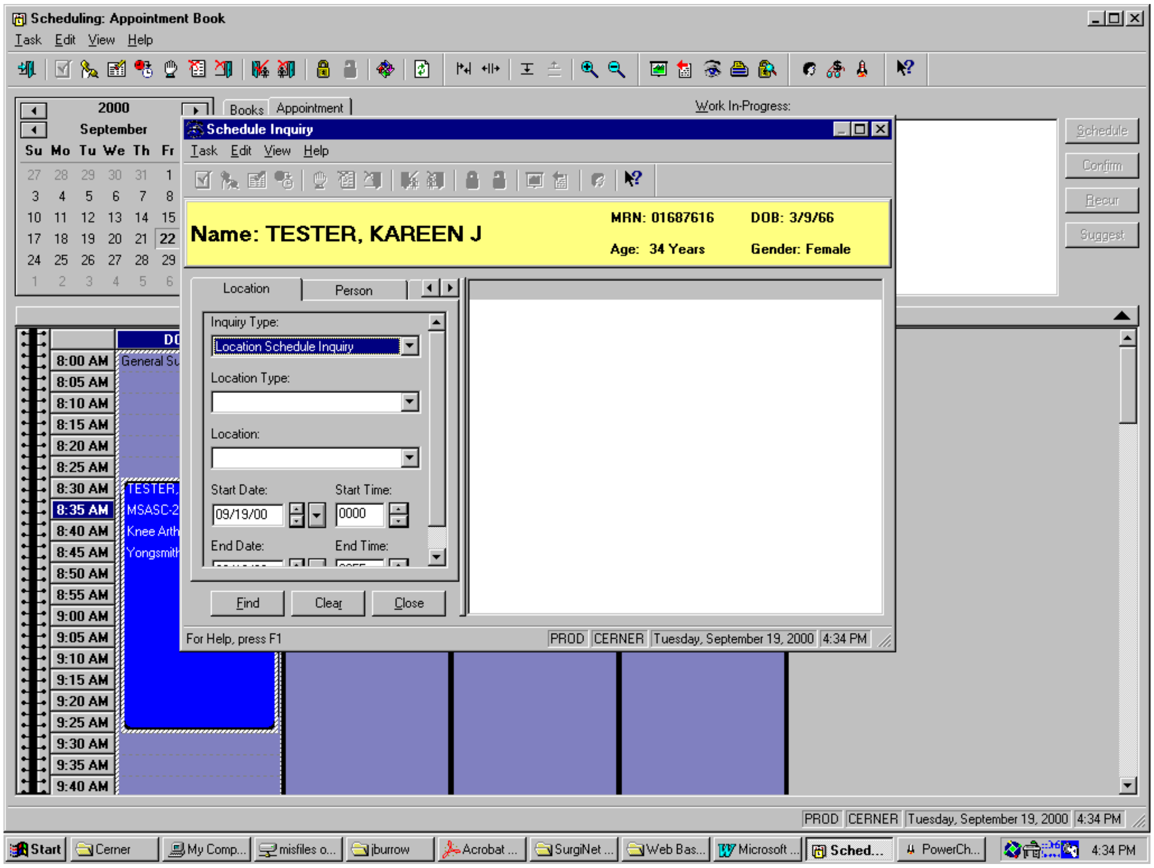


Figure 2-27

- A list with all information about cases scheduled for that patient will appear. To see all information, use the arrows to scroll across the screen.

2.11 Viewing Appointment History

Application Used: SchApptBook.exe

- Open the SchApptBook.exe
- On case in scheduling grid, right click →Inquiry →Appointment History View

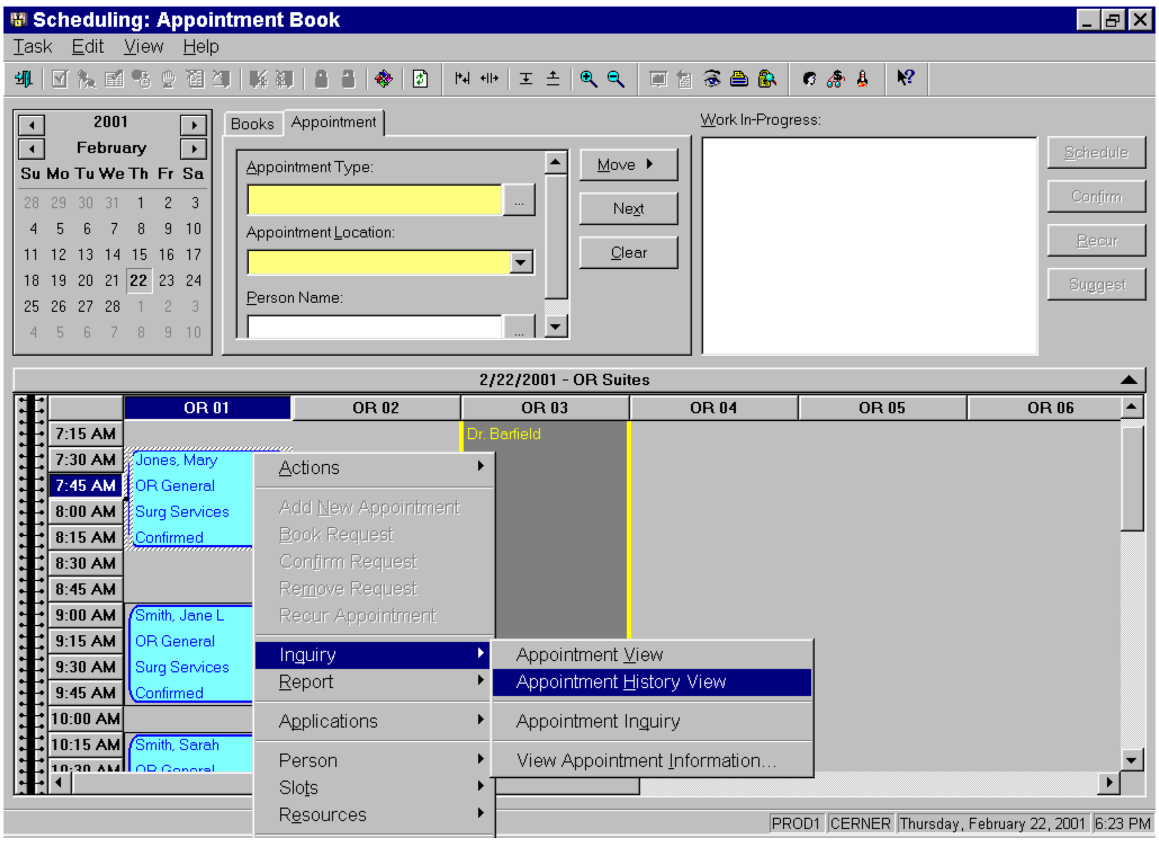


Figure 2-28

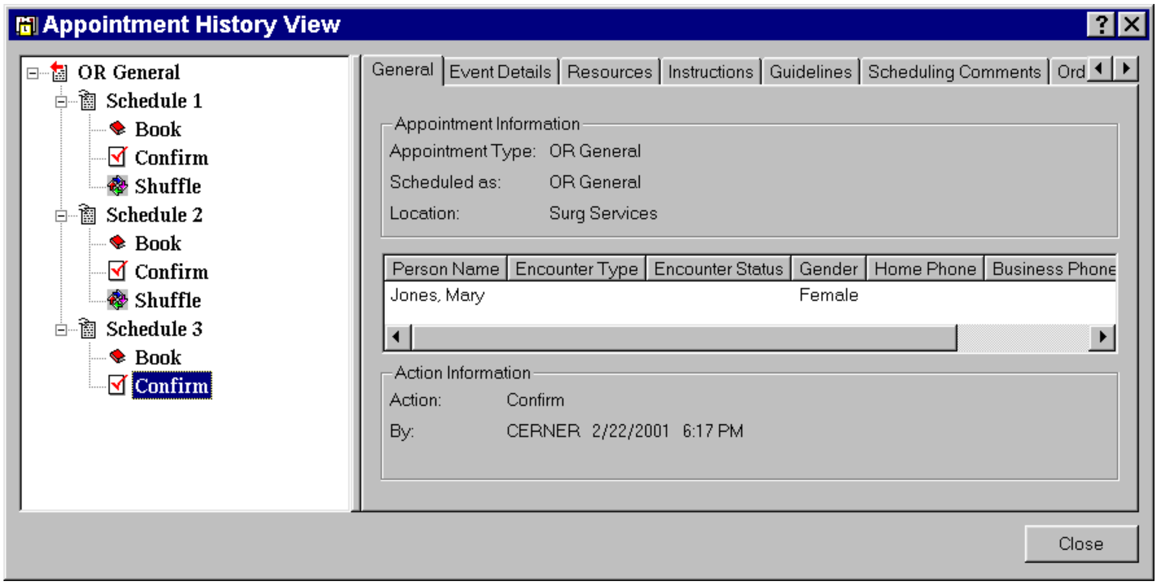


Figure 2-29

- On the right side of the Appointment History View window, it shows how many times the case has been modified.
- In the General tab, it shows who performed that specific action in the Action Information section. In this example, Cerner confirmed the case on February 22, 2001 at 6:17 PM.
- You can also navigate throughout the other tabs within in this window. You can retrieve case information such as event details from the scheduling accept format, resources that are scheduled for the case, instructions for the case as well as other important pieces of information.
- Click Close to exit out of the Appointment History View.

2.12 To Print Schedule Reports

Application Used: SNSchRpt.exe

- Launch the SNSchRpt.exe application
- To create a new report, click on the new icon (green disk)

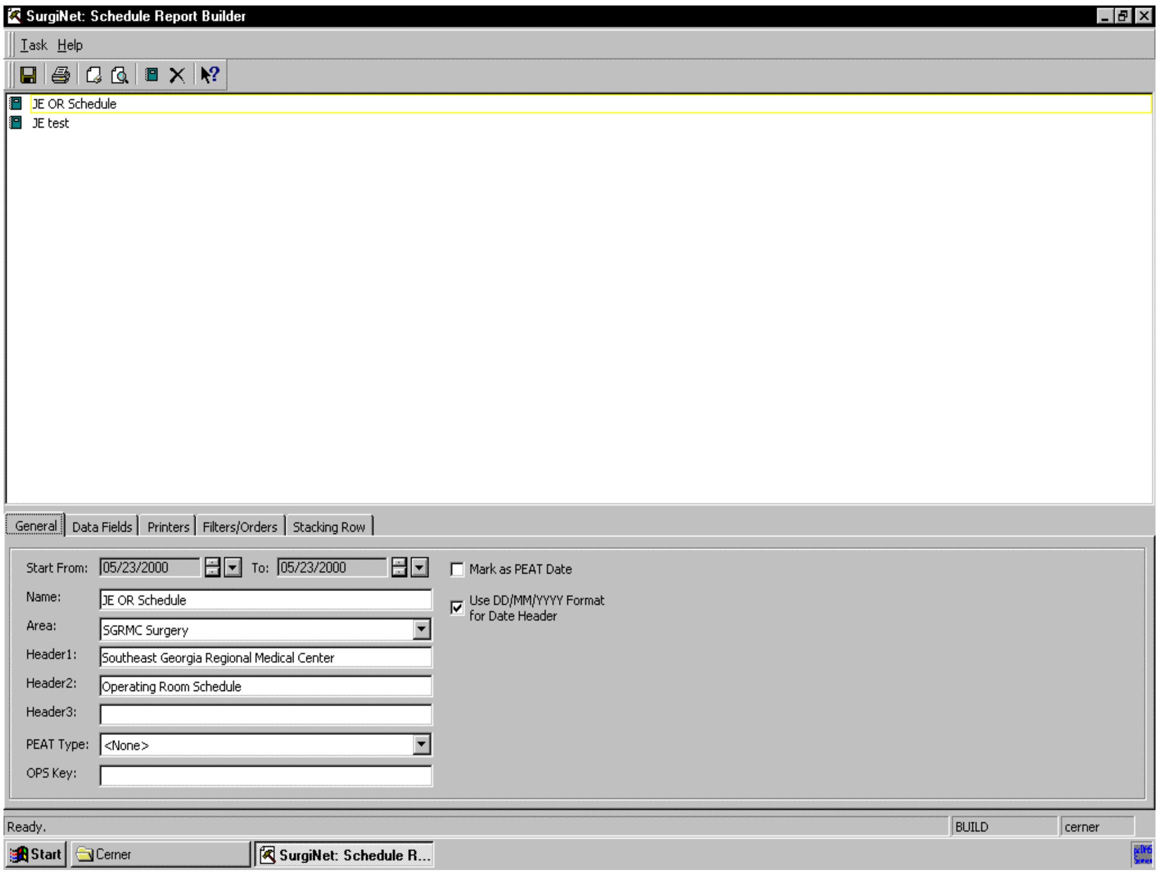


Figure 2-30

General Tab:

- Select the date you want to run the report
- Type the Name of the report
- Select the location of "Main OR"
- Type a header if desired – there are up to 3 lines for a header.
- Do not enter anything for the PEAT Type as USAF is not using this functionality.

- The ops field is for ops job printing. See Ops Job documentation for more on how to set this up.

Data Fields Tab:

- Selected Fields Column – Shows the complete display of fields. This column is uneditable.
- Display Column – This column shows you the header display that will be printed on the report for selected field. This can be edited by clicking on the text and changing the text.
- Size Column – This is the size of the selected field. This can be edited as well.
- The (+) that appears in the selected fields column symbolized the field is an Appointment Book field.

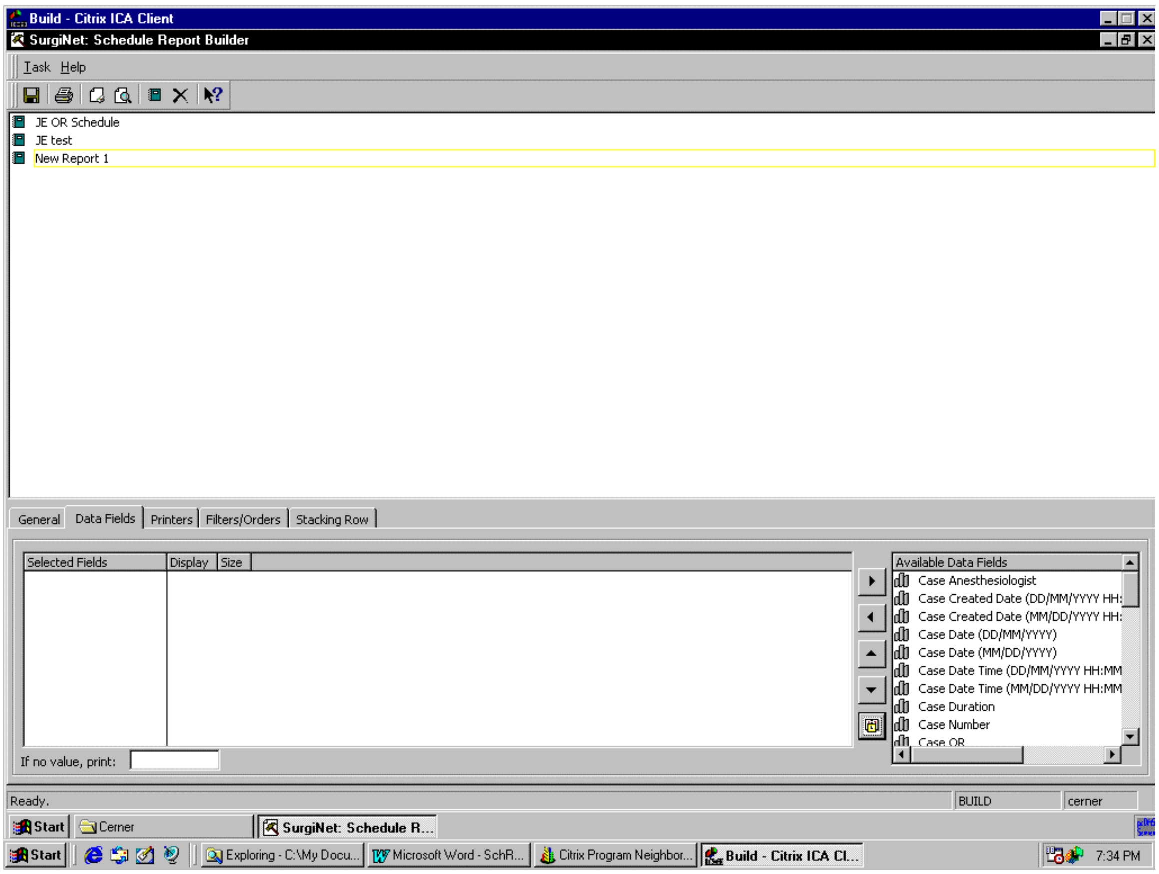


Figure 2-31

- Click on the appointment book icon.
- Select a field type - indicates whether it is a case accept format or a procedure accept format.

- Type a header for the field, enter a size (numerical value)
- Choose the appt type of "surgery"
- Click in the value column next to the appt type you are using "surgery" and there will be a list of fields from the accept format you chose (see screen print on next page)

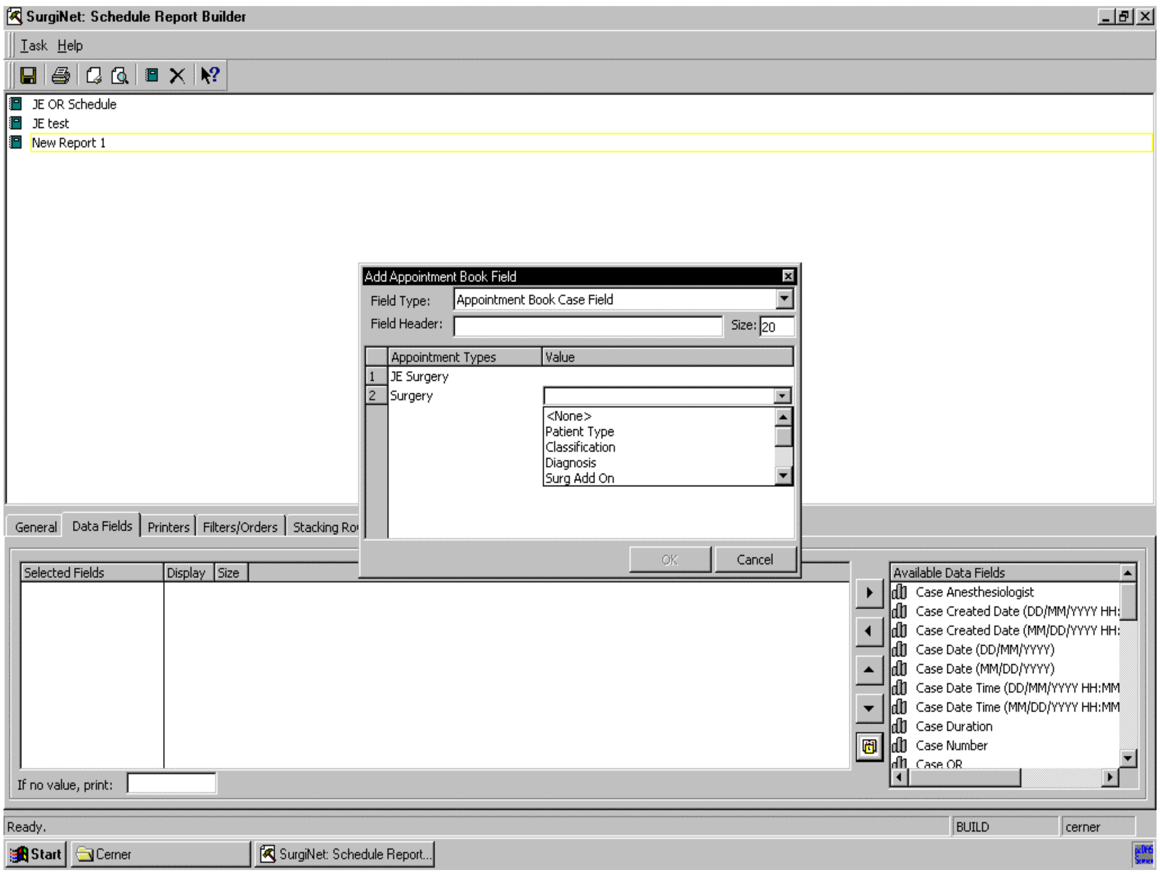


Figure 2-32

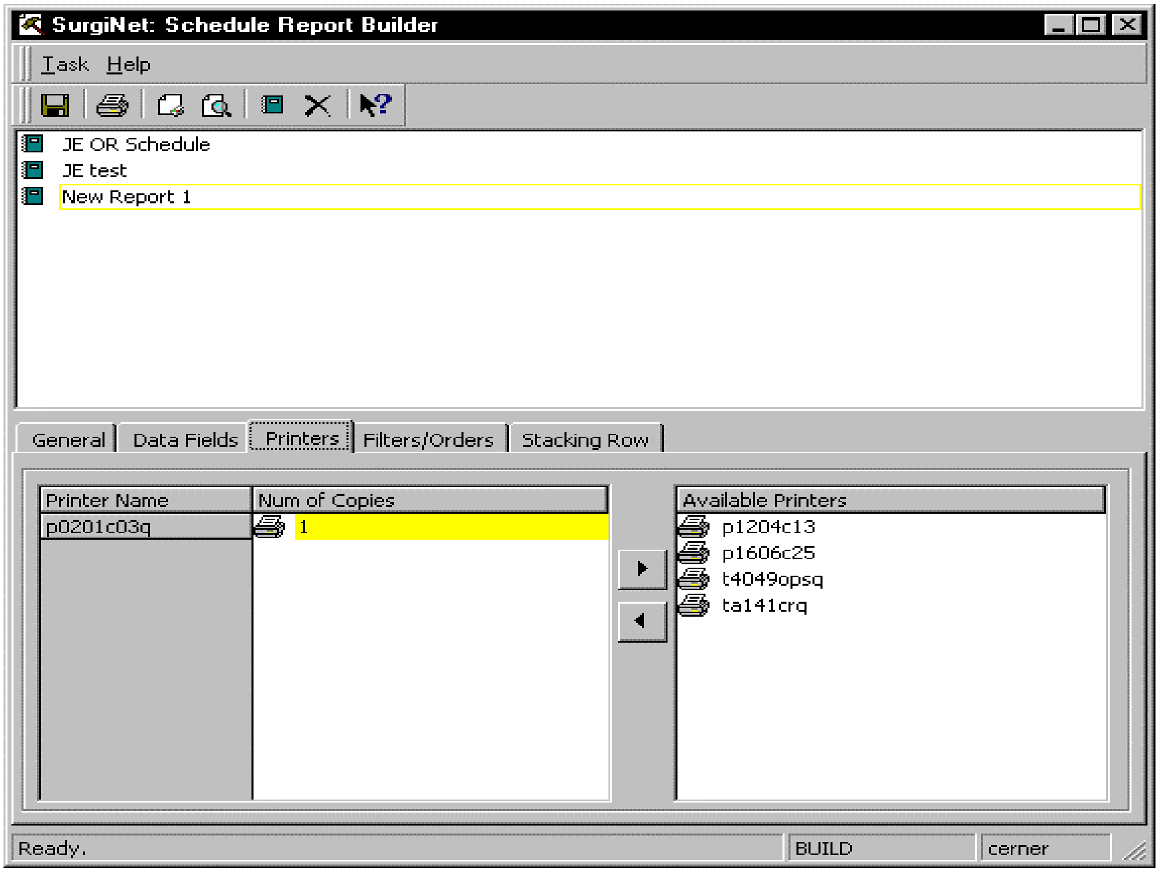


Figure 2-33

Printers Tab:

- Select from a list of available printers where you want this report to be sent.
- Enter the number of copies of the printed report
- The > and < are the move arrows to add or remove a printer to the list.

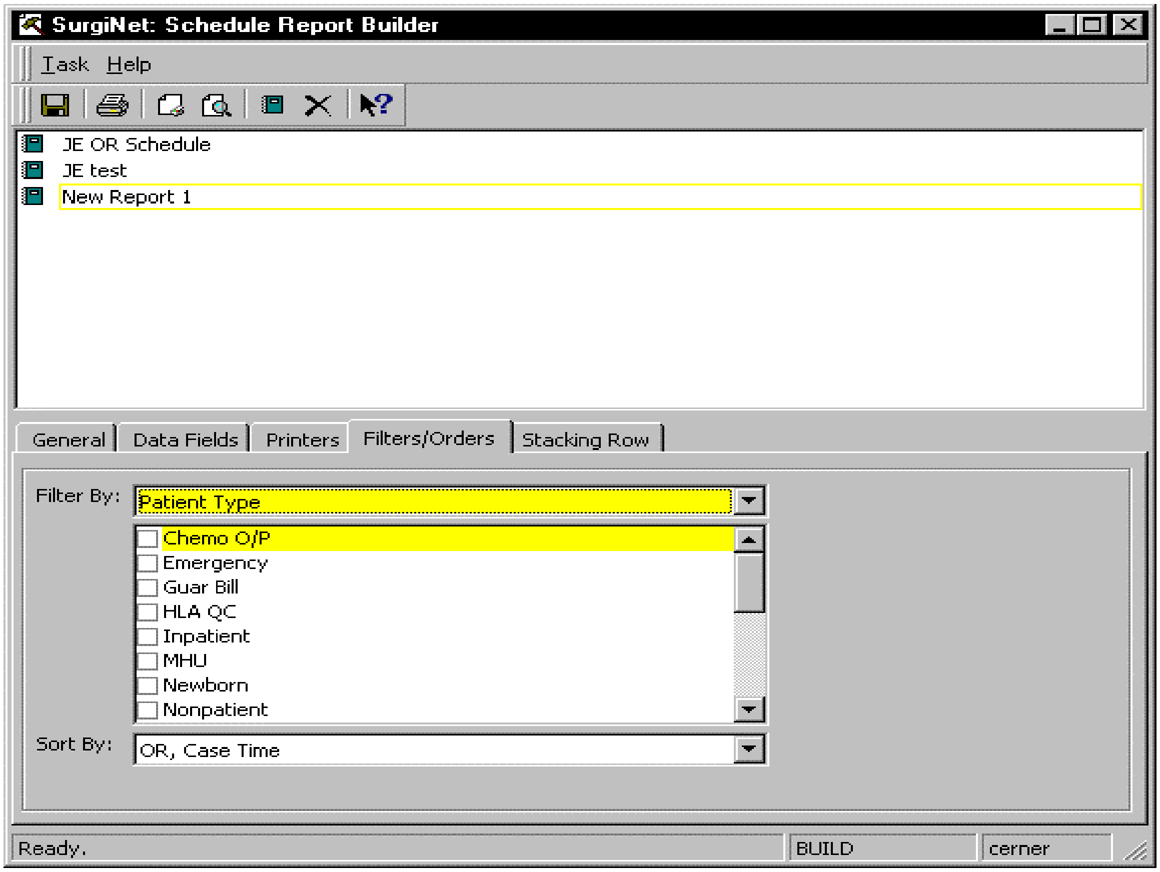


Figure 2-34

Filters/Orders Tab:

This tab allows you to specify the filter criteria and select a sort option. This is an optional tab.

- Select a filter by: Patient Type or Specialty and choose what to Sort by:

Stacking Row Tab:

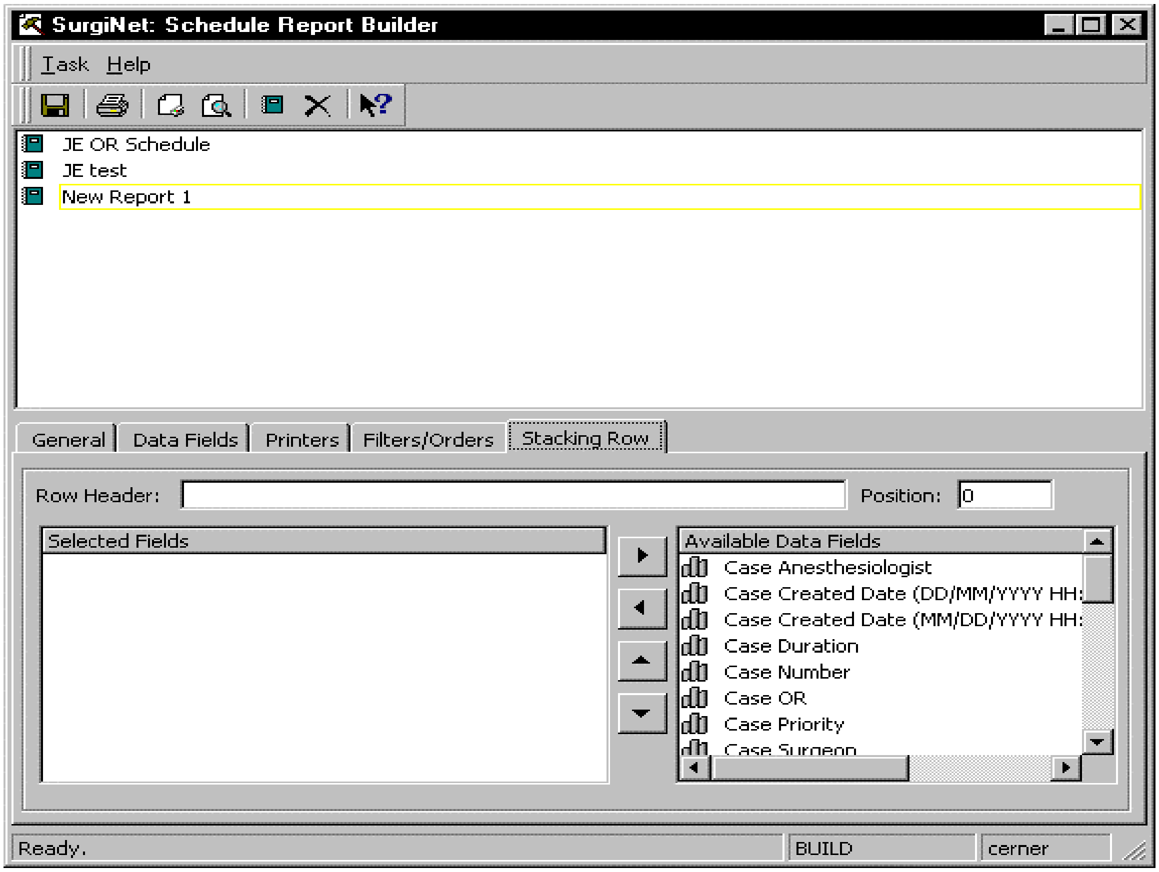


Figure 2-35

- This tab allows you to select additional data without extending the report beyond the margin of the paper.

<u>Row Header</u>: Description given to the row of additional fields

<u>Position</u>: This is the starting position of the stacking row on the report. A position number of 0 will start the stacking row at the left margin of the report.

<u>Selected Fields</u>: These are the data fields that will be applied to the stacking row on the report.

<u>Available Fields</u>: This shows all the available fields that the application can retrieve and add to the stacking row.

You have the ability to move these fields up, down, right, or left by using the move arrow icons.

Do not forget to save the report if you want this to remain in the list of regular reports to be run and printed.

2.12.1 Print the Schedule

The Schedule Report Builder application is used for printing the schedule to multiple locations around the facility. This script guides the user in how a schedule would be printed. The schedule requires a postscript printer queue.

- Launch the Schedule Report Builder application (SNSchRpt.exe) on the AppBar.
- Select Demonstration Report 1.
- Enter a date range from the current date to tomorrow's date.
- Press Print Preview from the tool bar.
- Verify that the report is displayed with the values from the date fields tab displayed as column headers. The values from the case or cases should be displayed beneath. Additional values should be displayed in the Demonstration Row field.
- Exit the application.

NOTES

2.13 Modifying Appointment Details

Application Used: SchApptBook.exe

- Open the Appointment Book.
- Find the case on the grid that you wish to modify.
- Right click on the case on the grid, select "Actions" then left click on "Modify".

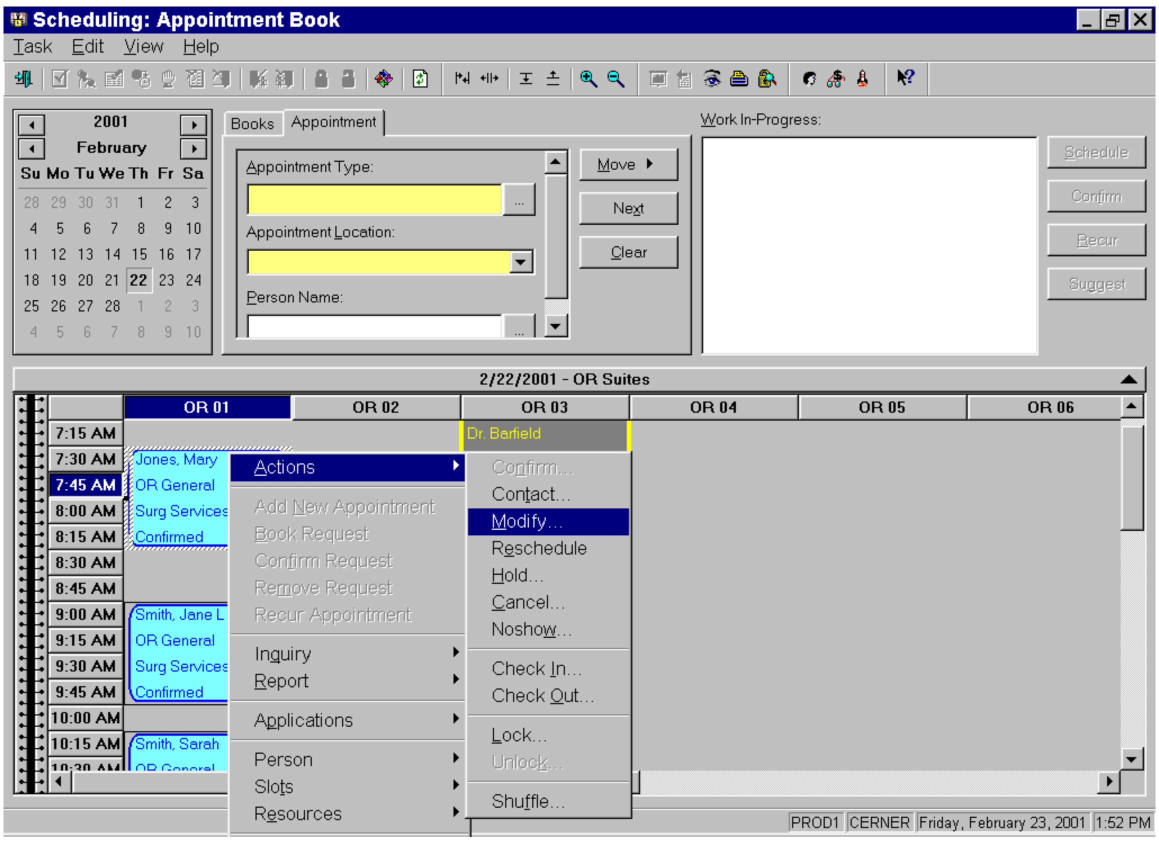


Figure 2-36

- Click on the "Details" tab to change any information listed in the case accept format such as priority, patient type, surgeon, etc.

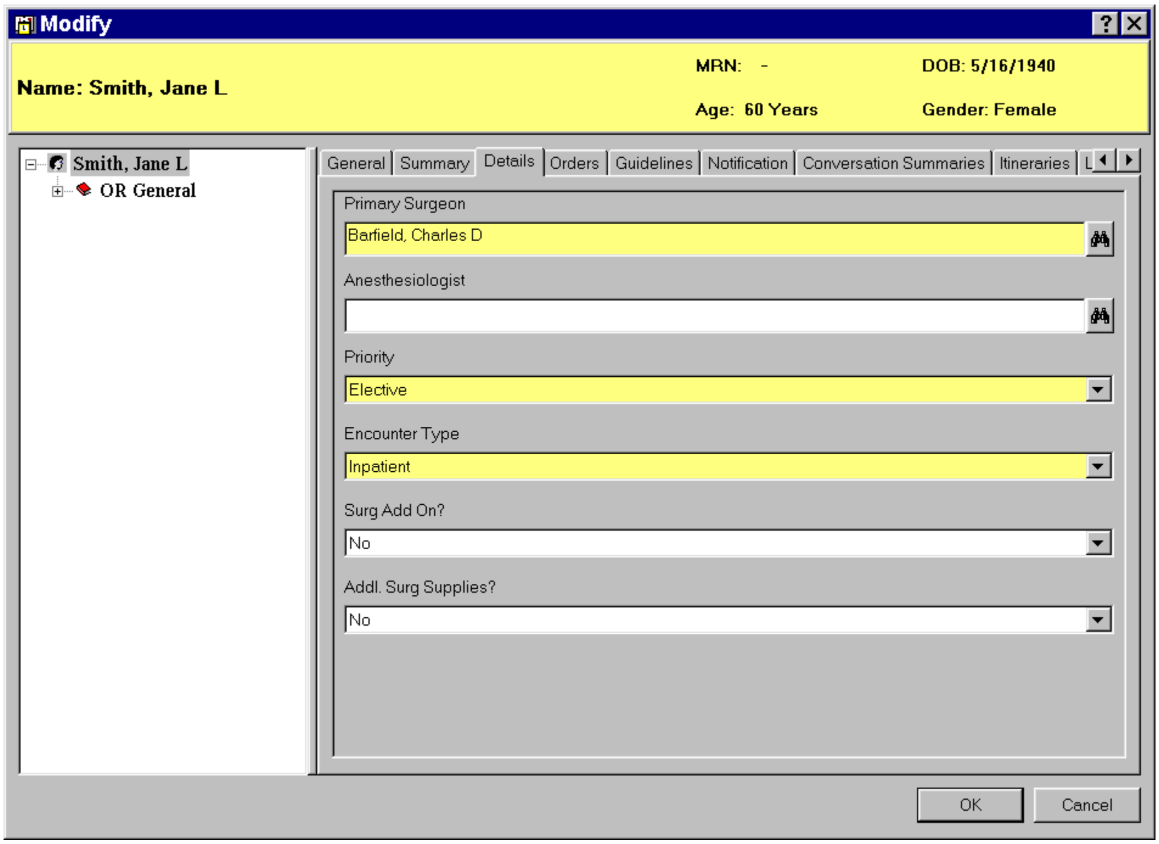


Figure 2-37

- Click the Orders tab to change any information listed in the procedure accept format such as Order (Procedure), anesthesia type, procedure modifier, etc.

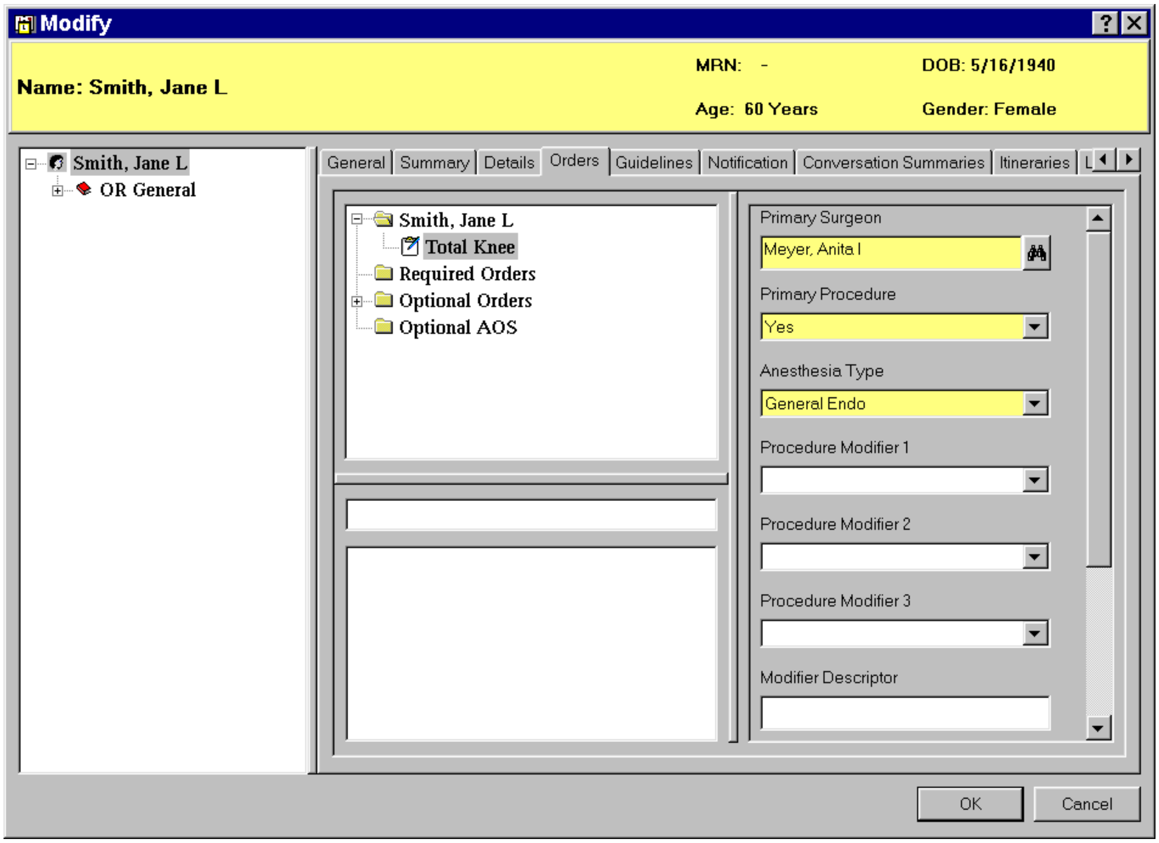


Figure 2-38

- Click OK to go back to the appointment book.

NOTES

2.14 Adding a Slot from Resource Scheduler

Application Used: SCHAPPTBOOK.exe

- Update the schedule by adding the desired block back in. Right click →Slots →Add Slot in the scheduling grid in the room you want to add the slot.

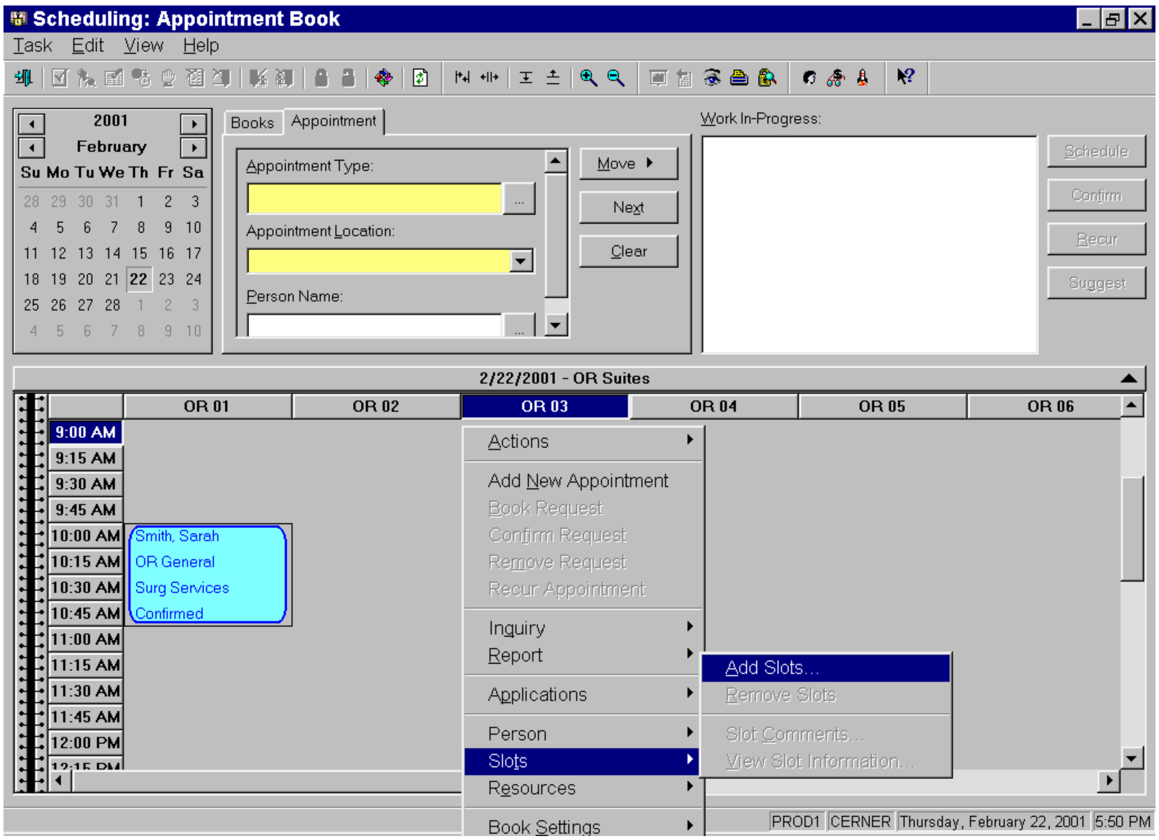


Figure 2-39

- In the Add Slot window, change the Day Begin time to the desired time and the Day End time to the desired time.
- Set the desired Time Interval.
- Click on the + next to Slot Groups then the + next to Surgery Group to show their contents.

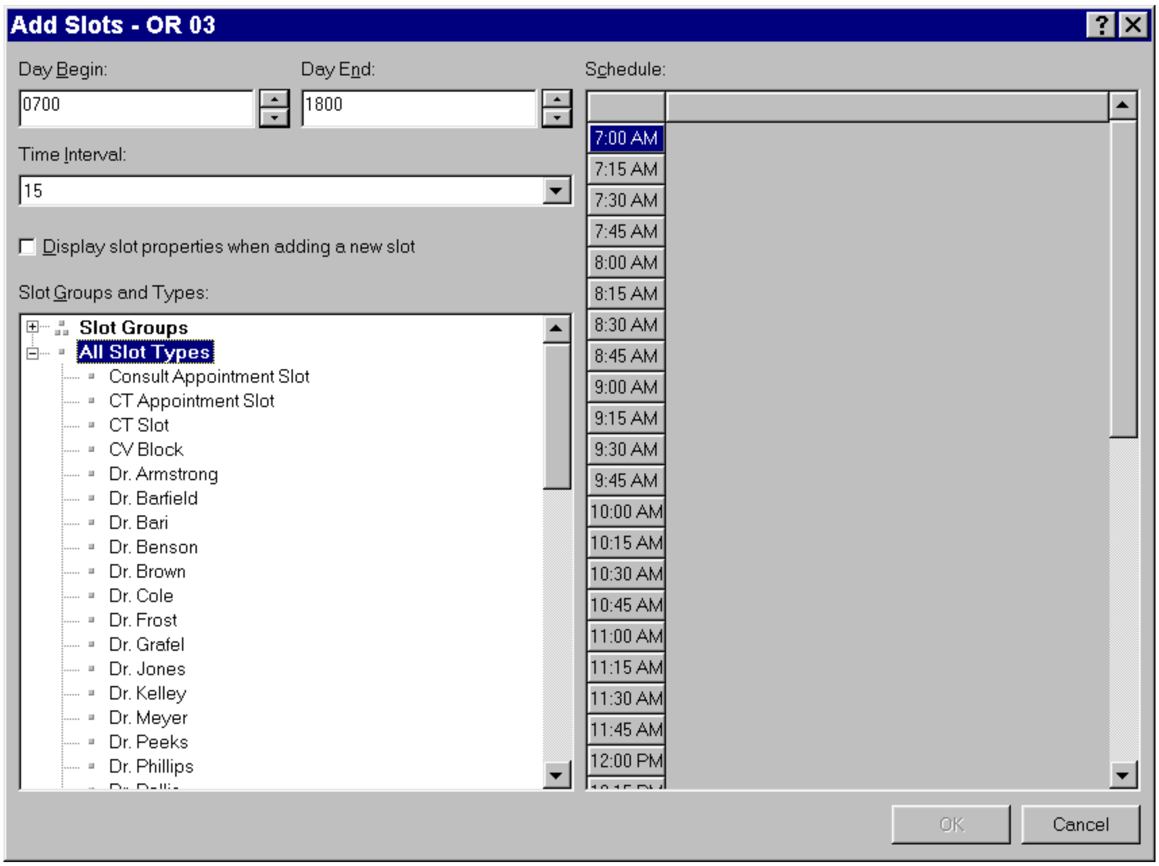


Figure 2-40

- Drag and drop the desired block to the Schedule section on the right.

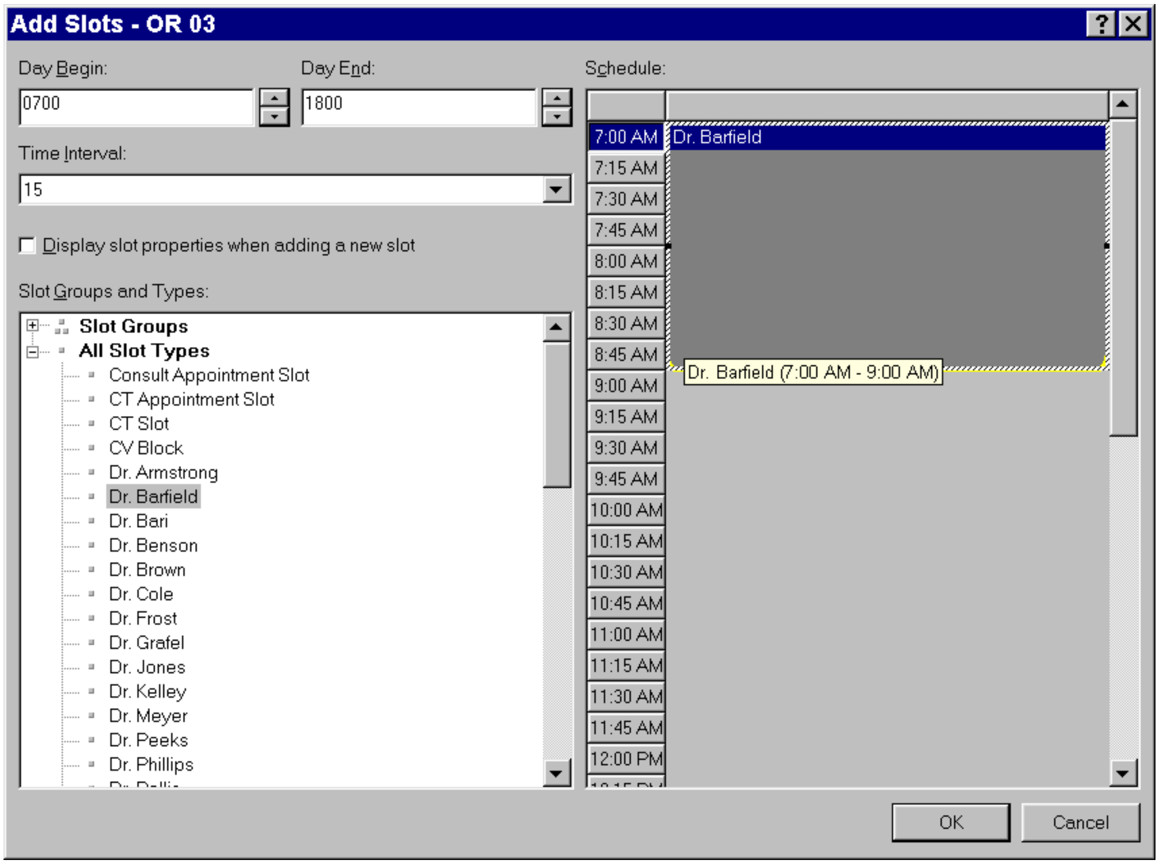


Figure 2-41

- Right click the new slot and select Properties.

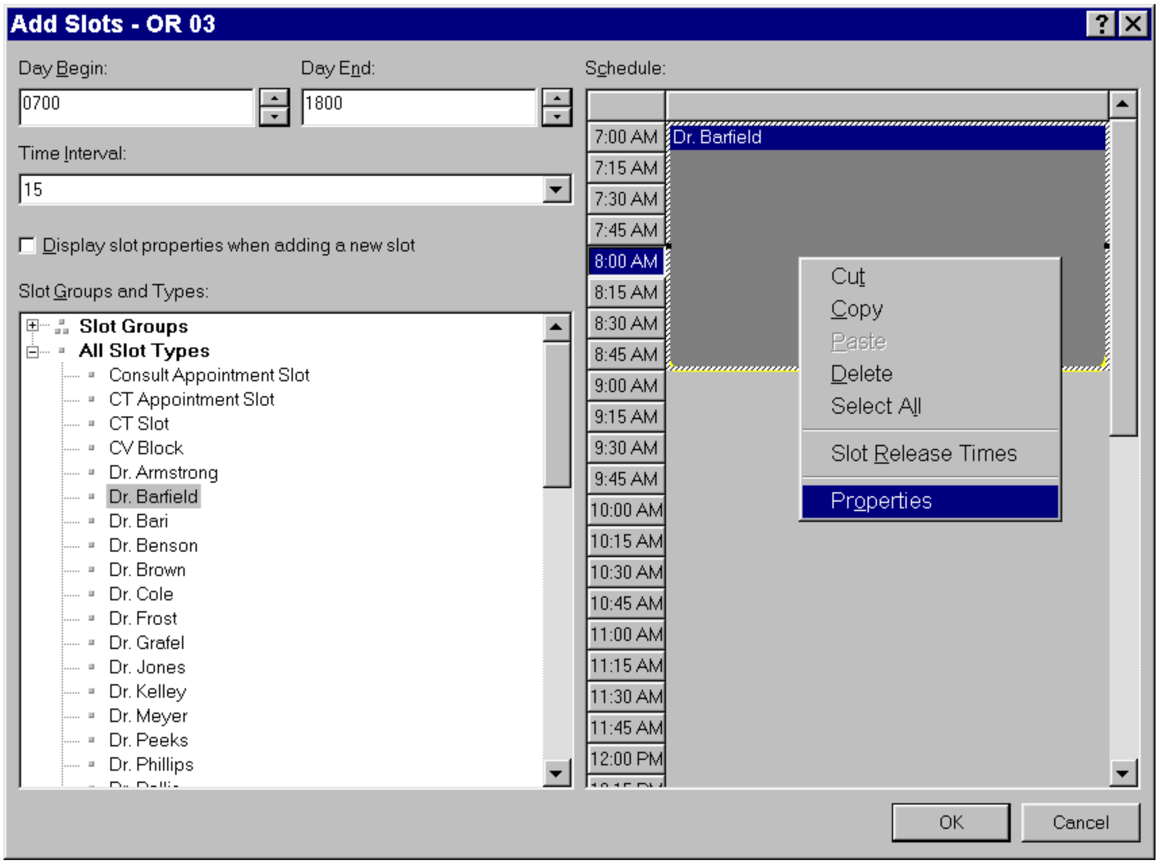


Figure 2-42

- In the Properties window in the Duration field, enter the slot duration.

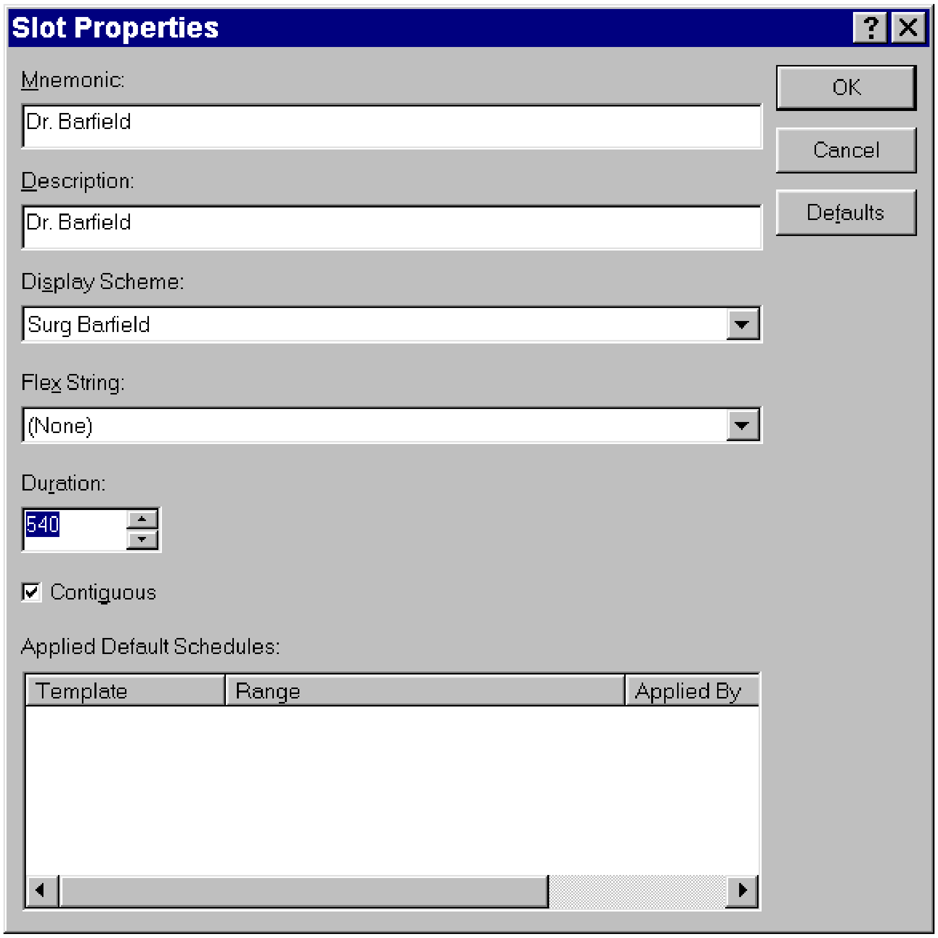


Figure 2-43

- Click OK to close the Properties window

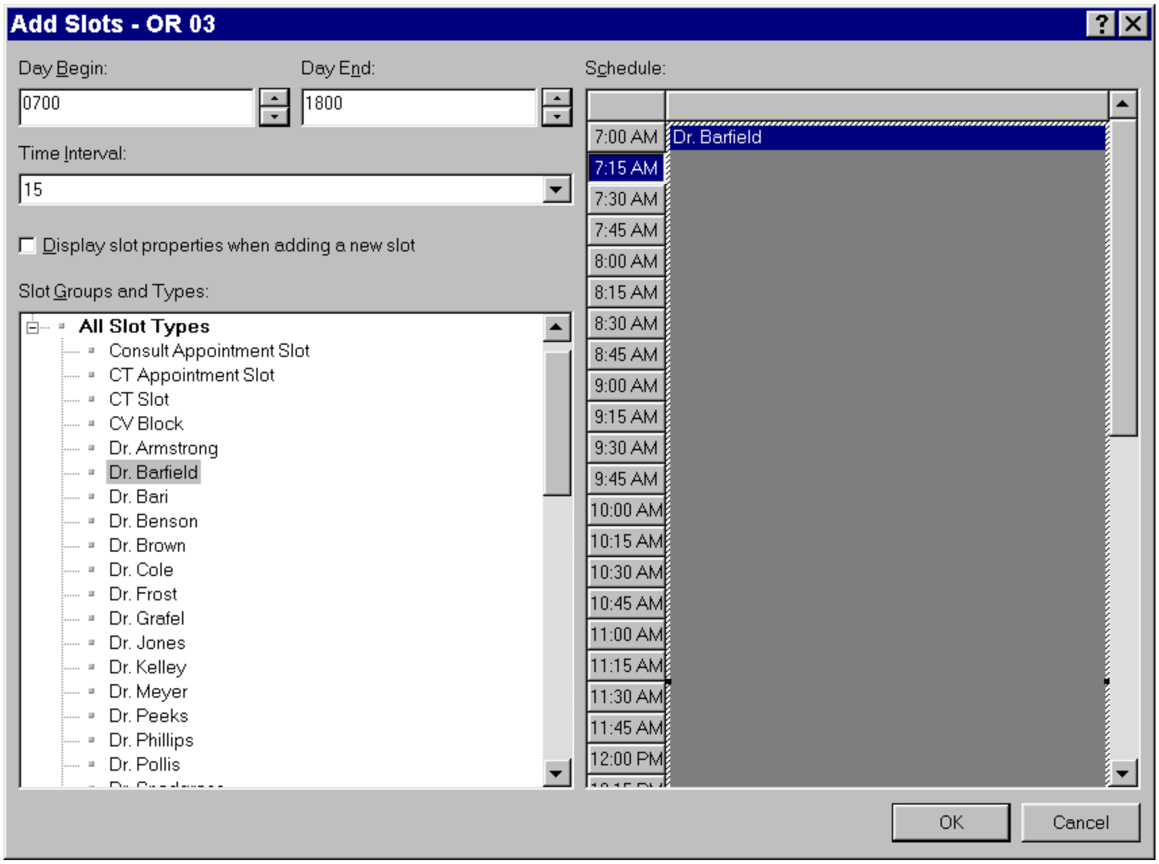


Figure 2-44

- Click OK to add the block to the grid.

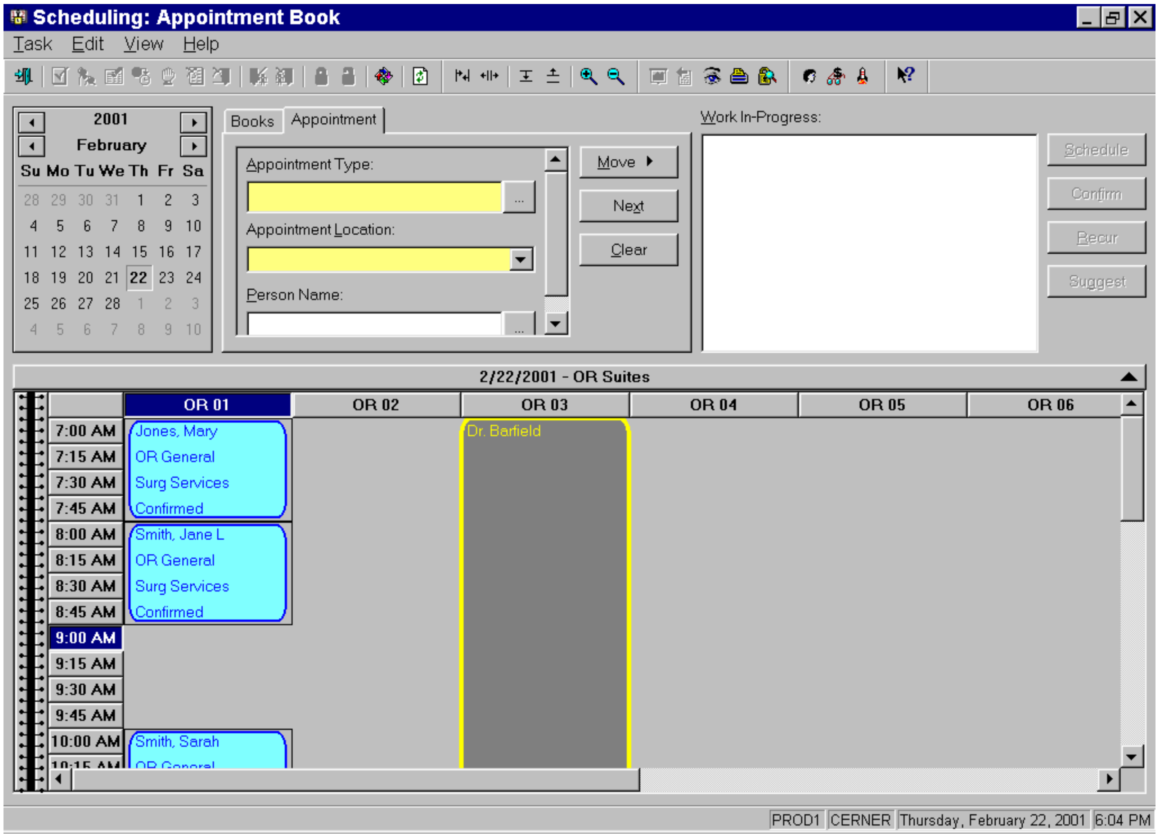

Scheduling: Appointment Book
Task Edit View Help
2001
February
Su Mo Tu We Th Fr Sa
Books
Appointment
Appointment Type:
Appointment Location:
Person Name:
Move
Next
Clear
Work In-Progress:
Schedule
Confirm
Recur
Suggest
2/22/2001 - OR Suites
OR 01
OR 02
OR 03
OR 04
OR 05
OR 06
7:00 AM
7:15 AM
7:30 AM
7:45 AM
8:00 AM
8:15 AM
8:30 AM
8:45 AM
9:00 AM
9:15 AM
9:30 AM
9:45 AM
10:00 AM
Jones, Mary
OR General
Surg Services
Confirmed
Smith, Jane L
OR General
Surg Services
Confirmed
Smith, Sarah
Dr. Barfield
PROD1
CERNER
Thursday, February 22, 2001
6:04 PM

Figure 2-45

NOTES

2.15 Removing a Slot from Resource Scheduler

Application Used: SCHAPPTBOOK.exe

- Update the schedule by removing the slot from the appointment book grid.
- Right click →Slots →Remove Slot in the scheduling grid on the slot you want to remove.

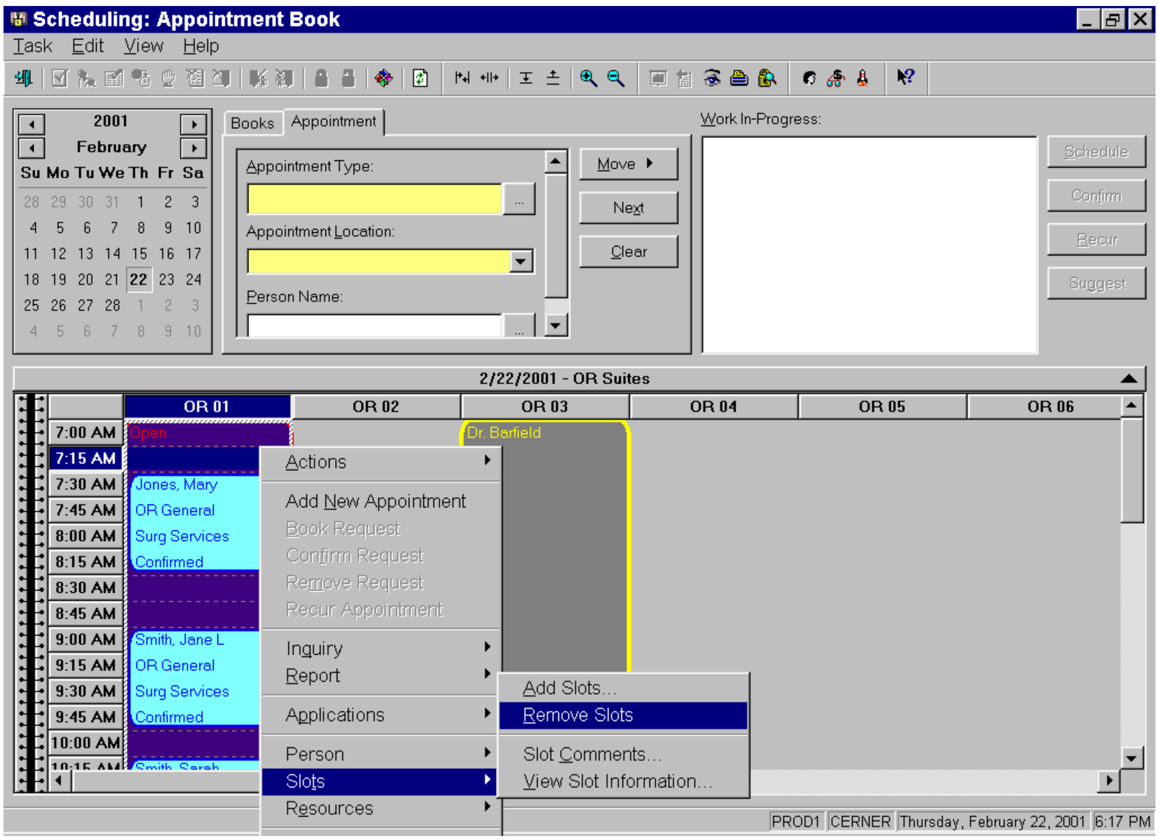


Figure 2-46

- If appointments were scheduled into this block, a Displacement Report dialog will display. This allows you to print a report of all the appointments that will be displaced by removing the block from the schedule.
- Select the appropriate printer from the Output Device field to print report.
- Click cancel if you have not defined any print devices.

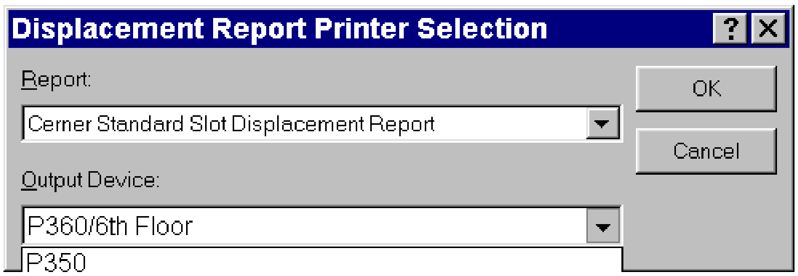


Figure 2-47

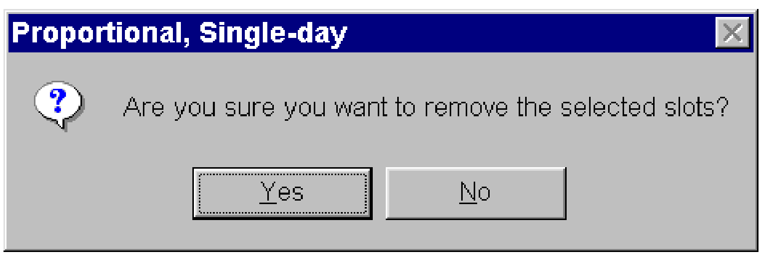


Figure 2-48

- Click Yes to remove the selected slot.

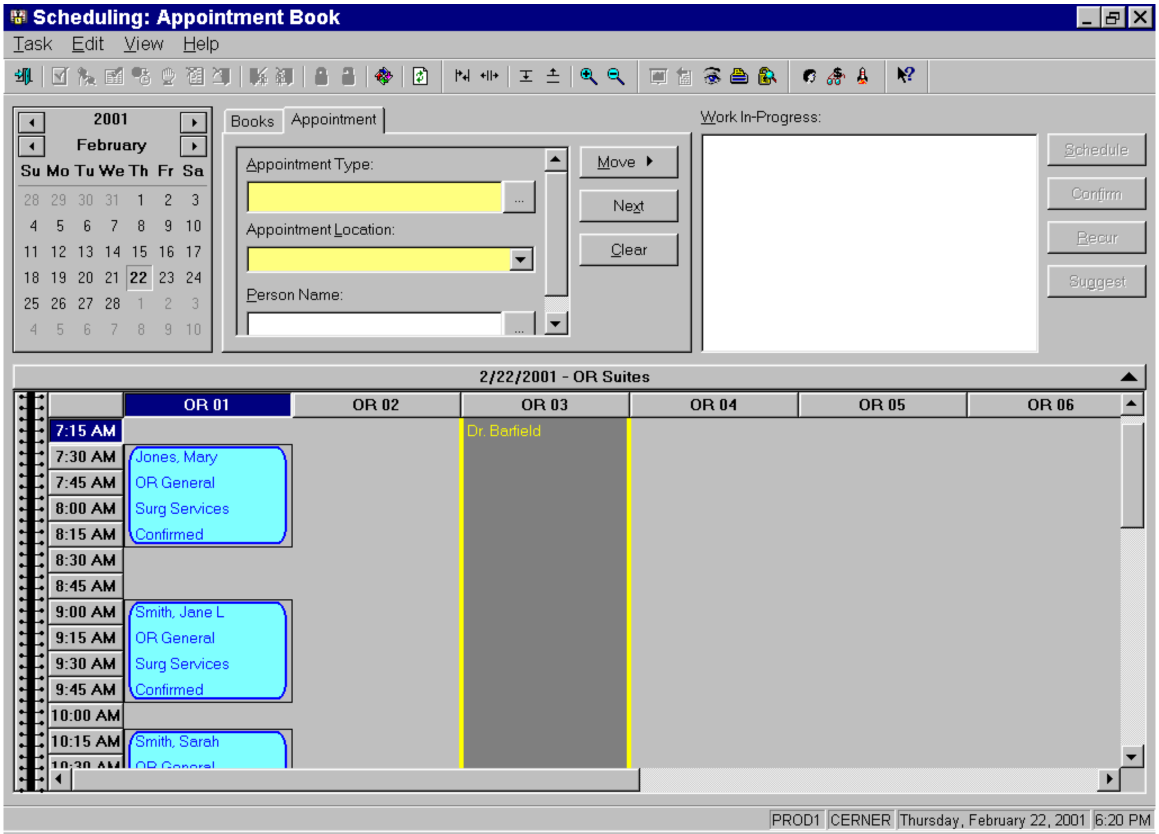


Figure 2-49

The Block will be removed from the scheduling grid and any displaced appointments would need to be rescheduled. (Normally, cases would be rescheduled before a block would be removed.)

If displaced appointments existed, you could drag them to the Work In Progress window, then drag, and drop the Resource set to another block.

NOTES

2.16 Define User's Options

Application Used: SCHAPPTBOOK.exe

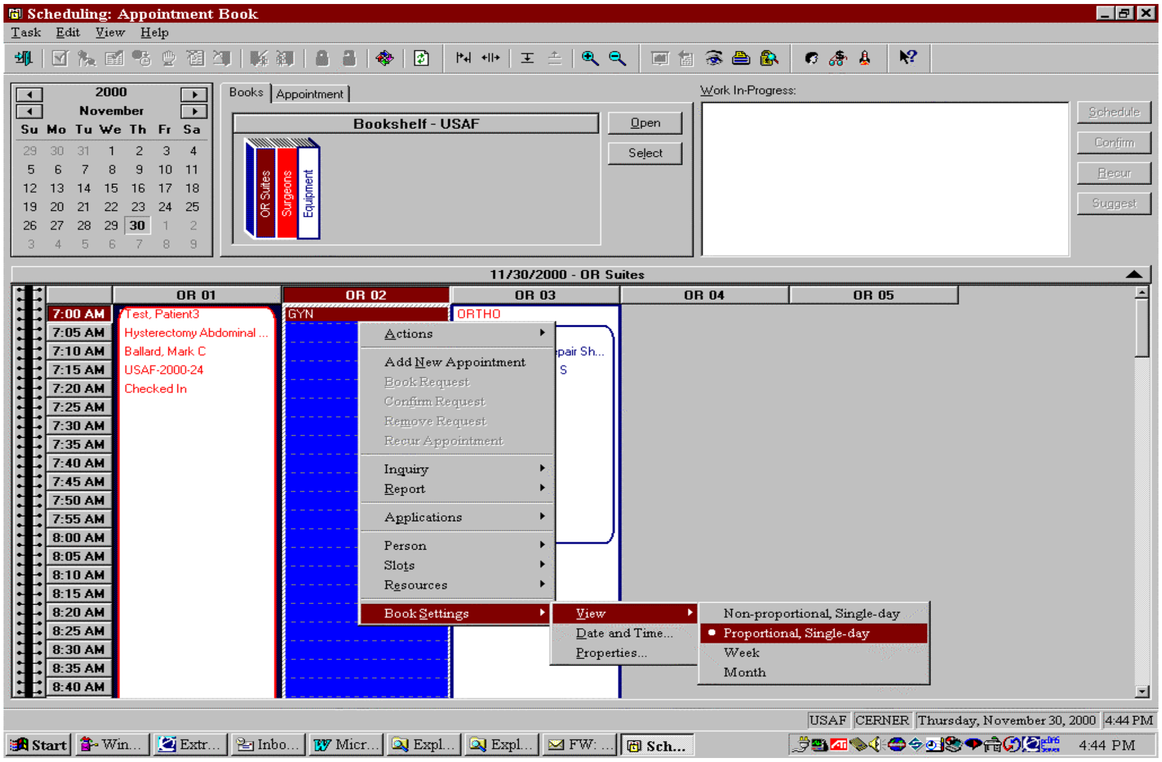


Figure 2-50

- Right click anywhere in the appointment book. Select Book Settings → View. You should select Proportional, Single Day to view all the cases in the appointment book on the same time scale.

- Right click anywhere in the appointment book. Select Book Settings → Properties.
- On the General Tab: The visible day range should be the times in which your site can schedule.

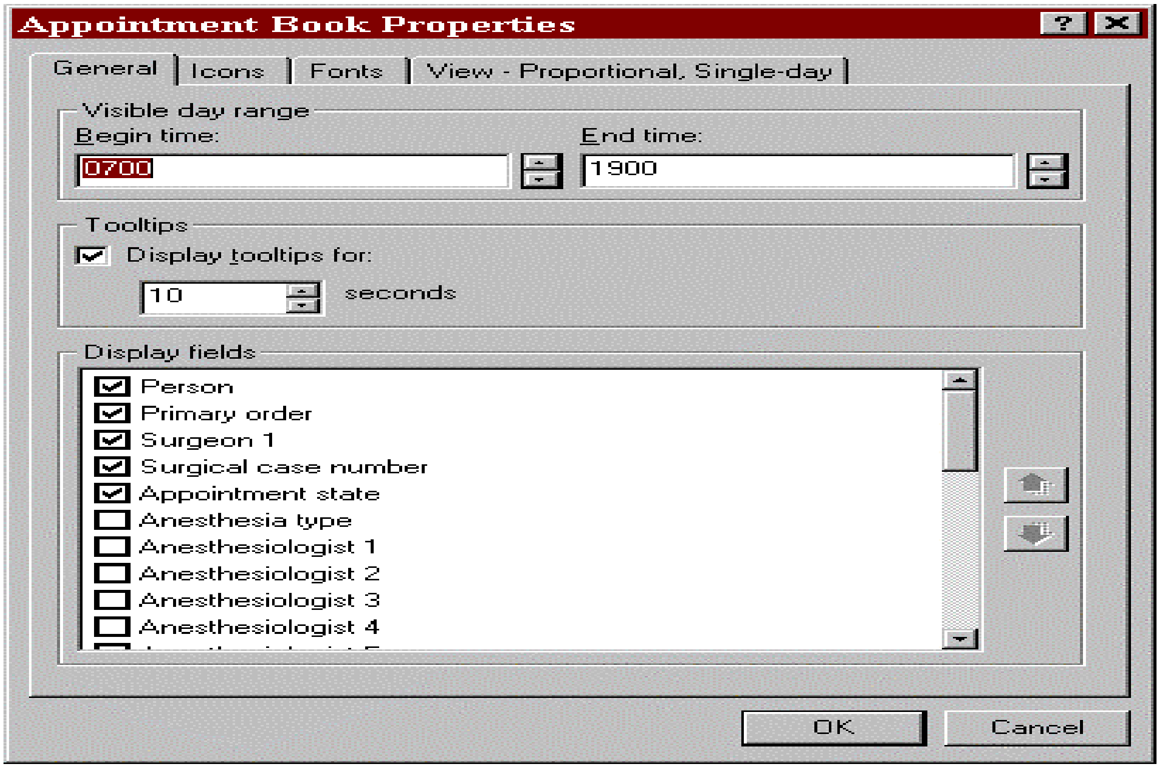


Figure 2-51

- In Display fields, you can select information about the case that will appear in the appointment book. Typically, for surgery appointments you should select Person to see the Patient, Primary Order to see the Primary Procedure, Surgeon 1, and probably Surgical Case Number if you use that as a confirmation number. Click in the box next to the field you want to display and a checkmark appears. To change the order of the fields select the field and use the up and down arrows to the right to move the field before or after the other fields.

On the View tab:

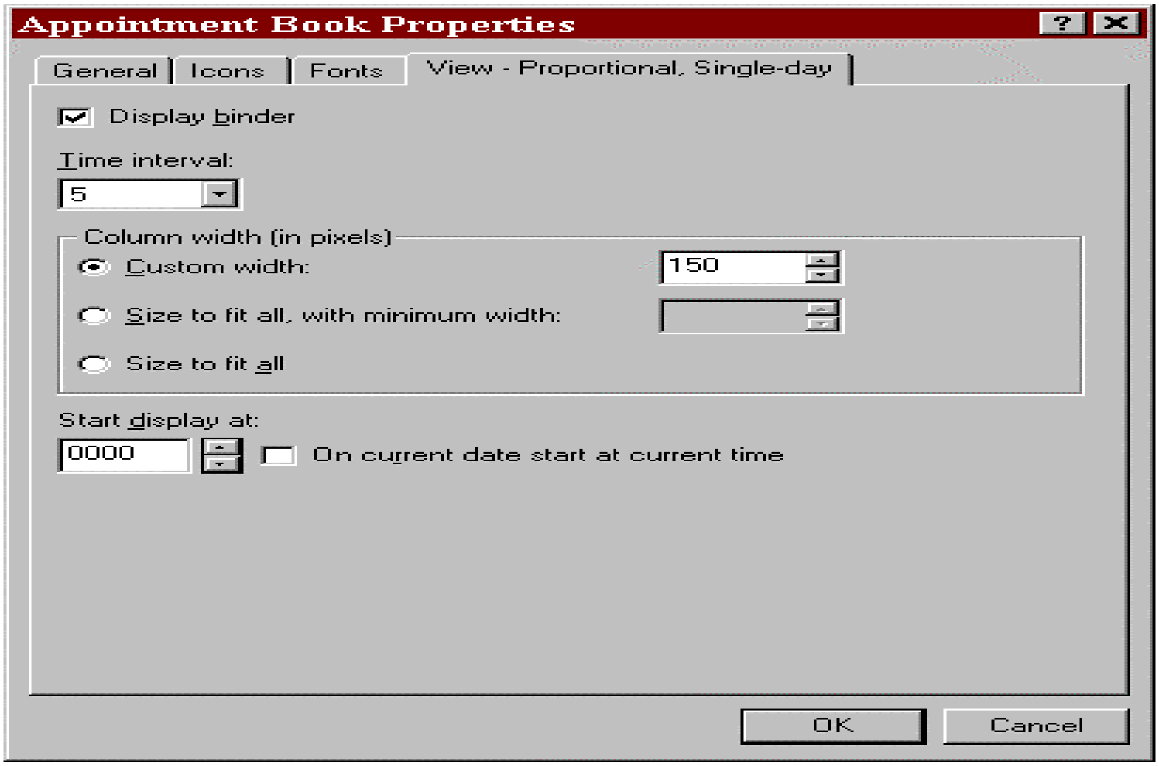


Figure 2-52

- To see the "binder" rings on the far left of the appointment book, check Display binder.
- To set the time interval, click on the left side of the appointment book. If you want to see more time in less space, choose a larger interval. ORMA recommends a 15-minute time interval.
- You can determine how wide each OR will display in the appointment book. If you do not have very many OR's, you might want to size to fit all. If you have more OR's, you can indicate a minimum width so that the display isn't too small. Or you can indicate a custom width.
- To indicate the time at which you want the appointment book to default, scroll up and down to see other times once you're in the application.

NOTES

2.17 Define a Default Resource Book

Application Used: SCHApptBook.exe

- To set the default bookshelf for your sign on go to View > Options > Default Book and select the default bookshelf from the dropdown list.
- Double-click on the book. The appointment book will appear with a view of each room and the associated blocks.
- Select the date by clicking on the calendar in the upper left-hand corner of the appointment book. Use the right/left arrows to navigate between year and months.
- In order to view the entire appointment book, use right/left arrows at the bottom of the screen to scroll left and right. Use the up/down arrows on the right side of the screen to scroll up and down.

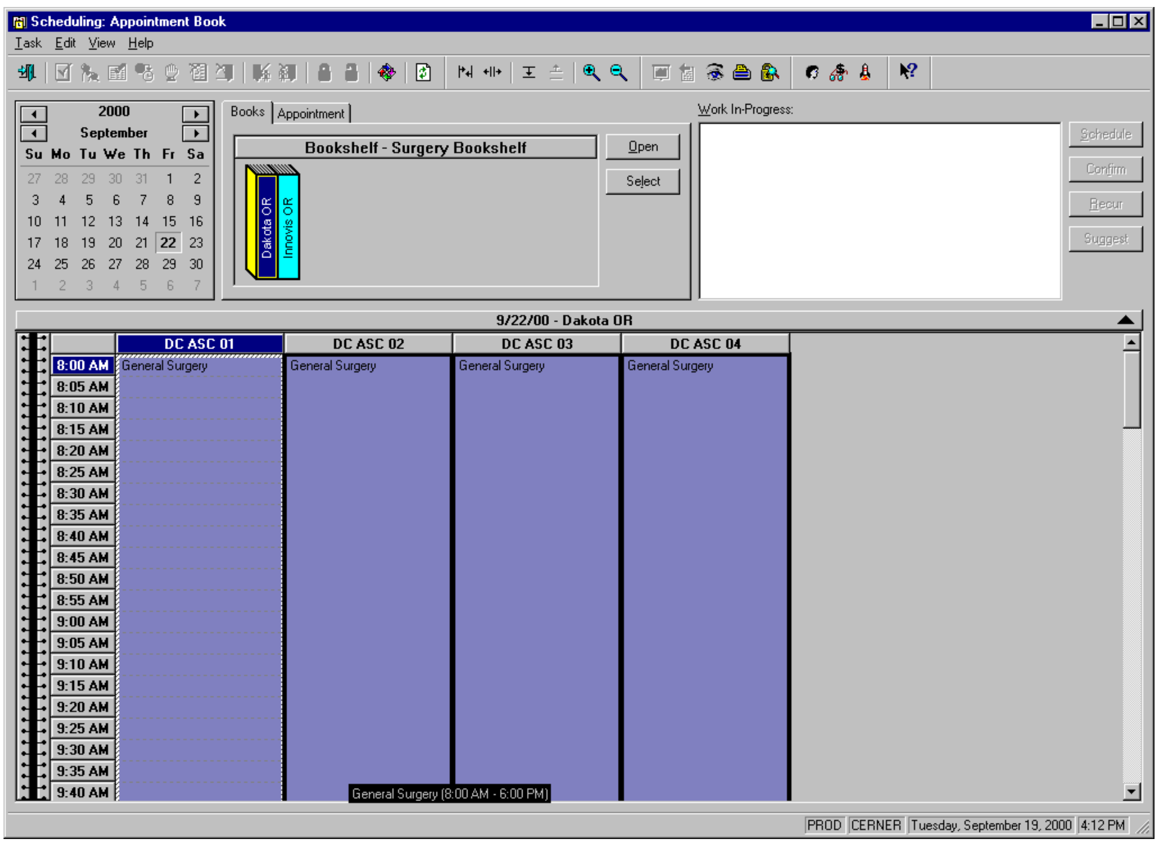


Figure 2-53

NOTES

2.18 Using the Calendar

Application Used: SCHAPPTBOOK.exe

Open SCHAPPTBOOK.exe

The calendar is displayed in the Appointment Book. You can select a date by clicking a specific date in the calendar. The date that is selected currently is shown with a box around it. The current date is the default date displayed on the calendar.

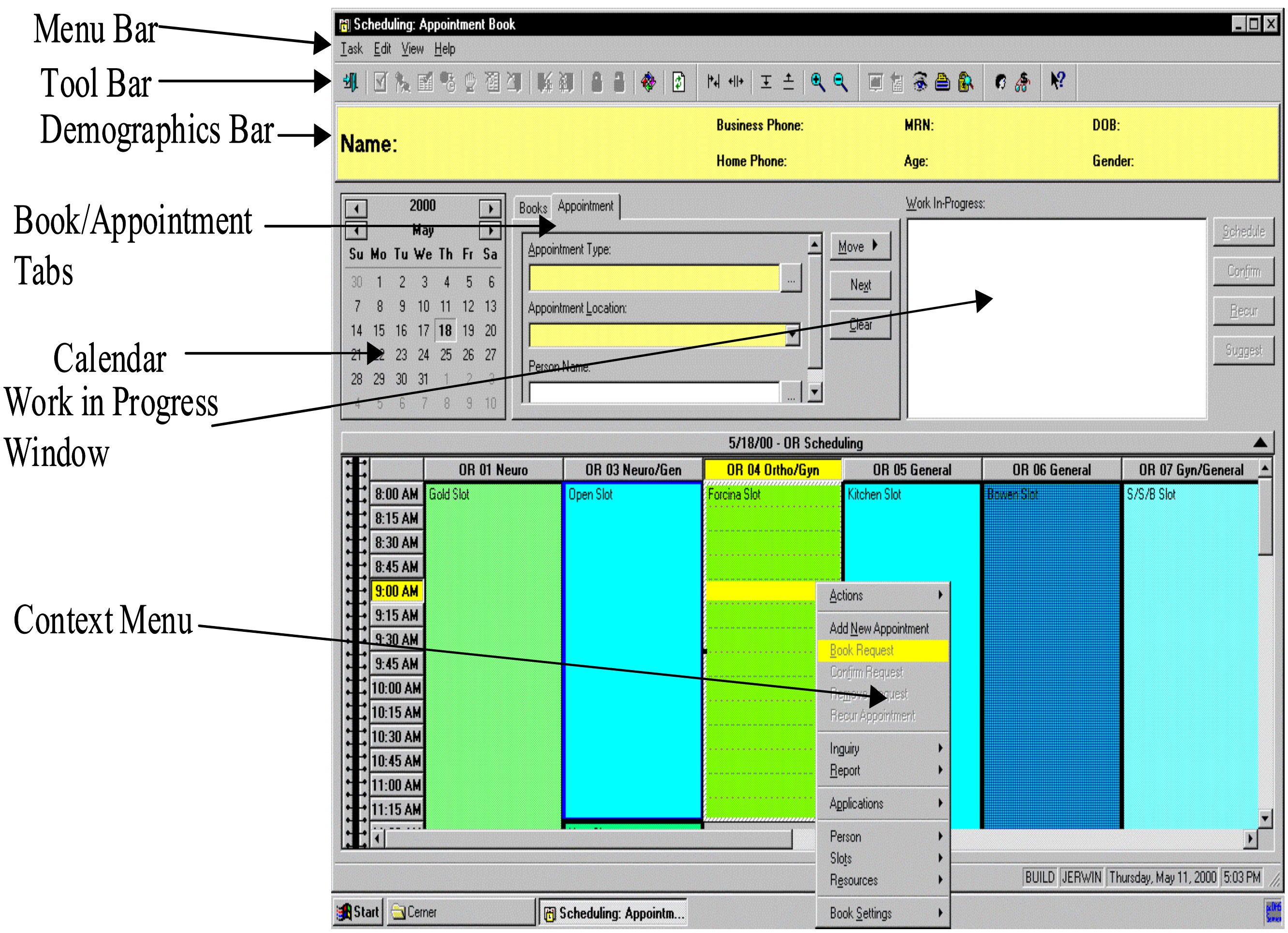


Figure 2-54

- Use the arrow buttons to change the month and year displayed.
- When you move an appointment to the **Work In-Progress box** to be scheduled, all dates that are available for that appointment will be displayed in bold on the calendar. This enables you to tell at a glance what days are available for scheduling. The dates will display in bold to show these dates only if you enter a check in the Mark

qualifying days on calendar box in the Options dialog box, which is accessed from the View menu.

- The Work In-Progress box displays appointments that are in the process of being scheduled. The details associated with the appointment have been entered, but the appointment scheduling process has not been completed. To continue, select the appointment that you wish to schedule and determine the resource and time with which it should be associated. If the appointment type has a resource list associated with it, the system will select the appropriate resources automatically. You can right-click to display a menu of commands. For a description of these commands, click here.
- There are several ways to enter the appointment in a specific slot on the resource's schedule. One way is to click Schedule to open the Schedule dialog box so you can enter specific information associated with the appointment.
- Once the appointment is displayed in the time slot, click Confirm to finalize the appointment.
- Under each person listed in the Work In-Progress box is a Schedule page. This contains all scheduled appointments for the person so you can prevent scheduling conflicts when selecting dates, times, and resources for the appointment.

2.18.1 Description of Buttons on the Calendar

Button	***Description***
Schedule button	Schedules the appointment based on the information entered.
Confirm button	Confirms or finalizes the suggested schedule for the appointment. If the specific appointment is selected in the displayed box, click Confirm to finalize it. If the person's name is selected in the box, click Confirm to finalize all scheduled appointments associated with that person.
Recur button	Opens the Recurrings dialog box so you can specify the days and number of instances the appointment should be scheduled.
Suggest button	Opens the Suggested Schedules dialog box, which allows the system to suggest an appropriate date and time to which the appointment can be scheduled based on criteria you enter.

2.18.2 Options Dialog Box

The Options dialog box is used to define your default preferences that will be displayed each time you enter the Appointment Book. This dialog box is accessed by selecting Options from the View menu. The dialog box contains the following elements:

Boxes	***Description***
Default Book box	Enter the name of the resource book to be displayed on the bookshelf as your default book. There is a list available to assist you in selecting a predefined book.
Days in Past box	Enter the number of days that you can schedule an appointment in the past without receiving a warning message from the system. For example, set this at "1". If you are looking at a resource's schedule from the previous month and inadvertently try to schedule an appointment at that past date, the system would display a message letting you know you are attempting to schedule outside the predefined range.
Days in Future box	Enter the number of days that you can schedule an appointment in the future without receiving a system message indicating you are attempting to schedule outside the predefined range.
Health Plan Check box	Select this box if the system should automatically verify whether the person has an associated health plan, and if the date for which the appointment is being scheduled falls within the eligible coverage time for the health plan.
Display Future Requests/Appointments	Select this box if you want the system to display the Future Requests/Appointments dialog box automatically when you reschedule an appointment or schedule a request from the Schedule Inquiry window.
Mark Qualifying Days on Calendar box	Select this box to display dates that are available for scheduling a specific appointment. When you move an appointment to the Work In-Progress box, the calendar will display all dates to which the appointment can be scheduled in bold.

Display Person Search Encounter window box.	Select this box to display encounter information when using the Person Search functionality
Allow Add Encounter box	Select this box if you want the ability to add an encounter during the scheduling process.
Always Display Schedule Discrete Slots box	Select this box if the Schedule dialog box should be opened whenever an appointment is scheduled into a discrete slot.
Always Display Schedule Contiguous Slots box	Select this box if the Schedule dialog box should be opened whenever an appointment is scheduled into a contiguous slot.
Always Display Confirm dialogue box	Select this box if the Confirm dialog box should be displayed whenever an appointment is confirmed.
Use Best Encounter box.	Select this box if your site has set encounter preferences and you wish to associate the appointment being scheduled with the best encounter as defined in your database. The best encounter can be defined as the active encounter, the inpatient encounter, or future encounters
Always Display PM Organization dialog … box	Select this option if the Person Management Organization dialog box should be displayed every time you add an encounter.

2.18.3 Appointment Tab Description

View Person Flex Form box	Select a defined format in which information is displayed when viewing details associated with a specific person.
Add Person Flex Form box	Select a defined flex form from the list to be used as a default when registering new persons.
Modify Person Flex Form box	Select a defined flex form from the list to be used as a default when modifying information associated with previously defined persons.
View Encounter Flex Form box	Select a defined flex format from the list to be used as a default when viewing encounter information associated with the appointment.

Add Encounter Flex Form box	Select a defined flex form from the list to be used as a default when adding new encounters.
Modify Encounter Flex Form box	Select a defined flex form from the list to be used as a default when modifying information associated with a previously defined encounter.
Cancel Encounter Flex form box	Select a defined flex form from the list to be used as a default when canceling an encounter.
Default Location box	Select a location from the list to be entered as a default location when you are scheduling appointments. For example, if you consistently schedule for a particular location, selecting that location as your default would allow it to be entered automatically when you are scheduling appointments. However, if you are scheduling an appointment type that has not been associated with your default location, you must select an appropriate location from the list that will be associated with the appointment type.
Add person and encounter check box	Select this box if you want to add a person and encounter at the same time.
Appointment Detail Fields box	The required details (Appointment Type, Appointment Location, and Person) are displayed. This information is required for an appointment to be scheduled, regardless of what other information is needed for the appointment type. Since these three boxes are required, you can determine the order in which you want them to display for your convenience.
Up Arrow button	Moves the detail up the list. This will affect the order in which the boxes are displayed in the Appointment tab.
Down Arrow button	Moves the detail down the list. This will affect the order in which the boxes are displayed in the Appointment tab.

2.18.4 Confirm Tab Description

Always Create New Encounter When Required box	Select this box if a new encounter is to be created during the confirm process. This is applicable if the appointment type requires an encounter to be associated with it, and if an encounter has not already been associated with the appointment.

2.18.5 Check In Tab Description

View Person Flex Form box	Select the format in which information is displayed when you click View in the Check In dialog box.
Modify Person Flex Form box	Select the format in which information is displayed when you click Modify in the Check In dialog box.
Add Encounter Flex Form box	Select a defined flex form from the list to be used as a default when adding new encounters.
View Encounter Flex Form box	Select a defined flex form from the list to be used as a default when viewing encounters.
Modify Encounter Flex Form box	Select a defined flex form from the list to be used as a default when modifying information associated with a previously defined encounter.
Check In Warning Range box	Enter the number of minutes prior to the scheduled appointment time in which an appointment can be checked in without a warning message being displayed to the user. This time range affects whether the appointment will be rescheduled by the system or just checked in early.
Always Create New Encounter When Required box	Select this box if a new encounter is to be created during the confirm process. This is applicable if the appointment type requires an encounter to be associated with it, and if an encounter has not already been associated with the appointment.

2.18.6 Check Out Tab Description

View Person Flex Form box	Select the format in which information is displayed when you click View in the Check Out dialog box.
Modify Person Flex Form box	Select the format in which information is displayed when you click Modify in the Check Out dialog box.
Add Encounter Flex Form box	Select a defined flex form from the list to be used as a default when adding new encounters.
View Encounter Flex Form box	Select a defined flex form from the list to be used as a default when viewing encounters.
Modify Encounter Flex Form box	Select a defined flex form from the list to be used as a default when modifying information associated with a previously defined encounter.
Allow Discharge box	Select this box to allow discharges when you check out a person from the Check Out dialog box.
Always Discharge box.	Select this box if the person should be discharged every time you check someone out using the Check Out dialog box. If this option is selected and the Interactive Discharge Using Discharge Flex Form option is not selected, the discharge will occur automatically in the background and you will not need to perform any further actions to discharge the person
Interactive Discharge box	Select this box to open a dialog box that allows you to enter additional information when you are discharging someone. If this option is not selected, the discharge process occurs in the background with no additional information required.
Discharge Flex Form box	Select a defined flex form to be used as a default when discharging a person. This field is available only if you checked the previous box.

2.18.7 PM ToolBar Tab

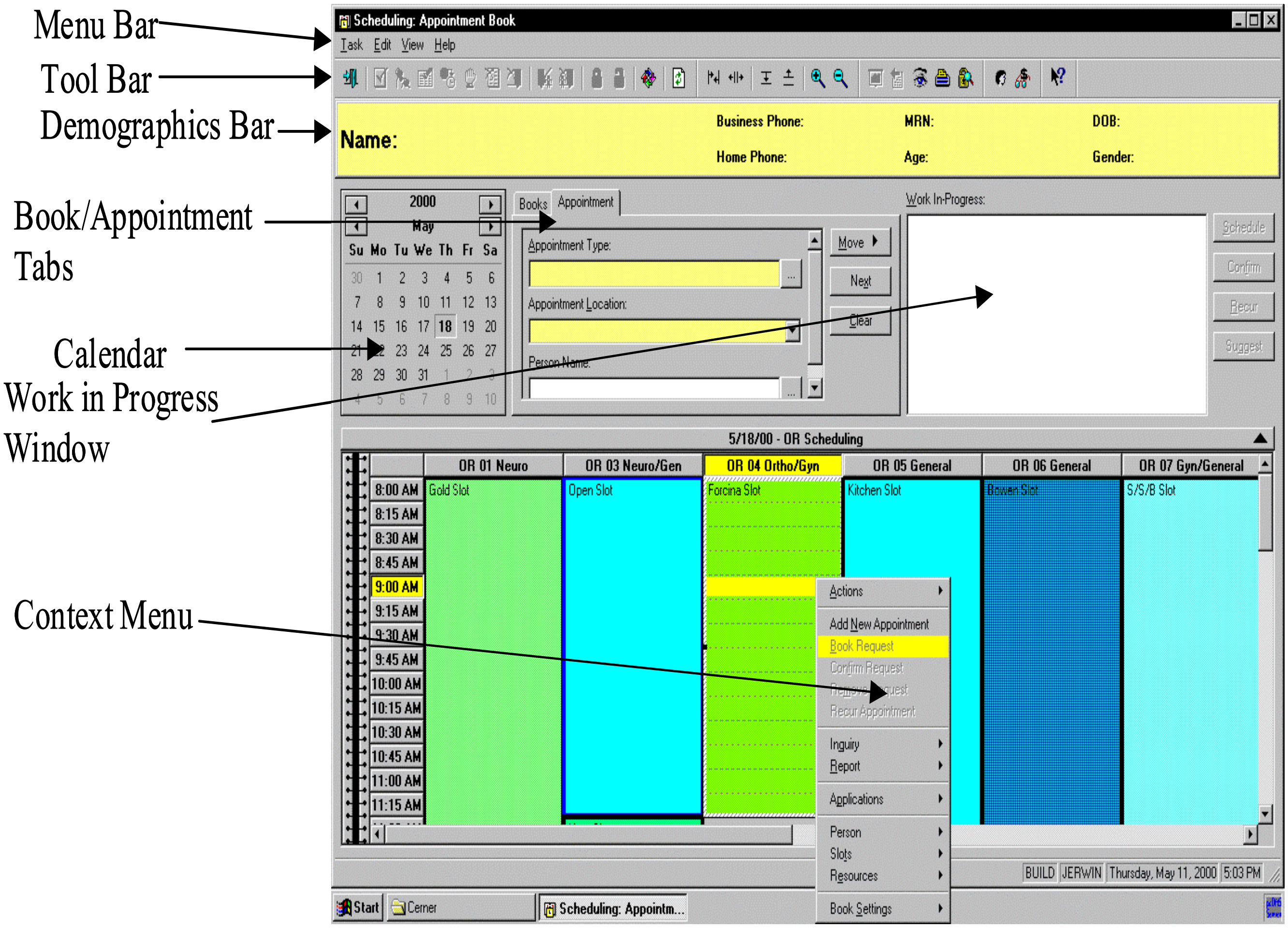
View Person Flex Form box	Select a defined format in which information is displayed when viewing details associated with a specific person.
Add Person Flex Form box	Select a defined flex form from the list to be used as a default when adding a new person to the database.
Modify Person Flex Form box	Select a defined format in which information is displayed when modifying details associated with a specific person.
View Encounter Flex Form box	Select a defined flex format from the list to be used as a default when viewing encounter information associated with the appointment.
Add Encounter Flex Form box	Select a defined flex form from the list to be used as a default when adding a new encounter.
Modify Encounter Flex Form box.	Select a defined flex form from the list to be used as a default when modifying information associated with a previously defined encounter
OK button	Saves the information and closes the dialog box.
Cancel button	Closes the dialog box without applying the information displayed.

2.18.8 View menu:

Actionbar	Toggles the actionbar. A check mark next to this command indicates the actionbar is visible.
Sizebar	Toggles the sizebar. A check mark next to this command indicates the sizebar is visible.
Viewbar	Toggles the viewbar. A check mark next to this command indicates the viewbar is visible.
Application bar	Toggles the application bar. A check mark next to this command indicates the application bar is visible.

Help bar	Toggles the What's This Help button. A check mark next to this command indicates the help bar is visible.
Demographics Bar	Toggles the demographics bar. A check mark next to this command indicates the demographics bar is visible.
Availability Bar	Toggles the availability bar. A check mark next to this command indicates the availability bar is visible.
Status Bar	Toggles the status bar. A check mark next to this command indicates the status bar is visible.
Small Buttons	Decreases the size of the icons in the toolbar. A check mark next to this command indicates this option is active.
Large Buttons	Enlarges the icons in the toolbar. A check mark next to this command indicates this option is active.
Cancels	Indicates that canceled appointments are displayed. A check mark next to this command indicates this option is active.
Reschedules	Indicates that rescheduled appointments are displayed. A check mark next to this command indicates this option is active.
Held Appointments	Indicates that appointments in a held status are displayed. A check mark next to this command indicates this option is active.
Empty Schedules.	Indicates that all resource schedules will be displayed. A check mark next to this command indicates this option is active. If there is no check mark next to this command, only resource schedules with appointments will be displayed. If a default schedule is applied to the resource, that resource is not considered to have an empty schedule so it will be displayed.
Refresh	Updates the displayed information to reflect changes in the database.

Options	Opens the Options dialog box in which you can define your default preferences.

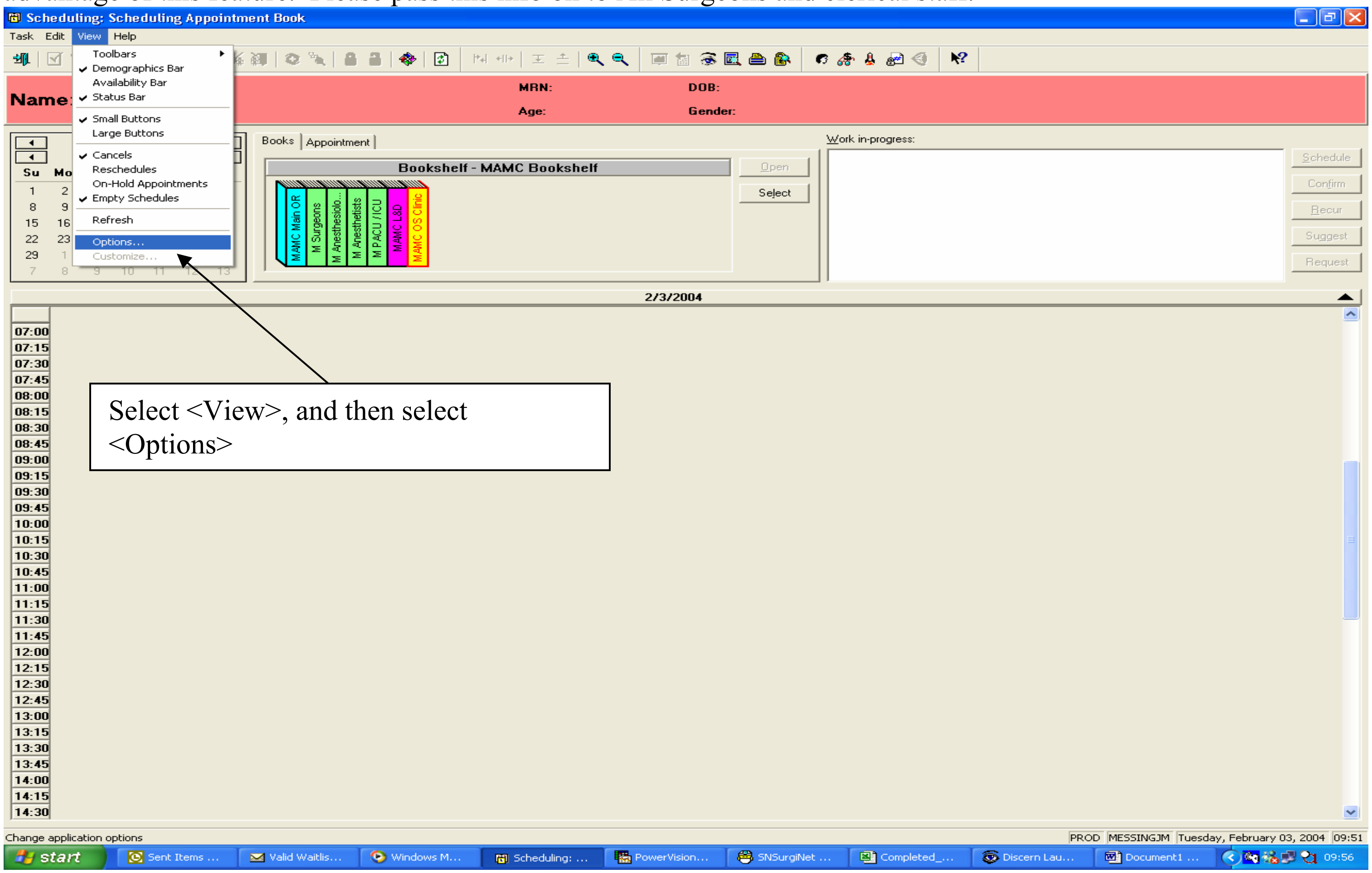

Menu Bar
Tool Bar
Demographics Bar
Book/Appointment Tabs
Calendar
Work in Progress Window
Context Menu
Scheduling: Appointment Book
Task Edit View Help
Name:
Business Phone:
Home Phone:
MRN:
Age:
DOB:
Gender:
2000
May
Books
Appointment
Appointment Type:
Appointment Location:
Person Name:
Move
Next
Clear
Work In-Progress:
Schedule
Confirm
Recur
Suggest
5/18/00 - OR Scheduling
OR 01 Neuro
OR 03 Neuro/Gen
OR 04 Ortho/Gyn
OR 05 General
OR 06 General
OR 07 Gyn/General
Gold Slot
Open Slot
Forcina Slot
Kitchen Slot
Bowen Slot
S/S/B Slot
Actions
Add New Appointment
Book Request
Confirm Request
Recur Appointment
Inquiry
Report
Applications
Person
Slots
Resources
Book Settings
BUILD
JERWIN
Thursday, May 11, 2000
5:03 PM
Start
Cerner
Scheduling: Appointm...

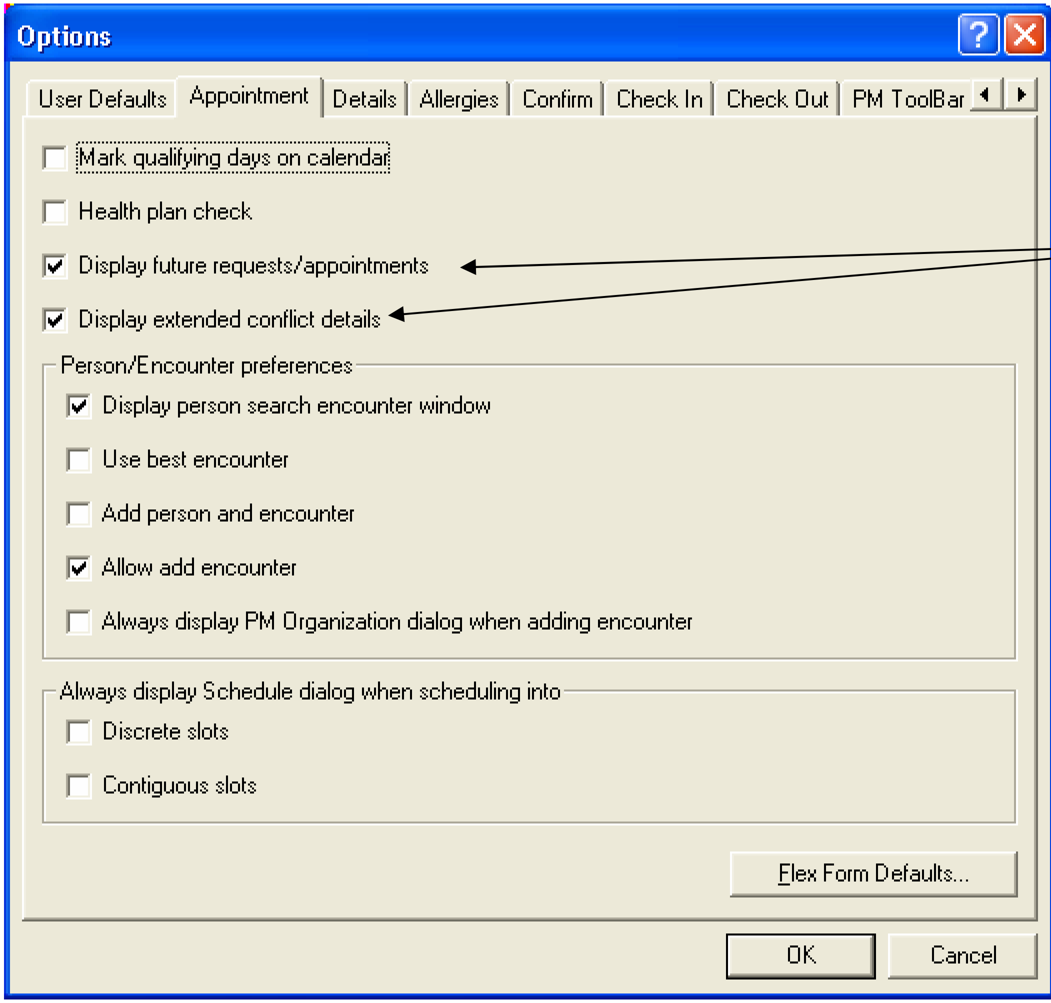
.

.

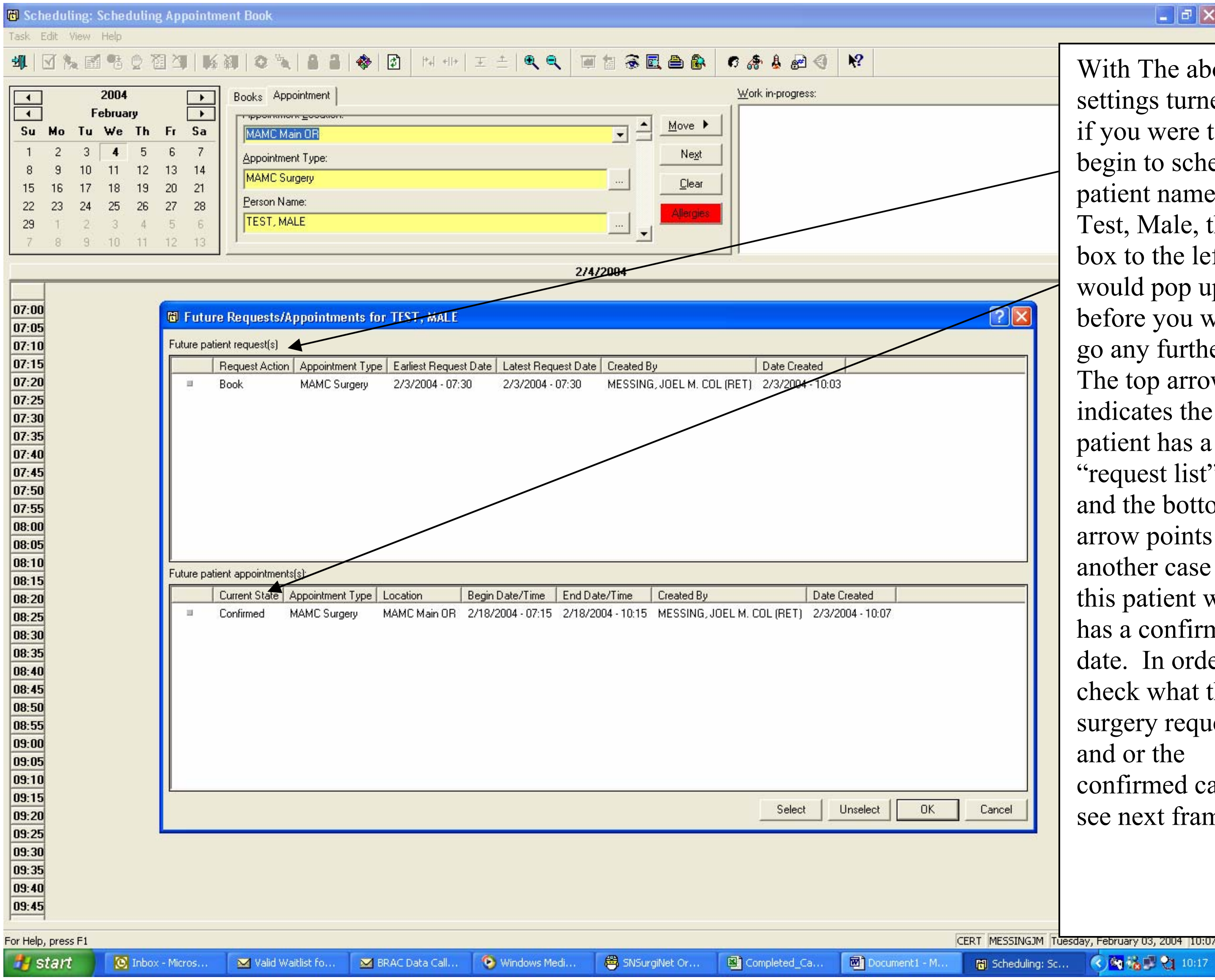
HOW TO SET UP FUTURE CASE/REQUEST LIST APPOINMENT FEATURE

These are the steps to make sure you review if a case is already on the request list or is scheduled in the future. If you set the settings correctly ORMA will have you verify the case you are planning to schedule . These are the settings you need to make to take advantage of this feature. Please pass this info on to All Surgeons and clerical staff.

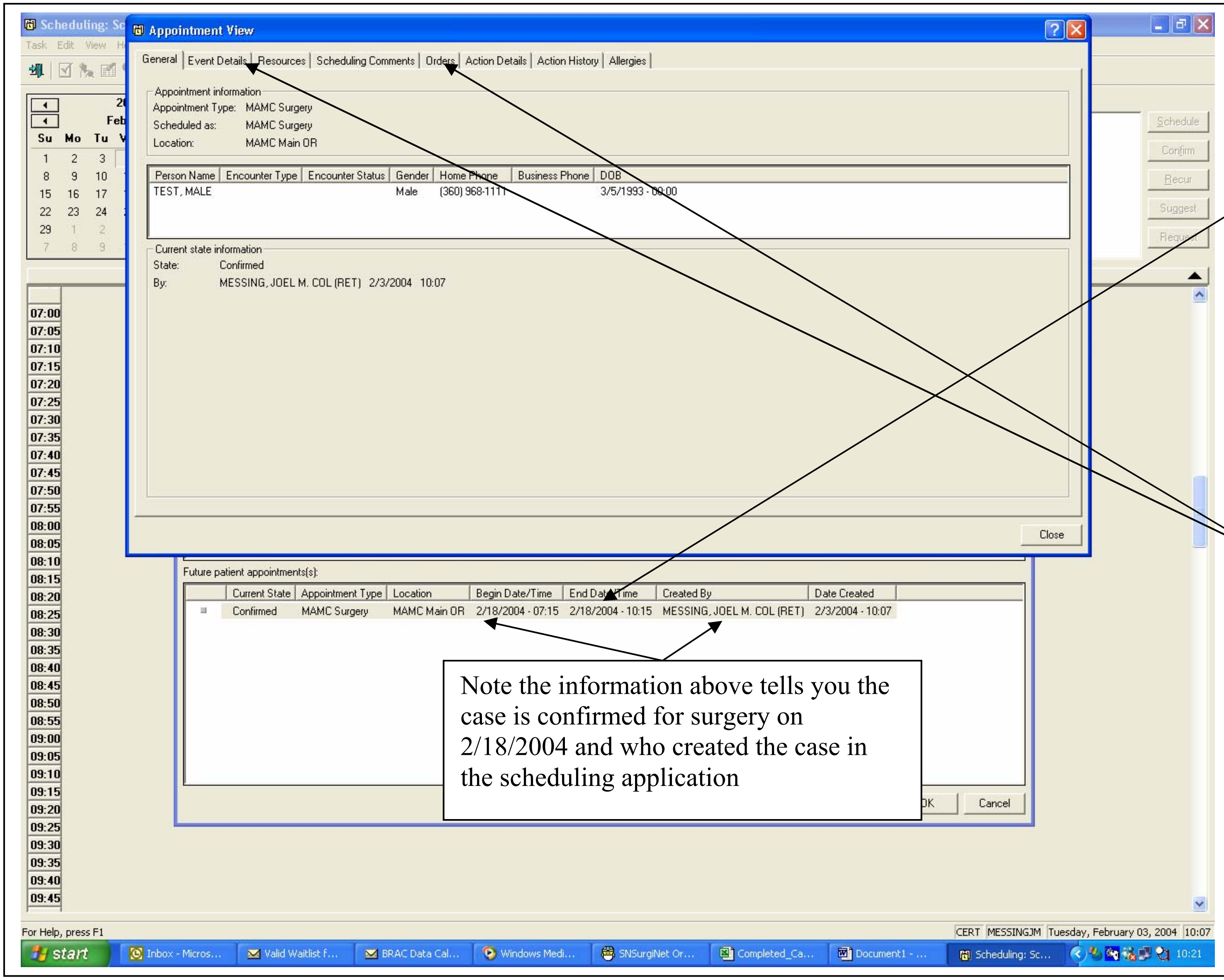




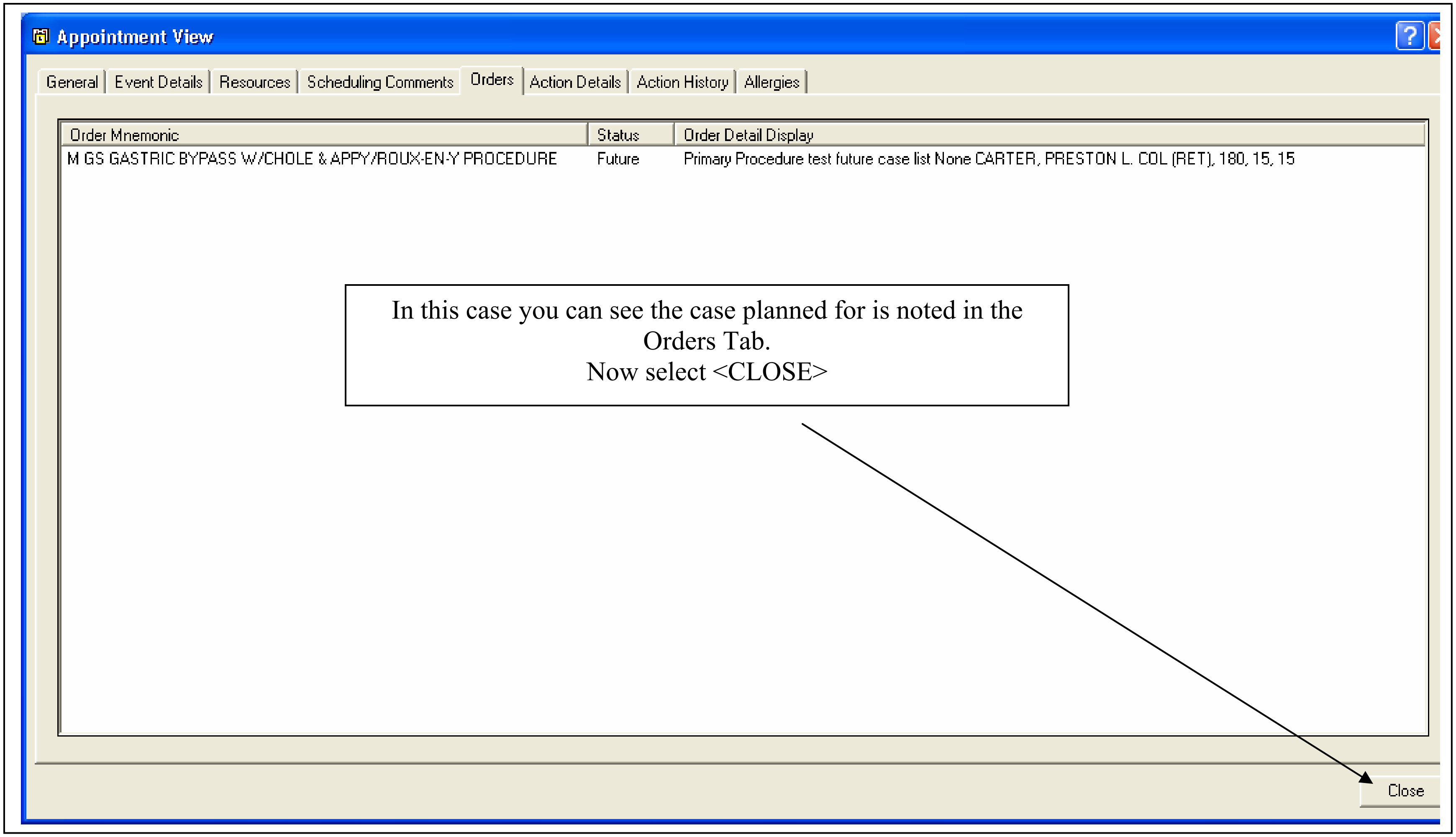
Make sure these Boxes are selected so it will hunt for cases listed in the request lists and any other future scheduled/confirmed cases

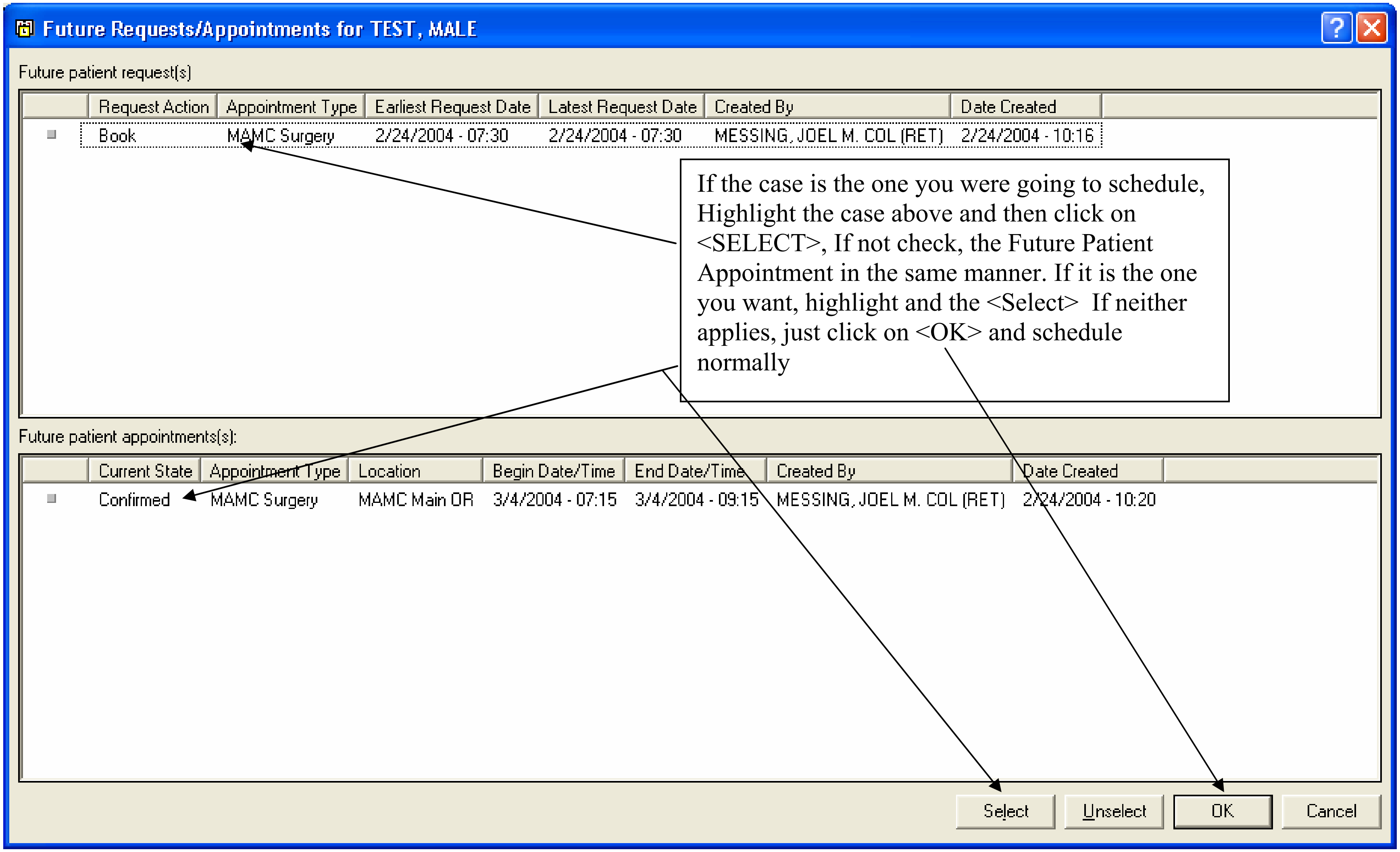


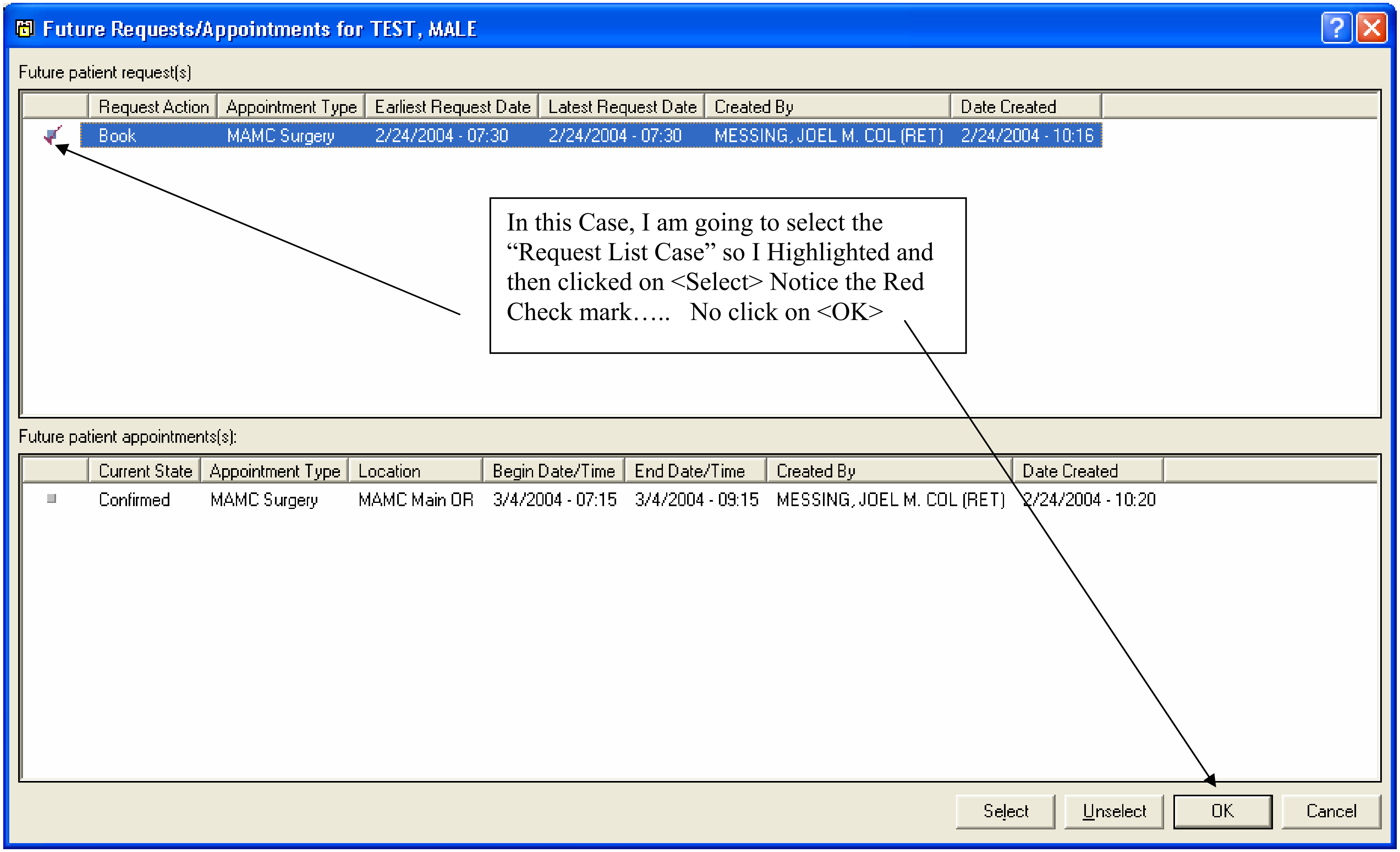
With The above settings turned on, if you were to begin to schedule a patient named: Test, Male, the box to the left would pop up before you were to go any further. The top arrow indicates the patient has a valid "request list" place and the bottom arrow points to another case for this patient who has a confirmed date. In order to check what the surgery request and or the confirmed case is, see next frame!



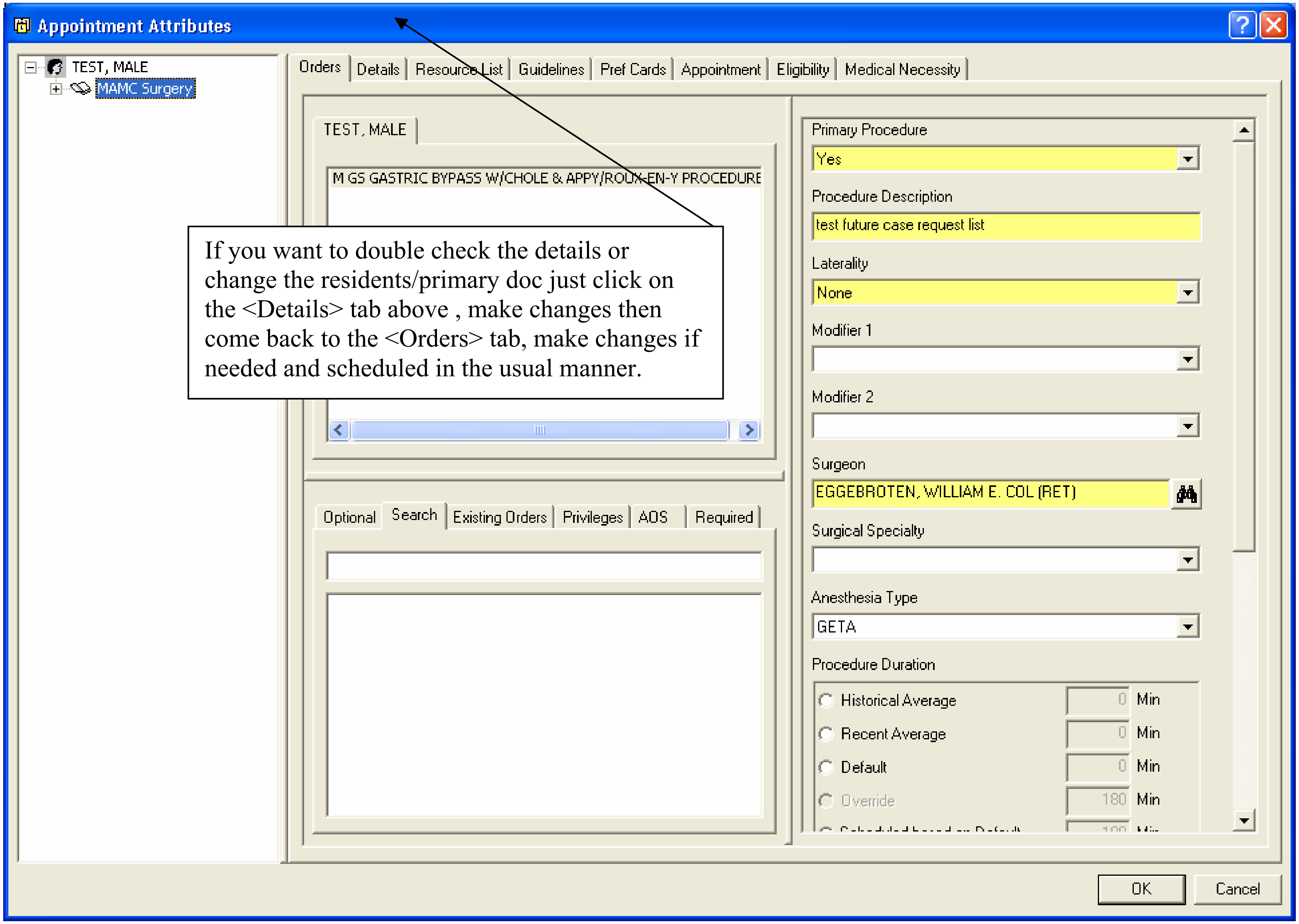
Note the information above tells you the case is confirmed for surgery on 2/18/2004 and who created the case in the scheduling application


Appointment View
General
Event Details
Resources
Scheduling Comments
Orders
Action Details
Action History
Allergies
Order Mnemonic
Status
Order Detail Display
M GS GASTRIC BYPASS W/CHOLE & APPY/ROUX-EN-Y PROCEDURE
Future
Primary Procedure test future case list None CARTER, PRESTON L. COL (RET), 180, 15, 15
In this case you can see the case planned for is noted in the Orders Tab.
Now select <CLOSE>
Close


Future Requests/Appointments for TEST, MALE
Future patient request(s)
Request Action
Appointment Type
Earliest Request Date
Latest Request Date
Created By
Date Created
Book
MAMC Surgery
2/24/2004 - 07:30
2/24/2004 - 07:30
MESSING, JOEL M. COL (RET)
2/24/2004 - 10:16
If the case is the one you were going to schedule, Highlight the case above and then click on <SELECT>, If not check, the Future Patient Appointment in the same manner. If it is the one you want, highlight and the <Select> If neither applies, just click on <OK> and schedule normally
Future patient appointments(s):
Current State
Appointment Type
Location
Begin Date/Time
End Date/Time
Created By
Date Created
Confirmed
MAMC Surgery
MAMC Main OR
3/4/2004 - 07:15
3/4/2004 - 09:15
MESSING, JOEL M. COL (RET)
2/24/2004 - 10:20
Select
Unselect
OK
Cancel


Future Requests/Appointments for TEST, MALE
Future patient request(s)
Request Action | Appointment Type | Earliest Request Date | Latest Request Date | Created By | Date Created
Book | MAMC Surgery | 2/24/2004 - 07:30 | 2/24/2004 - 07:30 | MESSING, JOEL M. COL (RET) | 2/24/2004 - 10:16
In this Case, I am going to select the “Request List Case” so I Highlighted and then clicked on <Select> Notice the Red Check mark….. No click on <OK>
Future patient appointments(s):
Current State | Appointment Type | Location | Begin Date/Time | End Date/Time | Created By | Date Created
Confirmed | MAMC Surgery | MAMC Main OR | 3/4/2004 - 07:15 | 3/4/2004 - 09:15 | MESSING, JOEL M. COL (RET) | 2/24/2004 - 10:20
Select
Unselect
OK
Cancel

After going through the <allergies> screen, go right to the Procedure /ORDER Details by passing the normal questions in the details window.



That is all you need to do. The best part is the case is then removed from its previous date or request list so you don't have to go back and clean up lists or worry about double scheduling.   This is active in PROD as of 2/24/2004.

If you have any questions or do not understand how to work this, call me at 253-968-5562.

Joel M. Messing
ORMA ADMIN