



Healthlink **Advisors**SM

Scheduling/Win32 **Participant Guide**

Table of Contents

1	Introduction	5
1.1	Overview	5
2	Overview of AppBar	6
2.1	App Bar Customization	6
3	Basic Functionalities of Schapptbook	9
3.1	Logging In	9
3.2	Logging Out	9
4	Setting Preferences	10
4.1	Change View	10
4.2	Book Preferences	10
4.3	Location Preferences	12
5	Overview of Scheduling Appointment Book Toolbar and Icons	16
5.1	Components of the Scheduling Appointment Book	16
5.2	Overview of Locks	17
5.3	Overview of Icons	18
5.4	Difference between Request List Inquiry and Request Queue	19
6	Scheduling an Exam (Appointment)	21
6.1	Suggested Scheduling Method	21
6.2	Drag and Drop Method	29
6.3	Scheduling Recurring Appointments	34
6.4	Modify a Recurring Appointment	40
7	Viewing Schedules Via the Bookshelf	41
7.1	Select the Bookshelf	41
7.2	Scheduling Multiple Appointments	43
8	Protocol Appointment Scheduling (Radiology Only)	51
8.1	Schedule a Protocol Appointment	51
8.2	Cancel Protocol Appointments via Appointment Inquiry (Radiology Only)	56
8.3	Cancel Protocol Appointment via Grid Area	59

8.4	Cancel Protocol Appointment via Toolbar	61
8.5	Reschedule Protocol Appointments via Appointment Inquiry (Radiology Only)	62
8.6	Reschedule Protocol Appointment via Grid Area	66
8.7	Reschedule Protocol Appointment via Toolbar	70
9	Group Appointments (MOMs Only)	74
9.1	MOM's Group Appointment	74
9.2	MOM's Resource Appointment	82
10	Walk In New Patients	91
10.1	Add a New Person	91
11	Client Billing	95
12	Searching For/Checking In a Patient.....	95
12.1	Search by the Patient Name.....	95
12.2	Search by Location	97
12.3	Checking in the Patient using the Book	98
13	Performing Actions on Appointments.....	100
13.1	Printing a Patient's Itinerary	100
13.2	Mark Appointments as No Show	101
13.3	Link to an Existing Appointment/Request	103
13.4	Link to a New Appointment	103
13.5	Shuffle Appointments Via Toolbar	105
13.6	Shuffle Appointments Via Grid.....	107
14	Modifications.....	111
14.1	Modify Appointment Information	111
14.2	Modify Patient Information	113
15	Viewing Appointment Details.....	115
15.1	Appointment View	115
15.2	Viewing Appointment History.....	116
16	Retaining Encounters.....	118
17	Associating Orders with an Encounter	124
18	Prior Authorizations.....	126
19	Blocking Schedules (Managers Only)	136
20	Types of Schedule Inquiry.....	140

20.1	Person Inquiry	140
20.2	Resource Inquiry	143
20.3	Location Inquiry.....	146
21	Work Queue Monitor (WQM)	149
21.1	Completing a Work Item	150
21.2	Adding a Signature Request	151
21.3	Indexing to Clarify Status	153
21.4	Faxing a Work Item	154
21.5	Routing a Work Item	155
21.6	Splitting a Work Item	156
22	Scheduling Using WQM	159
22.1	Orders to Scheduling using the Request List Queue.....	159
23	Print Daily Schedule Report.....	171
24	View Schedules Weekly vs Daily.....	173
25	Phynd.....	176
25.1	Enroll a new Provider	176

1 Introduction

Cerner Scheduling Management is a scheduling management system that is accessed from *PowerChart* via the Scheduling Appointment Book. It automates the appointment scheduling process by managing a single schedule across the organization within a single-facility or within a multi-facility setting.

The Scheduling application is also used to pre-register and complete full registration of patients by creating an electronic encounter for each visit. A patient's current demographic and insurance information is captured when they are registered, which is used for electronic billing.

1.1 Overview

The course participant will be able to access, navigate and use Scheduling Management (Schapptbook). The training course will cover several topics including, but not limited to logging into Schapptbook, Components of the Scheduling Appointment Book, select a Scheduling Bookshelf, Patient Scheduling, Scheduling to Orders, Appointment Inquiry, and Scheduling reports.

2 Overview of AppBar

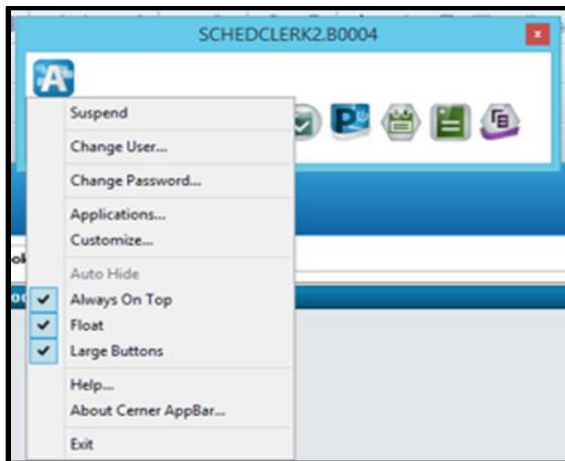
Use the AppBar to access OneChart applications. The AppBar enables easy access to multiple applications without requiring you to log on each time you open one.

Before your initial use of the AppBar, customize it to include the appropriate applications for your workflow.

2.1 App Bar Customization

Complete the following steps to customize the AppBar:

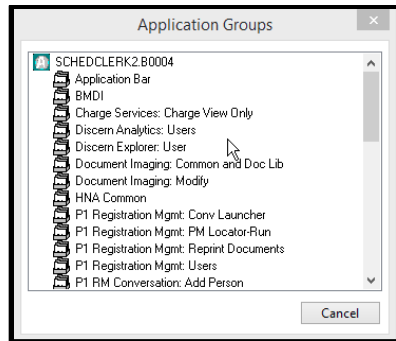
1. Click the Cerner icon  to open the Menu options.



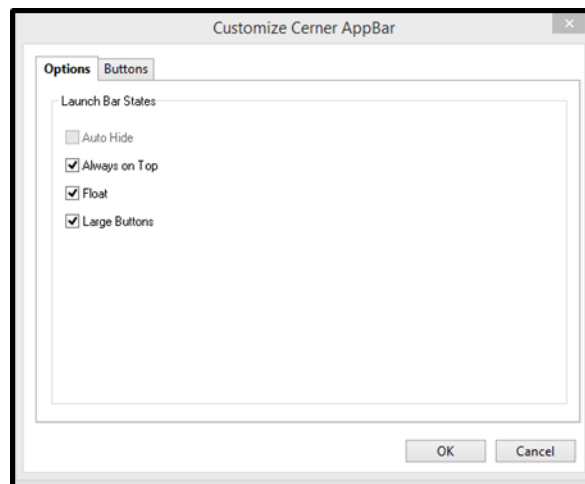
- **Suspend** – allows you to suspend your current session and when you resume takes you right back to your Last window.



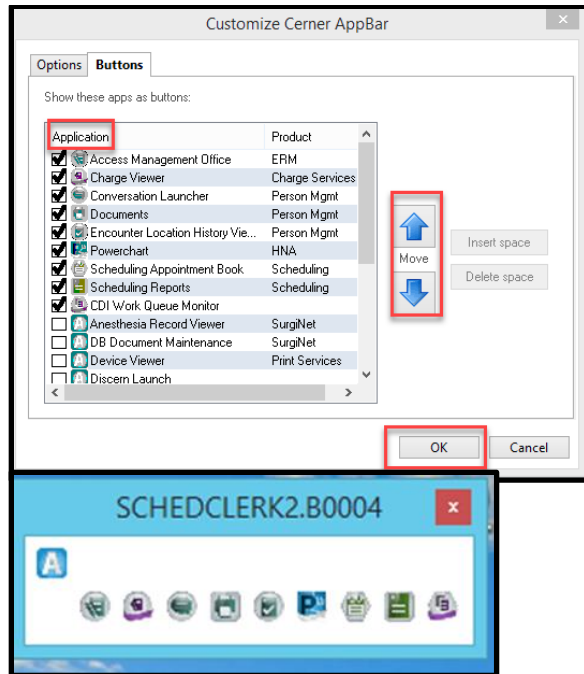
- **Change User** – allows a new user to log in (and logs the previous user off)
- **Change Password** – Do not change your password here as it is only changing the App Bar password.
- **Applications** – has the list of Application Groups that the User has access to.



- **Customize** – allows the user to add buttons or change the order that the buttons appear on the AppBar. Click Custom and the Cerner Customize Cerner AppBar window opens. You can Check or Uncheck the “Always on Top”, “Float”, or “Large Buttons” boxes



- Click the **Buttons Tab** and place a checkmark next to any application button that is needed or remove the checkmark from those that are not needed. Within this window, staff can move the location of a button on the AppBar. **Left-click** on the Name of the application, then **left-click** the up or down arrow until it appears in the desired location on the list. **Repeat** this until all buttons are in the desired order.




- **Always on Top** – Click to place a checkmark beside this function if you wish to always have your AppBar on top of the other applications that are open.
- **Allow Floating** – Click to place a checkmark beside this function if you want to be able to move your AppBar around the screen. If you want the AppBar to be stationary on one of the four sides of your screen, then left-click again to deselect and remove the checkmark. The user will be able to move the AppBar from one side of the screen to another, but will not be able to move it away from the edge of the screen.
- **Large Buttons** – Click and this allows the user to change the size of the buttons on the AppBar from standard to large.
- **Exit** – Click to exit out of AppBar

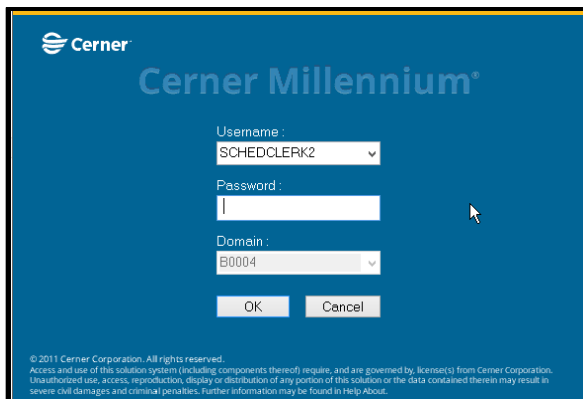
NOTE: Recommended setting is to have Allow Floating and Large Buttons but not Always on Top.

3 Basic Functionalities of Schappbook

3.1 Logging In

Complete the following steps to log in to Schappbook:


2. At the Main Menu window, double-click on the Schappbook icon .
3. At the Cerner log-in window, type your user Name in the User Name field.
4. Press the **Tab** key to move to the next field and type your password into the Password field.
5. Click on the **OK** button or press the **ENTER** key.



3.2 Logging Out

When you have completed your activities, remember to log out of the application you are working on for security purposes.

Complete the following steps to log out of Schappbook:

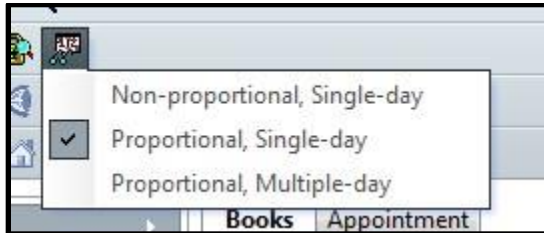
1. Go to the toolbar and Click on **Task**.
2. **Scroll** down and Click **Exit**. **OR**
3. Click on the **Exit icon** .

4 Setting Preferences

4.1 Change View

Complete the following steps to setup times:

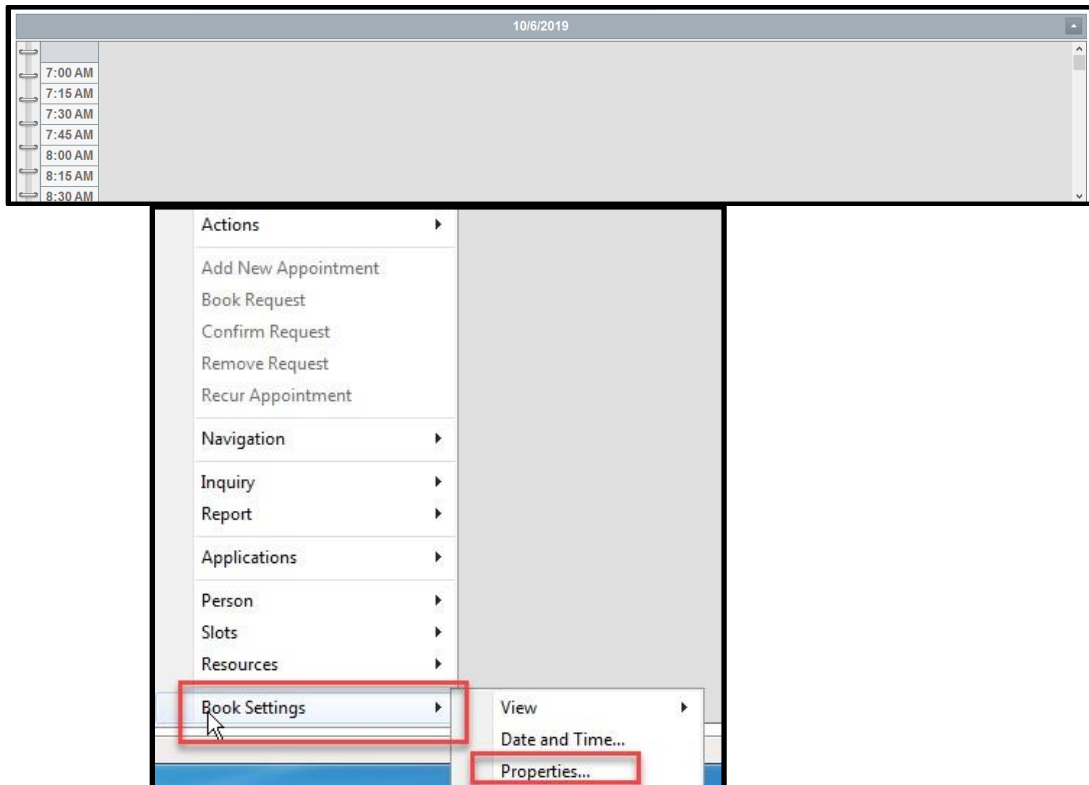
1. To see and set times on left side of schedule click on the icon that has eyeglasses in front of a document (**Change View**)
2. Click Proportional Single Day.

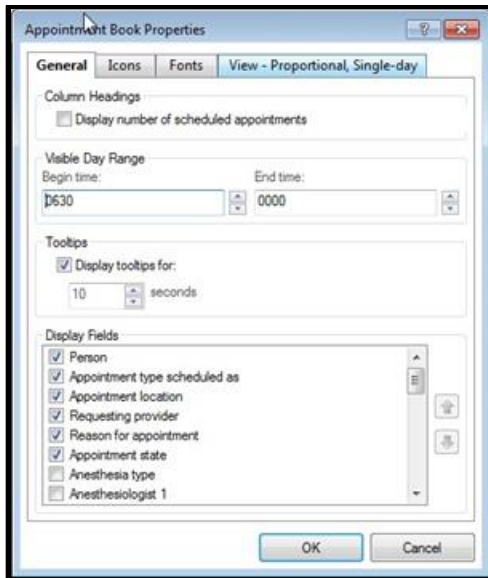


4.2 Book Preferences

Complete the following steps to set the book preferences:

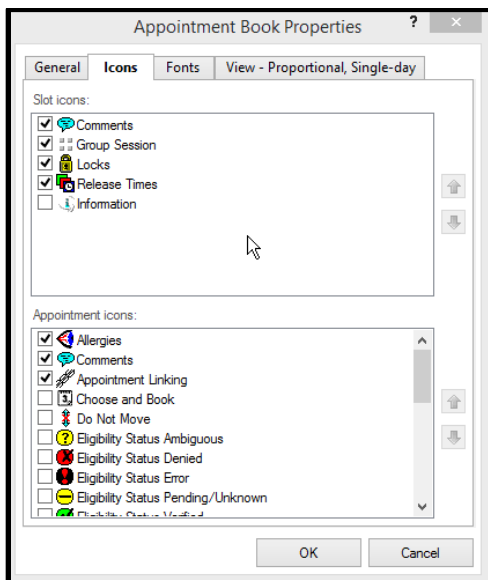
1. Right click within the box below, select Book Settings, Properties.



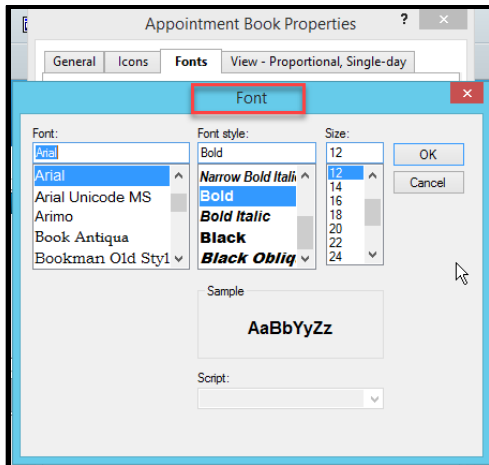


2. On the **General** tab, enter a Begin and End time for a day's schedule.
 - Tooltips: allows you to set the number of seconds that tooltips will display.
 - Display Fields: which fields do you want displayed on the schedule.
3. On the **Icon** tab, click the Slot icons to display and click Appointment Linking.

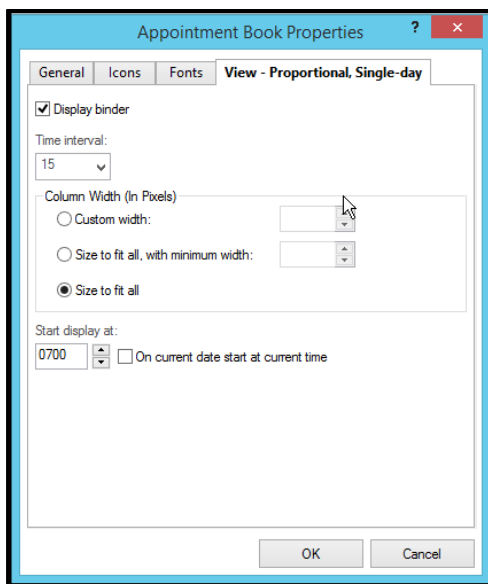
Allows the linking of appointments, so that one can see which appointments have another appointment linked to it.



4. On the **Fonts** tab, click the Font Type, Font Style, and Size.



5. On the **View** tab, click the checkbox for Display Binder.
6. Enter a time interval for appointments
7. Enter a Start time for the schedule.

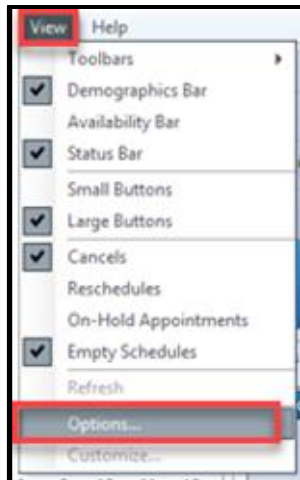


4.3 Location Preferences

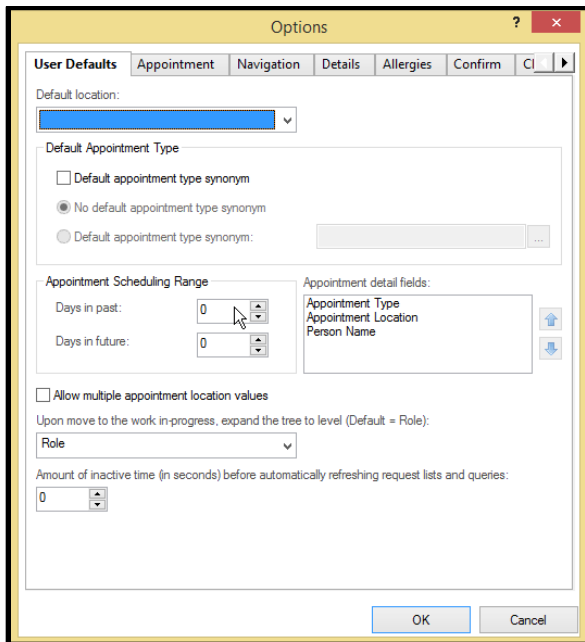
View in the Toolbar, allows users to set **Location** preferences.

Complete the following steps to set the Location preferences:

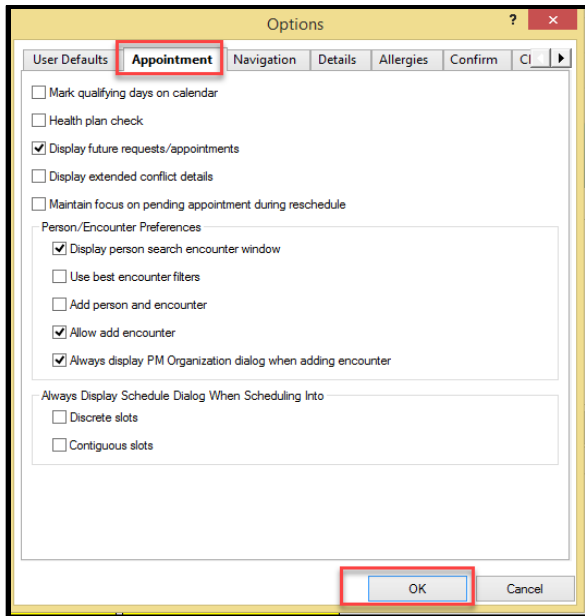
1. Click on **View** in the toolbar.
2. Click on Options.



3. On the **User Defaults** tab, select a **Default Location** if the user is scheduling to one specific location. Otherwise leave it blank.
 - a. Default Appointment Type – No default appointment type synonym.
 - b. Appointment Scheduling Range – allows you to set days in past or days in future.
 - c. Allow multiple appointment location values needs to be checked.

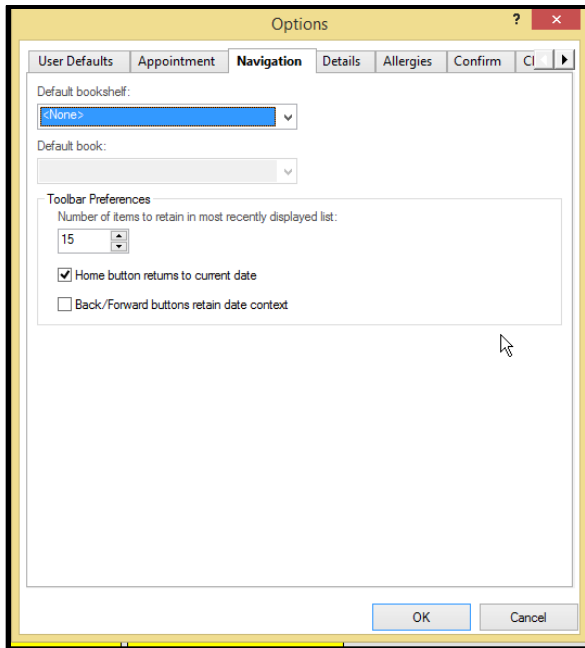


4. Click the **Appointment** tab.

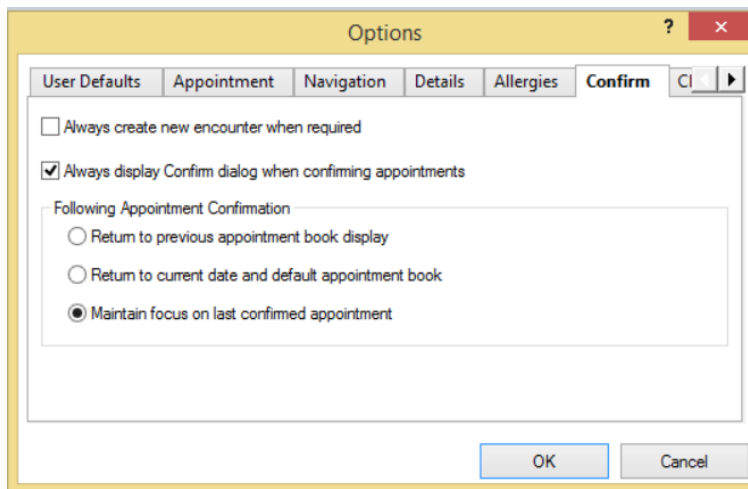


5. Click the checkbox for 'Display future requests/appointments' - this allows users to see future requests or confirmed appointments to help identify which appointments need to be linked.
6. Click the checkbox for 'Display person search encounter window'.
7. Click the checkbox for 'Allow add encounter'.
8. Click the checkbox for 'Always display PM Organization dialog when adding encounter'.
9. Click the **Navigation** tab.

10. Click a Default bookshelf if only working in one location. Otherwise click **None**.
11. Enter a number of Toolbar Preferences – the number of items to retain in the most recently displayed list.
12. Click the checkbox for 'Home button to returns to current date'.
13. Click the **Confirm** tab.



14. Click the checkbox for 'Always display Confirm dialog when confirming appointments'.
15. Click 'Maintain focus on Last confirmed appointment'.
16. Click on **OK** to save changes.



5 Overview of Scheduling Appointment Book Toolbar and Icons

5.1 Components of the Scheduling Appointment Book

Menu Bar: Displays the following Cerner Scheduling menu options:

- **Task** – provides users with the ability to Suspend, Change Password, Shuffle and Link appointments as well as other tasks.
- **Edit** - provides users with Cut, Copy, Paste, and Delete functionality.
- **View** - provides users with the following views: Demographics, Availability, Status, Small and Large Buttons, Cancels, Reschedules, On-Hold Appointments, Empty Schedules, Refresh, and Options.
- **Help** - allows users to research Help Topics, Policies and Procedures, Feedback, and Information about Appointment Book.

Tool Bar: Displays day to day icon activity and consists of the same functionality as right-click functionality on an appointment:

- Check – in, Check – out, Reschedule, Cancel, No Show, and Shuffle
- It also permits the following additional right-click functionality:
 - Appointment Inquiry.
 - Reports.
 - Zoom In and Out.

Demographics Bar: Displays person demographics and insurance information.

Calendar: Displays the current month calendar upon opening the Scheduling Appointment Book.

- The current date defaults and displays with a box around it.
- Click a specific date in the calendar to change the date.

Scheduling Bookshelf: The Scheduling Bookshelf, on the Books tab, displays all the books associated to the user's clinic. This enables the user to view the resources for which he or she is responsible instead of viewing many resource schedules from other departments.

Appointment Tab: Displays location specific fields used to build an appointment. The First three fields are required for all appointments to be scheduled; however, the order in which they display can be adjusted to the user's preference.

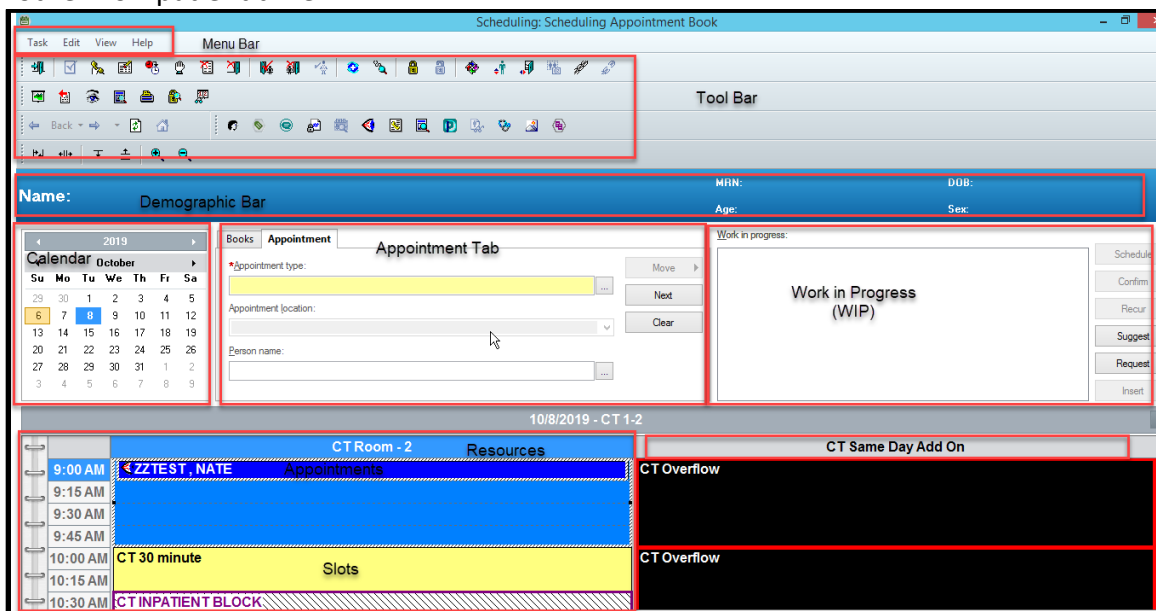
Work in Progress (WIP): Displays details of the appointment that is in the process of being scheduled. The details associated with the appointment have been entered, but

the appointment scheduling process has not been completed.

Resources: Displays the resource Name with limited availability for which a schedule is kept. Resource is a term that covers a wide range of meanings and can be applied to locations (such as examination rooms or therapy rooms), people (such as doctors or technicians), or equipment (such as a whirlpool or an x-ray machine).

Appointments: Displays a block of time that has been scheduled for a resource and the patient.

Slots: Displays default slots that are set up in the system to help automate scheduling. A slot represents a block of time in which appointments can be scheduled for a given resource. Slots are set up for regular appointments, urgent appointments, lunch, and other non-patient time.




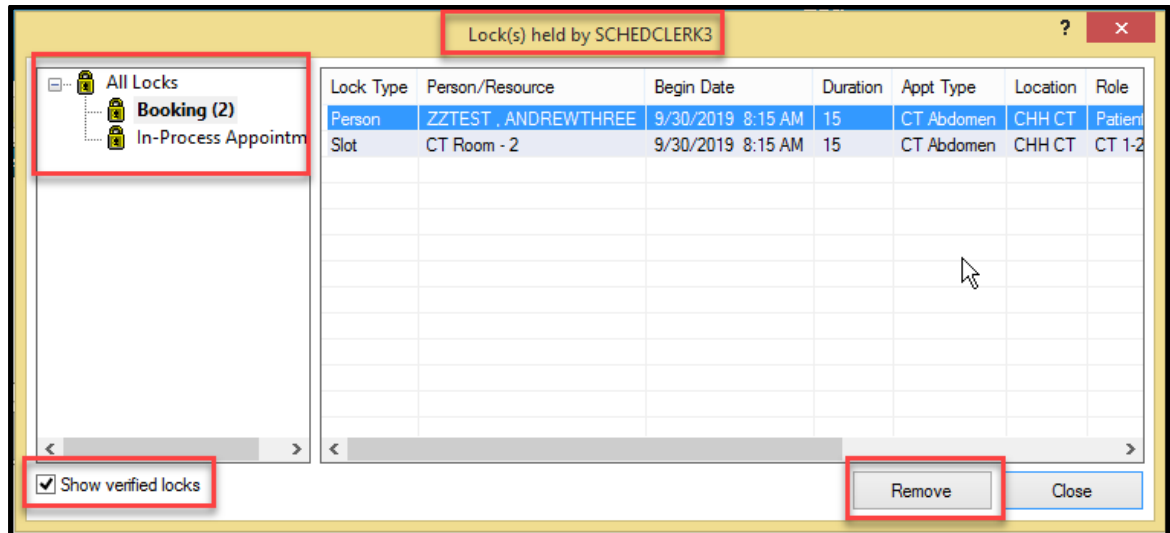
5.2 Overview of Locks

Scenario: Sometimes a slot or a patient will become locked when the user has tried to schedule an appointment to the slot, but for whatever reason they did not finish booking. The slot may appear open, but it will not allow you to book an appointment.











If you get a warning that a slot is locked, look to see who created it, then have that person unlock the slot.



























Complete the following steps to remove a Lock for a user that holds the lock:

1. **Locate the lock** by clicking the View Locks icon . A window will display listings all Locks created by the user.
2. **Click Booking** to see if the slot was a booking lock. If there are locks which you would like to remove, highlight them and press the **Remove** button.
3. If you don't see a lock in Booking, click **In-Progress Appointments** to see if there is a lock in there. Highlight any In Progress locks and press the Remove button.
4. To **release any verified locks**, click the checkbox next to Show Verified Locks in the bottom left corner of the window.




5.3 Overview of Icons


Request Queue 	Launch <i>PowerChart</i> 
Health Maintenance 	Medical Necessity 
Document Imaging 	Launch Work Queue Monitor 
Refresh 	Home 
Exit 	Confirm 

Contact 	Modify 
Reschedule 	Cancel 
No Show 	Check In and Check Out 
Med Nec Check 	Lock and Unlock 
Shuffle 	Create Group Session 
Appointment View 	Appointment History View 
Appointment Inquiry 	Request List Inquiry 
View Locks 	Change View 
Patient Information Request 	Launches PMLaunch 
Appointment Report 	Link and Unlink 
Swamp Resources 	Reorder 
Verify 	Patient Seen 
Hold 	Person Management 

5.4 Difference between Request List Inquiry and Request Queue

Request List Inquiry : A request list is a collection of appointment requests in a spreadsheet format that are pending completion. You can think of request lists as a work list. For example, a patient needs to be scheduled for an appointment type, but there are no

current openings for the necessary resources. This request can be placed on a request list waiting for an opening. Another example is when additional information is needed before a scheduled appointment can be confirmed. This appointment can be sent to a request list pending the additional information.

Request Queue  Use the Request Queue (HIMRequestQueue.exe) application to view all of the requests for paper charts that have been entered and their current state of completion. Request Queue displays internal chart requests (for example, nursing units, Risk Management department, and so on) and requests for the paper chart to fulfill external Release of Information (ROI) requests. You can process and update requests in the queue, attach notes to individual requests or to patient visits, and print pull lists and request slips. Once a request is placed in complete status, the location of the chart is updated to the requesting location in both the Request Queue and Chart Tracking (HIMTracking.exe) applications.

Request Queue works closely with the Patient Information Request and Request Manager or Request Management applications. You enter a request using the appropriate application, then view the logged requests in Request Queue and update them.

6 Scheduling an Exam (Appointment)

The system can suggest available times at which an appointment can be scheduled based on date and time parameters that you enter.

This provides you with date and time options from which you can select without requiring you to locate available slots manually.

This method is recommended for those areas where available appointment times are limited and also for more complicated appointments.

There are three methods you can use to schedule an appointment.

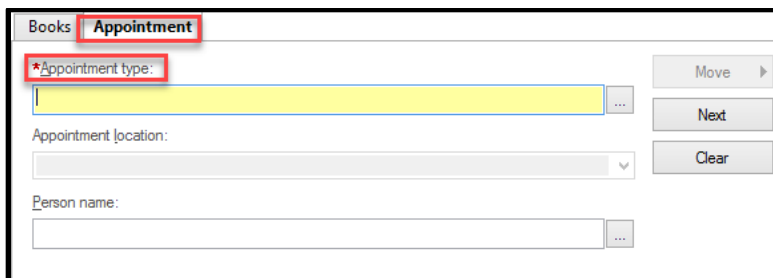
1. Suggested Scheduling Method (Always use with Protocol or Reoccurring Appt.).
2. Drag and Drop Method.
3. Schedule Button Scheduling Method.

6.1 Suggested Scheduling Method

Complete the following steps to schedule an appointment:

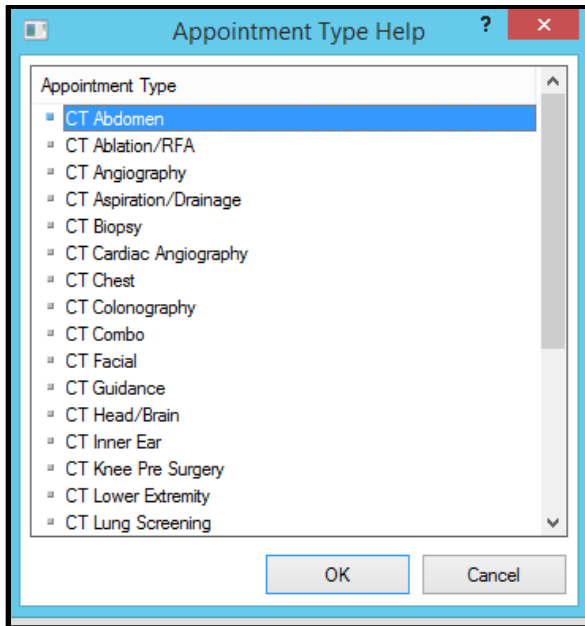
Appointment Type:

1. Click the **Appointment** tab.
2. In the Appointment Type box, enter the First few letters of your appointment type Name (i.e. **CT**) and press **ENTER** or click the **ellipsis**.

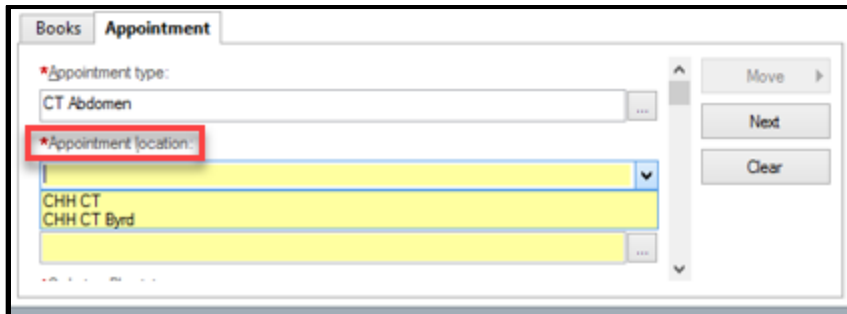


The screenshot shows a software interface for scheduling an appointment. At the top, there are two tabs: 'Books' and 'Appointment', with 'Appointment' selected and highlighted in red. Below the tabs is a form with the following elements: a label '*Appointment type:' with a red box around it, a text input field containing 'CT' and a yellow highlight, an ellipsis button (...), a 'Move' button with a right arrow, a 'Next' button, an 'Appointment location:' dropdown menu, a 'Clear' button, a 'Person name:' label, and another text input field with an ellipsis button (...).

3. The **Appointment Type** Help window opens.
4. Select the appropriate **Appointment Type** Name.
5. Click **OK**.
6. The **Appointment Type** Name now is displayed in the Appointment Type box.



7. Click on **Drop Down** arrow and the list of Appointment Locations are listed.
8. Select the **appropriate location** for the appointment to be performed.

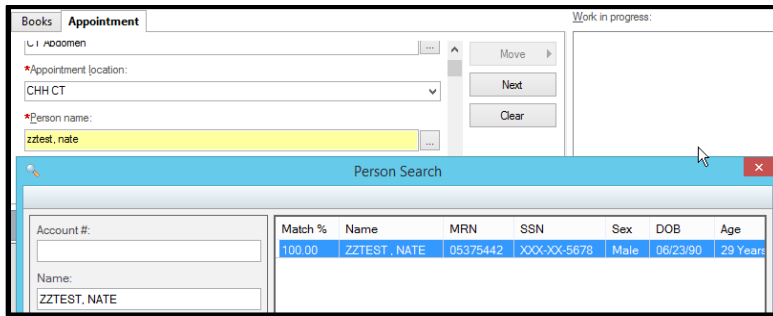


NOTE: If there is only one valid location for the Appointment Type you selected, then the Appointment Location automatically defaults and you are not required to select one.

9. If your user preference is set to allow for multiple appointment locations, then you see an **ellipsis** rather than a list in the Appointment Location field. To select an appointment location with a multi-value field, click the **ellipses**. Select the location you want from the Location Help window and click **OK**

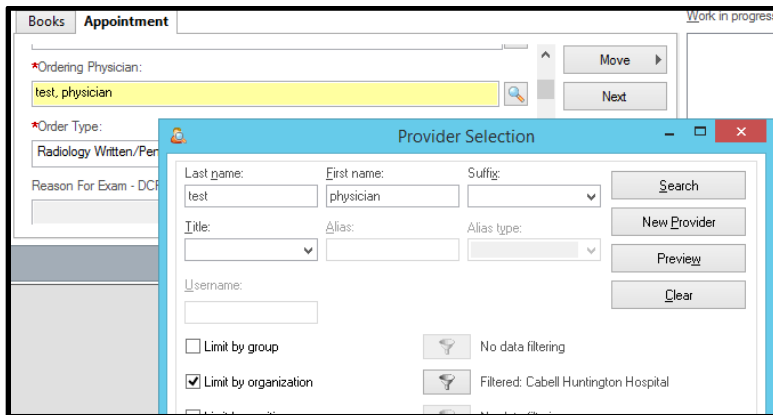
Person:

1. In the **Person Name** box, enter the patient's Last Name and First two letters of the First Name.
2. Press **ENTER** or the **ellipses** to search.
3. The **Person Search** window opens and lists patients whose Name matches the patient information you entered.
4. Select the appropriate patient.
5. If the Encounter for the Test is not showing **Add Encounter**.
6. Click **OK** (The patient's Name now is displayed in the Person Name box).



Ordering Physician

1. In the Ordering Physician box, enter the Physicians Last Name and First two letter of the First Name.
2. Press **ENTER** or the **ellipses** to search.
3. Provider Selection window opens.
4. Select the appropriate Physician.
5. Click **OK** (The provider's Name now is displayed in the Ordering Physician box).



Order Type:

1. **Order Type** (will automatically populate) (if incorrect, Click on Drop down arrow and list of Order Type is displayed, choose the correct one).

The screenshot shows the 'Appointment' form in a software application. The 'Ordering Physician' field is populated with 'Test, Physician3'. The 'Order Type' dropdown menu is open, displaying a list of options: 'Radiology Written/Pending', 'Forward for Authentication', 'Nursing Order', 'Phone Readback', 'Proposed Pending Approval', 'Verbal Readback', 'Initiate Protocol', 'Protocol/Standing Order', 'Written/Electronic', 'Radiology Written/Pending', and 'Fax'. The 'Move' button is visible on the right side of the form.

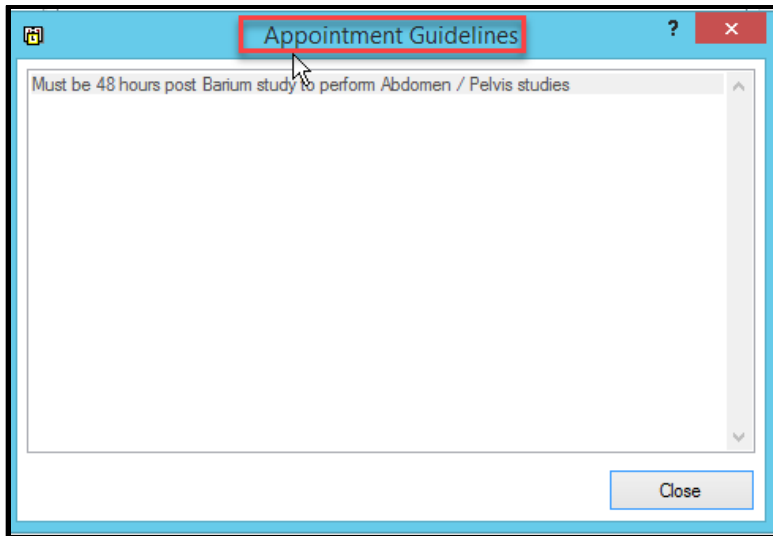
Order Questions:

1. Most Appointment Types are built with additional questions to be asked during the scheduling process (**Accept Format** questions). Answer the remaining questions for the Appointment Type.
2. Click **Move** to place the event details in the Works in Progress (WIP).

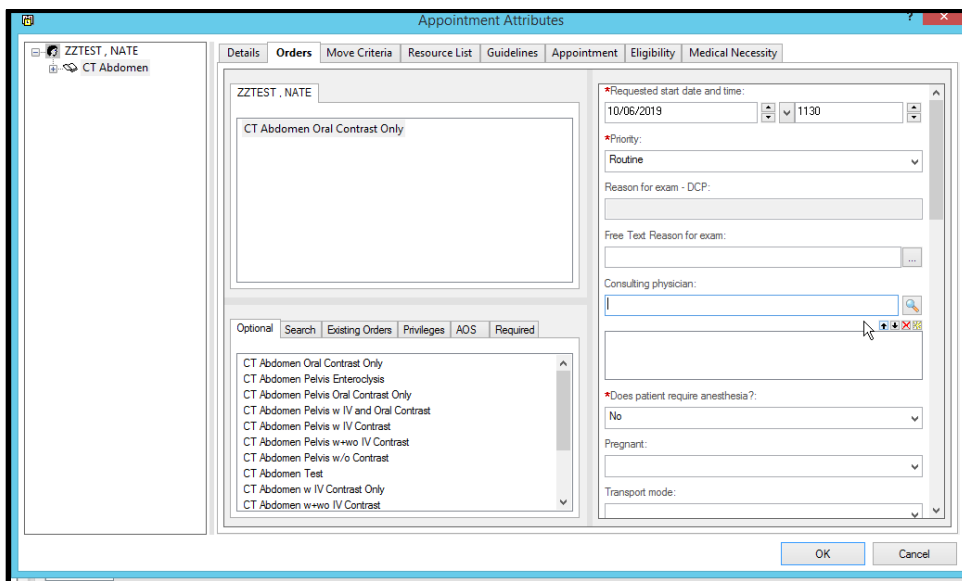
The screenshot shows the 'Appointment' form with the 'Order Type' dropdown set to 'Written/Electronic'. The 'Reason For Exam - DCP:' field is empty. The question '*Does Patient Require Sedation?:' is highlighted with a red box. The 'Move' button is also highlighted with a red box. The 'Next' and 'Clear' buttons are visible on the right side of the form.

Order Guidelines:

1. Some Appointment have **Appointment Guidelines** that patient will need to know.
2. Click **Close**.

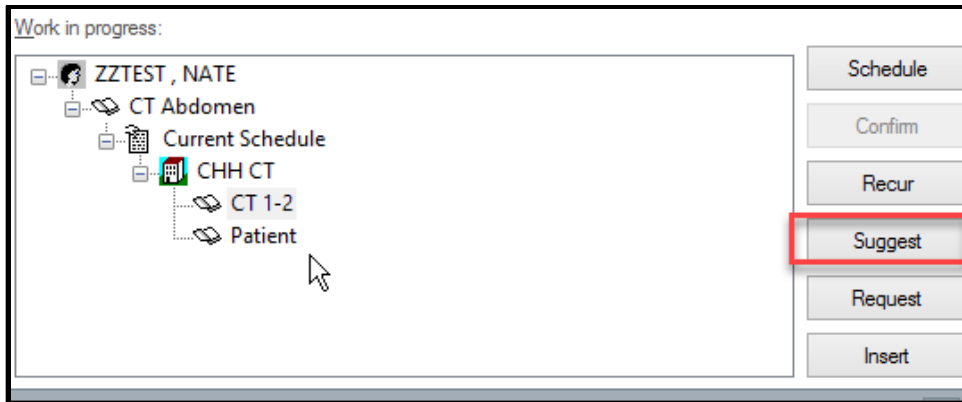


3. Complete appropriate details in the Appointment Attributes window.
4. Click **OK**.



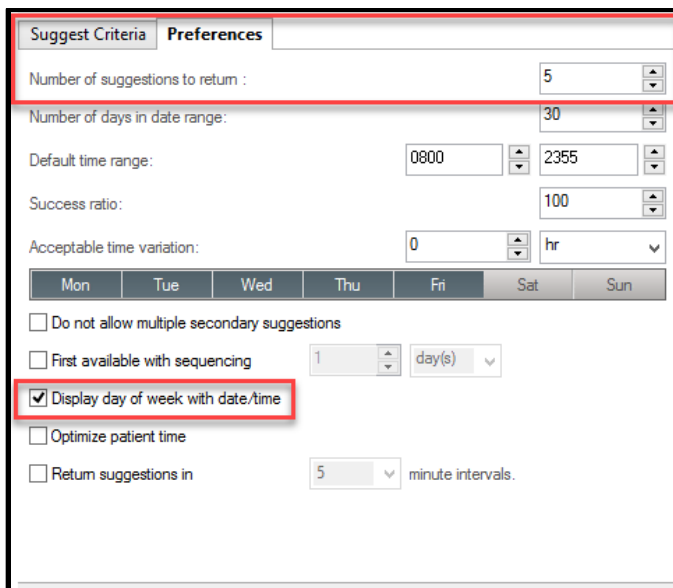
Work in Progress:

1. Work in progress window opens.
2. With your appointment in the Work In-Progress box, click **Suggest** to open the Suggested Schedules dialog box.



Suggest Criteria:

1. The **Suggest Criteria** window opens.
2. Click the **Preference Tab** (be sure the number of suggestions return is set to a higher number than **1**. Also check the **Display day of the week with date/time** in order to see these when you see the suggested appointments).



3. Click Suggest Criteria Tab
 - a) Appointment Date
 - b) Date Range
 - c) Schedule in
 - d) Date restrictions
 - e) Appointment Time
 - f) Time Range
 - g) Time restrictions

Suggest Criteria Preferences

Appointment Date

Date range: 10/06/2019 11/05/2019

Schedule in: 1 Days From: 10/06/2019

Date restrictions: Next 2 Days

Mon Tue Wed Thu Fri Sat Sun Exceptions

Appointment Time

Time range: 0800 2355

Time restrictions: AM Only

Schedule as visit within 1 day(s)

Override suggested date and time

Schedule multiple persons to mixed Group Sessions

Clear Suggest

Next Next Day Clear Select

4. Click **Suggest**
5. If the times suggested are not wanted, click **Next** to display the next available times.
6. If the day suggested is not wanted, click **Next Day** to display the First available times which the appointment can be scheduled on the next valid day.
7. Once you have found a suggested date and time to use, click **Select**.
8. Click **OK** to close the Suggested Schedules dialog box and schedule the appointment.
OR
9. Click **Cancel** to close the dialog box without scheduling the appointment.

Suggested Schedules Preferences

Appointment Date

Date range: 10/06/2019 11/05/2019

Schedule in: 1 Days From: 10/06/2019

Date restrictions: Next 2 Days

Mon Tue Wed Thu Fri Sat Sun Exceptions

Appointment Time

Time range: 0800 2355

Time restrictions: AM Only

Schedule as visit within 1 day(s)

Override suggested date and time

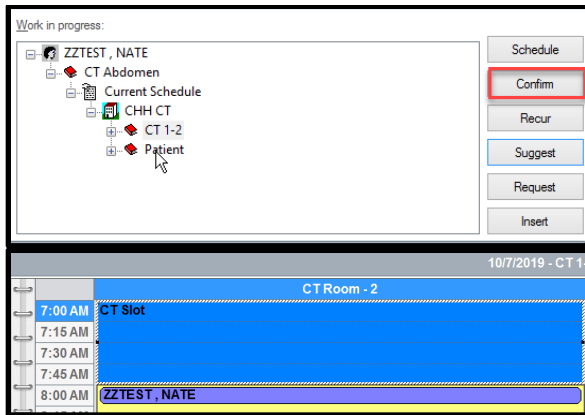
Schedule multiple persons to mixed Group Sessions

Clear Suggest

Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order
15 Minutes	Monday, 10/7/2019 - 8:00 AM	ZZTEST, NATE	Monday, 10/7/2019 - 8:00 AM	CT Abdomen	CT Room - 2	CHH CT	CT Abdomen Oral C
15 Minutes	Monday, 10/7/2019 - 8:00 AM	ZZTEST, NATE	Monday, 10/7/2019 - 8:00 AM	CT Abdomen	CT Same Day Ass On	CHH CT	CT Abdomen Oral C
15 Minutes	Monday, 10/7/2019 - 8:05 AM	ZZTEST, NATE	Monday, 10/7/2019 - 8:05 AM	CT Abdomen	CT Room - 2	CHH CT	CT Abdomen Oral C
15 Minutes	Monday, 10/7/2019 - 8:10 AM	ZZTEST, NATE	Monday, 10/7/2019 - 8:10 AM	CT Abdomen	CT Room - 2	CHH CT	CT Abdomen Oral C
15 Minutes	Monday, 10/7/2019 - 8:15 AM	ZZTEST, NATE	Monday, 10/7/2019 - 8:15 AM	CT Abdomen	CT Room - 2	CHH CT	CT Abdomen Oral C

Next Next Day Clear Select

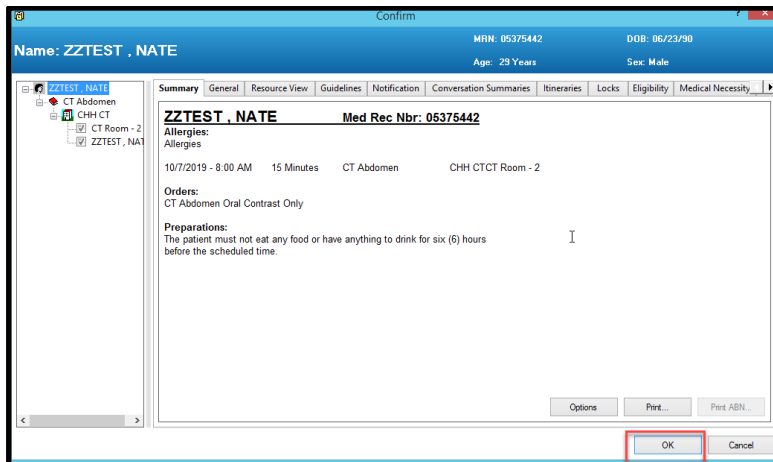
OK Cancel



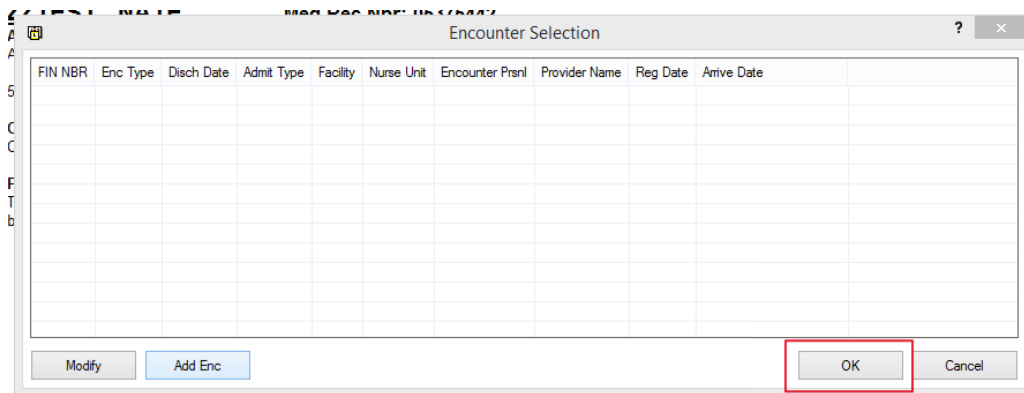
10. Click **Confirm** in the WIP box or **right-click** the appointment on the grid and select **Confirm Request**.

11. The Confirm window opens.

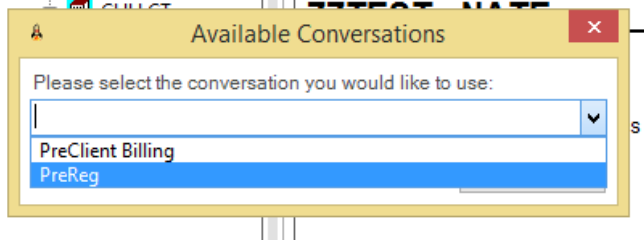
12. Click **OK** to confirm the appointment.



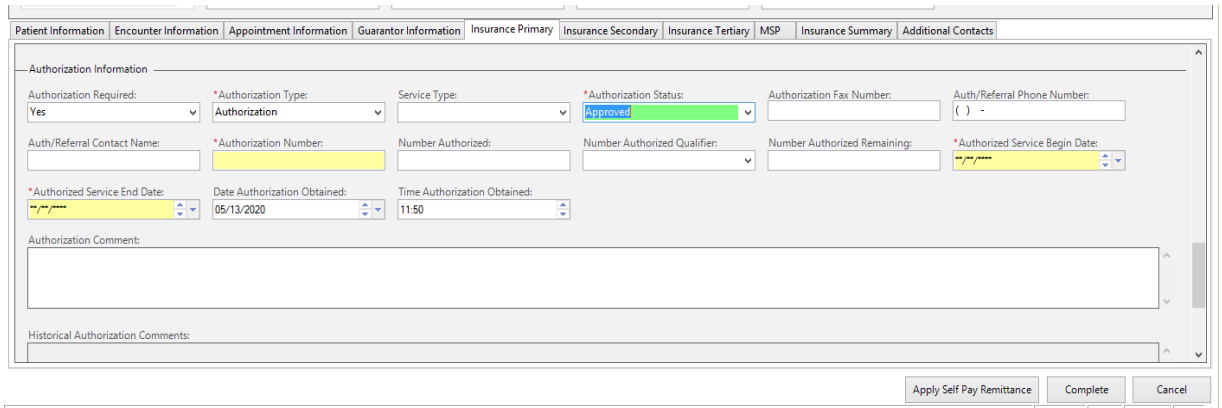
13. Select **Add Enc** to create a new pre-registration for the appointment



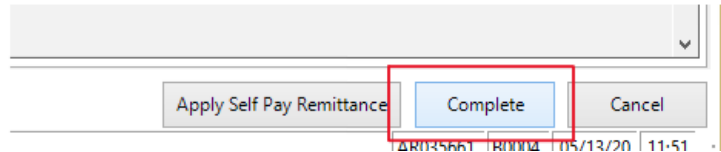
14. Select the PreReg encounter type to be added



15. Fill out required fields in registration conversation. Navigate to the Insurance Primary tab and copy over the authorization information from the **Authorization Comments** accept **format fields** or the message in **Message Center Inbox**.



16. When all required fields are filled out, select **Complete** to finish the pre-registration



6.2 Drag and Drop Method

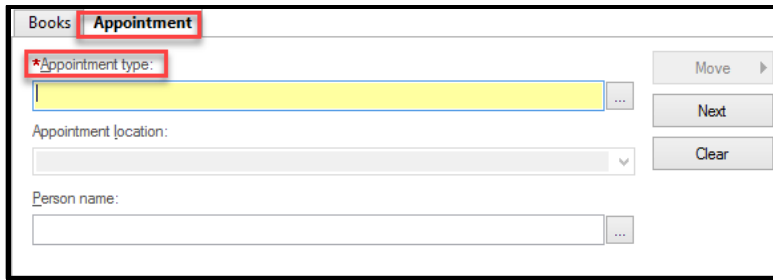
The drag-and-drop functionality is a quick and simple method when scheduling single appointments, especially when it is easy to locate available slots with minimal searching.

This method works best in scheduling areas which are not booked out far into the future.

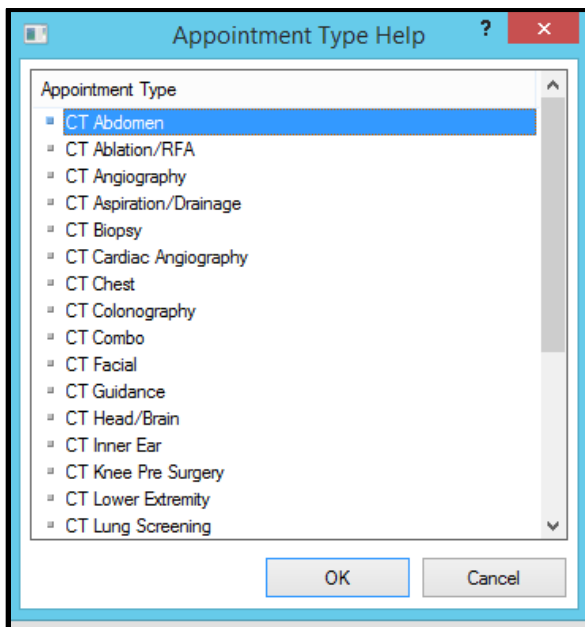
Complete the following steps to use Drag and Drop when scheduling:

1. Click the **Appointment** tab.
2. In the **Appointment Type** box, enter the First few letters of your appointment type Name (i.e. **CT**) and press **ENTER** or click the **ellipsis**.

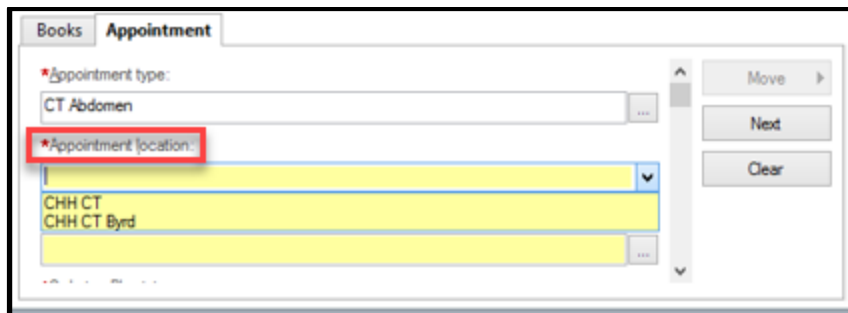
The **Appointment Type** Help window opens.



3. Select the appropriate Appointment Type Name.
4. Click **OK**.
5. The Appointment Type Name now is displayed in the Appointment Type box.

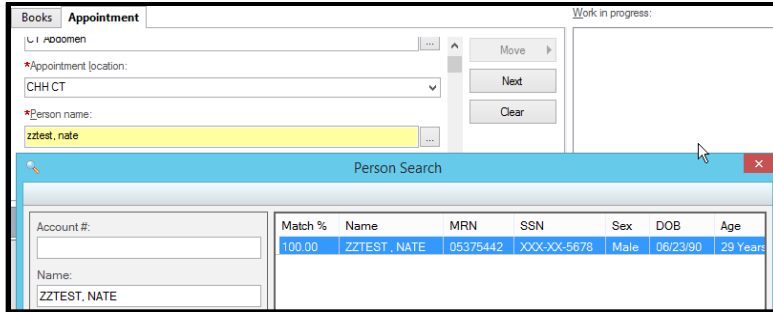


6. Click on **Drop Down** arrow and the list of Appointment Locations are listed.
7. Select the **appropriate location** for the appointment to be performed.

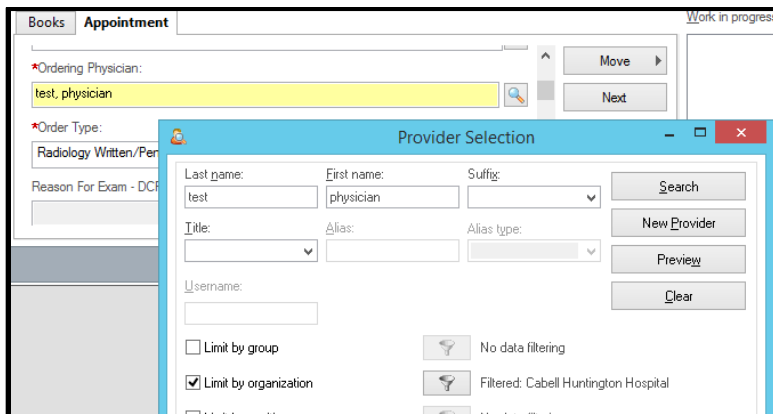


8. In the **Person Name** box, enter the patient's Last Name and First two letters of the First Name.

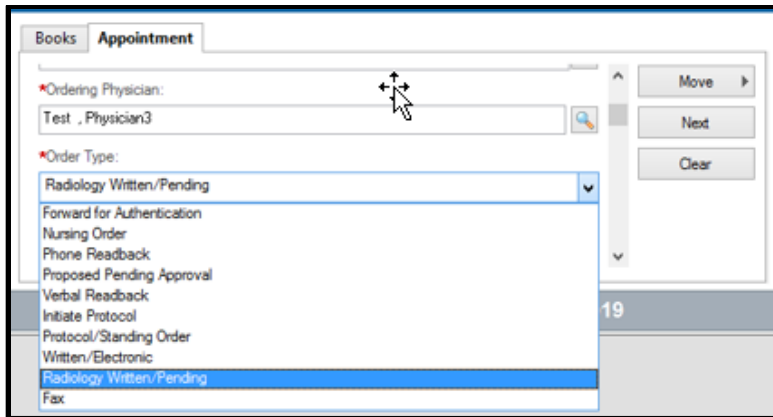
9. Press **ENTER** or the **ellipses** to search.
10. The **Person Search** window opens and lists patients whose Name matches the patient information you entered.
11. Select the appropriate patient.
12. If the Encounter for the Test is not showing, click **Add Encounter**.
13. Click **OK** (The patient's Name now is displayed in the Person Name box).



14. In the Ordering Physician box, enter the Physicians Last Name and First two letter of the First Name.
15. Press **ENTER** or the ellipses to search.
16. Provider Selection window opens.
17. Select the appropriate Physician.
18. Click **OK** (The provider's Name now is displayed in the Ordering Physician box).

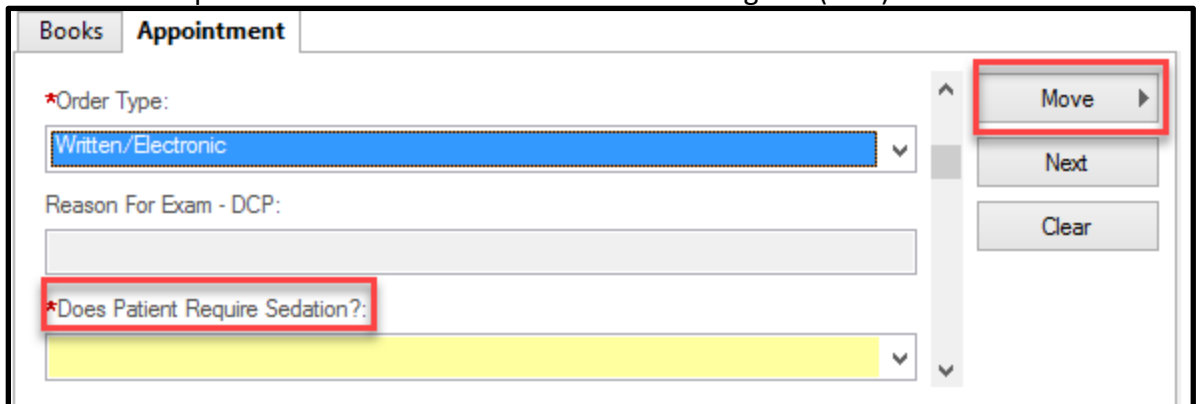


19. **Order Type** (will automatically populate) (if incorrect, Click on Drop down arrow and list of Order Type is displayed, choose the correct one).



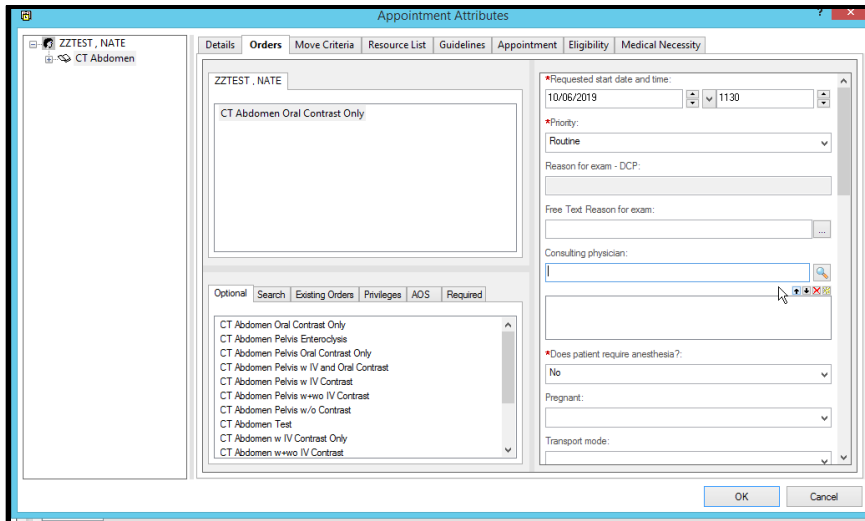
20. Most Appointment Types are built with additional questions to be asked during the scheduling process (Accept Format questions). Answer the remaining questions for the Appointment Type.

21. Click **Move** to place the event details in the Works in Progress (WIP)



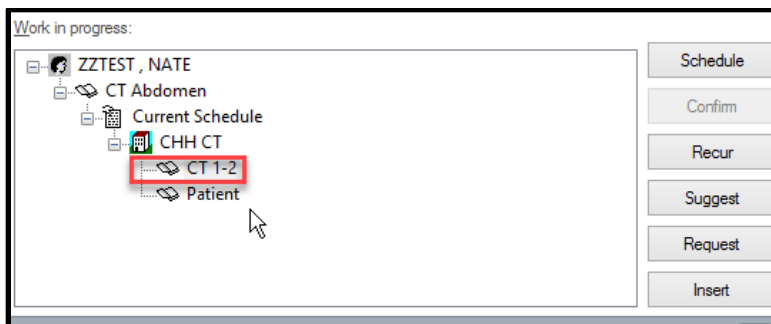
22. Complete appropriate details in the Appointment Attributes window.

23. Click **OK**.

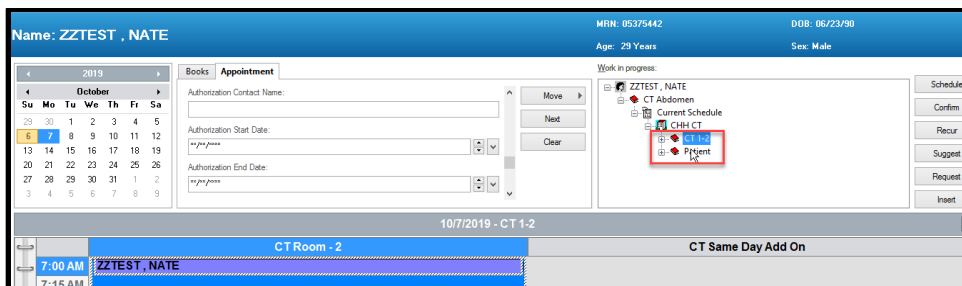


Drag and Drop

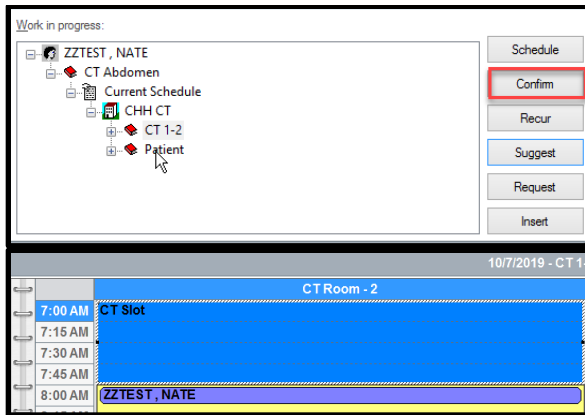
1. The Work in progress window opens.
2. With your appointment in the **Work In-Progress box**, Click the **primary resource** selected (CT 1-2) and **drag the cursor** to the appointment slot you want to schedule.



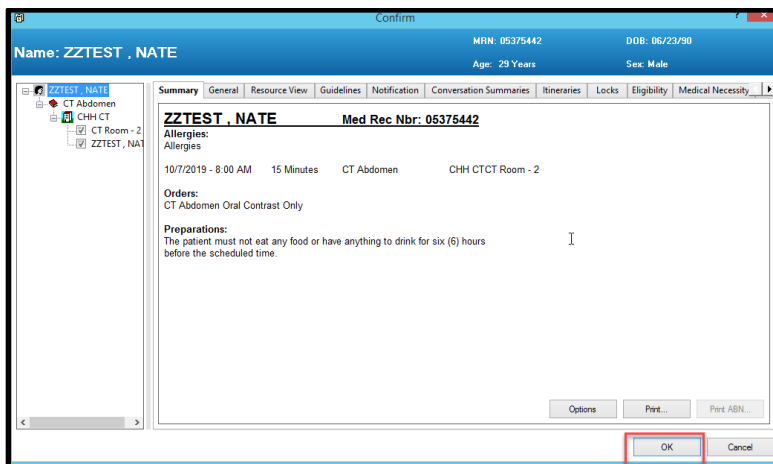
3. The **appointment displays** in the slot in a pending state, which is denoted by the red books in the WIP.



4. Click **Confirm** in the WIP box or right-click the appointment on the grid and select **Confirm Request**.



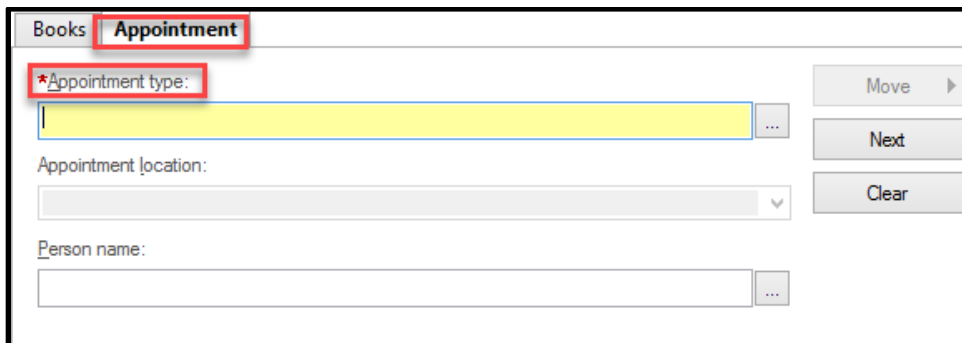
5. The Confirm window opens. Click **OK** to confirm the appointment.



6.3 Scheduling Recurring Appointments

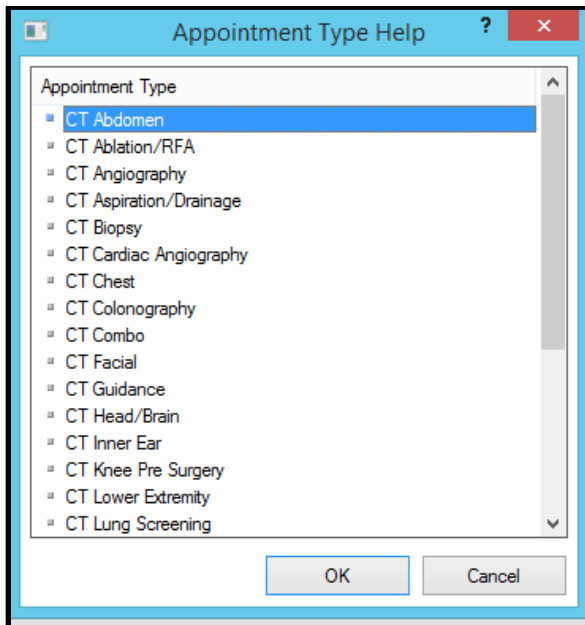
Complete the following steps to schedule Recurring appointments:

1. Click the **Appointment** tab.
2. In the Appointment Type box, enter the First few letters of your appointment type Name (i.e. **CT**) and press **ENTER** or click the **ellipsis**.



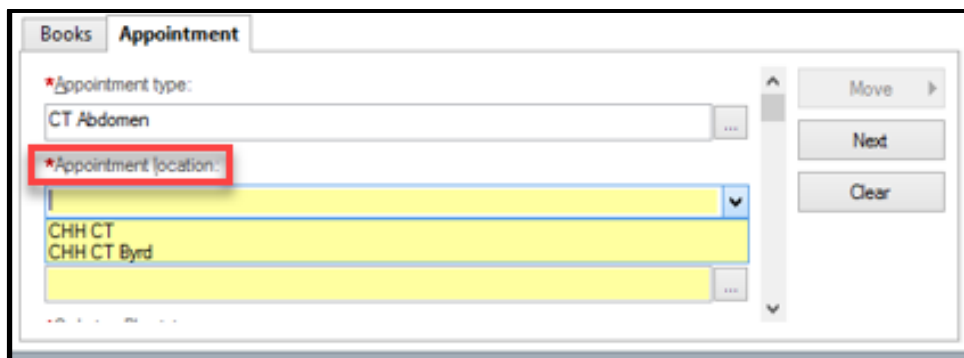
Appointment Type:

3. The **Appointment Type** Help window opens.
4. Select the appropriate Appointment Type Name.
5. Click OK.
6. The **Appointment Type Name** now is displayed in the Appointment Type box.



Appointment Location:

1. Click on **Drop Down** arrow and the list of Appointment Locations are listed.
2. Select the **appropriate location** for the appointment to be performed.

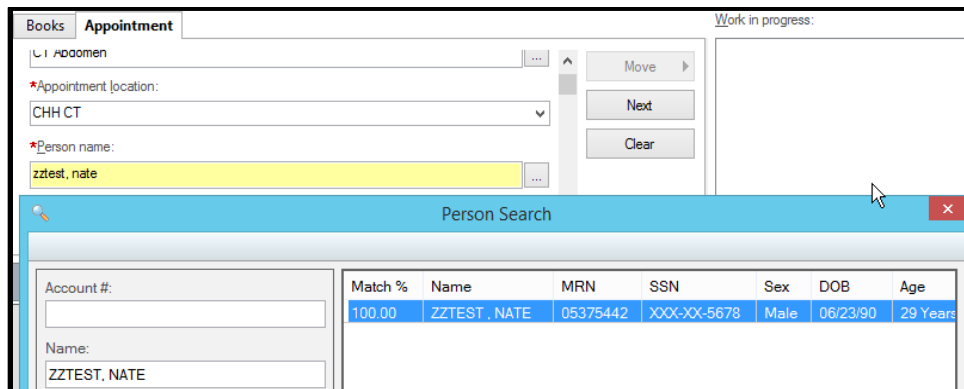


NOTE: If there is only one valid location for the Appointment Type you selected, then the Appointment Location automatically defaults and you are not required to select one.

NOTE: If your user preference is set to allow for multiple appointment locations, then you see an ellipsis rather than a list in the Appointment Location field. To select an appointment location with a multi-value field, click the ellipses. Select the location you want from the Location Help window and click OK.

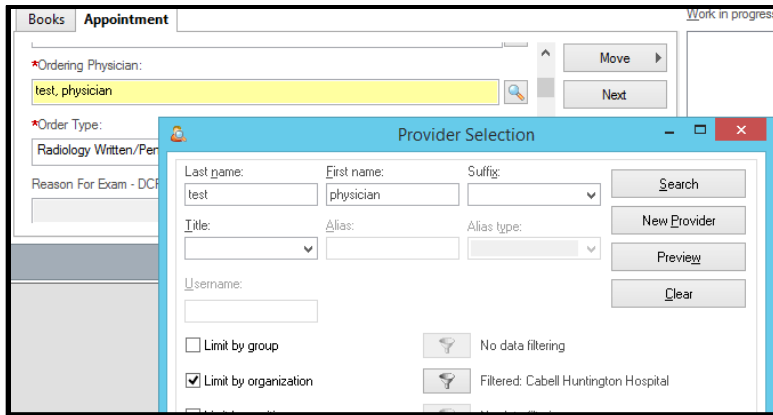
Person:

1. In the Person Name box, enter the patient's Last Name and First two letters of the First Name.
2. Press ENTER or the **ellipses** to search.
3. The Person Search window opens and lists patients whose Name matches the patient information you entered.
4. Select the appropriate patient.
5. If the Encounter for the Test is not showing Add Encounter.
6. Click **OK** (The patient's Name now is displayed in the Person Name box).



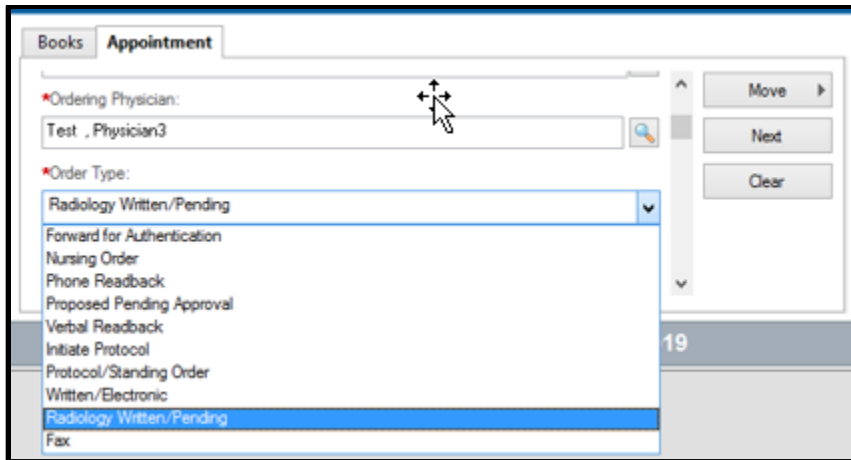
Ordering Physician:

1. In the Ordering Physician box, enter the Physicians Last Name and First two letter of the First Name.
2. Press ENTER or the ellipses to search.
3. Provider Selection window opens.
4. Select the appropriate Physician.
5. Click OK (The provider's Name now is displayed in the Ordering Physician box).

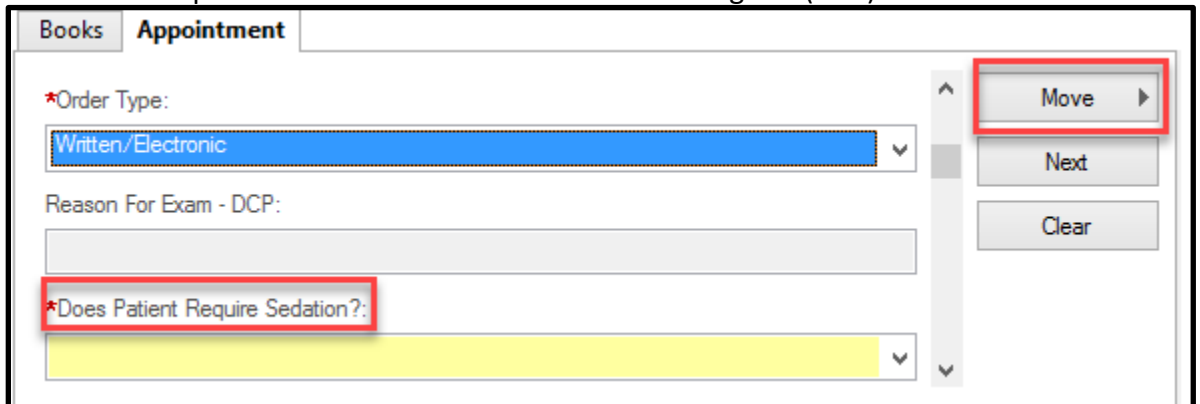


Order Type:

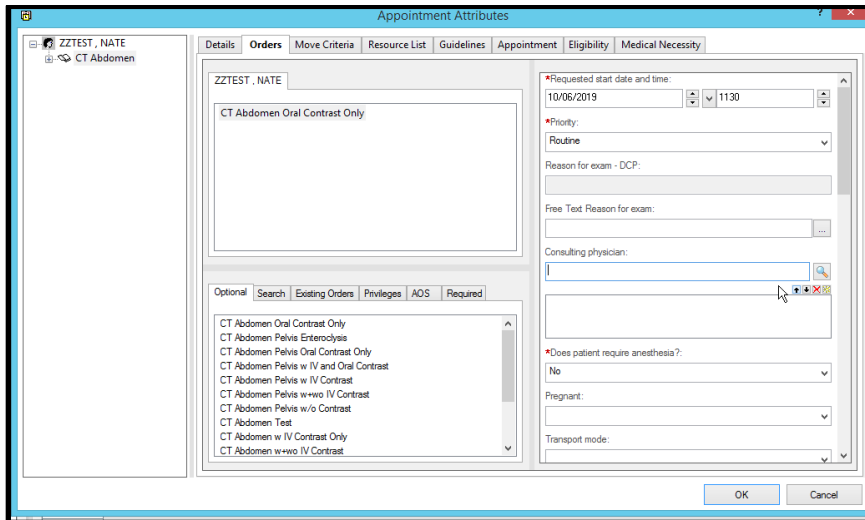
1. **Order Type** (will automatically populate) (if incorrect, Click on Drop down arrow and list of Order Type is displayed, choose the correct one).



2. Most **Appointment Types** are built with additional questions to be asked during the scheduling process (Accept Format questions). Answer the remaining questions for the Appointment Type.
3. Click **Move** to place the event details in the Work in Progress (WIP).

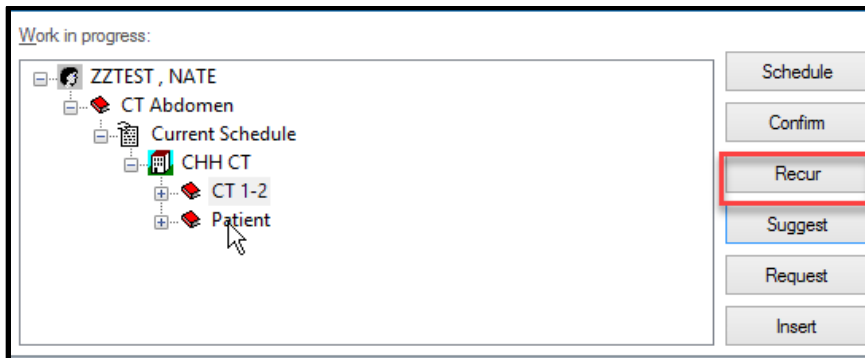


4. Some Appointment have Appointment Guidelines that patient will need to know.
5. Click **Close**.
6. Complete appropriate details in the Appointment Attributes window.
7. Click **OK**.

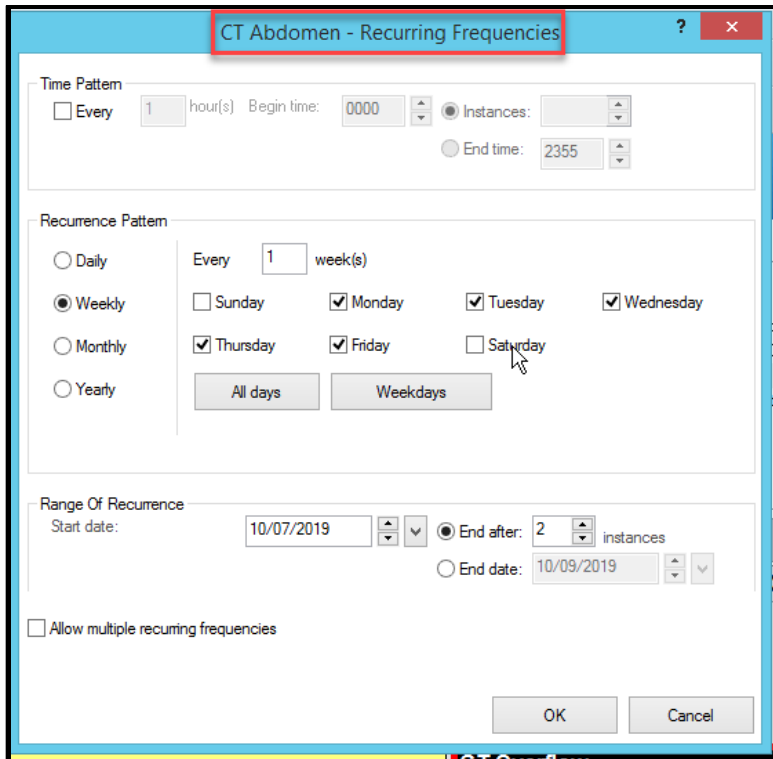


Work in Progress

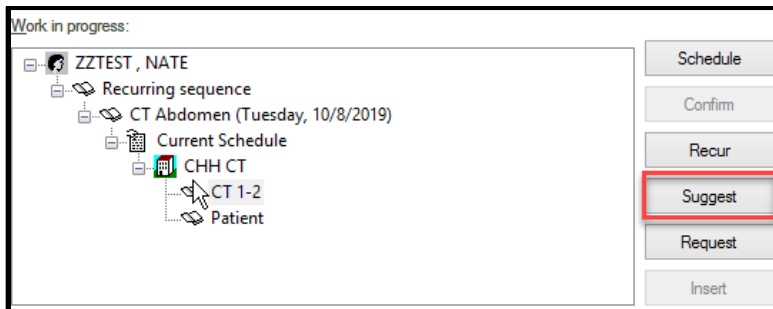
1. Work in progress window opens.
2. Click **Recur**.

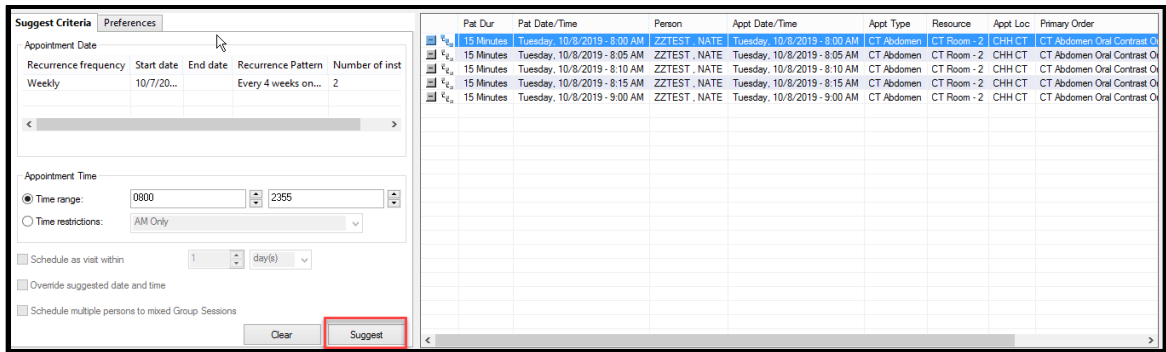


3. Recurring Frequencies window opens
 - a) Time Pattern
 - b) Recurrence Pattern (change Every "1" to "4" weeks)
 - c) Range of Recurrence
 - d) Allow Multiple Recurring Frequencies option
4. Click **OK**.

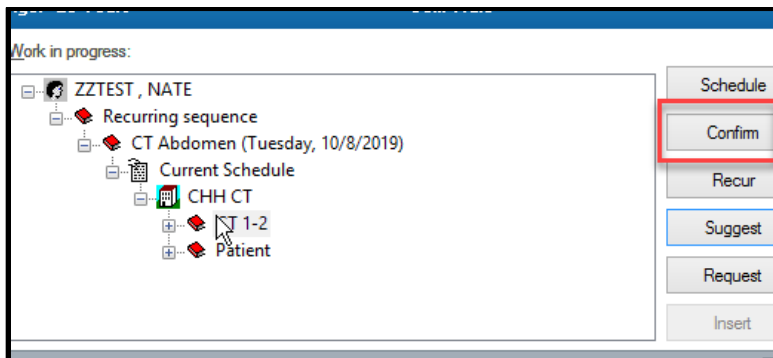


5. Work in Progress window opens.
6. Click **Suggest**.






7. Select Component of Recurring Appointment series.
8. Click OK.
9. Work in Progress window opens.
10. Click Confirm.



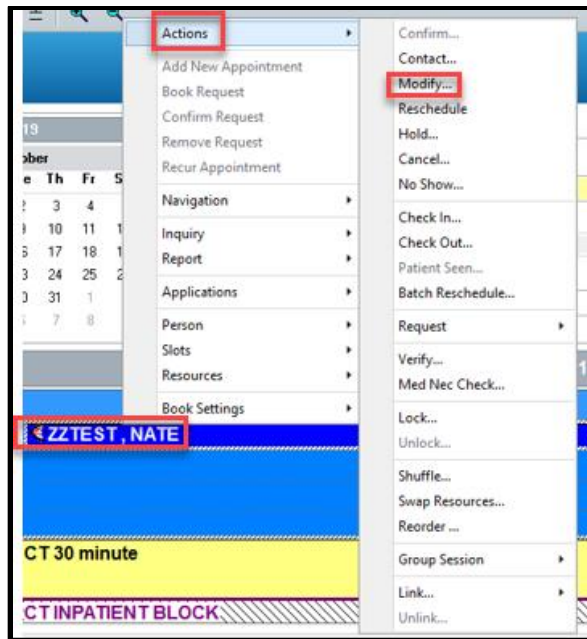
11. Confirm Window opens.
12. Click OK to Confirm the Appointment.

6.4 Modify a Recurring Appointment

Complete the following steps to modify a Recurring appointment:

1. Find the appropriate Schedule.
2. Find the patient's appointment.
3. Right Click Appointment.
4. Select Actions.
5. Select Modify or Click Modify icon .
6. Modify Window opens.
7. Modify Reason: Select the Modify Reason.
8. Click Details Tab (make any applicable changes).

9. Click Orders Tab (if applicable).
10. Click OK.



7 Viewing Schedules Via the Bookshelf

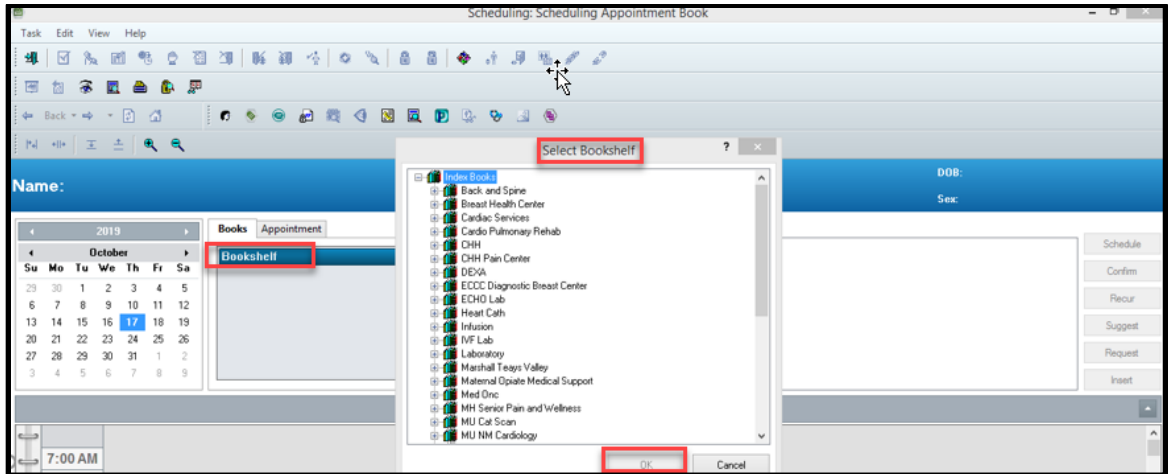
To view schedules, access the **Books** tab in the Scheduling Appointment Book.

7.1 Select the Bookshelf

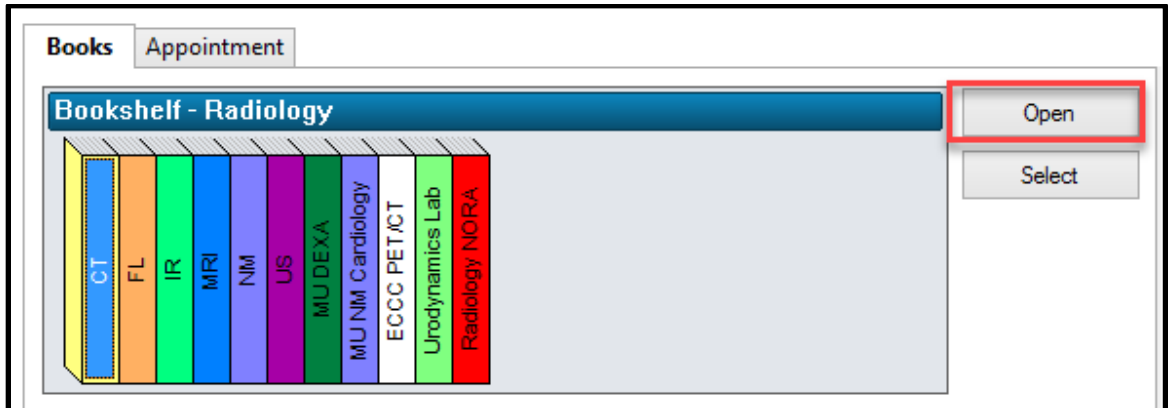
Complete the following steps to view a schedule:

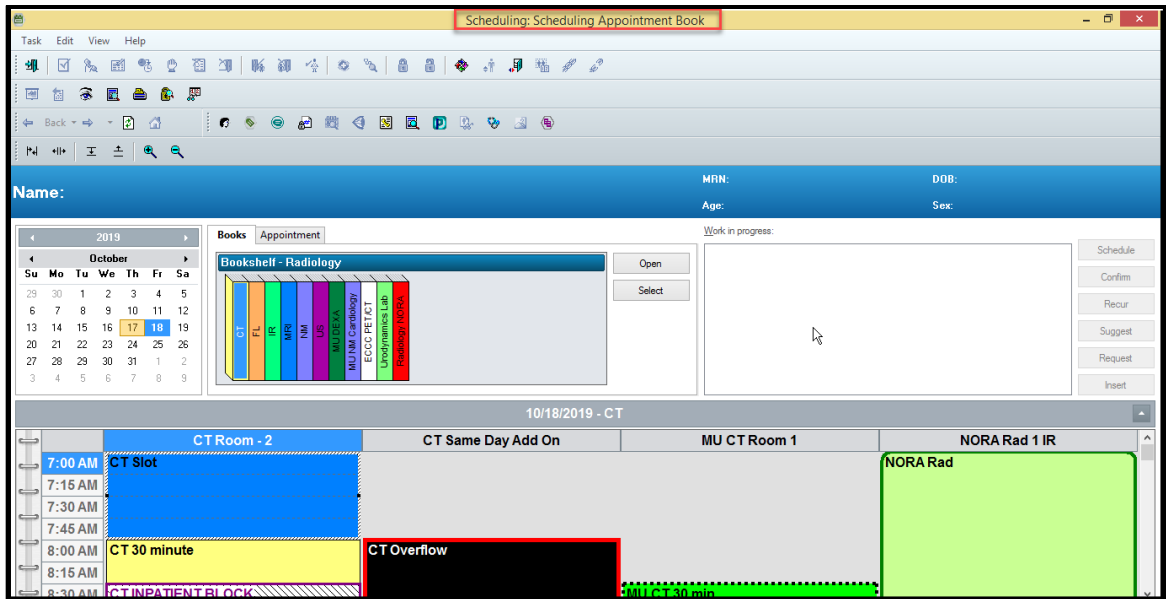
1. Click **Books**.
2. Click Bookshelf.
3. Select **Bookshelf** window opens.
4. Select the **Bookshelf** that you want.

5. Click OK.



6. Click to highlight a specific book.
7. Click Open to open the Appointment Book (you can also double click the Appointment Book to open it).





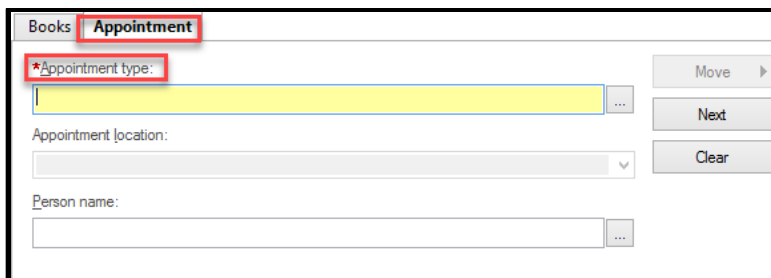
8. The appointment book opens.

7.2 Scheduling Multiple Appointments

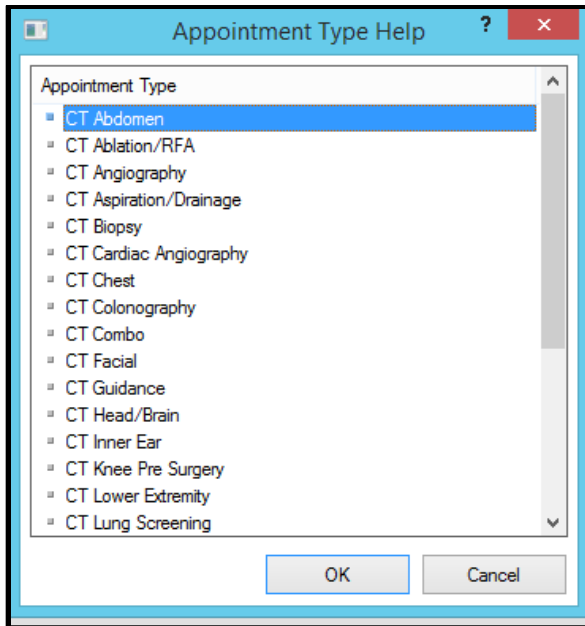
NOTE: You can schedule more than one appointment for a patient without entering in all of the same information twice.

Complete the following steps to schedule multiple appointments for the same patient:

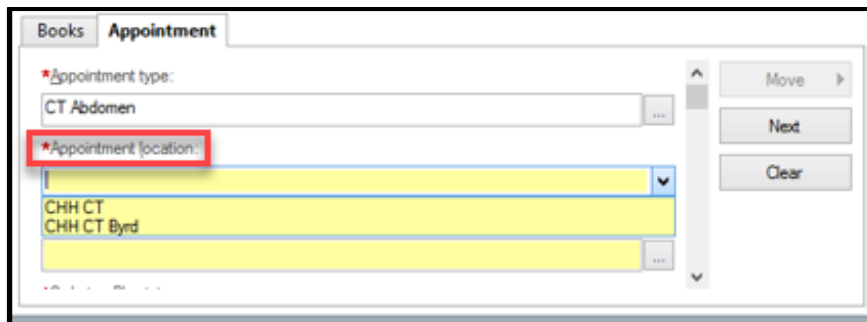
1. Click the Appointment tab.
2. In the Appointment Type box, enter the First few letters of your appointment type Name (i.e. **CT**) and press **ENTER** or click the **ellipsis**.



3. The Appointment Type Help window opens.
4. Select the appropriate Appointment Type Name.
5. Click OK.
6. The Appointment Type Name now is displayed in the Appointment Type box.



7. Click on Drop Down arrow and the list of Appointment Locations are listed.
8. Select the appropriate location for the appointment to be performed.

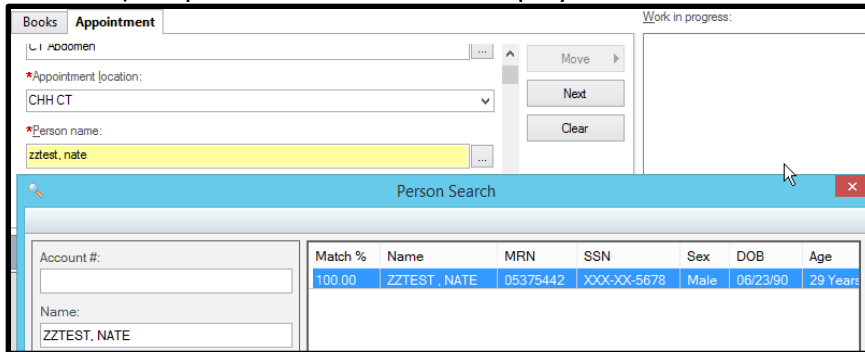


NOTE: If there is only one valid location for the Appointment Type you selected, then the Appointment Location automatically defaults and you are not required to select one.

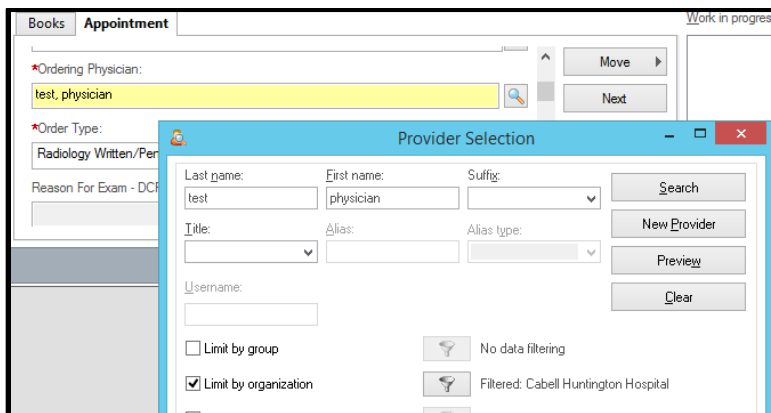
NOTE: If your user preference is set to allow for multiple appointment locations, then you see an ellipsis rather than a list in the Appointment Location field. To select an appointment location with a multi-value field, click the ellipses. Select the location you want from the Location Help window and click OK.

9. In the Person Name box, enter the patient's Last Name and First two letters of the First Name.
10. Press ENTER or the ellipses to search.

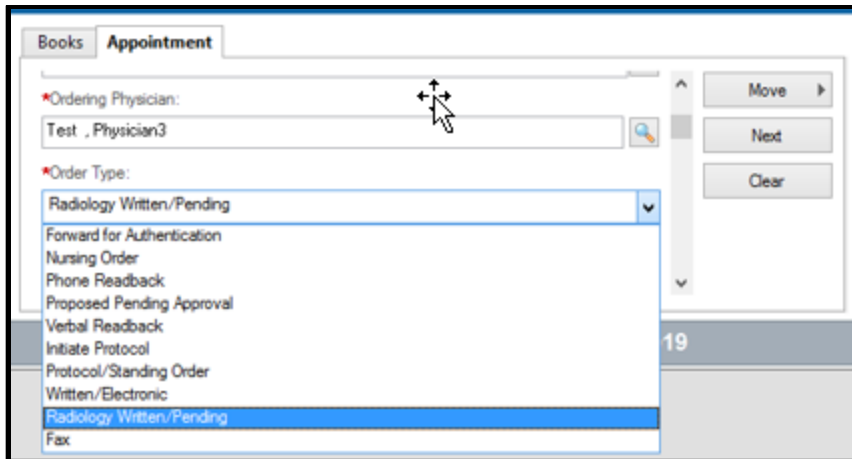
11. The Person Search window opens and lists patients whose Name matches the patient information you entered.
12. Select the appropriate patient.
13. If the Encounter for the Test is not showing Add Encounter.
14. Click OK (The patient's Name now is displayed in the Person Name box).



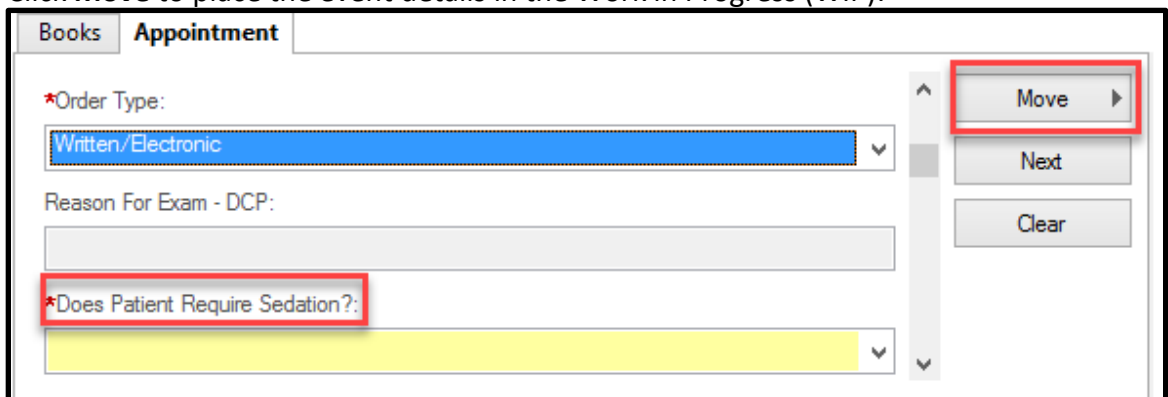
15. In the Ordering Physician box, enter the Physicians Last Name and First two letter of the First Name.
16. Press ENTER or the ellipses to search.
17. Provider Selection window opens.
18. Select the appropriate Physician.
19. Click OK (The provider's Name now is displayed in the Ordering Physician box.)



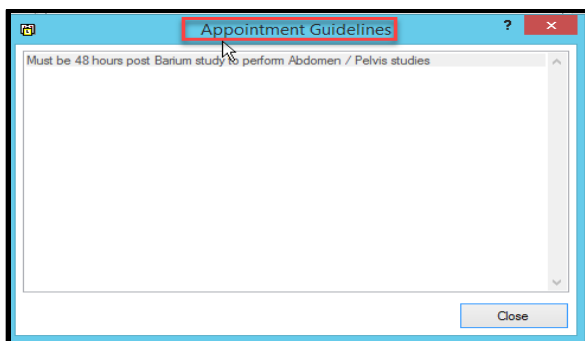
20. Order Type (will automatically populate) (if incorrect, Click on Drop down arrow and list of Order Type is displayed, choose the correct one).



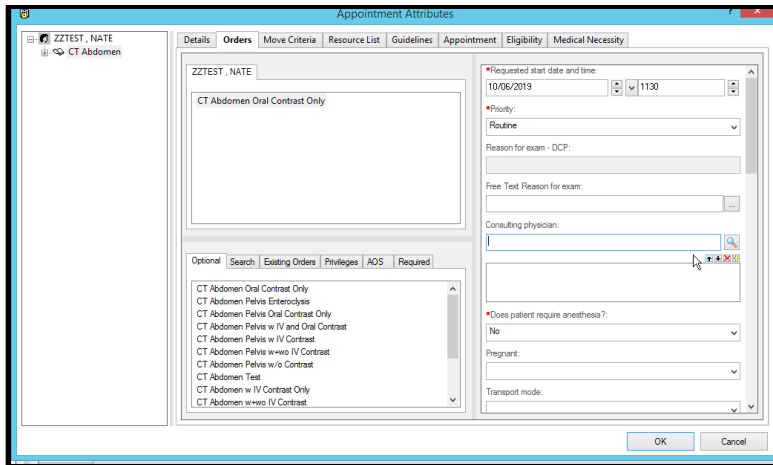
21. Most Appointment Types are built with additional questions to be asked during the scheduling process (Accept Format questions). Answer the remaining questions for the Appointment Type.
22. Click **Move** to place the event details in the Work in Progress (WIP).



23. Some Appointment have Appointment Guidelines that patient will need to know.
24. Click **Close**.

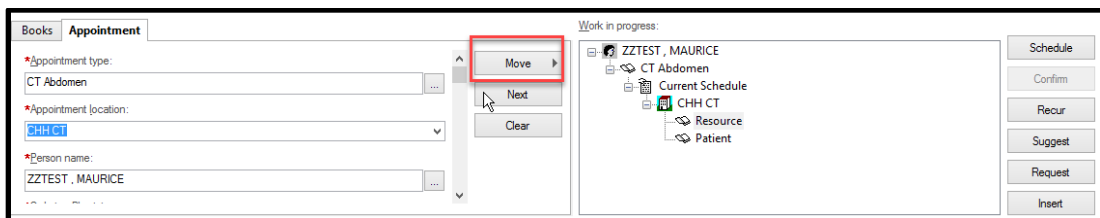


25. Complete appropriate details in the Appointment Attributes window.
26. Click **OK**.



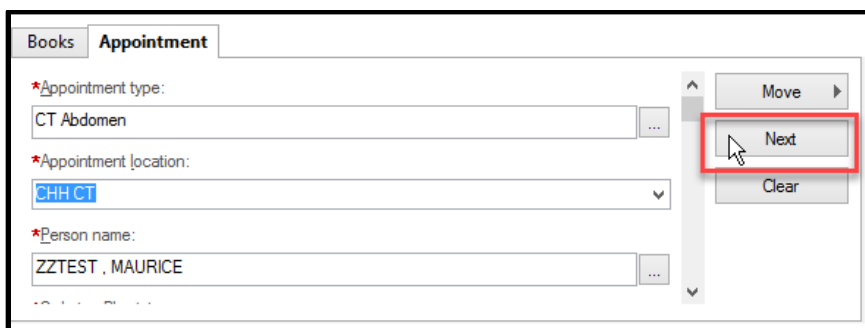
27. Appointment information shows in the accept format fields.

28. Click **Move** to move the information to the Work-In-Progress. (WIP).



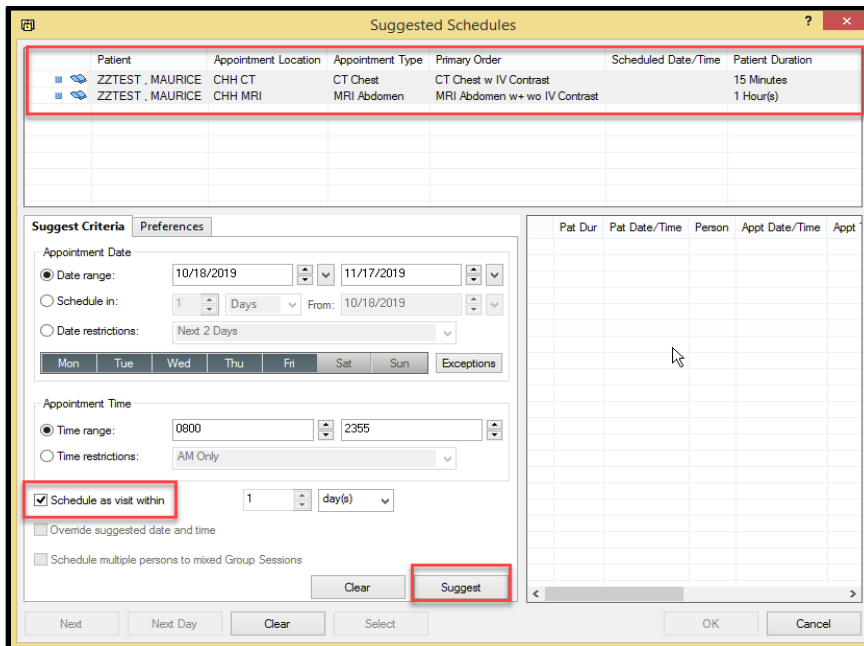
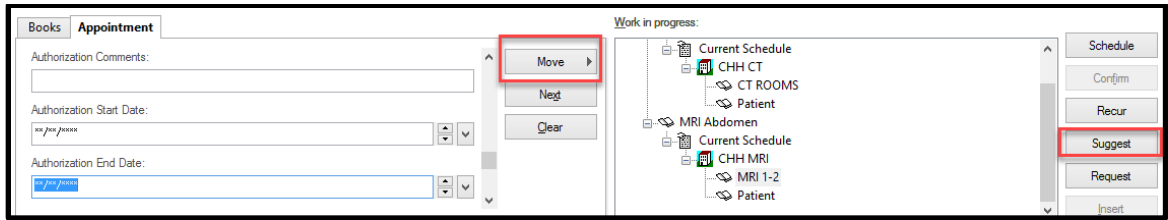
Multiple Appointments

1. Once you have entered in all of the information for the First appointment, click **Next**. Your cursor will move back to the fields within the **Appointment** tab.

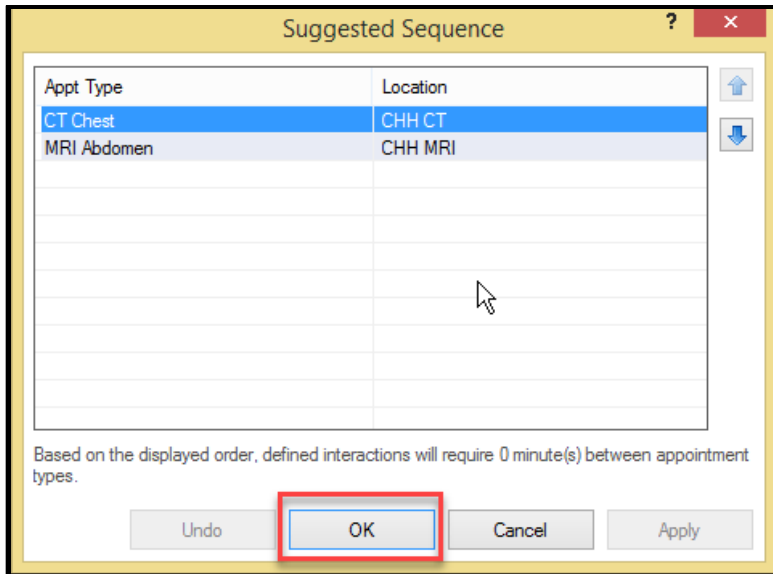


2. In the **Appointment Type** field, replace the First Appointment Type Name with the next appointment type that you are scheduling and press ENTER or click the ellipses to search. Select the appropriate Appointment Type from the search window.
3. Select the appropriate Appointment Location.
4. Scroll down through the rest of the accept format questions. You will notice that the information you entered on the First appointment is still in the fields. Change any appropriate information.

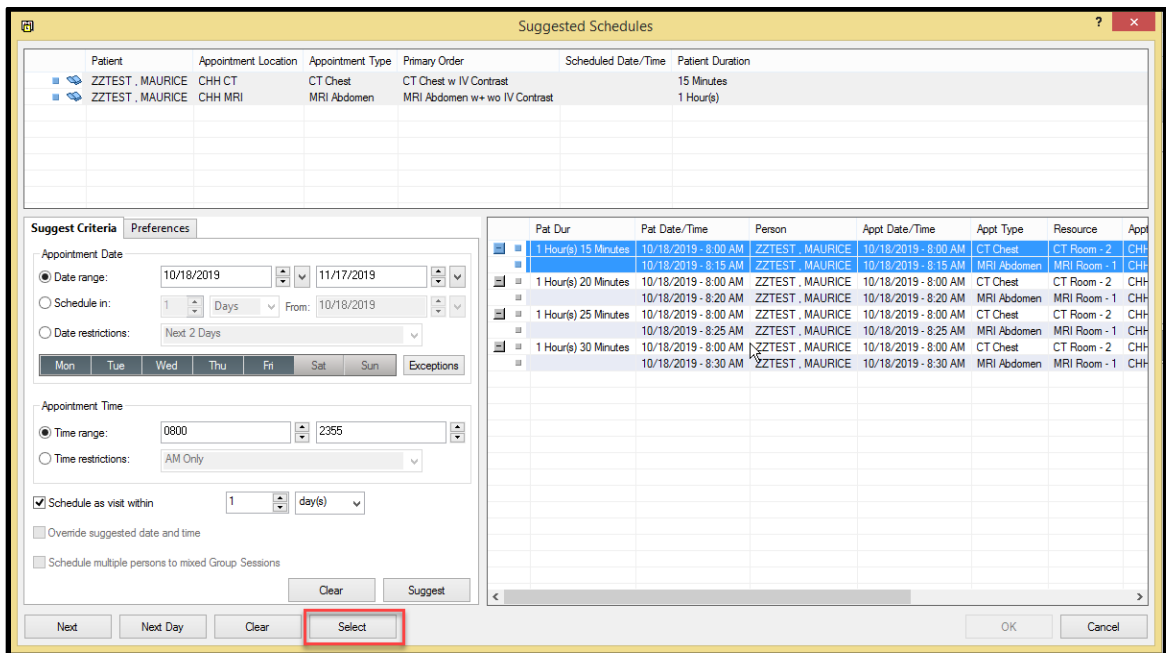
5. Click **Move**.
6. Both appointments are displayed within the **WIP**.
7. Click **Suggest** to find an available appointment time.



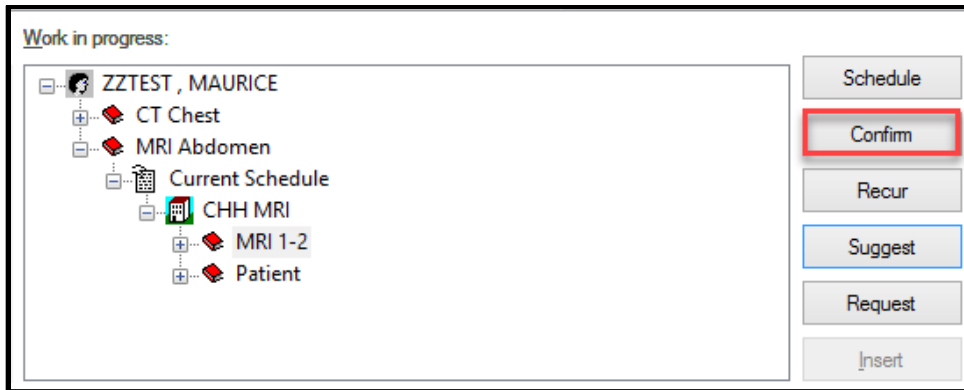
8. The Suggested Schedules window is displayed.
9. Press **SHIFT** and click both appointments.
10. In the lower left portion of the screen, select **Schedule as a Visit Within**. Leave the time frame defaulted to 1 day. This allows you to find an available appointment time for both appointments within a one-day time frame.
11. Click **Suggest**.
12. The Suggested Sequence window is displayed. This allows you to indicate to the system which appointment you would like to schedule First.
13. Leave the appointments in the order they default and click **OK**.



14. Select one of the appointment times.
15. Click Select.
16. Click OK.

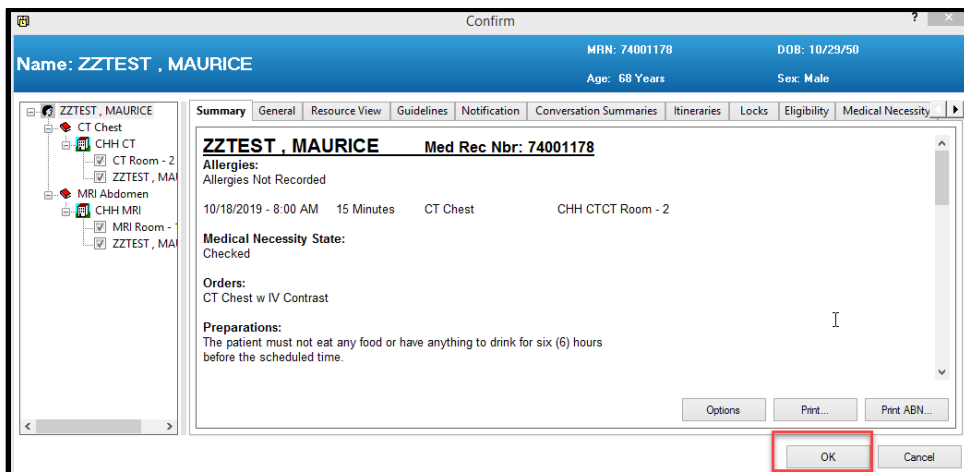


17. Both appointments are displayed in the WIP in a pending status.
18. Select the patient's Name in the WIP.
19. Click Confirm.



20. The Confirmation window is displayed with a summary of both appointments.

21. Click **OK**. The appointment is now in a Confirmed status.

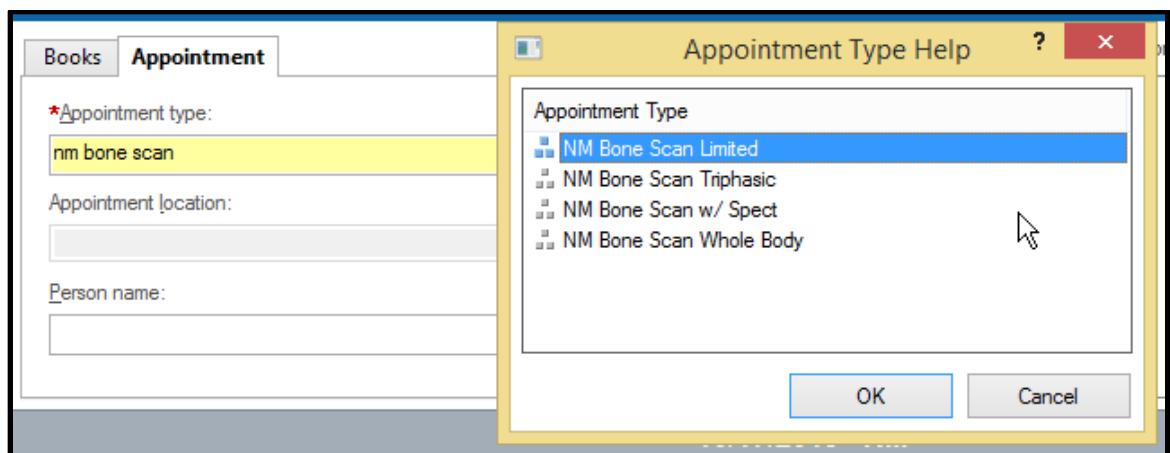


8 Protocol Appointment Scheduling (Radiology Only)

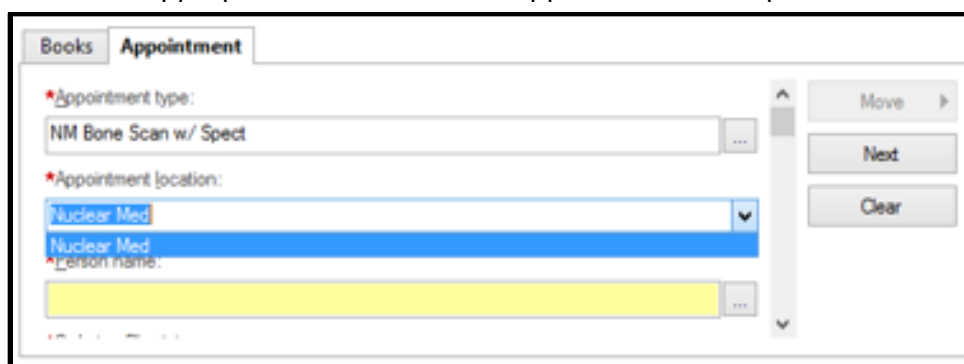
8.1 Schedule a Protocol Appointment

Complete the following steps to use Protocol Appointment scheduling:

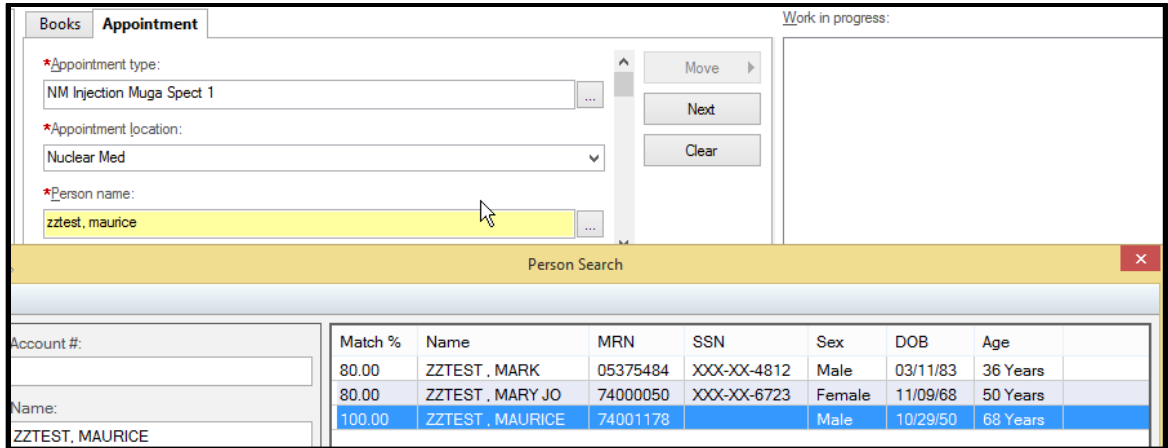
1. Click the **Appointment** tab.
2. In the **Appointment Type** box, enter the First few letters of your appointment type Name (i.e. NM Bone Scan) and press ENTER or click the ellipsis.
3. The Appointment Type Help window opens.
4. Select the appropriate Appointment Type Name (i.e. NM Bone Scan w/Spect).
5. Click **OK**.
6. The Appointment Type Name now is displayed in the Appointment Type box.



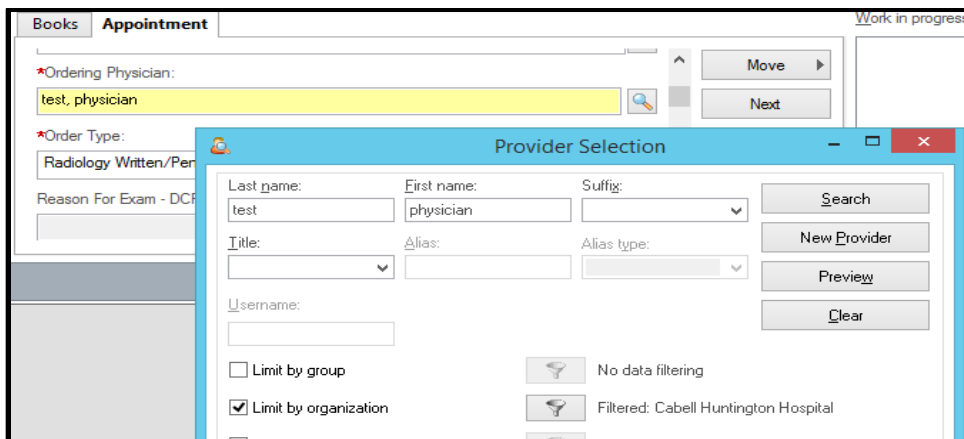
7. Click on Drop Down arrow and the list of Appointment Locations are listed.
8. Select the appropriate location for the appointment to be performed.



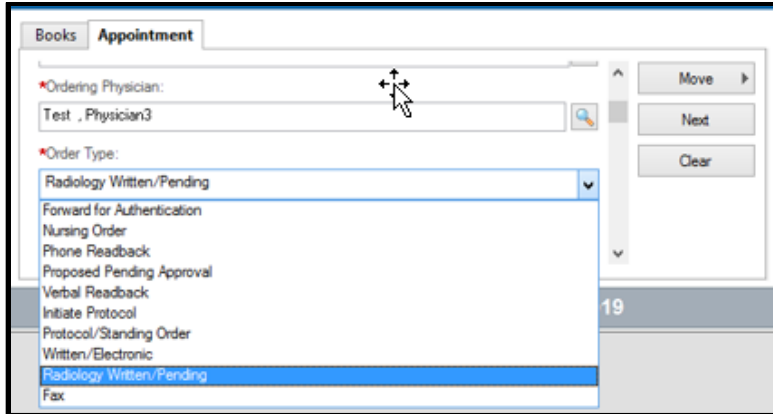
9. In the Person Name box, enter the patient's Last Name and First two letters of the First Name.
10. Press ENTER or the ellipses to search.
11. The Person Search window opens and lists patients whose Name matches the patient information you entered.
12. Select the appropriate patient.
13. If the Encounter for the Test is not showing, click **Add Encounter**.
14. Click **OK** (The patient's Name now is displayed in the Person Name box).



15. In the Ordering Physician box, enter the Physicians Last Name and First two letter of the First Name.
16. Press ENTER or the ellipses to search.
17. Provider Selection window opens.
18. Select the appropriate Physician.
19. Click **OK** (The provider's Name now is displayed in the Ordering Physician box).

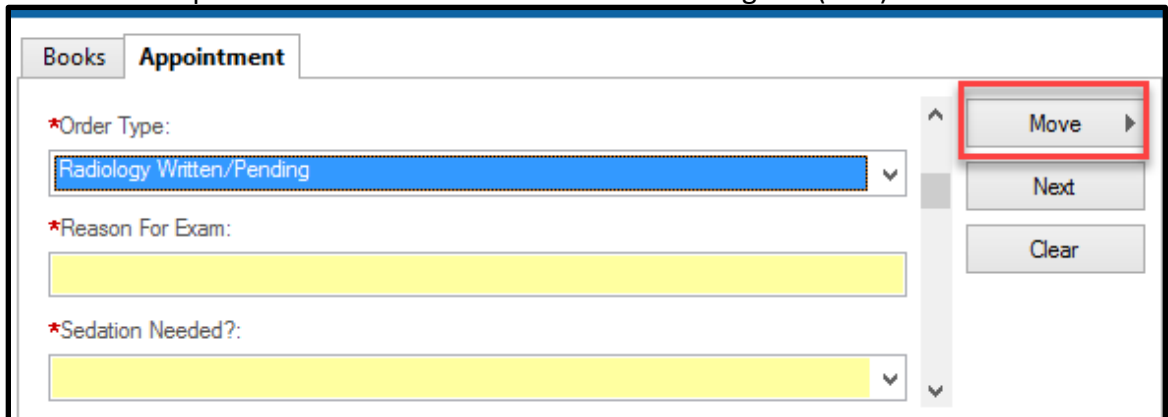


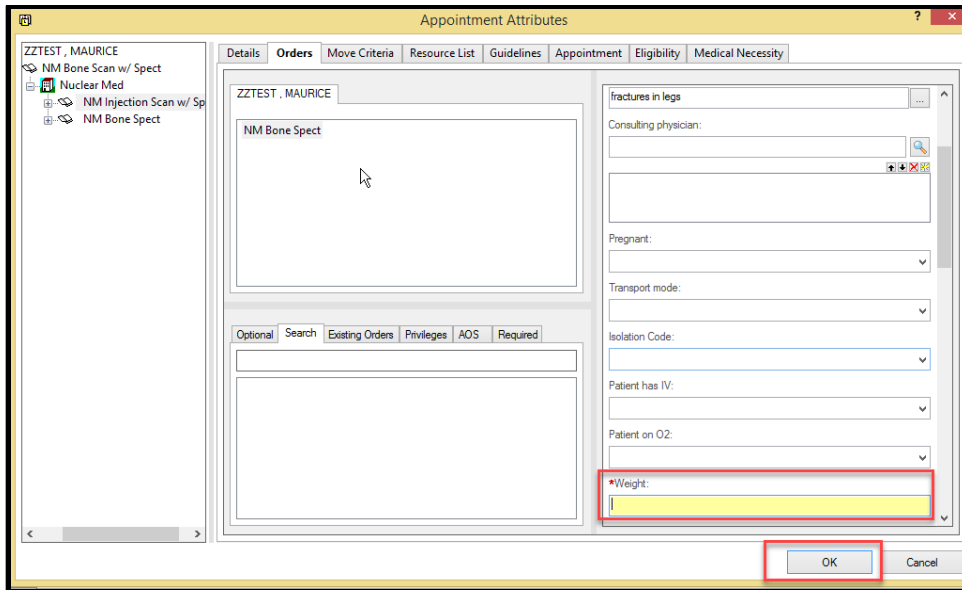
20. **Order Type** (will automatically populate) (if incorrect, Click on Drop down arrow and list of Order Type is displayed, choose the correct one).



21. Most Appointment Types are built with additional questions to be asked during the scheduling process (Accept Format questions). Answer the remaining questions for the Appointment Type.

22. Click **Move** to place the event details in the Works in Progress (WIP).



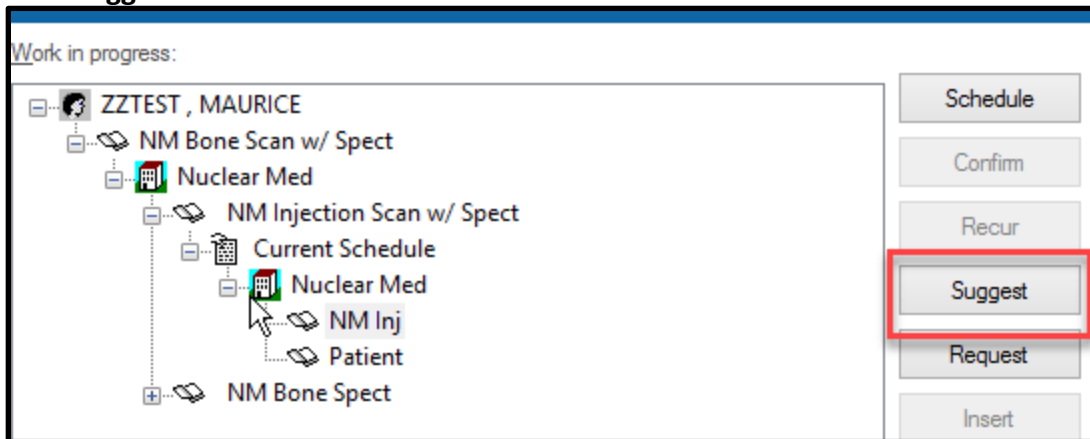


23. Complete appropriate details in the Appointment Attributes window.

24. Click **OK**.

25. The protocol components - the injection and scan - display within the WIP.

26. Click **Suggest**.



27. Suggested List window opens.

28. Click **Suggest** to search for valid times and availability. The Suggested Schedules window is display.

Suggest Criteria Preferences

Appointment Date

Date range: 10/17/2019 11/16/2019

Schedule in: 1 Days From: 10/17/2019

Date restrictions: Next 2 Days

Mon Tue Wed Thu Fri Sat Sun Exceptions

Appointment Time

Time range: 0800 2355

Time restrictions: AM Only

Schedule as visit within 1 day(s)

Override suggested date and time

Schedule multiple persons to mixed Group Sessions

Clear Suggest

Next Next Day Clear Select

29. Select a valid time.

30. Click OK.

Suggest Criteria Preferences

Appointment Date

Date range: 10/17/2019 11/16/2019

Schedule in: 1 Days From: 10/17/2019

Date restrictions: Next 2 Days

Mon Tue Wed Thu Fri Sat Sun Exceptions

Appointment Time

Time range: 0800 2355

Time restrictions: AM Only

Schedule as visit within 1 day(s)

Override suggested date and time

Schedule multiple persons to mixed Group Sessions

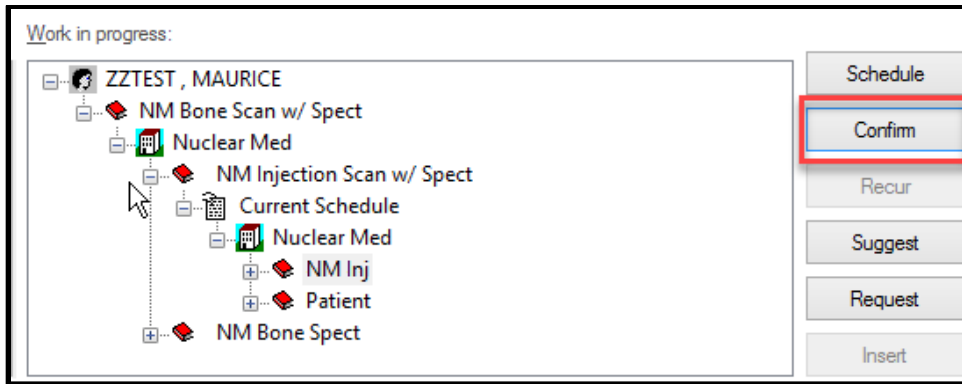
Clear Suggest

Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Li
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 11:30 AM	ZZTEST, MARK	Thursday, 10/17/2019 - 11:30 AM	NM Injection Scan w/ Spect	NM Inj Chair	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 1:30 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 1:30 PM	NM Bone Spect	NM Room - 2	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 12:00 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 12:00 PM	NM Injection Scan w/ Spect	NM Inj Chair	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 2:00 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 2:00 PM	NM Bone Spect	NM Room - 2	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 12:30 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 12:30 PM	NM Injection Scan w/ Spect	NM Inj Chair	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 2:30 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 2:30 PM	NM Bone Spect	NM Room - 2	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 1:00 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 1:00 PM	NM Injection Scan w/ Spect	NM Inj Chair	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 3:00 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 3:00 PM	NM Bone Spect	NM Room - 2	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 1:30 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 1:30 PM	NM Injection Scan w/ Spect	NM Inj Chair	Nuclea
2 Hour(s) 45 Minutes	Thursday, 10/17/2019 - 3:30 PM	ZZTEST, MARK	Thursday, 10/17/2019 - 3:30 PM	NM Bone Spect	NM Room - 2	Nuclea

Next Next Day Clear Select OK Cancel

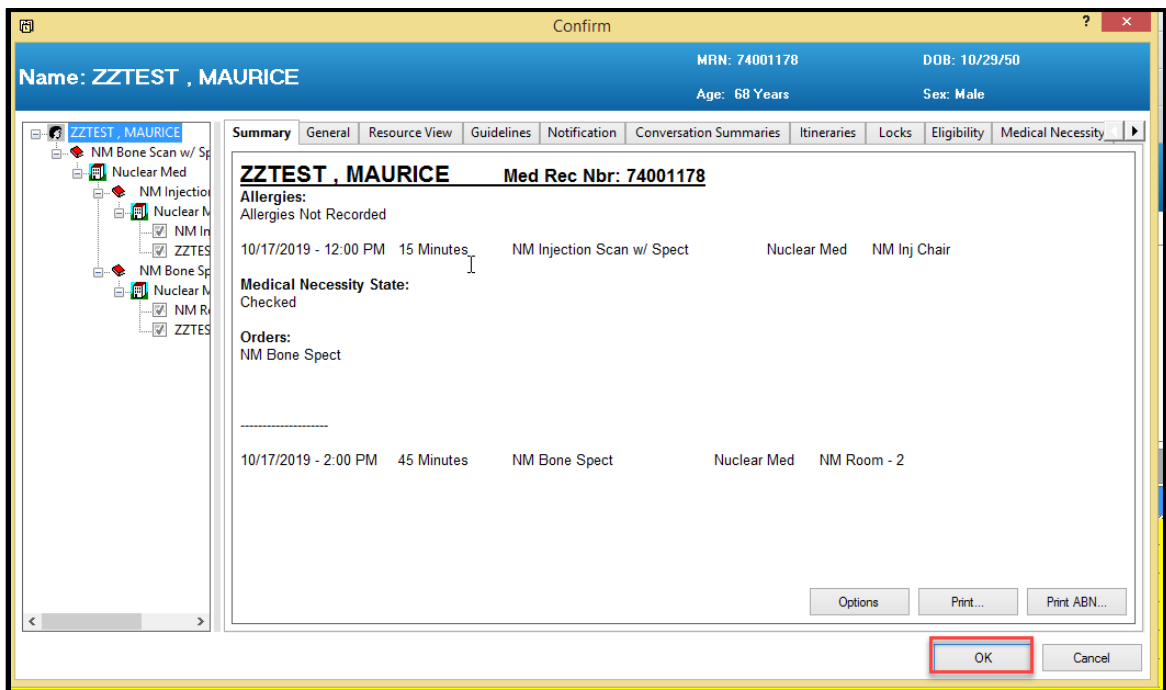
31. The appointment will display in a pending status within the WIP.

32. Click Confirm.



33. Confirm window opens.


34. Click **OK** in the **Confirm Summary** dialog box. This will confirm both the injection and the scan at the same time. The WIP should now be empty.

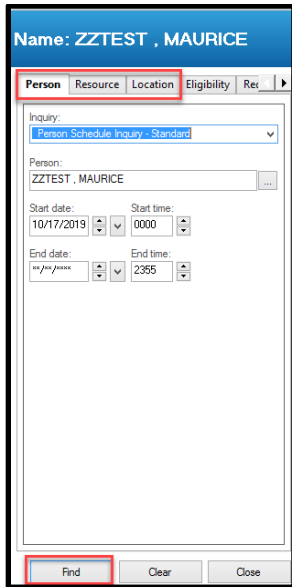


8.2 Cancel Protocol Appointments via Appointment Inquiry (Radiology Only)

NOTE: To cancel a Protocol appointment, follow the same procedure as with other appointments. However, because these are two appointment types linked together, the system will ask if you want to cancel both appointments or just one.

Complete the following steps to cancel via Appointment Inquiry:

1. Select Appointment Inquiry .
2. Search for Appointment via Person Inquiry, Resource Inquiry, or Location Inquiry.
3. Search for patient if not showing by typing in the Patient's Name in the Person area and Click the **ellipses**.
4. Click **Find**.



Name: ZZTEST, MAURICE

Person Resource Location Eligibility Res

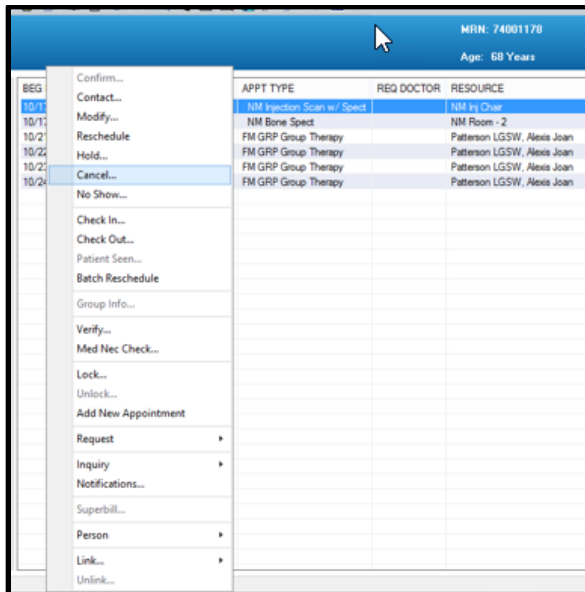
Inquiry: Person Schedule Inquiry - Standard

Person: ZZTEST, MAURICE

Start date: 10/17/2019 Start time: 0000

End date: End time: 2355

Find Clear Close

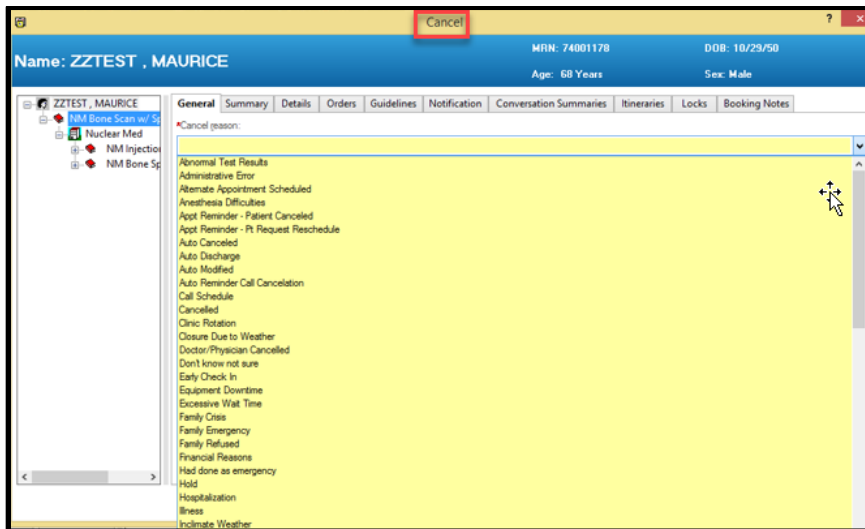
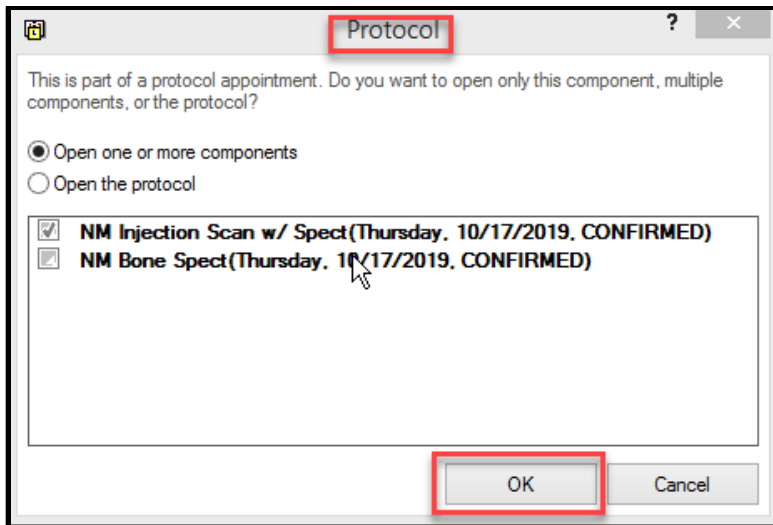


MRN: 74001178
Age: 68 Years

BEG	APPT TYPE	REQ DOCTOR	RESOURCE
10/17	NM Injection Scan w/ Spect		NM Pj Over
10/17	NM Bone Spect		NM Room -2
10/21	FM GRP Group Therapy		Patterson LGSW, Alexis Joan
10/22	FM GRP Group Therapy		Patterson LGSW, Alexis Joan
10/22	FM GRP Group Therapy		Patterson LGSW, Alexis Joan
10/22	FM GRP Group Therapy		Patterson LGSW, Alexis Joan

5. Select Appointment, **Right click** and select **Cancel**.
6. Protocol window opens.

7. Select **Open this Component** (to individually cancel a specific component).
8. Select **Open this Protocol** (to cancel both components).
9. Click **OK**.



10. Cancel window opens.

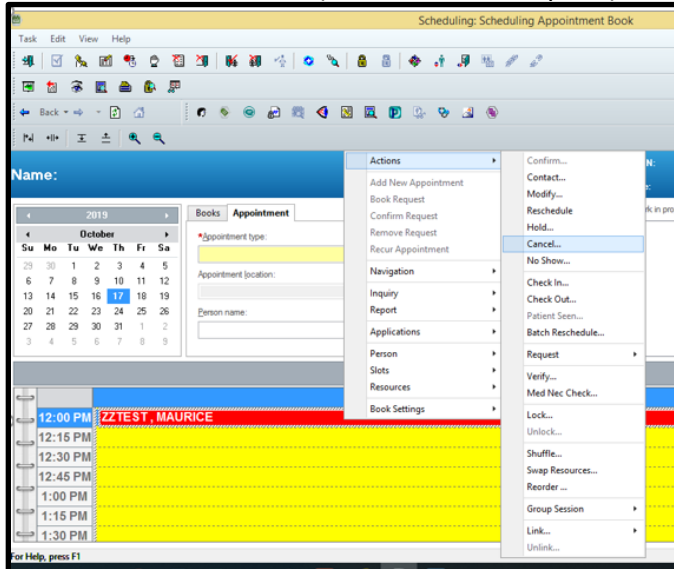
NOTE: As with regular appointments, you must give either a cancel reason. If you are just modifying one component of the Protocol, you will only need to give a reason once.

11. Select **Cancel Reason** from drop-down list (To modify both components, select a reason from the list for each appointment).
12. Click **OK** to cancel the appointment.

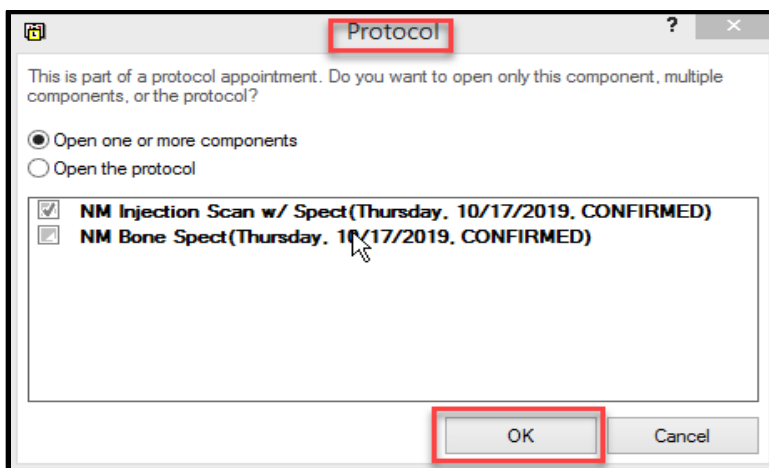
8.3 Cancel Protocol Appointment via Grid Area

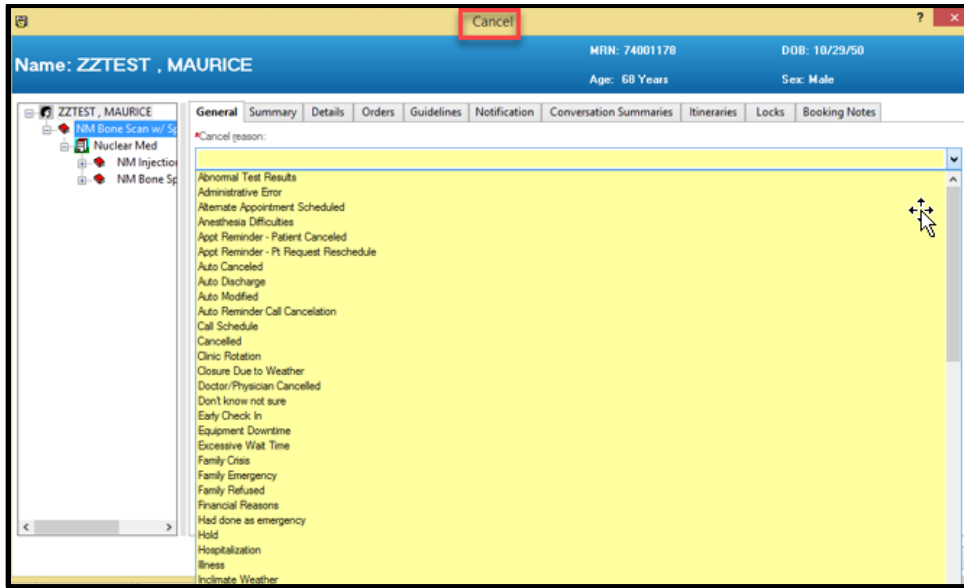
Complete the following steps to cancel via Grid Area:

1. **Click date** on the Calendar (patients appointment date) to see the list of appointments.
2. Select the patient's appointment.
3. Right Click Appointment.
4. Select **Actions > Cancel** (Cancel window opens).



5. Protocol Window opens.
6. Select Open this Component (to individually cancel a specific component).
7. Select Open this Protocol (to cancel both components).
8. Click **OK**.





9. Cancel window opens.


NOTE: As with regular appointments, you must give either a cancel reason. If you are just modifying one component of the Protocol, you will only need to give a reason once.

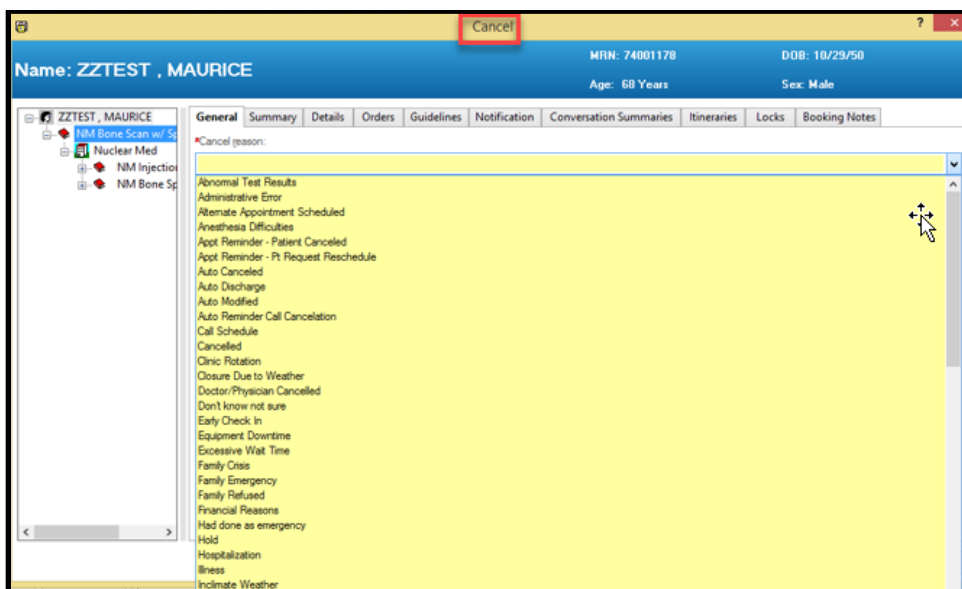
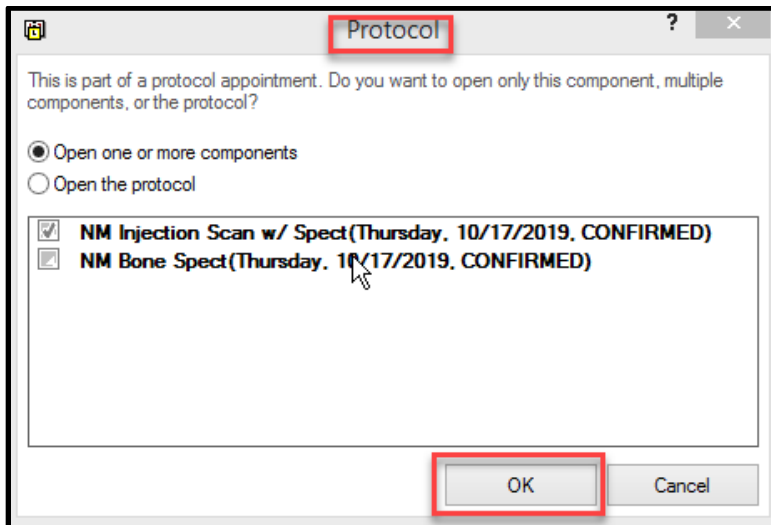
10. Select **Cancel Reason** from drop-down list (To modify both components, select a reason from the list for each appointment).

11. Click **OK** to cancel the appointment.

8.4 Cancel Protocol Appointment via Toolbar

Complete the following steps to cancel via the Toolbar:

1. Click date on the Calendar (patients appointment date) to see the list of appointments.
2. Select the patient's appointment.
3. Click the **Cancel**  icon on Toolbar.
4. Protocol Window opens.
5. Select Open this Component (to individually cancel a specific component).
6. Select Open this Protocol (to cancel both components).
7. Click **OK**.



8. Cancel window opens.


NOTE: As with regular appointments, you must give either a cancel reason. If you are just modifying one component of the Protocol, you will only need to give a reason once.

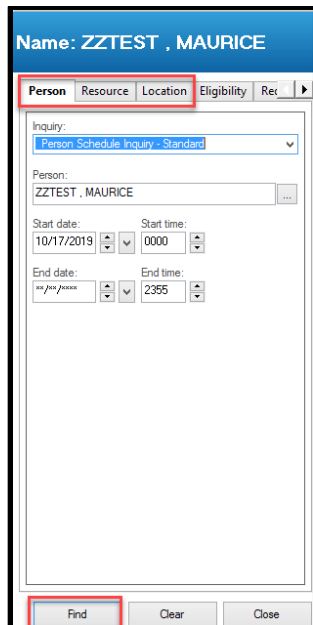
9. Select Cancel Reason from drop-down list (To modify both components, select a reason from the list for each appointment).
10. Click **OK** to cancel the appointment.

8.5 Reschedule Protocol Appointments via Appointment Inquiry (Radiology Only)

NOTE: To Reschedule a Protocol appointment, follow the same procedure as with other appointments. However, because these are two appointment types linked together, the system will ask if you want to reschedule both appointments or just one.

Complete the following steps to reschedule appointments via Appointment Inquiry:

1. Select Appointment Inquiry .
2. Search for Appointment via Person Inquiry, Resource Inquiry, or Location Inquiry.
3. Search for patient if not showing by typing in the Patient's Name in the Person area and Click the **ellipses**.
4. Click **Find**.



Name: ZZTEST , MAURICE

Person Resource Location Eligibility Res

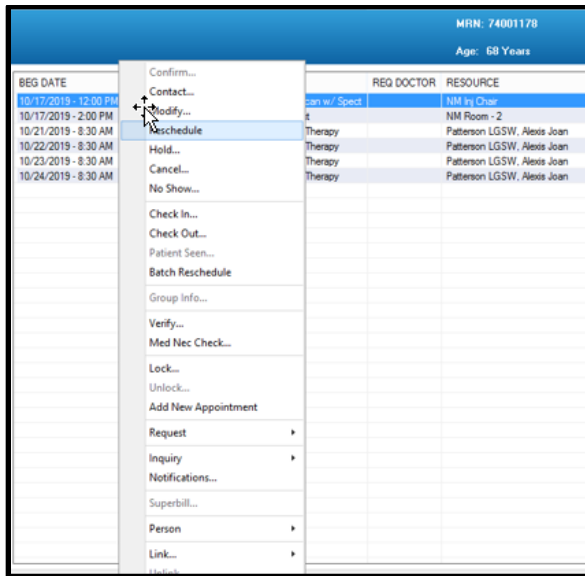
Inquiry:
Person Schedule Inquiry - Standard

Person:
ZZTEST, MAURICE

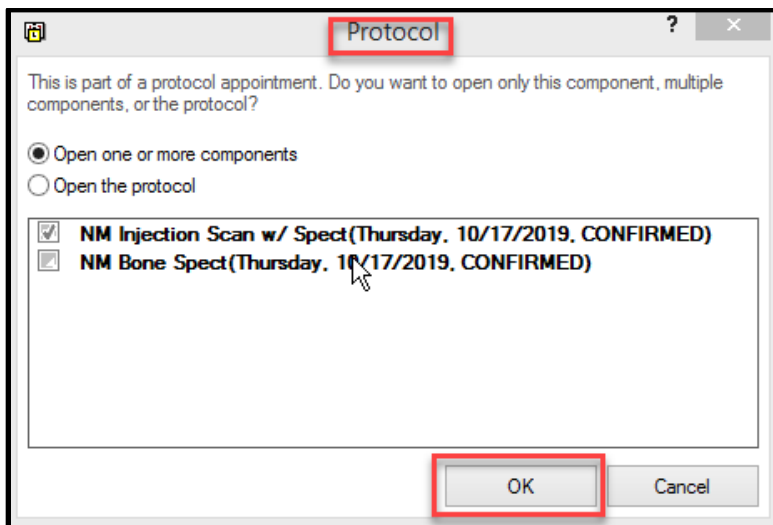
Start date: 10/17/2019 Start time: 0000

End date: 10/17/2019 End time: 2355

Find Clear Close

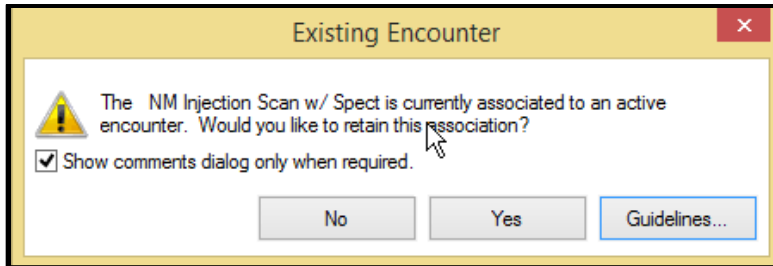


5. Select Appointment, Right Click and select **Reschedule**.
6. Protocol window opens.
7. Select Open this Component (to individually reschedule a specific component).
8. Select Open this Protocol (to reschedule both components).
9. Click **OK**.



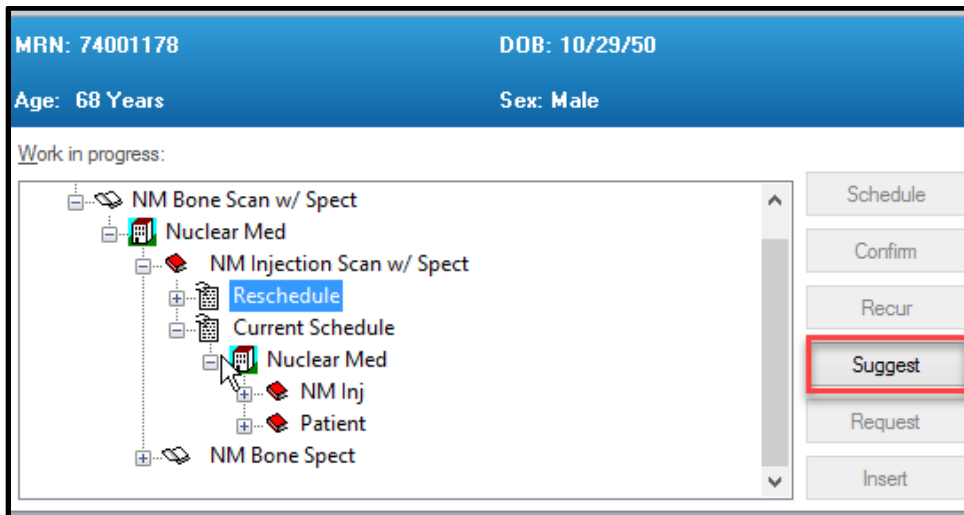
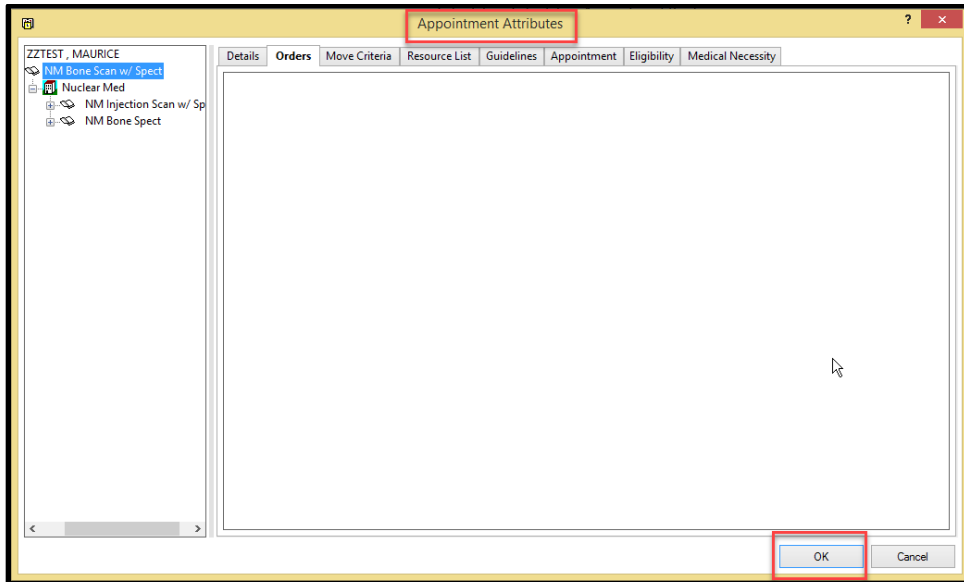
10. Existing Encounter window opens.
11. Click Yes to keep the association to the same Encounter.
12. The 2nd Existing Encounter window will open for the 2nd part of the protocol (i.e. NM Bone Spect)

13. Click Yes.



14. Appointment Attributes window opens.

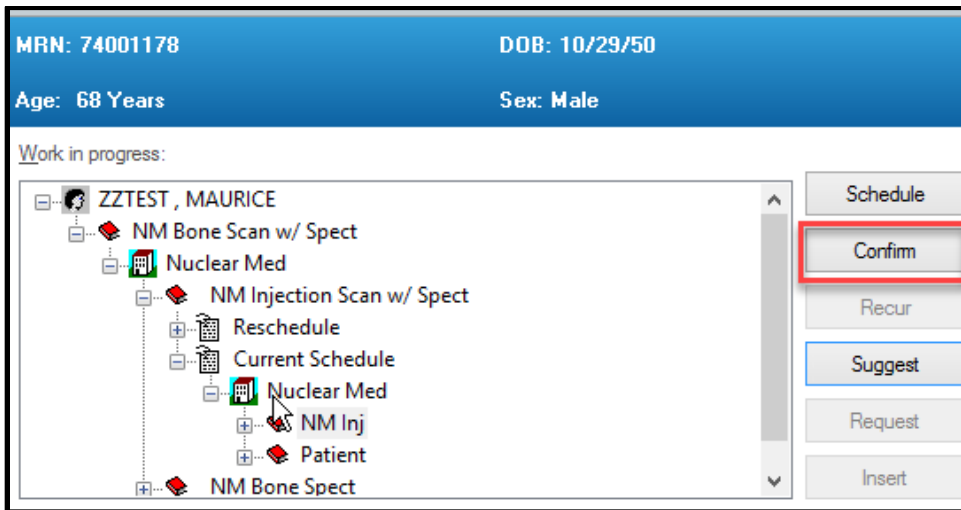
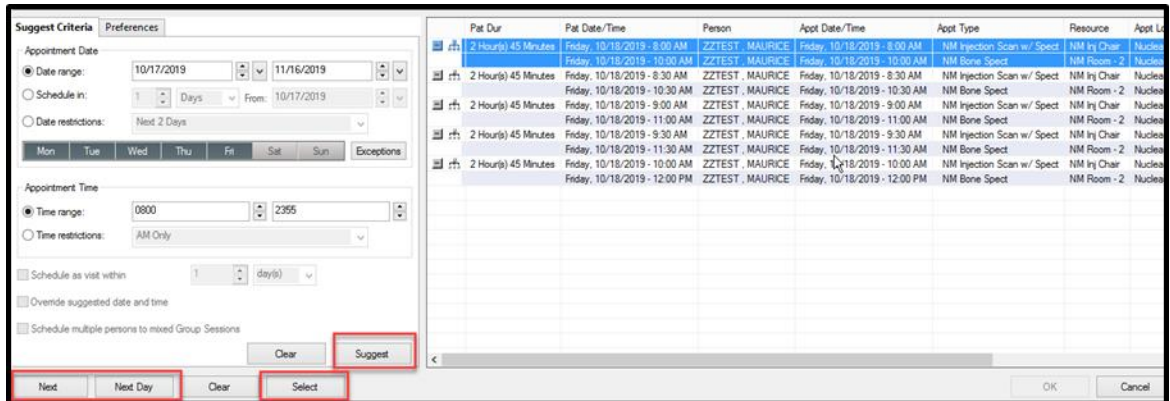
15. Click OK.



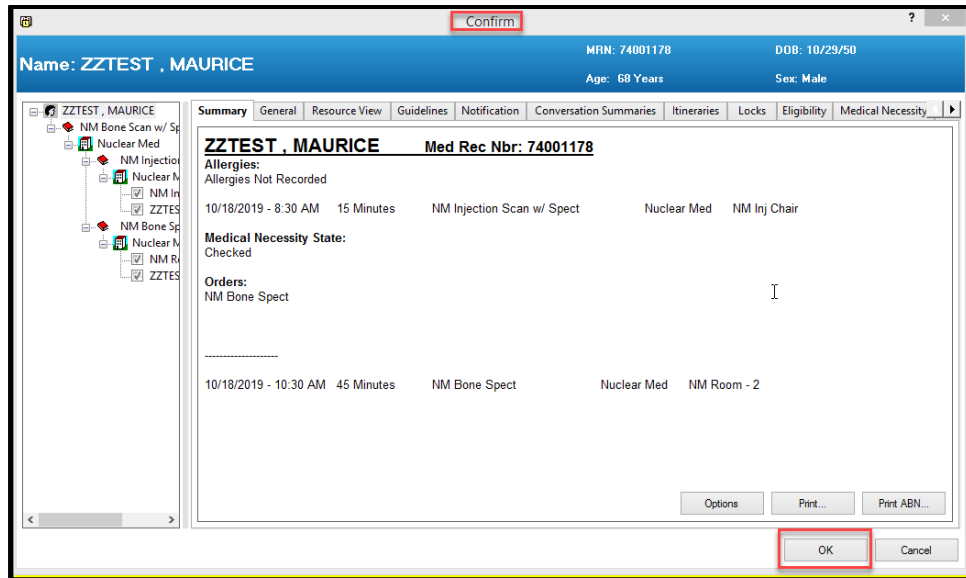
16. Work in Progress window opens.

17. Click Reschedule.

18. Click Suggest.
19. Suggest Criteria window opens.
20. Click Suggest and list of opens shows to the right.
21. Click **Next** or **Next Day** to see more suggested appointments.
22. Select the appointments.
23. Click **Select**.
24. Click **OK**.



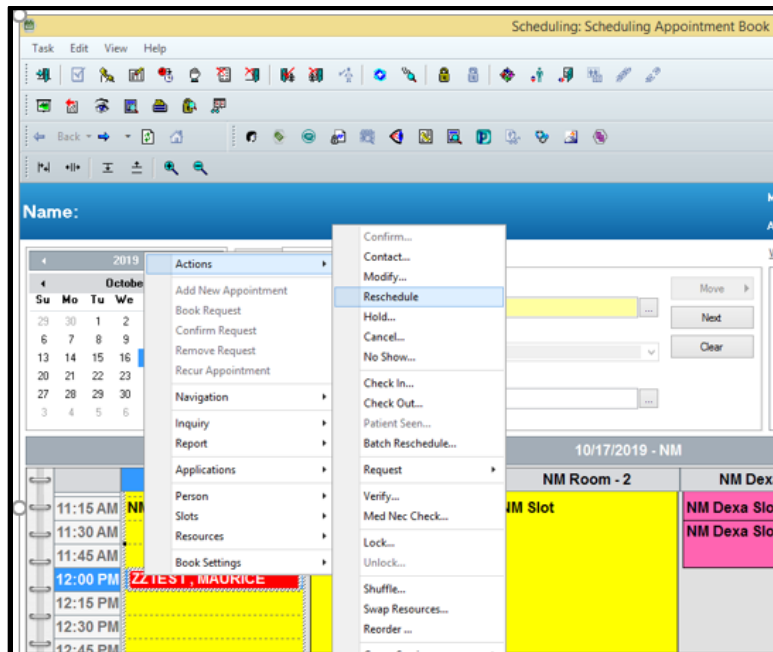
25. Work in Progress window opens.
26. The appointment will display in a pending status within the WIP.
27. Click **Confirm**.
28. Confirm window opens.
29. Click **OK** in the Confirm Summary dialog box. This will confirm both the injection and the scan at the same time. The WIP should now be empty.



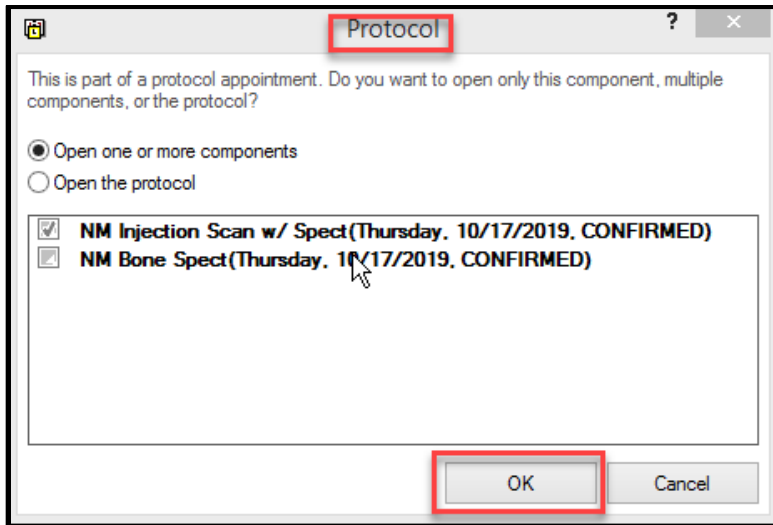
8.6 Reschedule Protocol Appointment via Grid Area

Complete the following steps to reschedule appointments via Grid Area

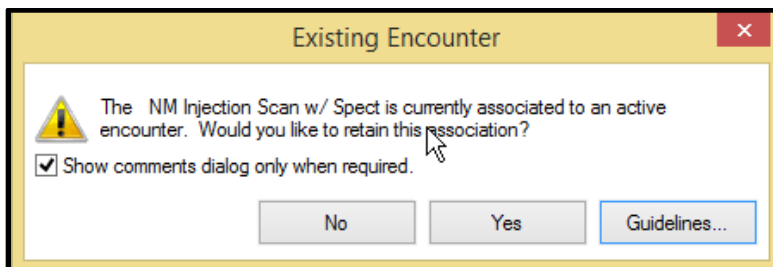
1. Click a date on the Calendar (patients appointment date) to see the list of appointments.
2. Select the patient's appointment.
3. Right click the Appointment.
4. Select Actions > Reschedule.



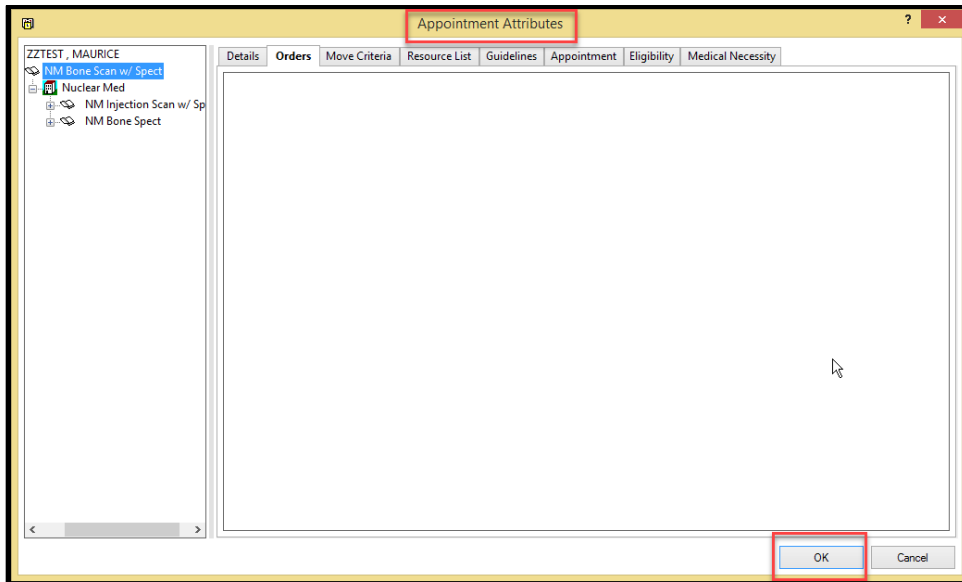
5. Protocol Window opens.
6. Select Open this Component (to individually reschedule a specific component).
7. Select Open this Protocol (to reschedule both components).
8. Click **OK**.



9. Existing Encounter window opens.
10. Click **Yes** to keep the association to the same Encounter.
11. The 2nd Existing Encounter window will open for the 2nd part of the protocol (i.e. **NM Bone Spect**).
12. Click **Yes**.



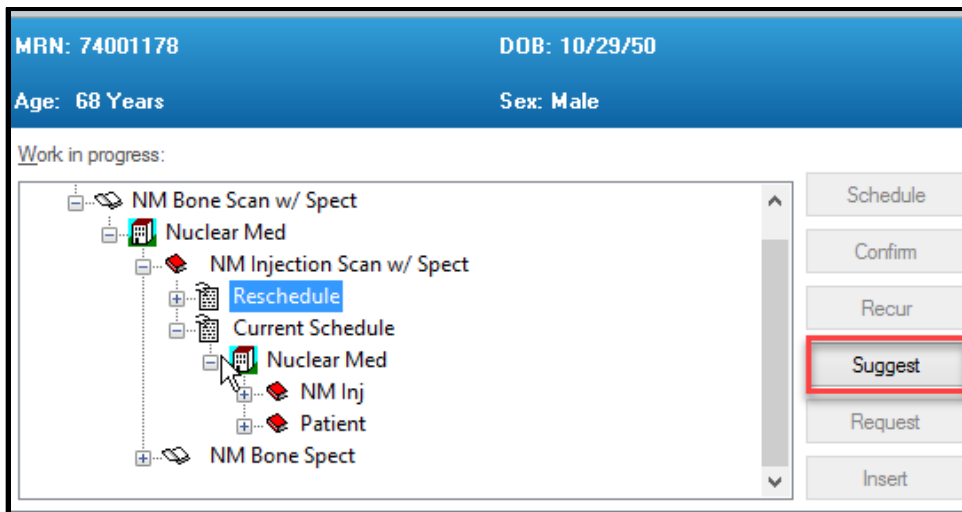
13. Appointment Attributes window opens.
14. Click **OK**.



15. Work in Progress window opens.

16. Click Reschedule.

17. Click Suggest.



18. Suggest Criteria window opens.

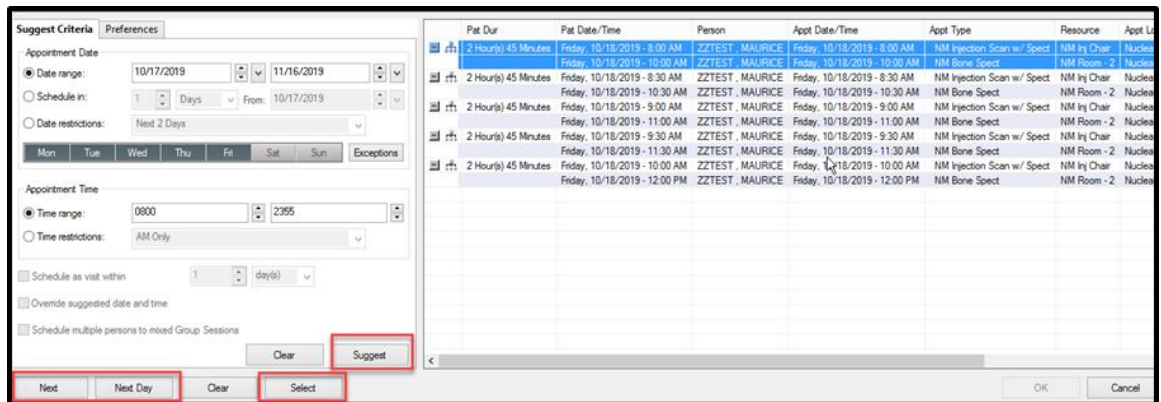
19. Click **Suggest** and list of opens shows to the right.

20. Click Next or Next Day to see more suggested appointments.

21. Select the appointments.

22. Click Select.

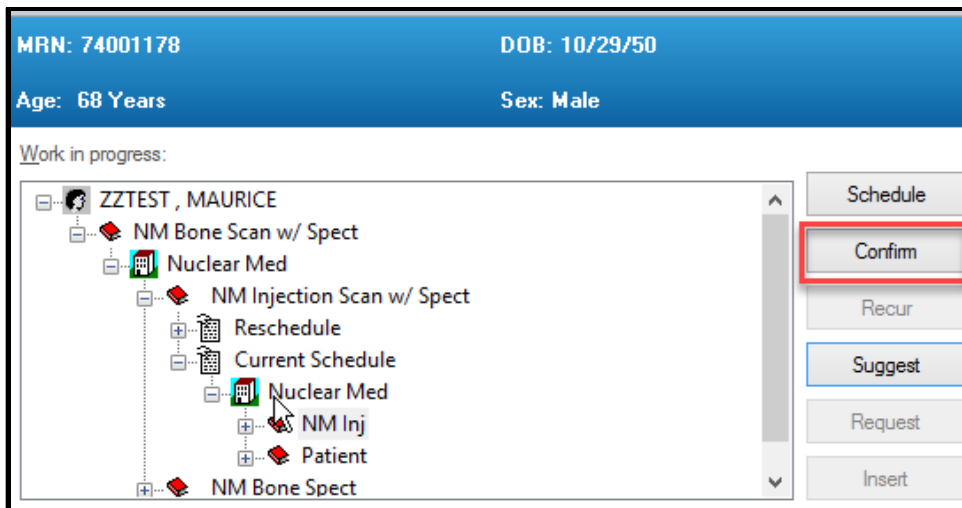
23. Click **OK**.



24. Work in Progress window opens.

25. The appointment will display in a pending status within the WIP.

26. Click **Confirm**.

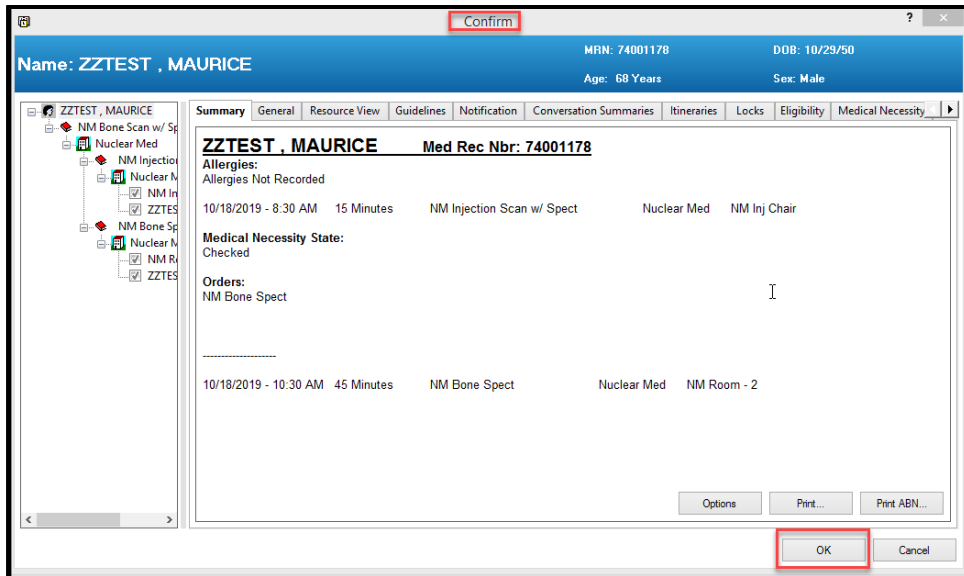


27. Confirm window opens.


28. Click **OK** in the Confirm Summary dialog box.

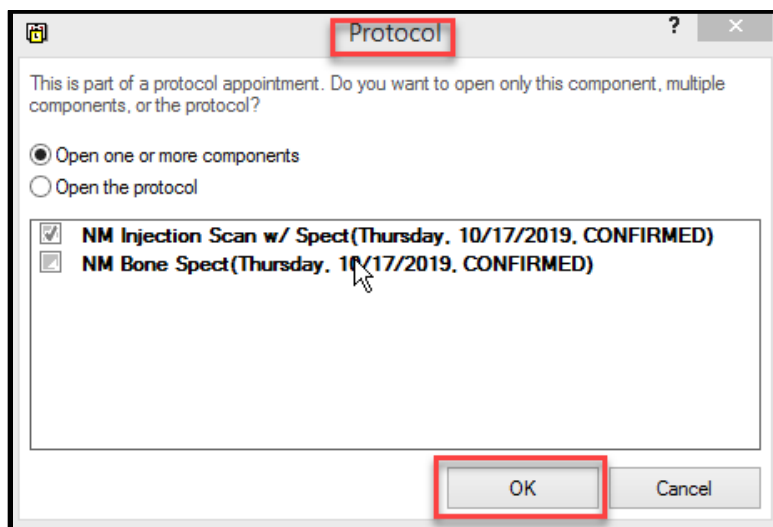
29. This will confirm both the injection and the scan at the same time.

30. The WIP should now be empty.

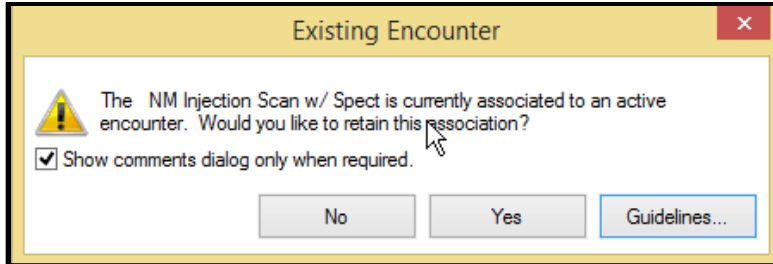


8.7 Reschedule Protocol Appointment via Toolbar

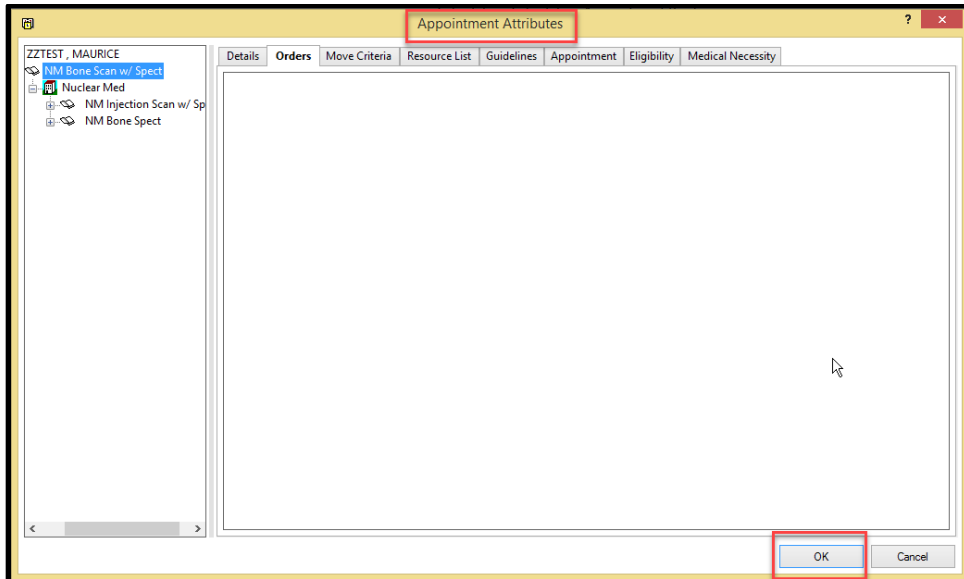
1. Click date on the Calendar (patients appointment date) to see the list of appointments.
2. Select the patient's appointment.
3. Click the Reschedule  icon on Toolbar.
4. Protocol window opens.
5. Select Open this Component (to individually reschedule a specific component).
6. Select Open this Protocol (to reschedule both components).
7. Click **OK**.



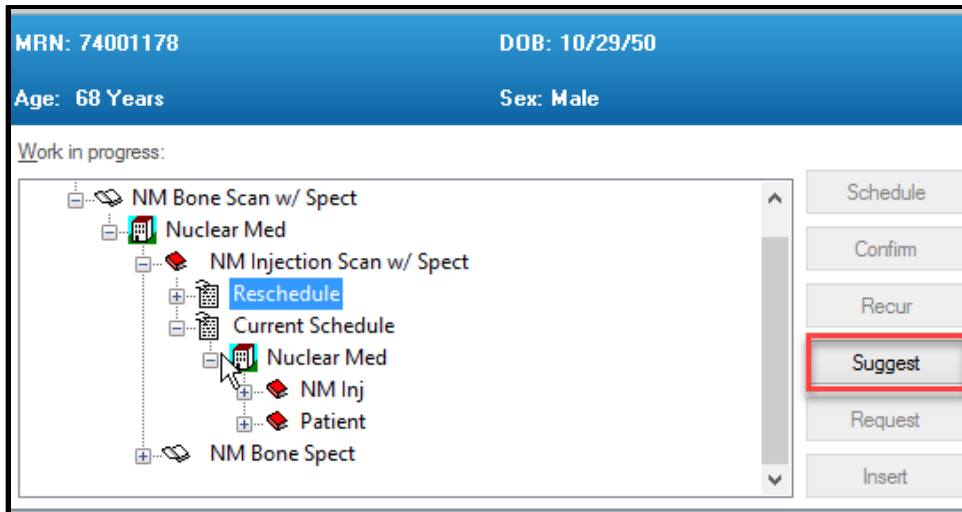
8. Existing Encounter window opens.
9. Click **Yes** to keep the association to the same Encounter.
10. The 2nd Existing Encounter window will open for the 2nd part of the protocol (i.e. NM Bone Spect).
11. Click **Yes**.



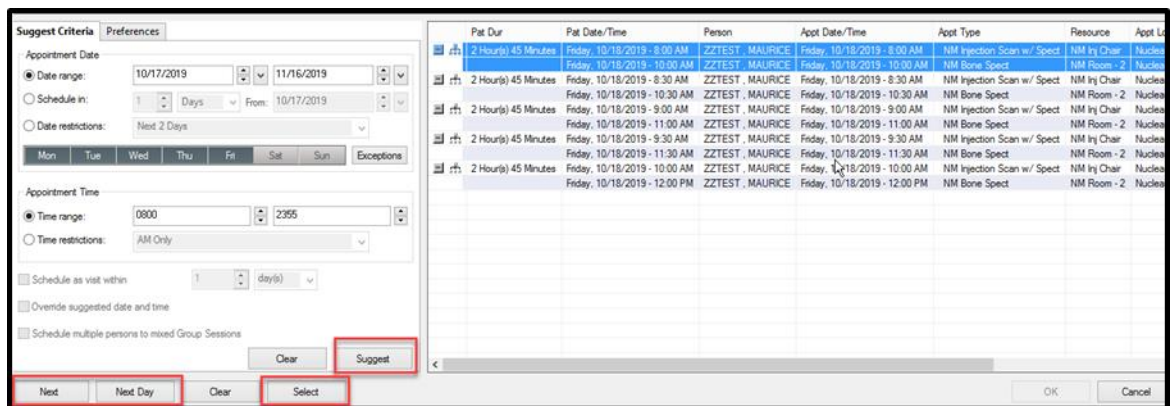
12. Appointment Attributes window opens.
13. Click **OK**.



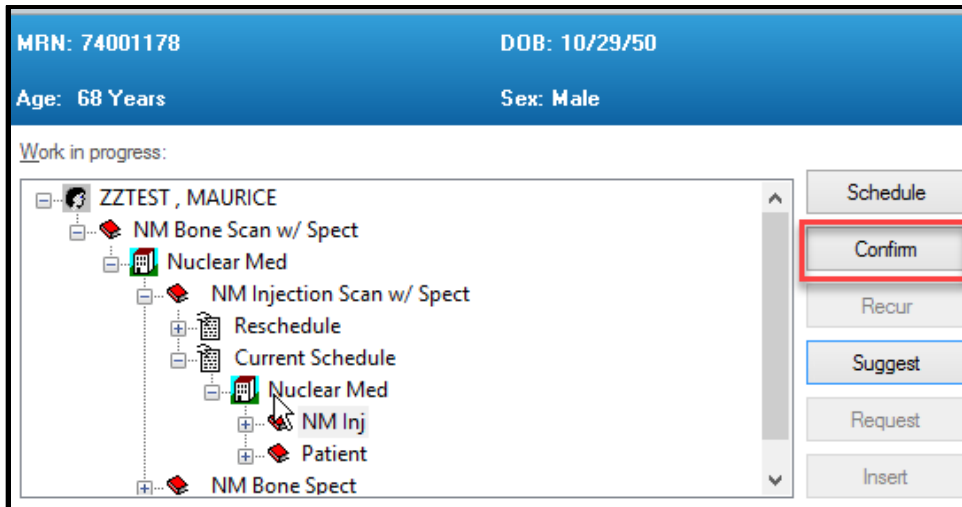
14. Work in Progress window opens.
15. Click Reschedule.
16. Click Suggest.



17. Suggest Criteria window opens.
18. Click Suggest and list of opens shows to the right.
19. Click Next or Next Day to see more suggested appointments.
20. Select the appointments.
21. Click Select.
22. Click OK.

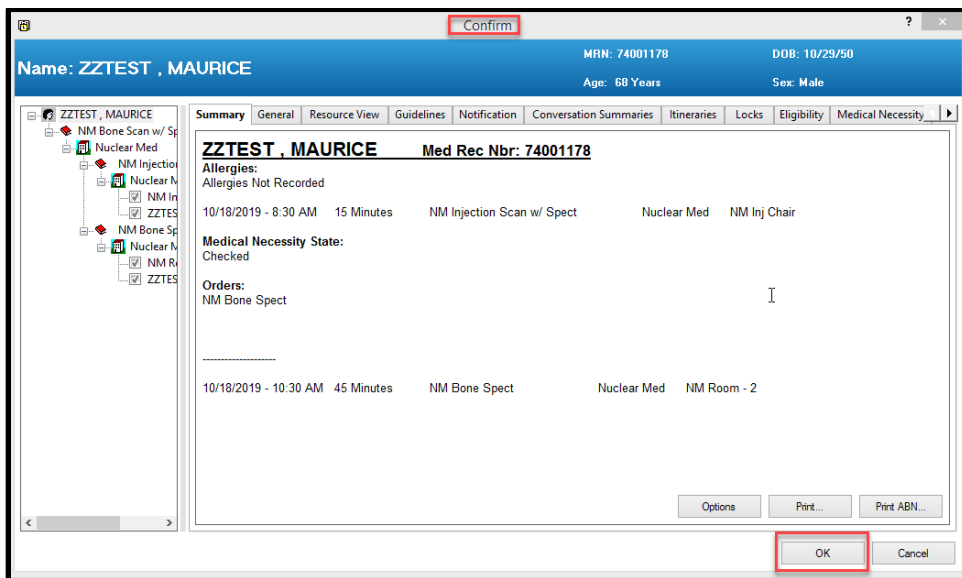


23. Work in Progress window opens.
24. The appointment will display in a pending status within the WIP.
25. Click Confirm.



26. Confirm window opens

27. Click **OK** in the Confirm Summary dialog box. This will confirm both the injection and the scan at the same time. The WIP should now be empty



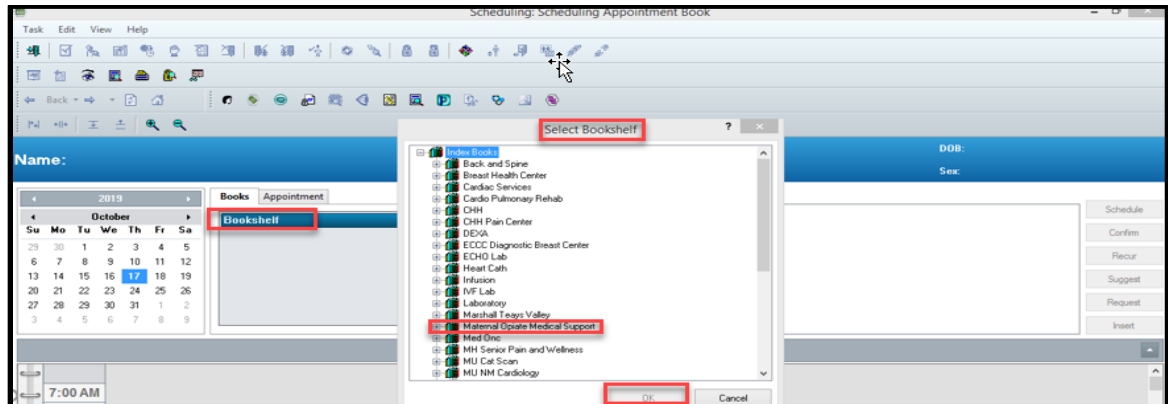
9 Group Appointments (MOMs Only)

- **Note:** Group appointments require a group session to **First** be placed out in the slots before a group appointment can be booked.

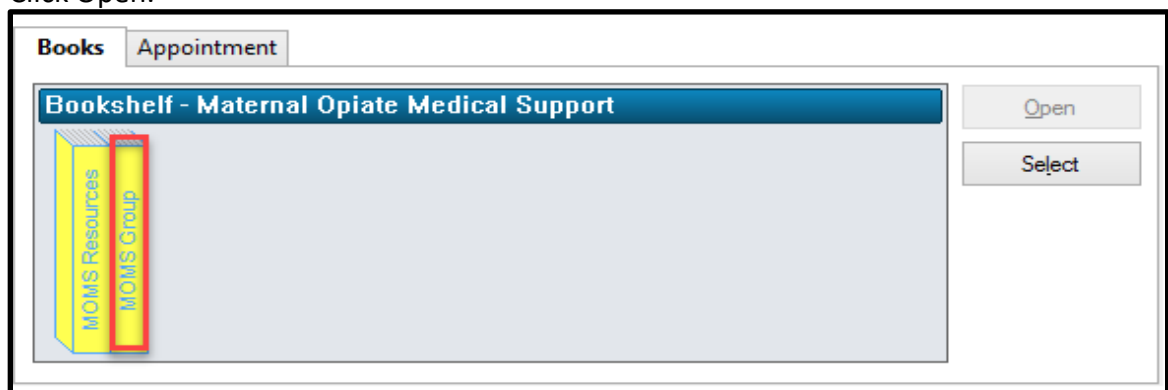
9.1 MOM's Group Appointment

Complete the following steps to book a group session appointment:

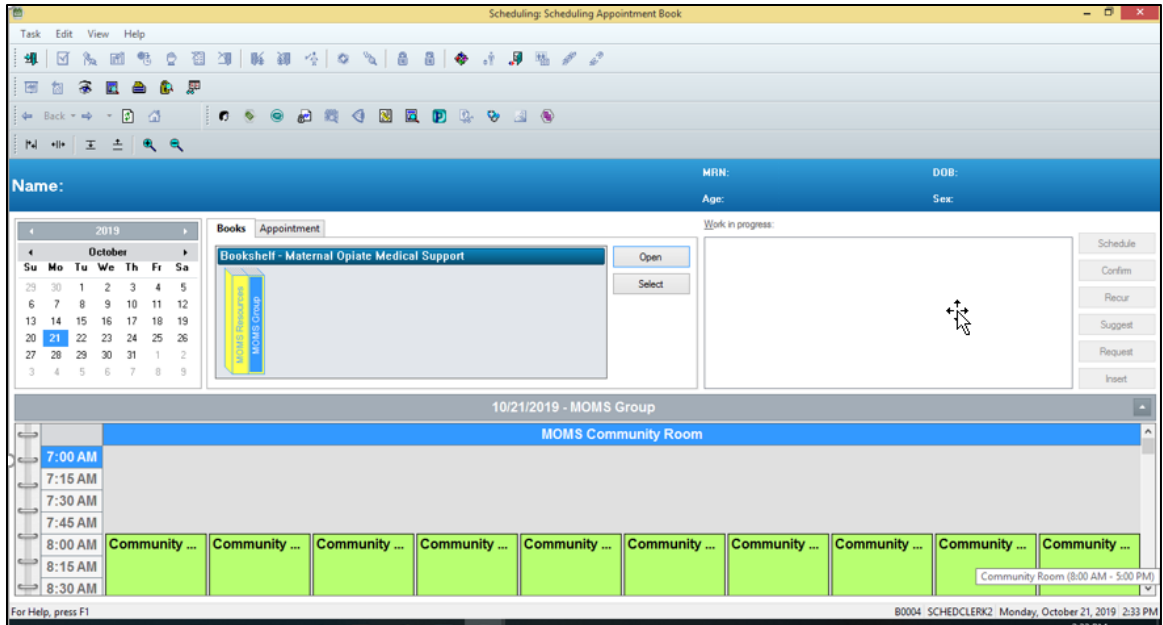
1. Click Books.
2. Click the Bookshelf.
3. Select Bookshelf window opens.
4. Select the Bookshelf that you want (i.e. Maternal Opiate Medical Support).
5. Click OK.



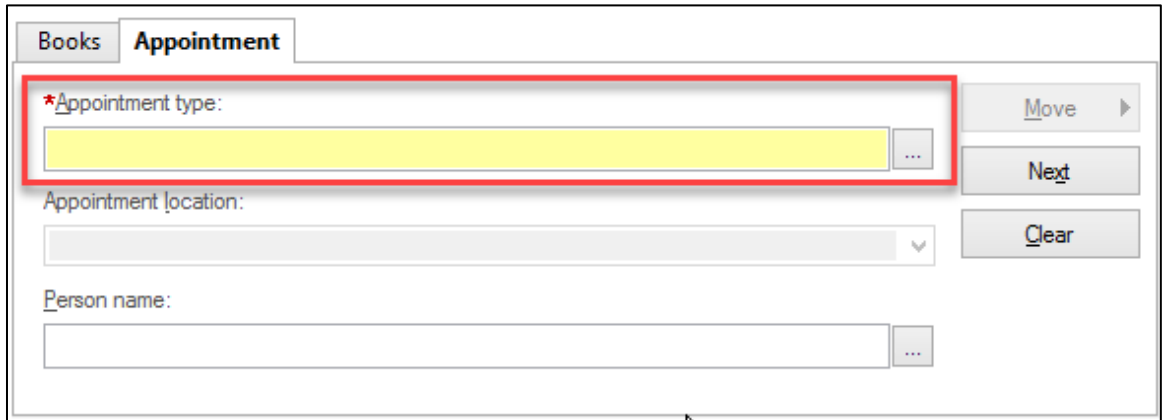
6. Click MOMS Group book.
7. Click Open.



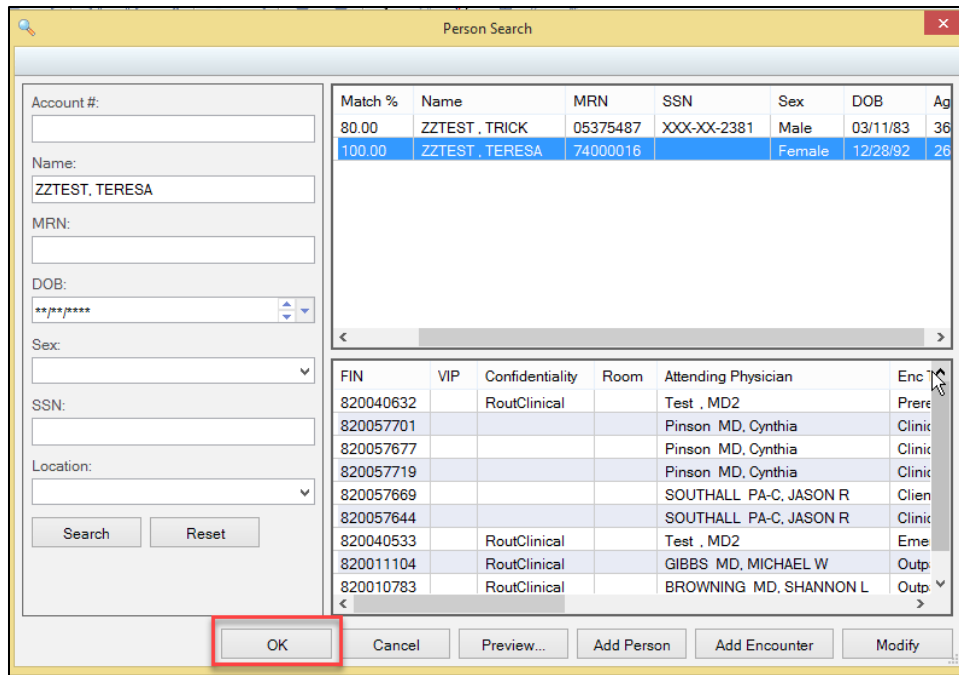
8. MOMS Community Room Calendar opens up with current day schedule (click on the Calendar to change the day).
9. Click on Appointment Tab.



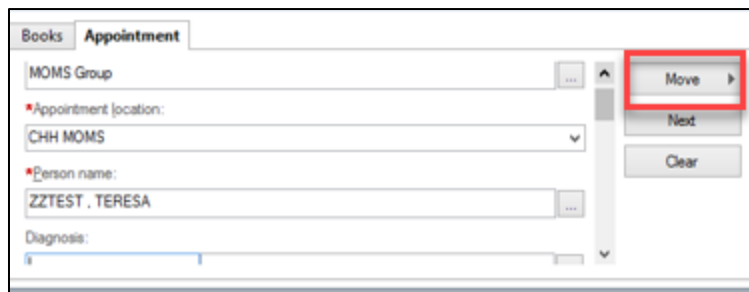
10. Appointment Tab opens
11. In Appointment Type: type in MOMS Group and Press Enter
12. Appointment Location automatically defaults to CHH MOMS



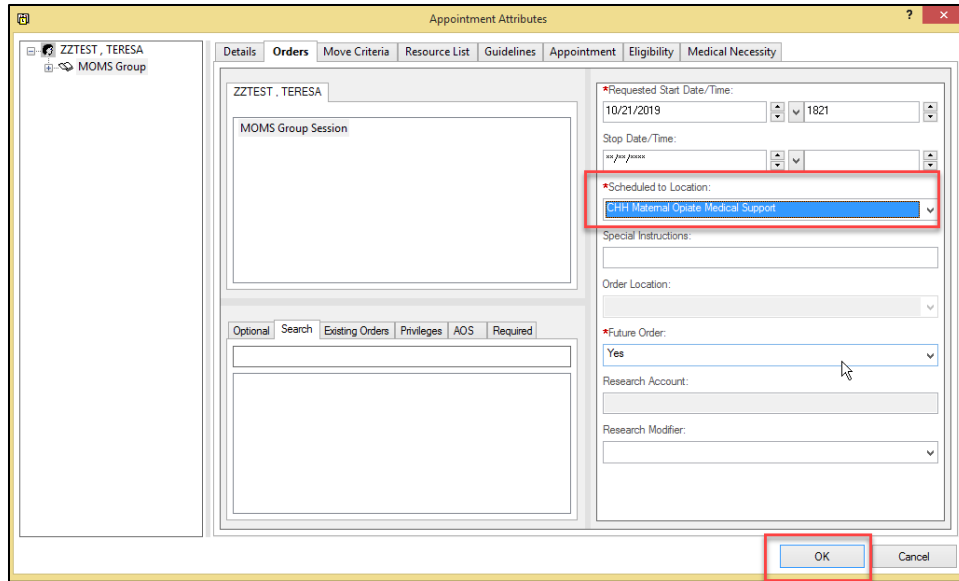
13. In the Person Name box, enter the patient's Last Name and First two letters of the First Name.
14. Press ENTER or the **ellipses** to search.
15. The Person Search window opens and lists patients whose Name matches the patient information you entered.
16. Select the appropriate patient.
17. Click **OK**.



18. Click **Move** to move to WIP



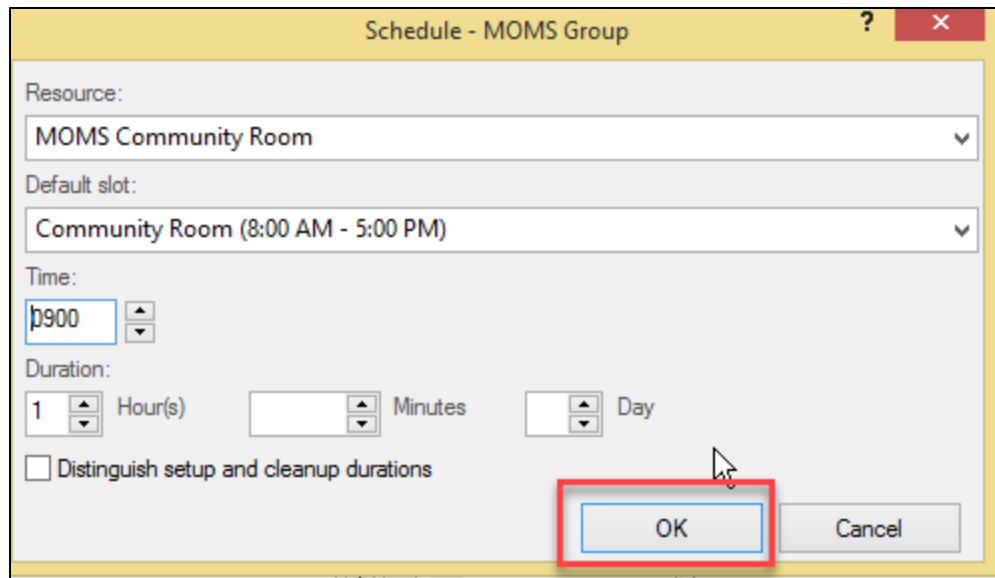
19. Complete any required fields on the Appointment Attributes.
20. Drop down Location field Select "CHH Maternal Opiate Medical Support"
21. Click **OK**.



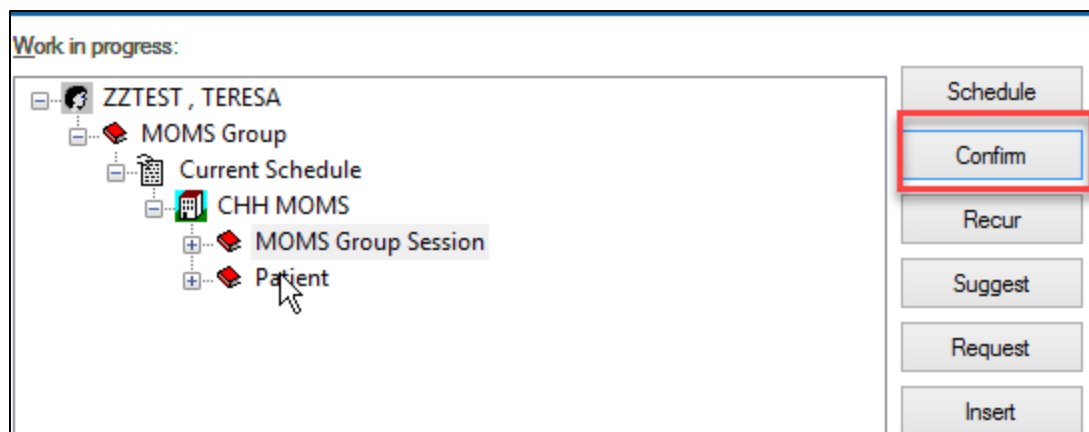
22. WIP window opens

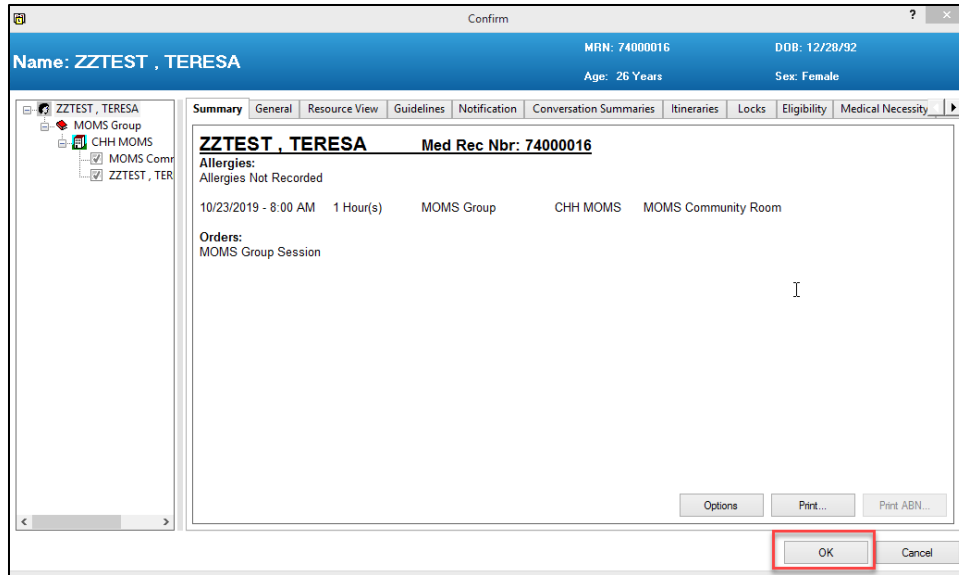
23. Click "Schedule" or "Recur" (if the appointment is going to be recurring)



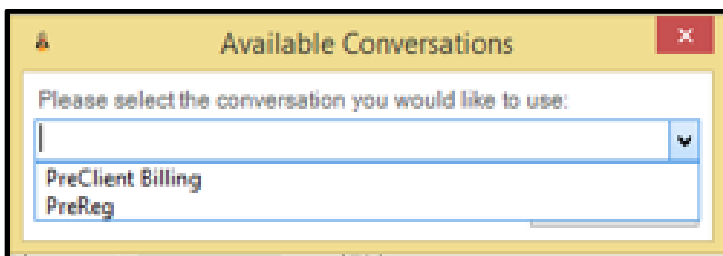
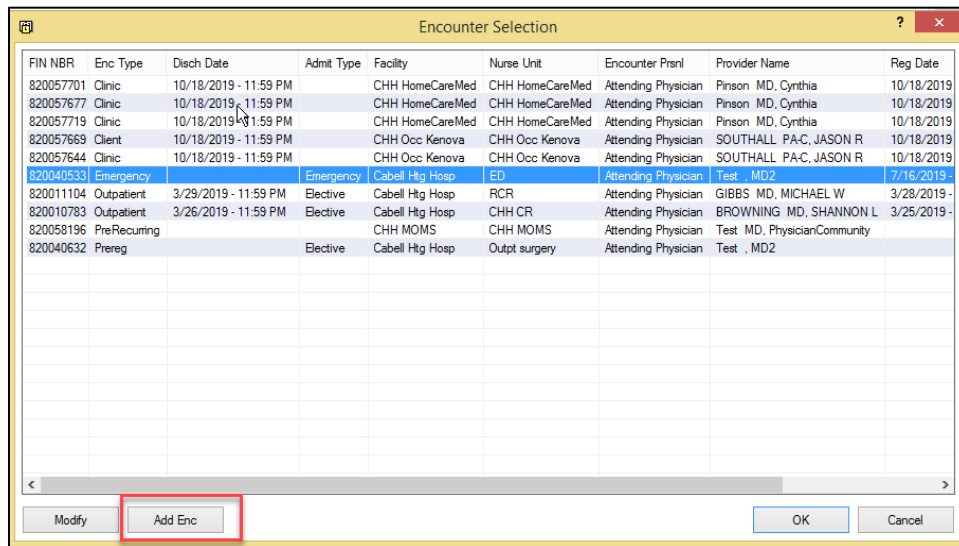


24. Schedule – MOMS Group window opens
25. Review Resource (MOMS Community Room)
26. Review the Default Slot (Community Room (8:00 AM – 5:00 PM))
27. Review the appointment Time
28. Duration
29. Click OK
30. Work in Progress window opens.
31. The appointment will display in a pending status within the WIP.
32. Click Confirm.

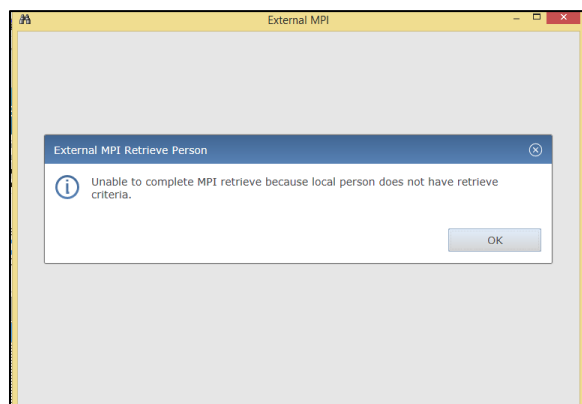
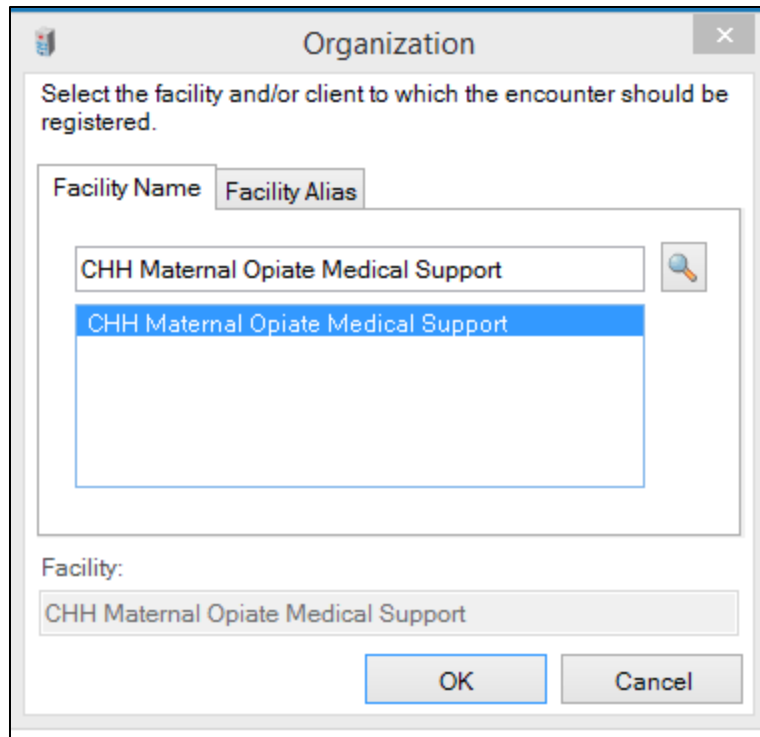




33. Click **OK** in the Confirm Summary dialog box
34. Encounter Selection window opens
35. Select the correct Encounter or Click “Add Enc”



36. Available Conversation window opens
37. Click on Drop-down and select PreReg
38. Click OK
39. Organization window opens
40. Type in the Facility Name (CHH Maternal Opiate Medical Support)
41. Click Enter
42. Click OK



43. External MPI runs
44. Results of External MPI opens

45. Click OK

46. Insurance Profile Selection window opens

47. Click box next to Health Professional (used for any type of Clinic visits)

48. Click OK

Profile	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number
<input checked="" type="checkbox"/> Health Professional	1	Medicare	Medicare	Medicare	ZZTEST , TERESA	454654	
	2	West Virginia Medicaid	West Virginia Medicaid	Medicaid WV	ZZTEST , TERESA	48646545	
<input type="checkbox"/> Hospital	1	Blue Cross CHH Employee	Blue Cross	CHH Employee	ZZTEST , TERESA	ZPO1234DSKFJLS	77777
<input type="checkbox"/> Worker's Comp	1	Workers Comp WV	Workers Comp WV	Workers Compensation	ZZTEST , TERESA	4654	

Images

Last Name: ZZTEST First Name: TERESA Middle Name: Preferred First Name: TERESA

Previous Last Name: Suffix: Admin Sex: Female *Birth Sex: Female Social Security Number: - -

Reason For No SSN: Patient refused Date of Birth: 12/28/1992 Age: 26Y Medical Record Number: 74000016 Financial Number:

Estimated Patient Responsibility: \$0.00 Medical Necessity Status: NOP Acknowledgement: Not on File *PreReg Status: Incomplete Arrival Comment:

Patient Information | Encounter Information | Appointment Information | Guarantor Information | Insurance Primary | Insurance Secondary | Insurance Tertiary | MSP | Insurance Summary | Additional Contacts

Address Information

Address Info: Pt Phys Addr - Clear (c): Pt Alt Address - Clear (c):

Pt Home (Mailing) Address: 1321 HAL GREER BLVD HUNTINGTON, WV 25701-3803... Pt Physical Address: 1321 HAL GREER BLVD HUNTINGTON, WV 25701-3803...

Address Verification

Pt Alternate Address: + Add Address...

Complete Cancel

Ready SCHEDCLERK2 | 80004 | 10/22/19 | 07:01

49. PreReg window opens.

50. Review each tab and complete any required information before clicking “Complete”

51. Patient Information Tab

- Verify Address Information
- Verify Telephone Information
- Verify Health Life Portal
- Verify Personal Data

52. Encounter Tab

- Building (automatically defaulted to CHH MOMS)
- Nurse\Ambulatory (automatically defaulted to CHH MOMS)

- Patient Type (PreRecurring)
- Medical Service (Counseling Services)
- Reason for Visit (type in the reason: Counseling Services)
- Attending/Rendering Physician
- Verify Account Data (Estimated Arrive Date and Estimated Arrive Time which is the date and time of the appointment)

53. Insurance Primary Tab (complete same steps if patient has Secondary and Tertiary)

- Verify Authorization Information

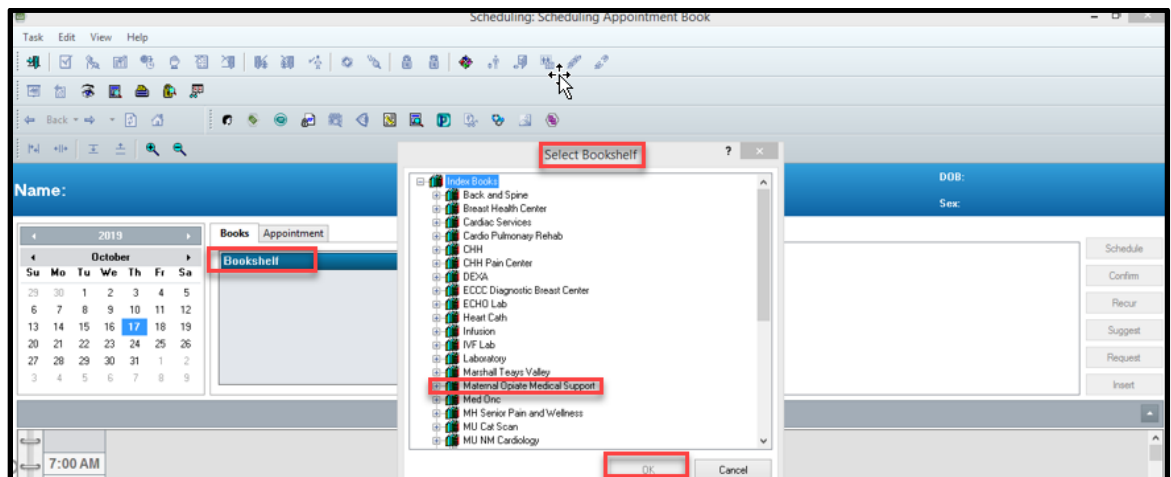
54. Click Confirm and your appointment will be confirmed on the appointment Grid.

55. Appointment is Confirmed and showing on Calendar Slot (WIP window is empty)

9.2 MOM's Resource Appointment

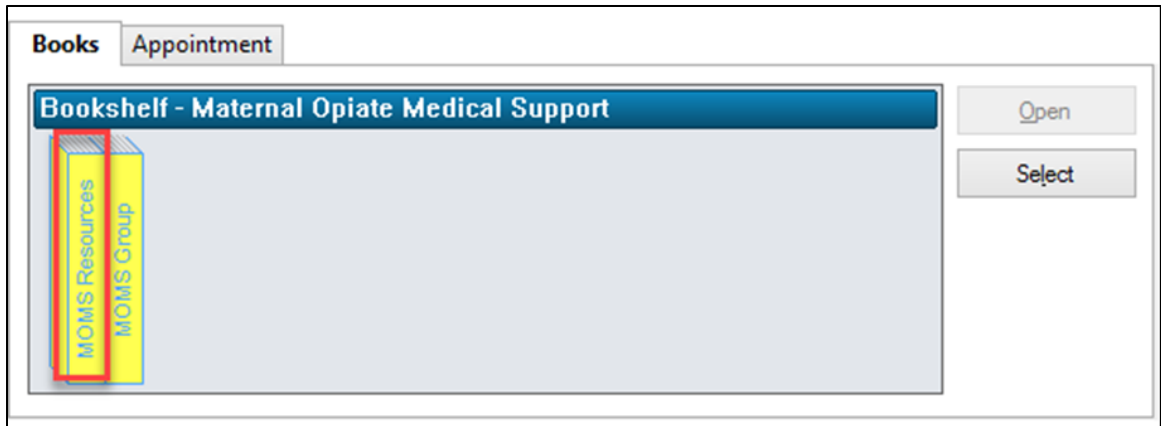
Complete the following steps to book a MOMs Resource appointment (to see the NP or SW):

1. Click the bookshelf.
2. Select Bookshelf window opens.
3. Select the Bookshelf that you want (i.e. Maternal Opiate Medical Support).
4. Click OK.

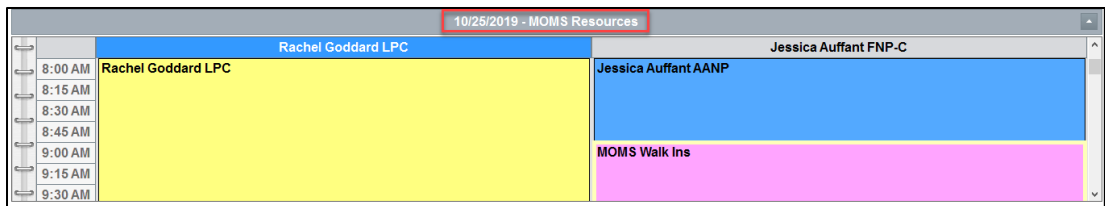


5. Click MOMs Resource book.

6. Click Open.

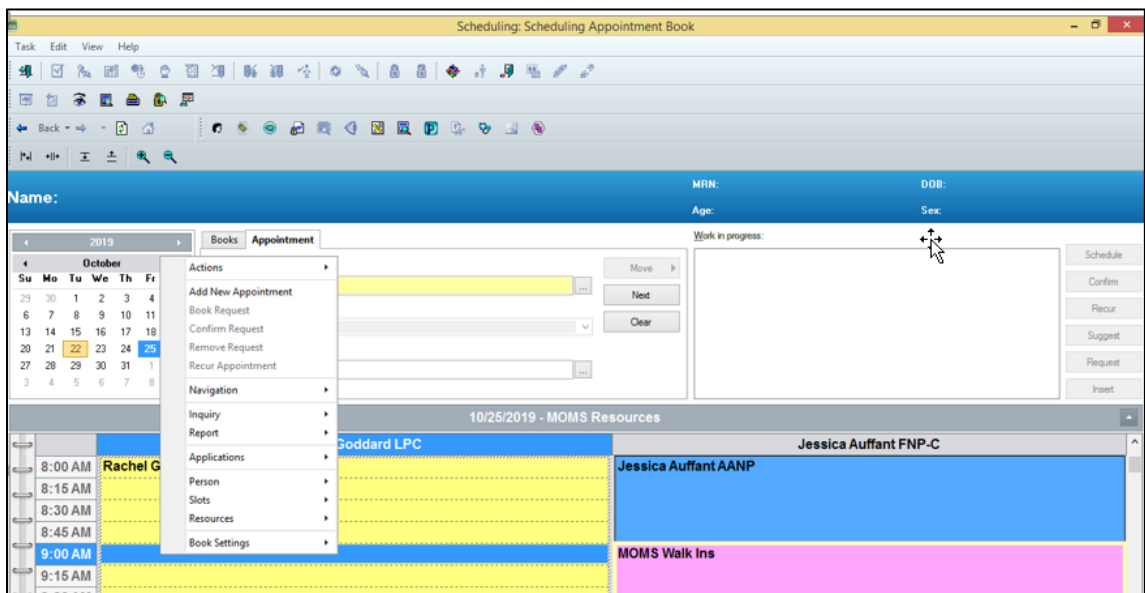


7. MOMS Resources Calendar opens up.



8. Select the Resource and Slot Time

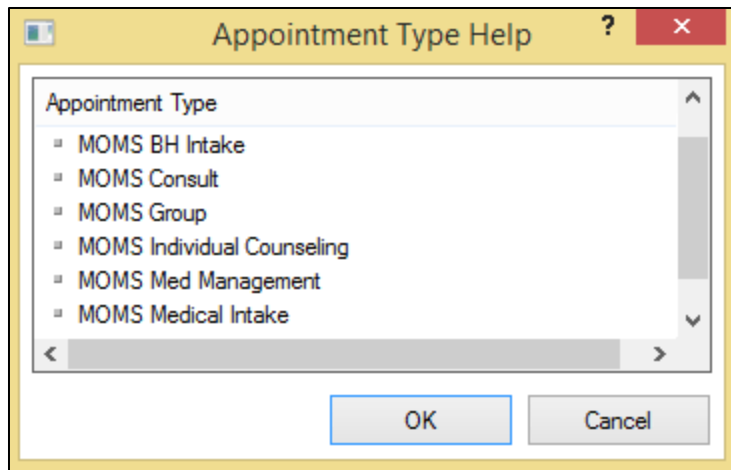
9. Right Click and Click Add New Appointment



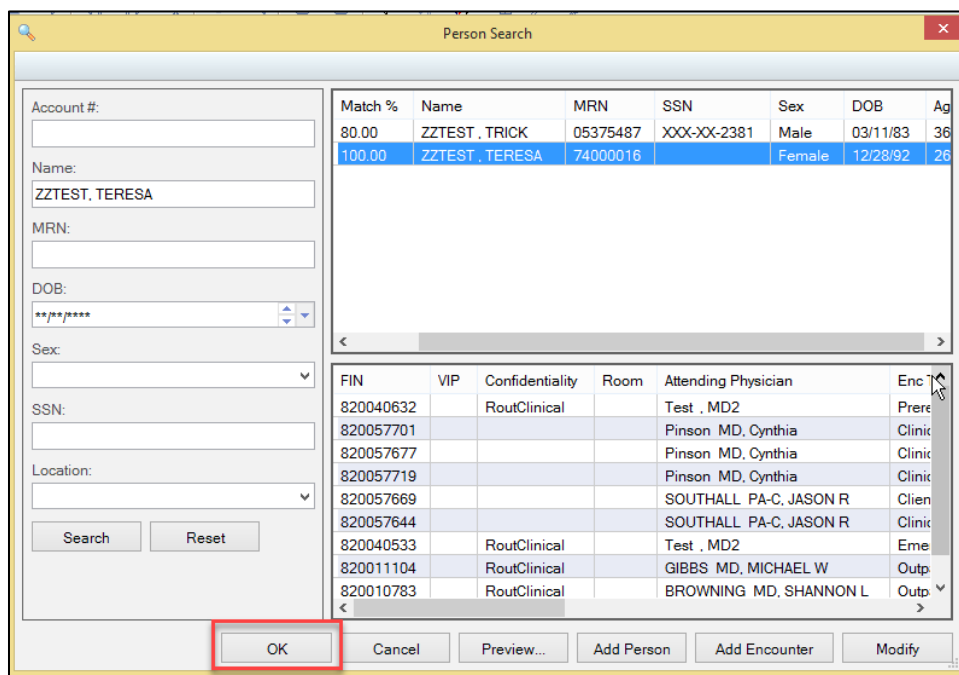
10. In Appointment Type: type in MOMS and Press Enter

11. Appointment Type Help window opens

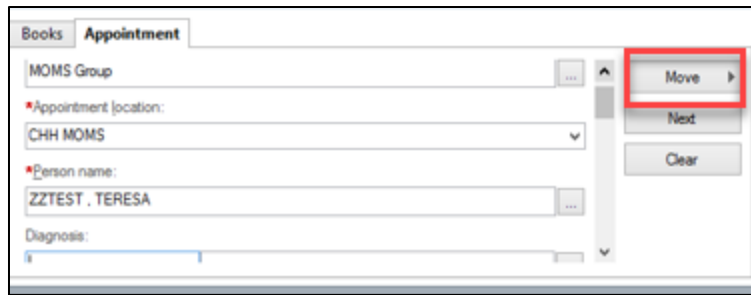
12. Select Appointment Type



13. Appointment Location automatically defaults to CHH MOMS
14. In the Person Name box, enter the patient's Last Name and First two letters of the First Name.
15. Press ENTER or the **ellipses** to search
16. The Person Search window opens and lists patients whose Name matches the patient information you entered.
17. Select the appropriate patient
18. Click OK

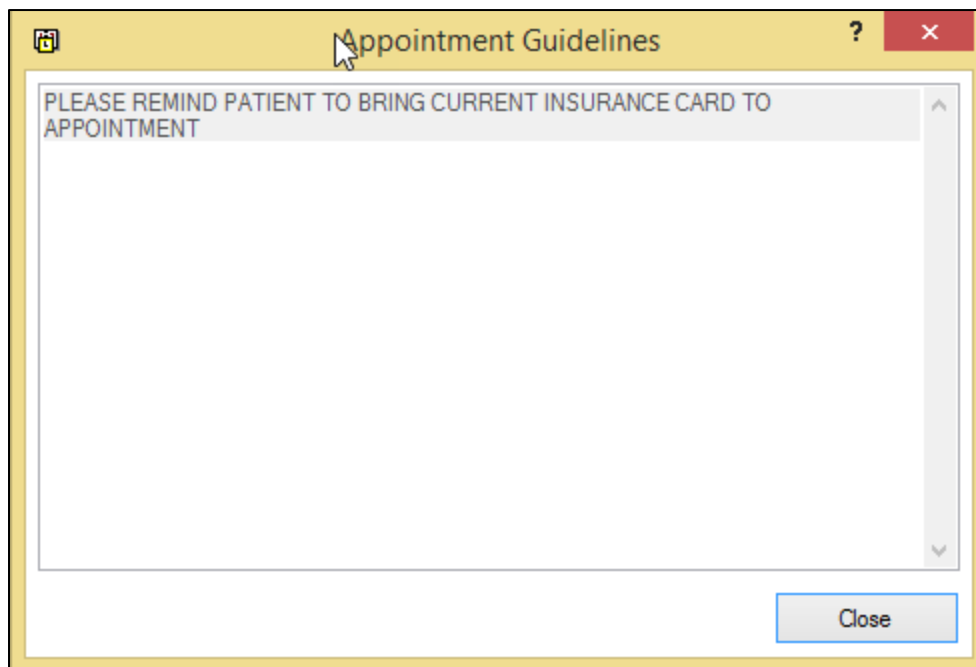


19. Patients Name is displaying
20. Click Move to move to WIP



21. Appointment Guidelines window opens

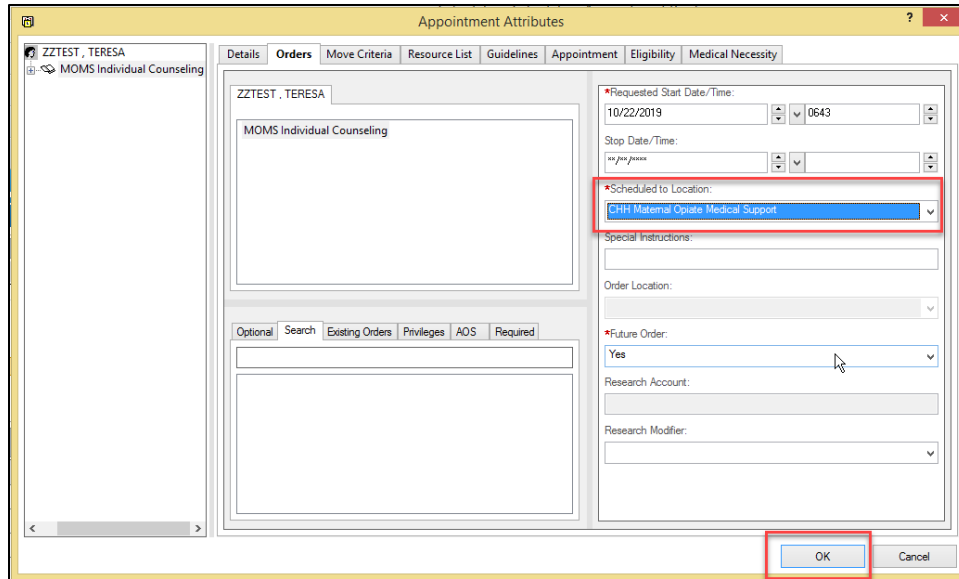
22. Click Close



23. Complete any required fields on Appointment Attributes.

24. Drop down Location field Select "CHH Maternal Opiate Medical Support"

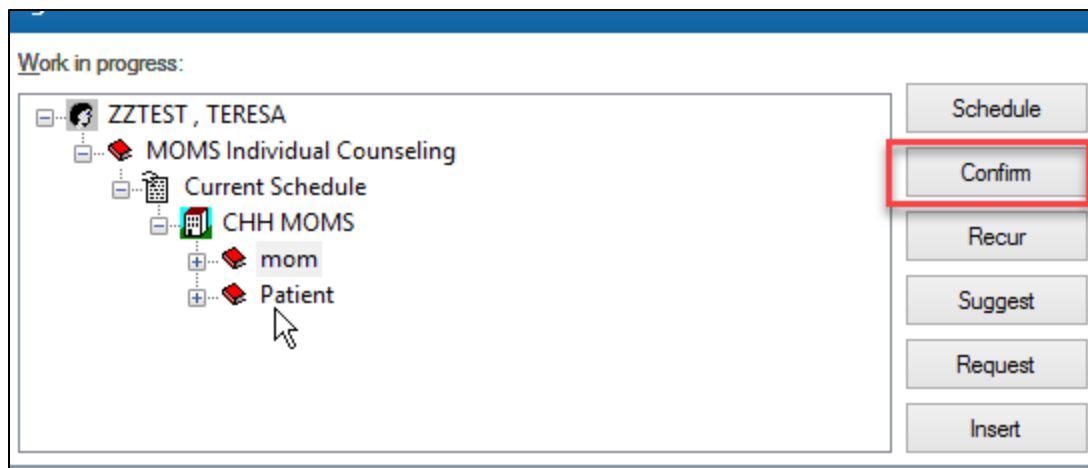
25. Click "OK"



26. Work in Progress window opens

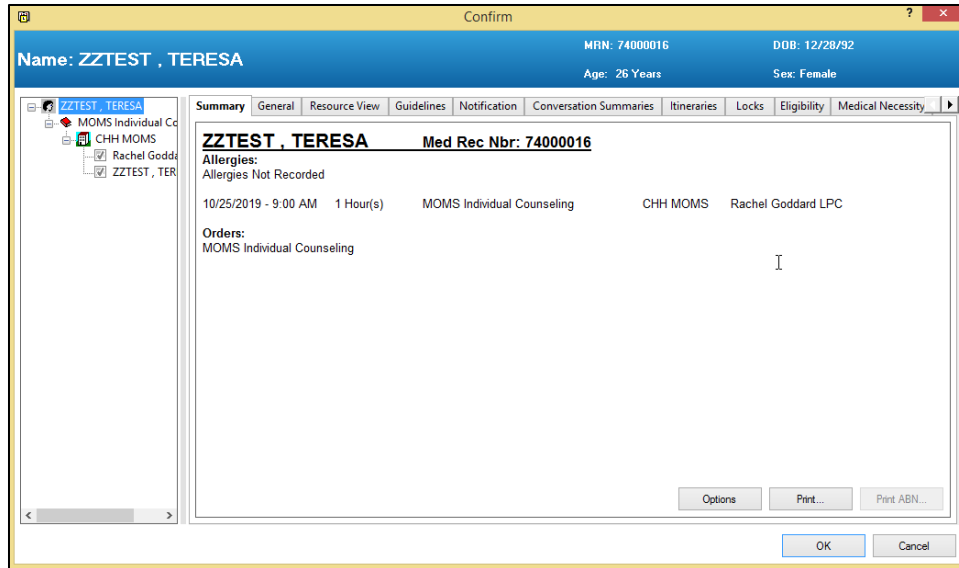
27. The appointment will display in a pending status within the WIP.

28. Click Confirm.

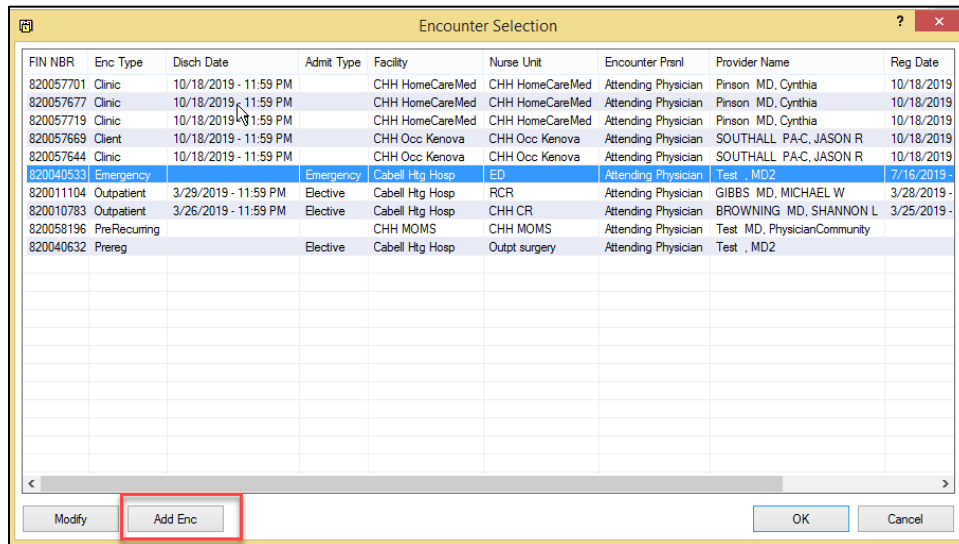


29. Confirm window opens

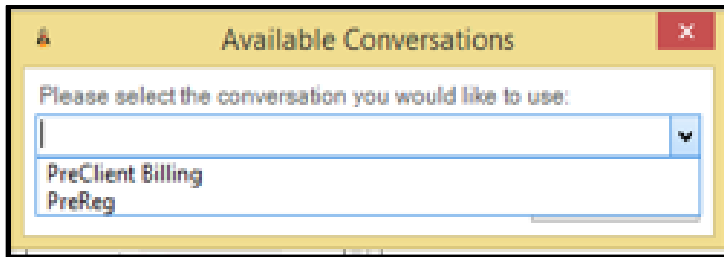
30. Click **OK** in the Confirm Summary dialog box.



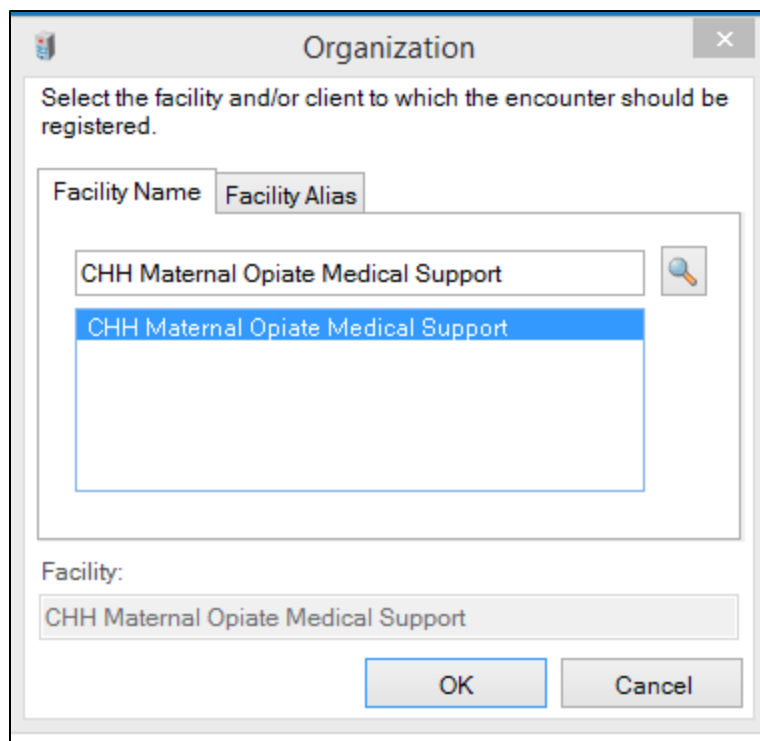
- 31. Encounter Selection window opens
- 32. Select the correct Encounter or Click "Add Enc"



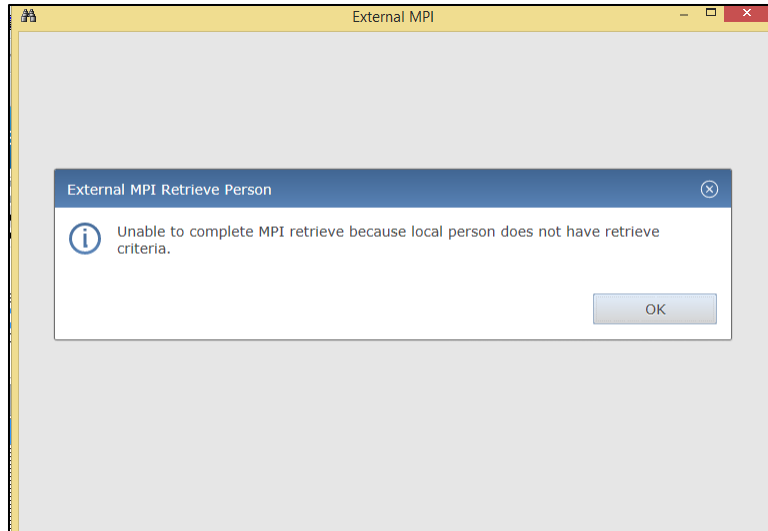
- 33. Available Conversation window opens
- 34. Click on Drop-down and select PreReg
- 35. Click OK



- 36. Organization window opens
- 37. Type in the Facility Name (CHH Maternal Opiate Medical Support)
- 38. Click Enter
- 39. Click OK



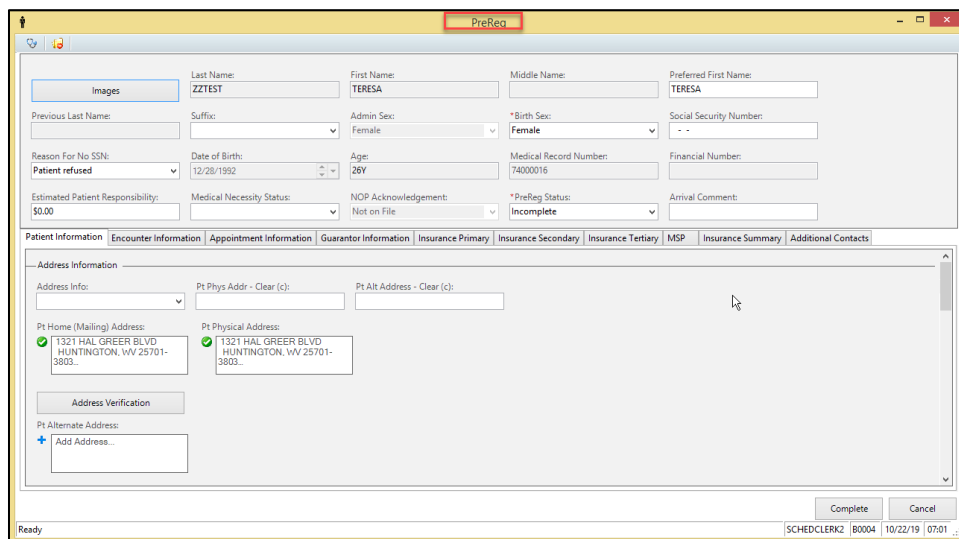
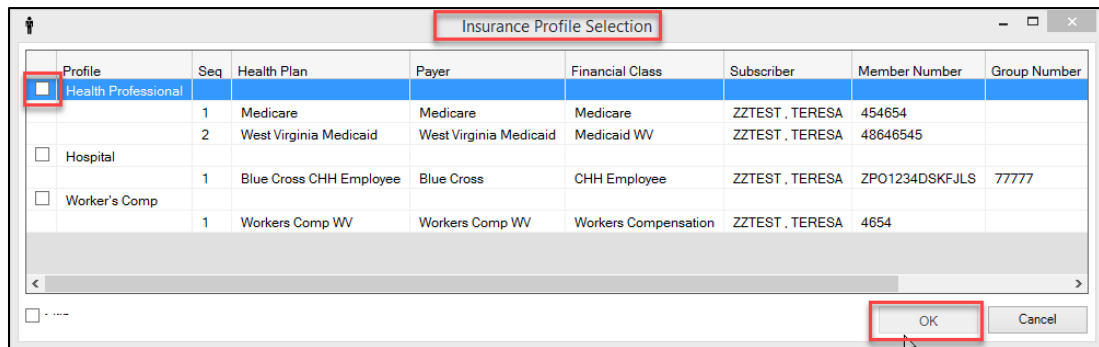
- 40. External MPI runs
- 41. Results of External MPI opens
- 42. Click OK



43. Insurance Profile Selection window opens

44. Click box next to Health Professional (used for any type of Clinic visits)

45. Click OK



46. On the PreReg, review each tab and complete any required information before clicking “Complete”.

47. Patient Information Tab

- Verify Address Information
- Verify Telephone Information
- Verify Health Life Portal
- Verify Personal Data

48. Encounter Tab

- Building (automatically defaulted to CHH MOMS)
- Nurse\Ambulatory (automatically defaulted to CHH MOMS)
- Patient Type (PreRecurring)
- Medical Service (Counseling Services)
- Reason for Visit (type in the reason: Counseling Services)
- Attending/Rendering Physician
- Verify Account Data (Estimated Arrive Date and Estimated Arrive Time which is the date and time of the appointment)

49. Guarantor Information Tab

- Verify Patient’s Relationship to Guarantor (Self or the relationship to the person who is the Guarantor)

50. Insurance Primary Tab (complete same steps if patient has Secondary and Tertiary)

- Verify Authorization Information

10 Walk In New Patients

Scenario: Patient walks in with a paper order for a Chest X-ray and is not in the system.

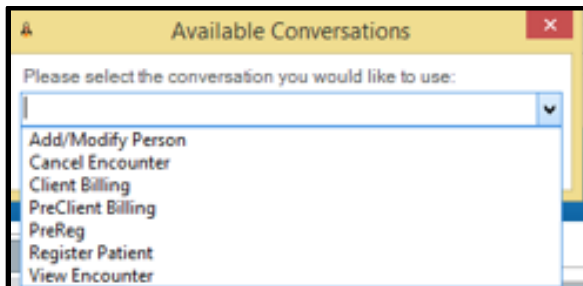
10.1 Add a New Person

Complete the following steps to add a new person to the system:

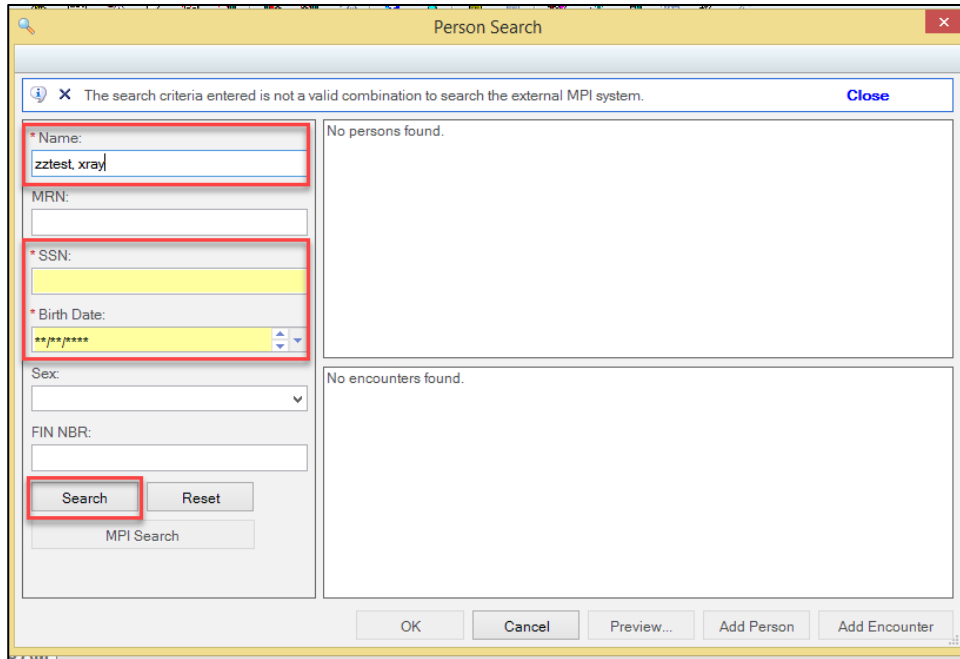
1. Click (...) to the right of the patient box in the the Launches PMLaunch icon



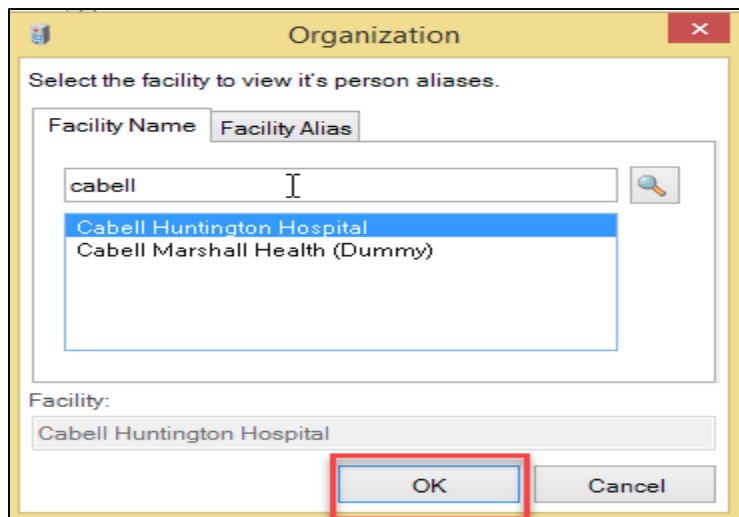
2. Available Conversations window opens
3. Click the Drop-Down arrow and Select Register Patient
4. Click OK



5. Person Search window opens
6. Search for the Patient (no patient is returned)
7. Add SSN or Birth Date
8. Click Search

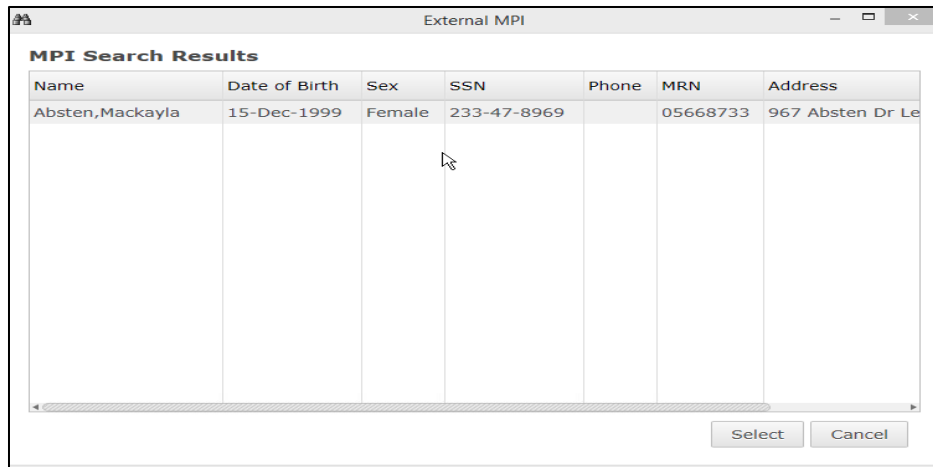


9. Patient is not currently in Cerner
10. Click MPI Search
11. Organization window opens
12. Type in Facility Name and Press Enter
13. Click OK



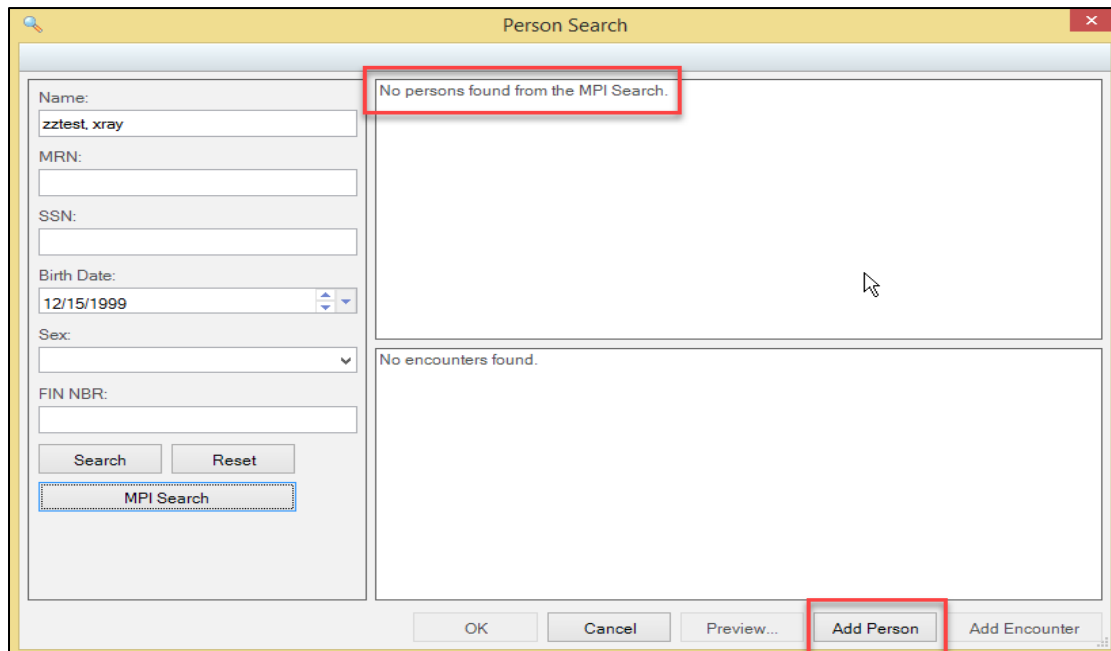
14. MPI Search window opens and MPI Search Results show
15. Patient showing is not the correct patient (results came back due to same Date of Birth)

16. Click Cancel



17. Click on the "Add Person" button

18. Register Patient window opens



19. The Register Patient conversation will appear

20. Complete all yellow highlighted fields

- Admin Sex
- Birth Sex
- Social Security Number or No SSN Reason

The screenshot shows the 'Register Patient' window with the following fields filled or highlighted:

- Last Name: ZZTEST
- First Name: XRAY
- Admin Sex: (highlighted)
- Birth Sex: (highlighted)
- Social Security Number: (highlighted)
- Date of Birth: 12/15/1999
- Estimated Patient Responsibility: \$0.00
- CHH Consent: Not on File

The 'Encounter Information' tab is highlighted in red in the navigation bar.

21. Click on the Encounter Information tab and complete the highlighted required fields based on your Department

- Add Nurse/Ambulatory (Select CHH XA)
- Add Patient Type (Select Outpatient)
- Add Medical Service (Select Radiology)
- Add Attending/Rendering Physician (Use Ordering Physician)

The screenshot shows the 'Encounter Information' tab with the following fields highlighted in yellow:

- Building: Cabell Htg Hosp
- Nurse/Ambulatory: (highlighted)
- Patient Type: (highlighted)
- Medical Service: (highlighted)
- Admit Type: (highlighted)
- Referral Source: (highlighted)
- Reason for Visit: (highlighted)
- Arrival Mode: (highlighted)
- Accident Related Visit?: (highlighted)
- Attending/Rendering Physician: (highlighted)
- Primary Care Physician: (highlighted)
- Referring Physician: (highlighted)

The 'Encounter Information' tab is highlighted in red in the navigation bar.


11 Client Billing

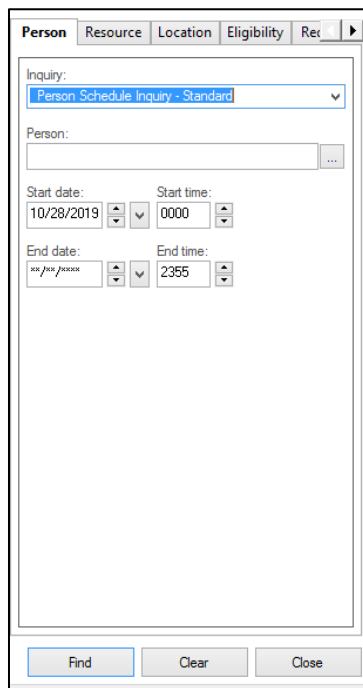
CLIENT BILLING CONVESATION IS ONLY CHOSEN WHEN THE PATIENT'S BILL WILL BE PAID FOR BY COMPANY. WORK THROUGH THAT CONVERSATION THE SAME AS YOU WOULD WORK THROUGH A PREREG

12 Searching For/Checking In a Patient

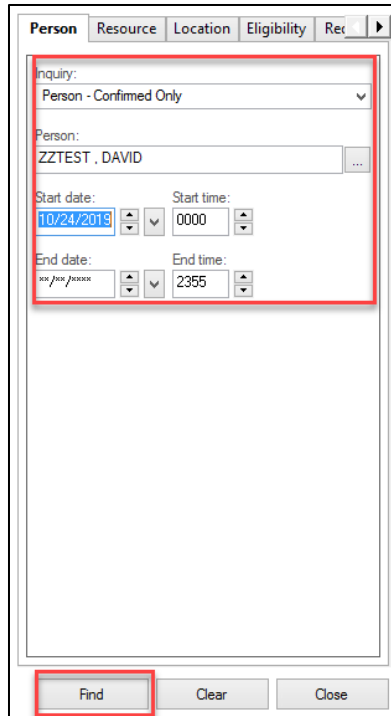
12.1 Search by the Patient Name

Complete the following steps to search by name to check in:

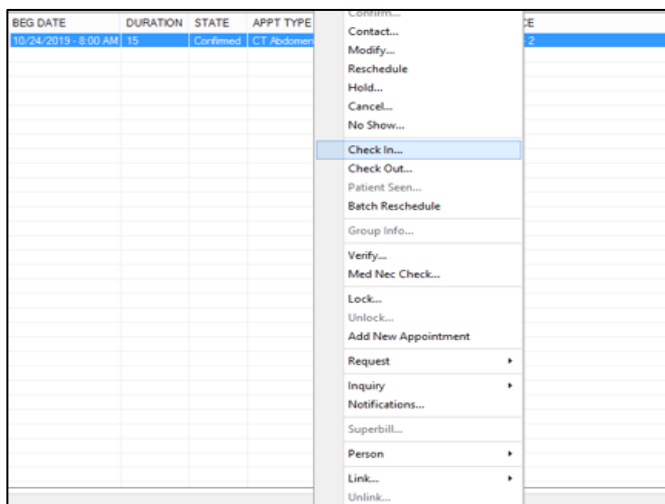
1. Click on Appointment Inquiry icon 
2. Resource Schedule Inquiry Standard window opens
3. Click on the Person Tab



The screenshot shows a software window titled "Person Schedule Inquiry - Standard". The window has a tabbed interface with "Person" selected. The "Inquiry:" dropdown menu is set to "Person Schedule Inquiry - Standard". Below this is a "Person:" text input field with a search icon. There are date and time pickers for "Start date" (10/28/2019), "Start time" (0000), "End date" (xxx-xx-xxxx), and "End time" (2355). At the bottom are "Find", "Clear", and "Close" buttons.




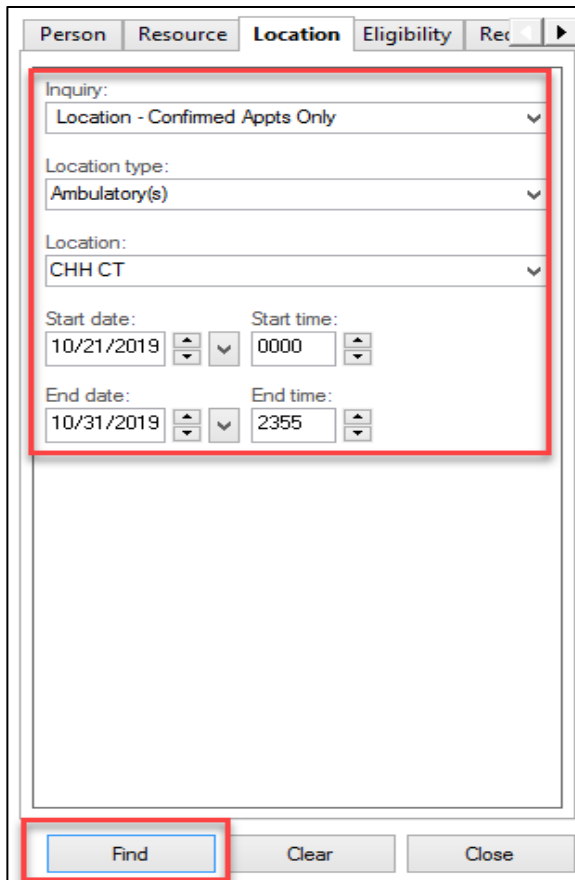
4. Change Inquiry to “Person – Confirmed Only”
5. Enter Patient’s Name
6. Enter Start Date
7. Click “Find”
8. Locate Patient
9. Right Click appointment
10. Select “Check In”



12.2 Search by Location

Complete the following steps to search by location to check in:

1. Click on Appointment Inquiry icon 
2. Resource Schedule Inquiry Standard window opens
3. Click on Location Tab
4. Inquiry (Select “Location – Confirmed Appts Only”)
5. Start Date and Start Time
6. End Date and End Time
7. Click “Find”

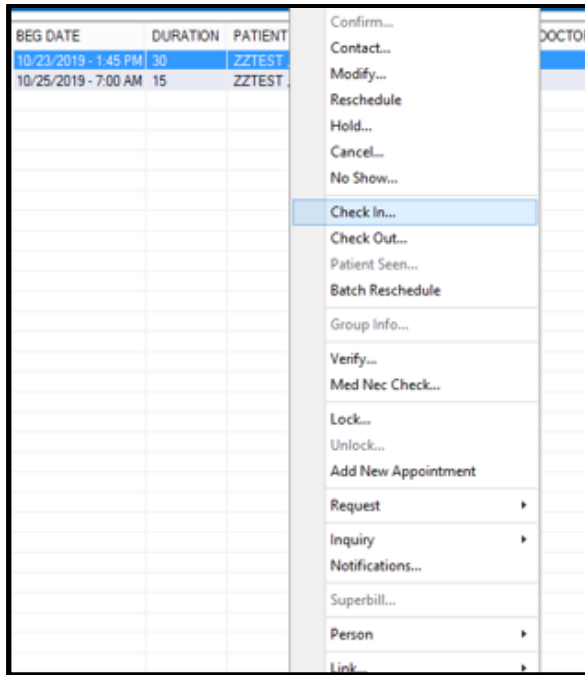


The screenshot shows a software window with several tabs: Person, Resource, Location (selected), Eligibility, and Rec. The main area contains search criteria for the Location tab, which are highlighted with a red border. The criteria include:

- Inquiry: Location - Confirmed Appts Only
- Location type: Ambulatory(s)
- Location: CHH CT
- Start date: 10/21/2019
- Start time: 0000
- End date: 10/31/2019
- End time: 2355

At the bottom of the window, there are three buttons: Find, Clear, and Close. The Find button is also highlighted with a red border.

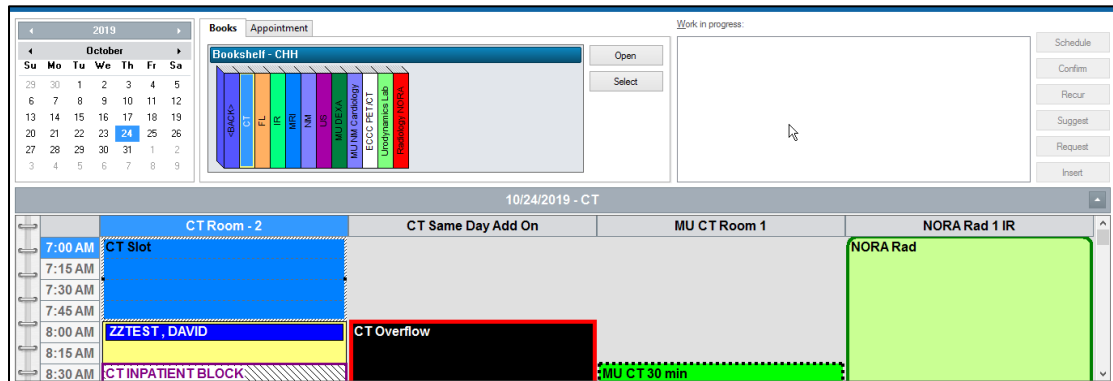
8. Locate Patient
9. Right Click appointment
10. Select "Check In"



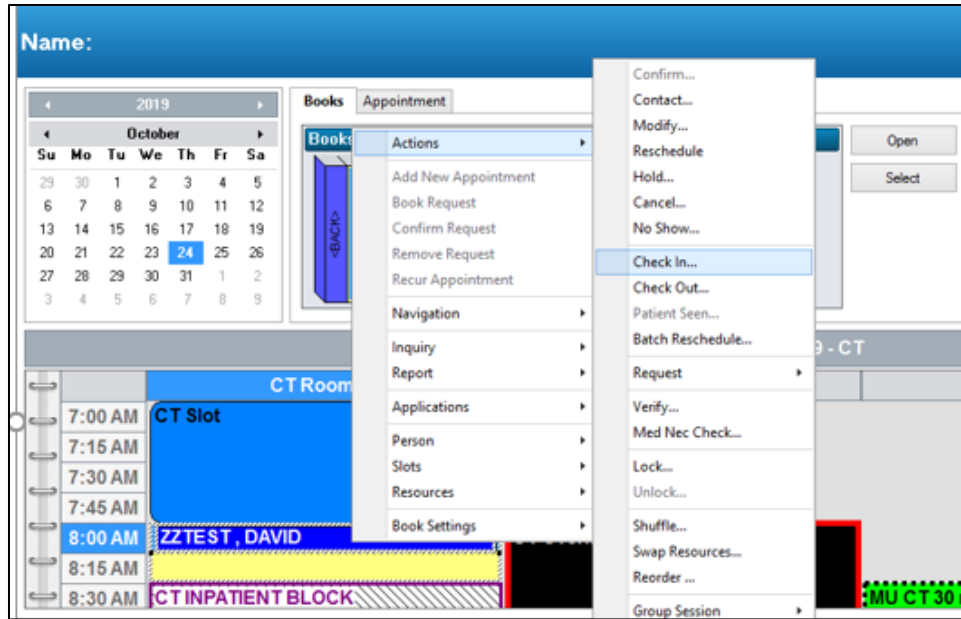
12.3 Checking in the Patient using the Book

Complete the following steps check in using the Book:

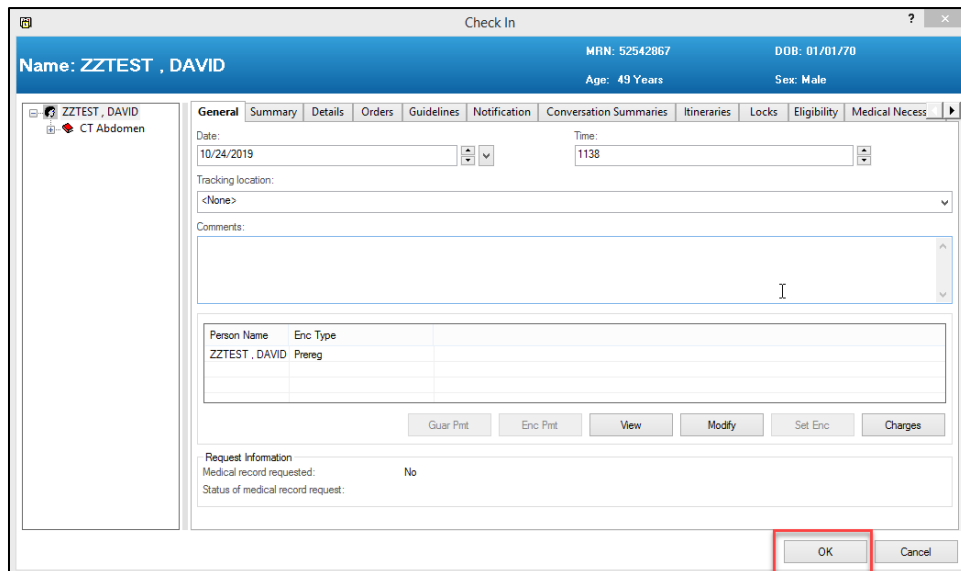
1. Double Click on Appropriate Book from Shelf
2. Book opens with Scheduled Appointments



3. Locate Patient Appointment



4. Right Click on Appointment, Select Actions, Check In
5. Check In window opens
6. Click OK

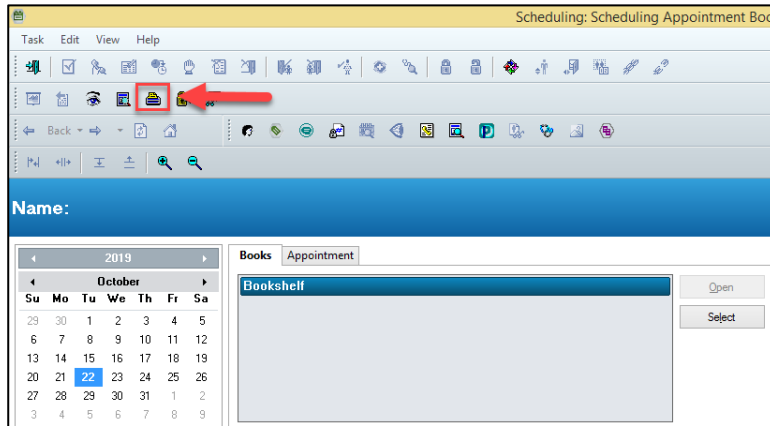


13 Performing Actions on Appointments

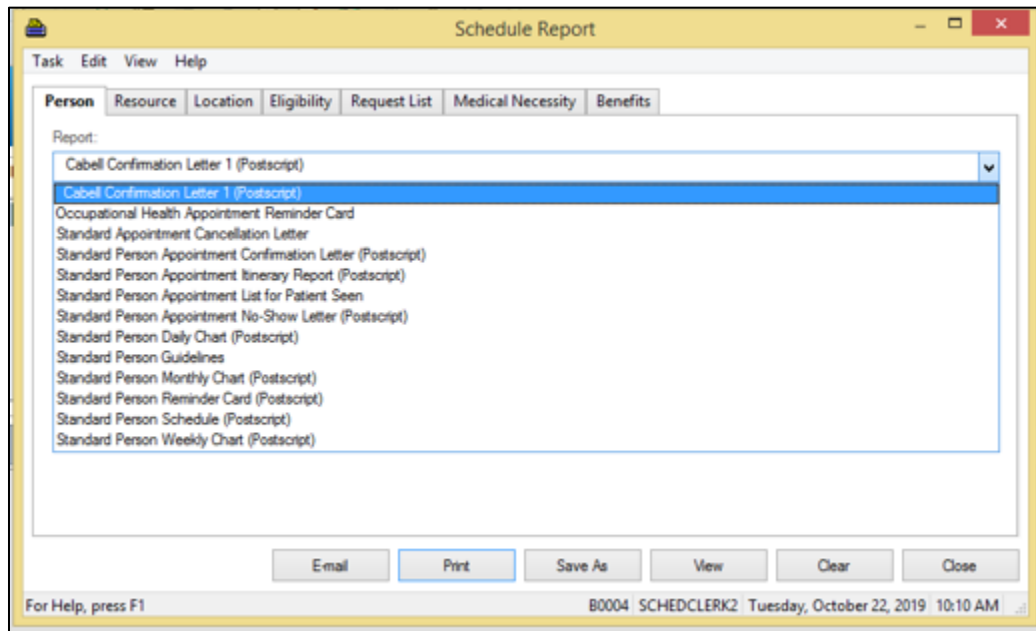
13.1 Printing a Patient's Itinerary

Complete the following steps to print an itinerary:

1. Click on the printer icon from the tool bar

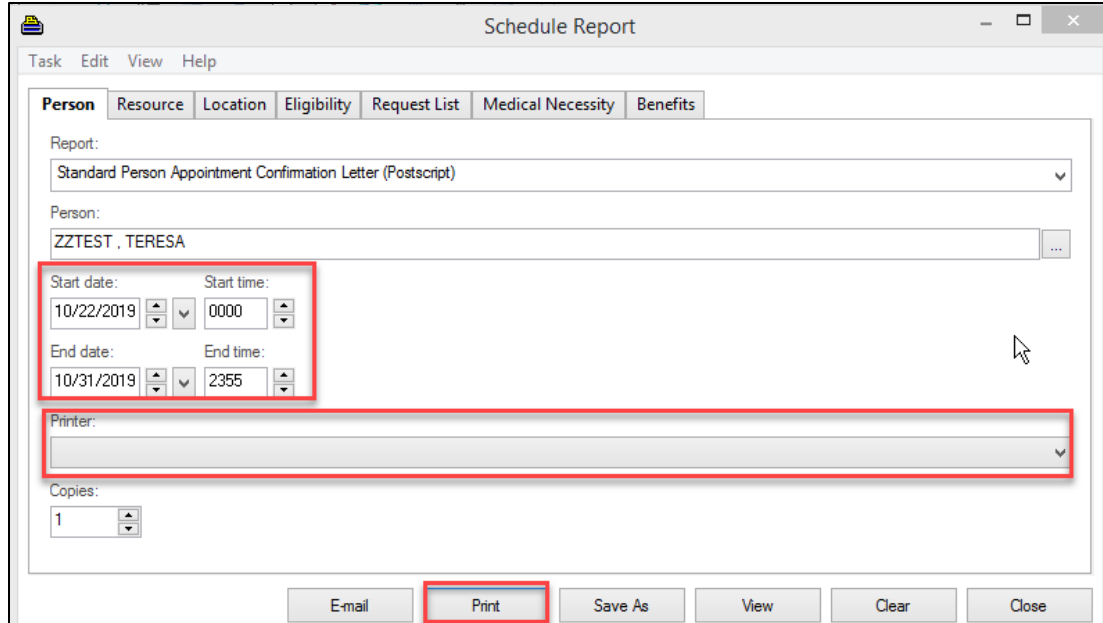


2. Go to the Person tab
3. Click on Drop down arrow to view the types of Reports
4. Select the Report that you want to print (i.e. Standard Person Appointment Confirmation Letter (Postscript))

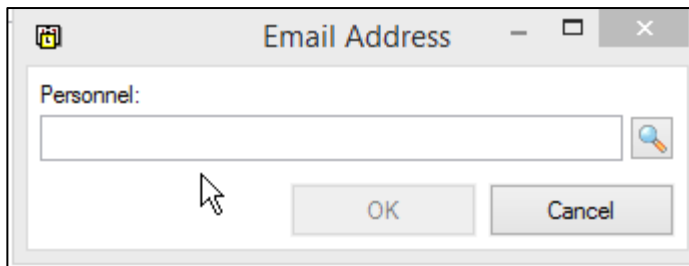


5. Type in Patients Name, Click Enter or Click the **ellipses** to search

6. Person Search window opens
7. Select the patient
8. Click OK
9. Patient added to Schedule Report



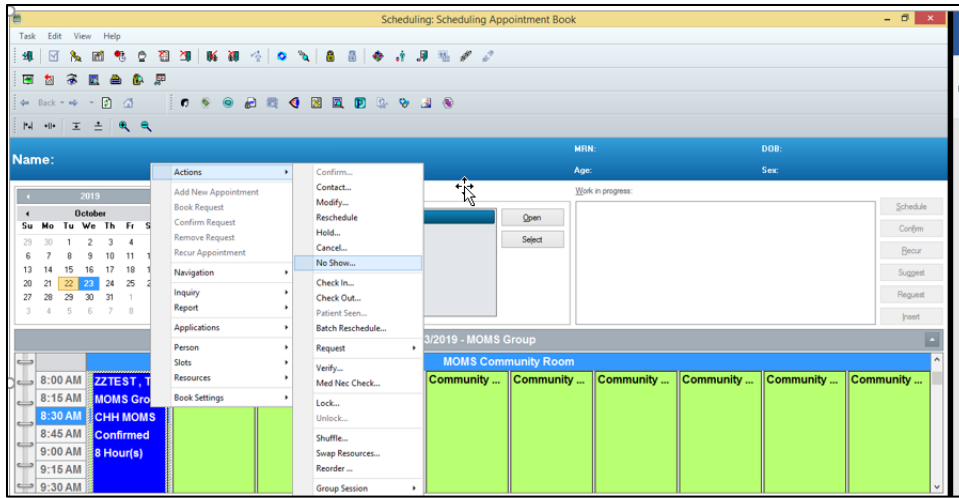
10. Select Start Date and Start Time
11. Select End Date and End Time
12. Select your printer from the drop-down arrow
13. Select Print
14. Schedule Report can be emailed
15. Click Email (instead of print)
16. Type in the patient's email address when Email Address when opens
17. Click OK



13.2 Mark Appointments as No Show

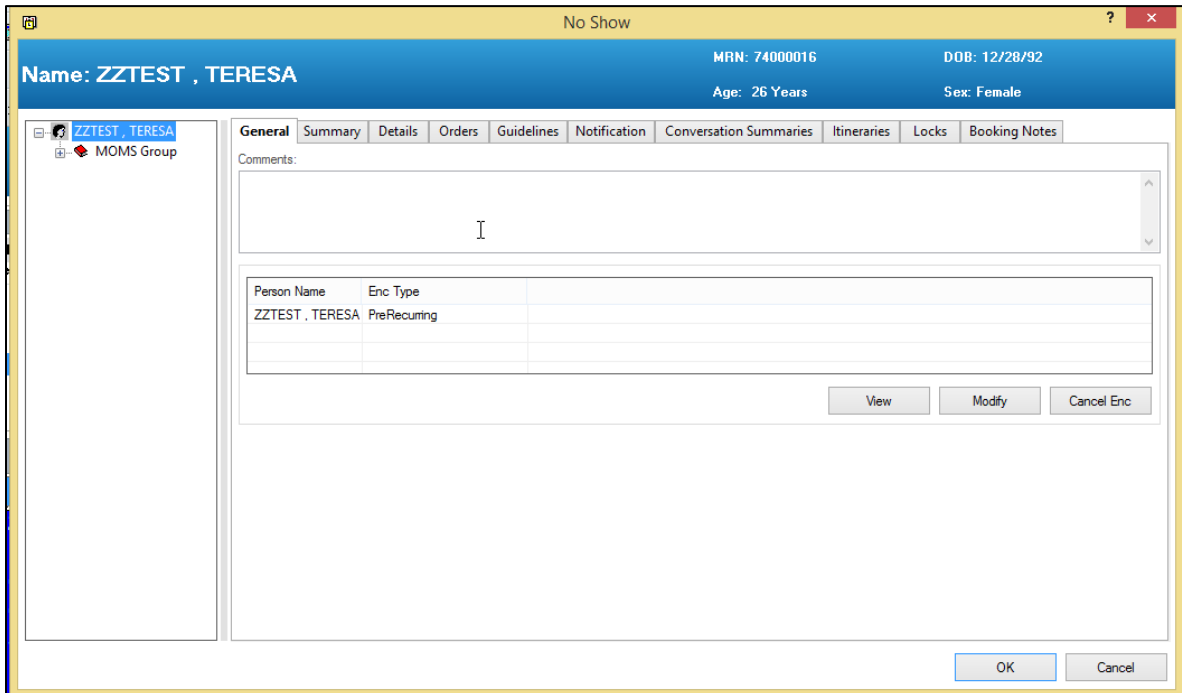
Complete the following steps to mark an appointment as a no show:

1. Access the Scheduling Grid
2. Right Click Appointment
3. Click “No Show”



4. No Show window opens
5. Add any Comments (if applicable)
6. Click OK

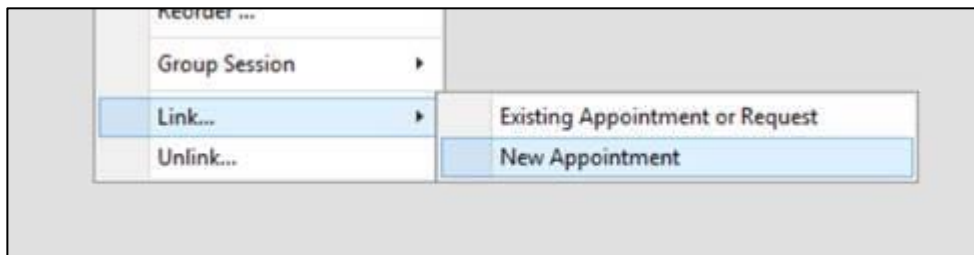
Note: Do Not Click Cancel Encounter as patient may call to be rescheduled and you can use same Encounter



13.3 Link to an Existing Appointment/Request

Complete the following steps to link to an existing appointment:

1. Right click on appointment
2. Click Actions
3. Click Link
4. Click Existing Appointment
5. Highlight appointment to link > click SELECT > provide reason for linking > click OK.



13.4 Link to a New Appointment

Complete the following steps to link to a new appointment:

1. Right click on appointment
2. Click Actions
1. Click Link
2. Click New Appointment
3. Provide reason for linking
4. Click OK
5. You are directed back to appointment tab to start scheduling the new appointment

Link

Name: ZZTEST , ERIC Ins Carrier: Unicare Healthplan of... MRN: 05375445 DOB: 08/27/84
 Age: 35 Years Sex: Male

Existing appointment or request
 New appointment

Appointments and Requests Event Details Orders

*Link reason:
 Transportation/No Ride

Comments:

OK Cancel

Books Appointment Work

*Appointment type:
 [Yellow highlighted field]

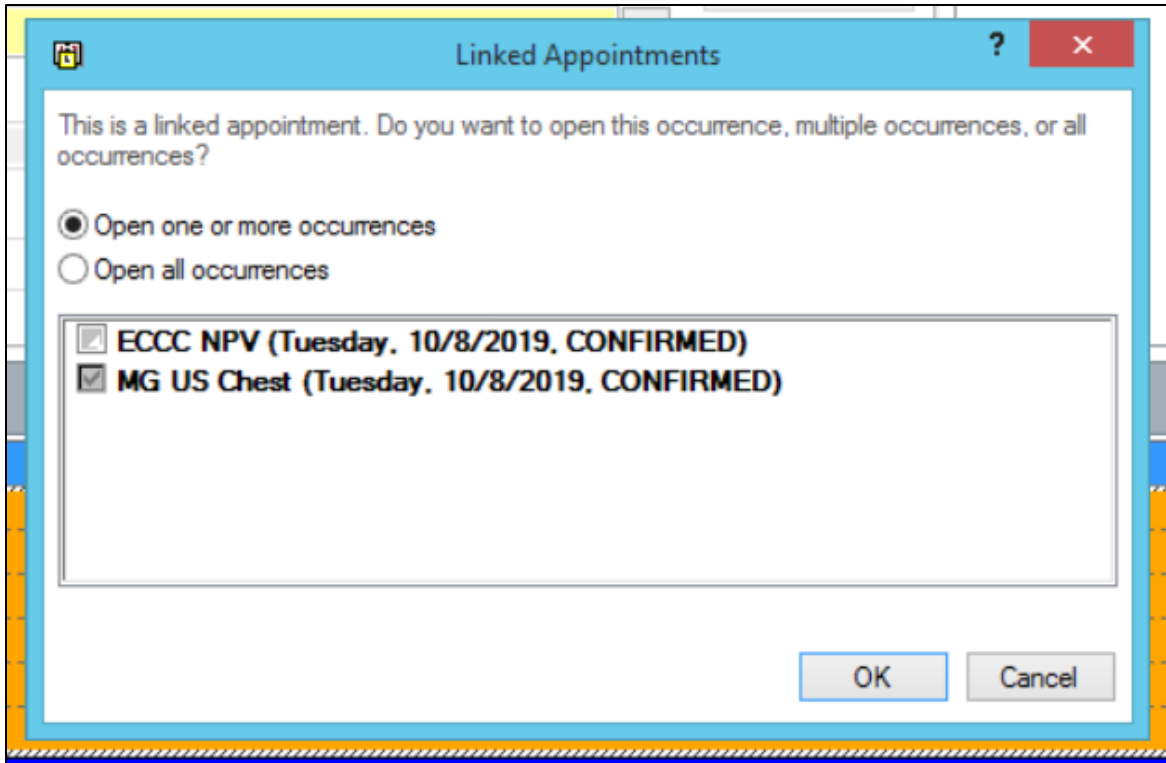
Appointment location:
 [Dropdown menu]

Person name:
 ZZTEST , ERIC

Move Next Clear

10/8/2019 - BHC US Room (Breast US)

- When action is taken on a linked appointment (i.e. reschedule) you will see the following pop up to remind users that they might have to modify the linked appointment as well.




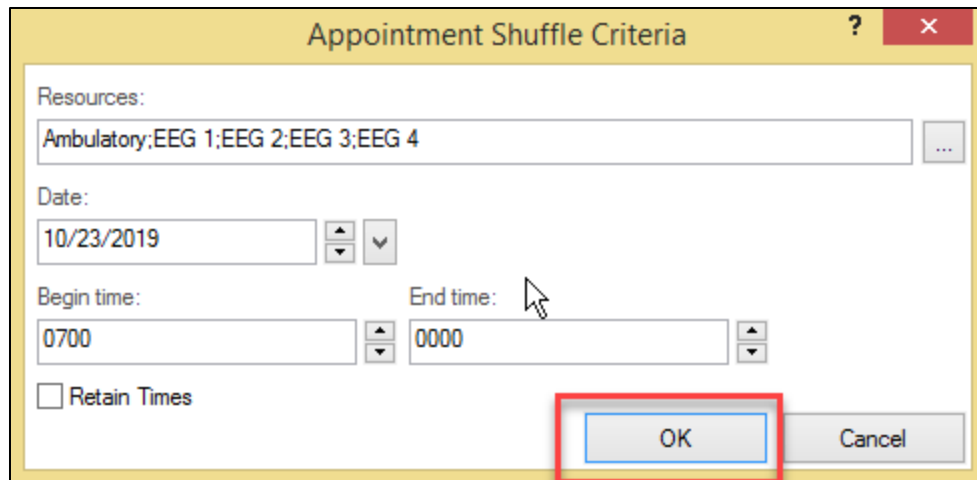
13.5 Shuffle Appointments Via Toolbar

The shuffling feature is used to move around appointments on the same day without having to go through all of the rescheduling steps.

For example, if appointments are scheduled for a particular examination room, and that room is no longer available, appointments can be moved to the available resource by shuffling.

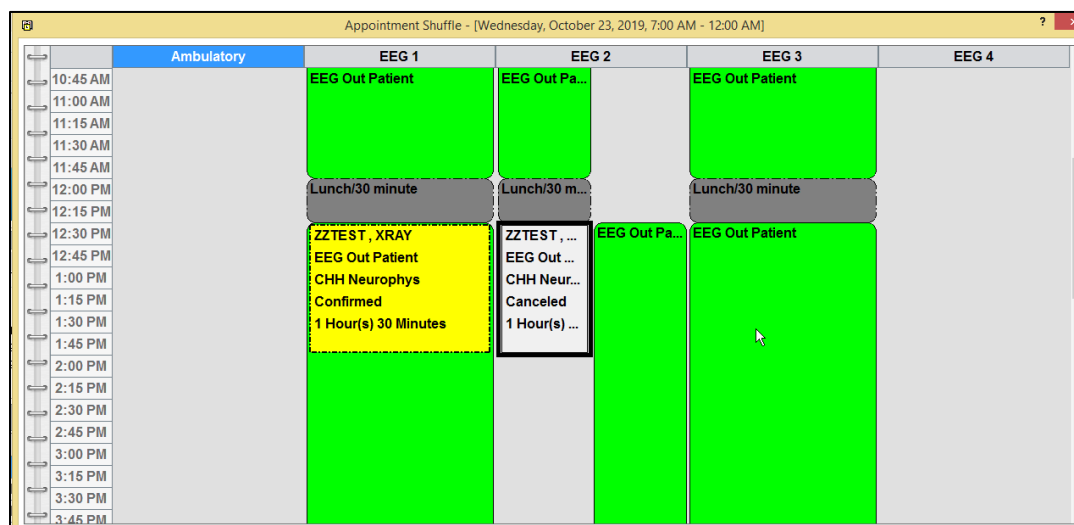
Complete the following steps to shuffle appointments via the toolbar:

1. Click  on the toolbar
2. The Appointment Shuffle Criteria window is displayed
3. Click OK



The dialog box titled "Appointment Shuffle Criteria" has a yellow header with a question mark and a close button. It contains the following fields:

- Resources:** A text box containing "Ambulatory;EEG 1;EEG 2;EEG 3;EEG 4" and a small menu icon to the right.
- Date:** A date picker showing "10/23/2019" with up/down arrows.
- Begin time:** A time picker showing "0700" with up/down arrows.
- End time:** A time picker showing "0000" with up/down arrows.
- Retain Times:** An unchecked checkbox.
- Buttons:** "OK" and "Cancel" buttons at the bottom right. The "OK" button is highlighted with a red rectangular border.



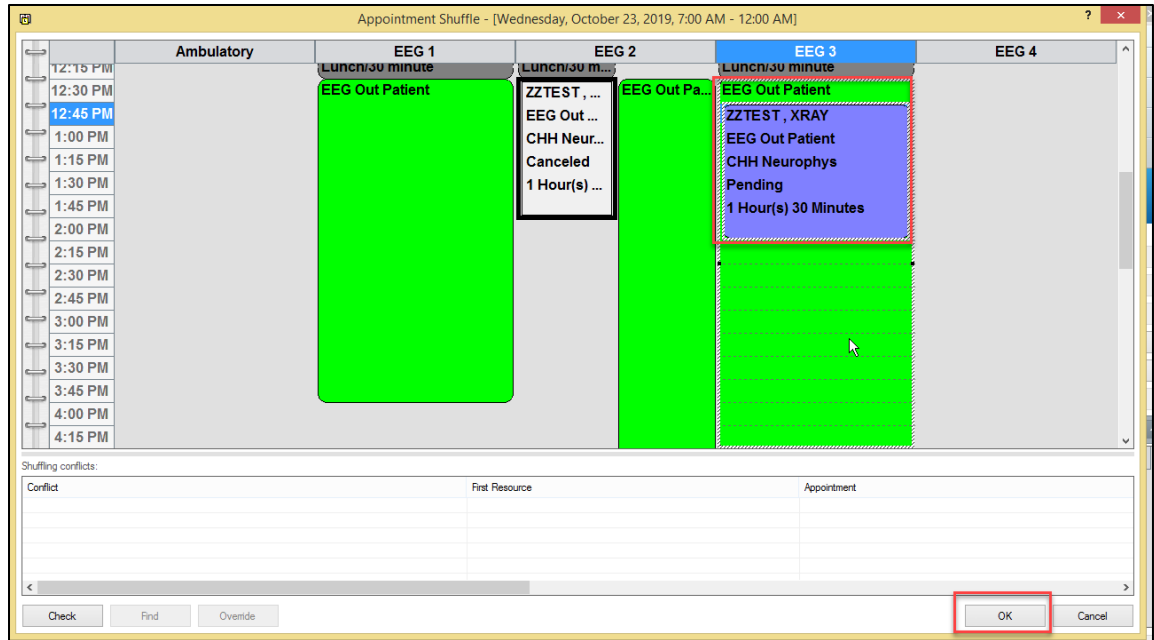
The window displays a scheduling grid for "Appointment Shuffle - [Wednesday, October 23, 2019, 7:00 AM - 12:00 AM]". The grid has columns for resources: Ambulatory, EEG 1, EEG 2, EEG 3, and EEG 4. The rows represent time slots from 10:45 AM to 3:45 PM in 15-minute increments. The grid shows various appointment blocks:

- EEG 1:** "EEG Out Patient" (10:45-11:45 AM), "Lunch/30 minute" (12:00-12:30 PM), "ZZTEST, XRAY EEG Out Patient CHH Neurophys Confirmed 1 Hour(s) 30 Minutes" (12:45-1:30 PM), and "EEG Out Patient" (1:45-3:45 PM).
- EEG 2:** "EEG Out Pa..." (10:45-11:45 AM), "Lunch/30 m..." (12:00-12:30 PM), "ZZTEST, ... EEG Out ... CHH Neur... Canceled 1 Hour(s) ..." (12:45-1:30 PM), and "EEG Out Pa..." (1:45-3:45 PM).
- EEG 3:** "EEG Out Patient" (10:45-11:45 AM), "Lunch/30 minute" (12:00-12:30 PM), and "EEG Out Patient" (1:45-3:45 PM).
- Ambulatory:** Empty.
- EEG 4:** Empty.

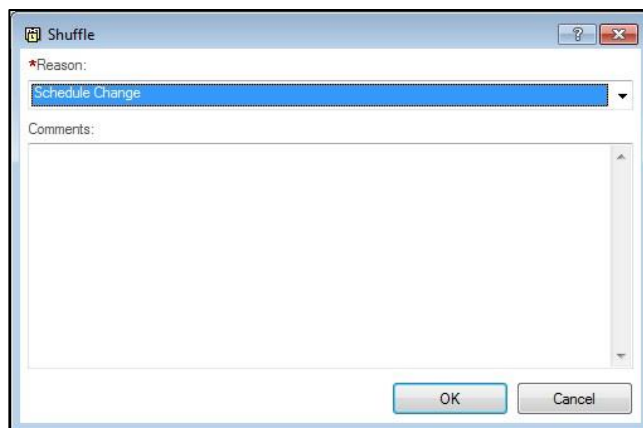
4. The Appointment Shuffle window is displayed

Note: You are only able to shuffle appointments from the primary resource to which they are scheduled. It is also important to note that the appointments can only be shuffled to a new slot or resource on the same day the original appointment was scheduled.

5. To move an appointment to a different time or Resource
6. Click the appointment and drag it to the time and resource you want



7. The appointment is displayed as pending in the new time frame or resource
8. Click OK
9. Click "OK". The Reason for Shuffle window is displayed
10. Select a reason from the drop-down list
11. Click "OK"
12. The appointment displays as Confirmed in the new time or resource

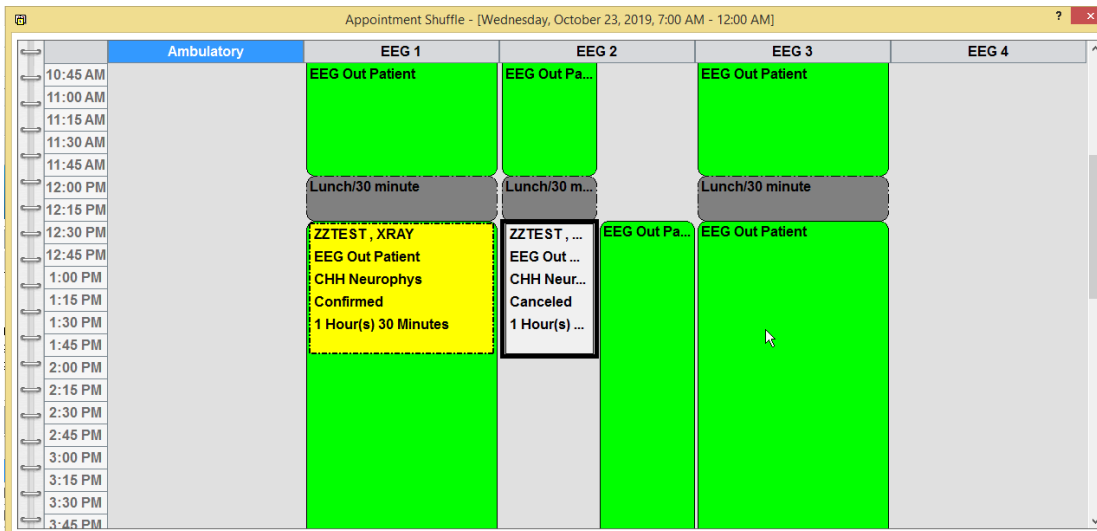
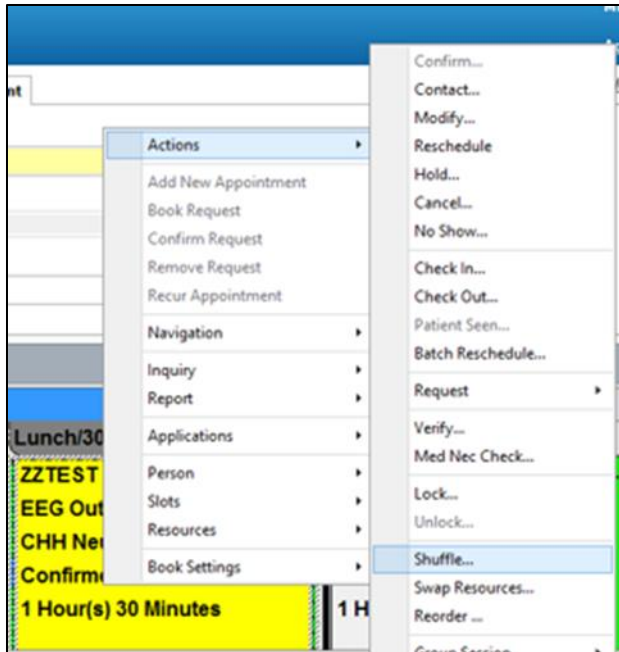


13.6 Shuffle Appointments Via Grid

Complete the following steps to shuffle appointments via the grid:

1. Right Click Appointment

2. Click Actions
3. Click Shuffle

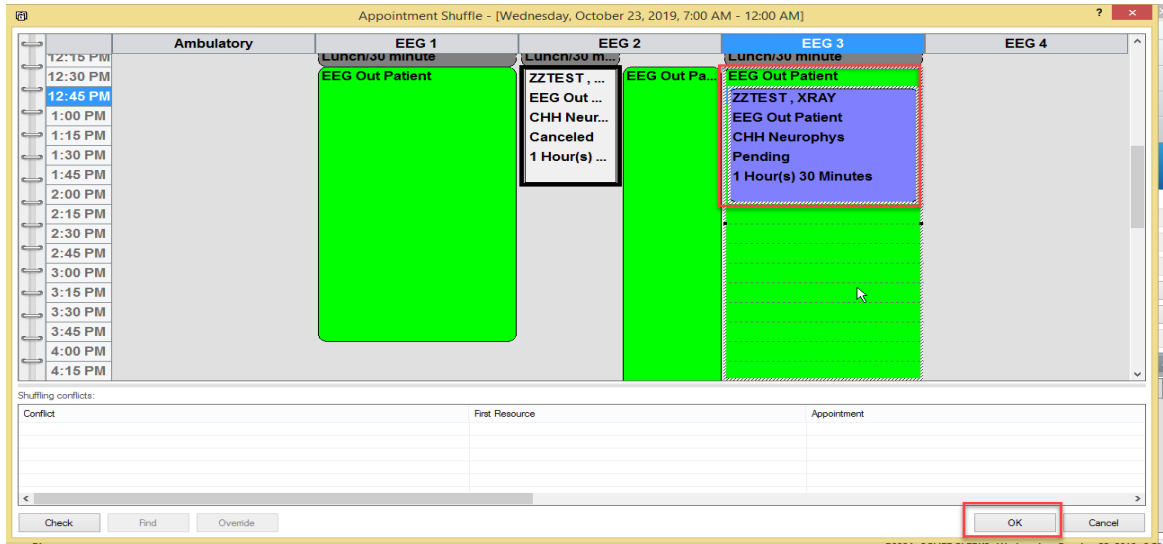


4. The Appointment Shuffle window is displayed

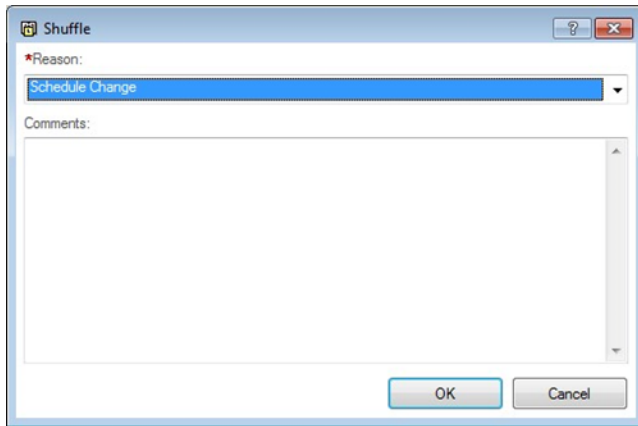
Note: You are only able to shuffle appointments from the primary resource to which they are scheduled. It is also important to note that the appointments can only be shuffled to a new slot or resource on the same day the original appointment was scheduled.

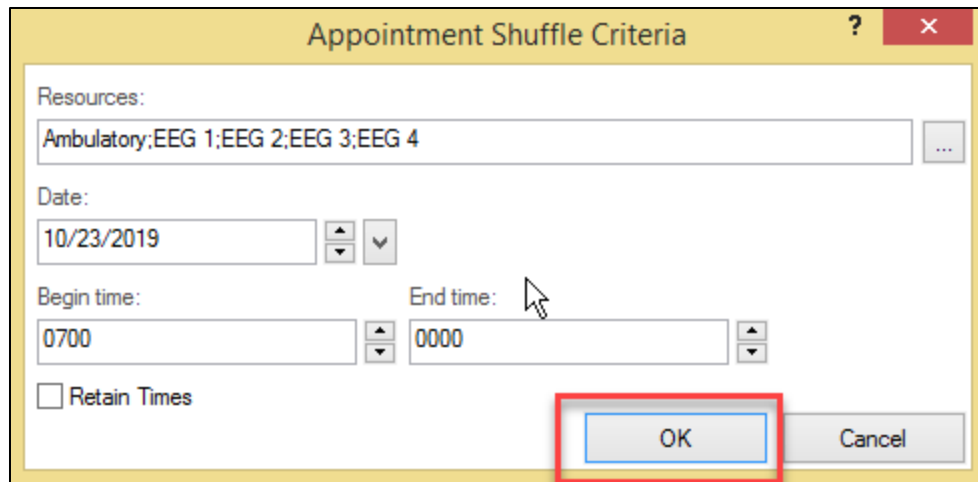
5. To move an appointment to a different time or Resource
6. Click the appointment and drag it to the time and resource you want

7. The appointment is displayed as pending in the new time frame or resource
8. Click OK



9. The Reason for Shuffle window is displayed
10. Select a reason from the drop-down list
11. Click "OK"





The image shows a dialog box titled "Appointment Shuffle Criteria". It contains the following fields and controls:

- Resources:** A text box containing "Ambulatory;EEG 1;EEG 2;EEG 3;EEG 4" and a small "..." button to its right.
- Date:** A date picker showing "10/23/2019" with up and down arrow buttons.
- Begin time:** A time picker showing "0700" with up and down arrow buttons.
- End time:** A time picker showing "0000" with up and down arrow buttons.
- Retain Times:** An unchecked checkbox.
- Buttons:** "OK" and "Cancel" buttons at the bottom right. The "OK" button is highlighted with a red rectangular border.


12. Click OK.

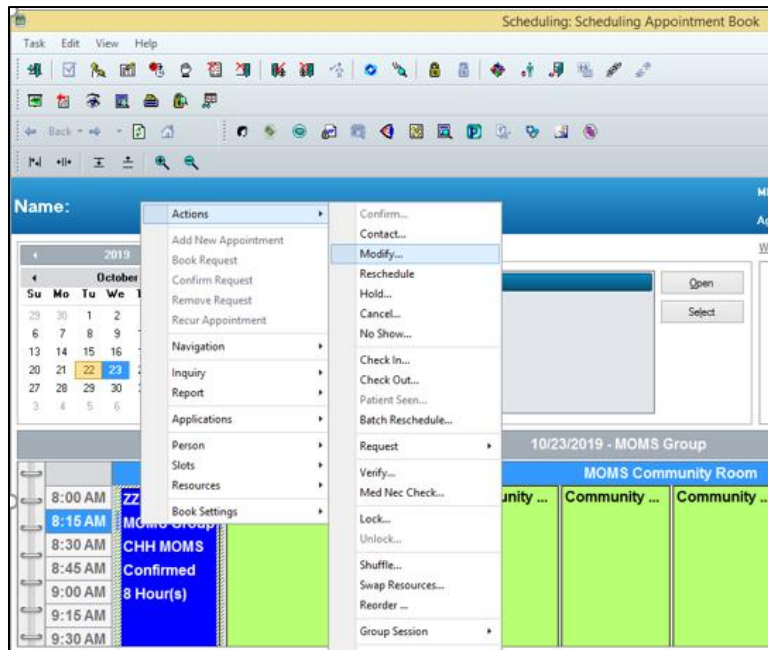
14 Modifications

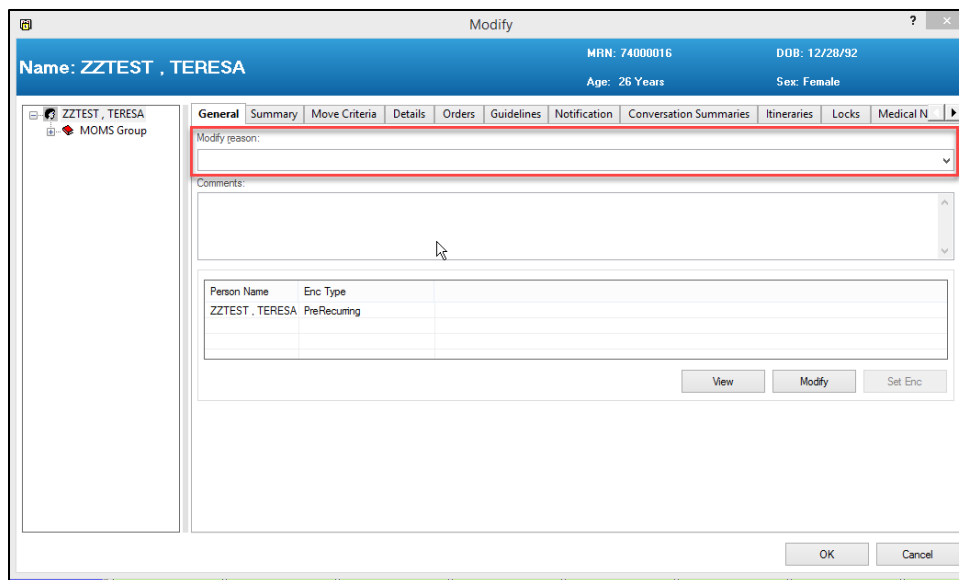
Note: You can modify Appointment information, which includes ordering physician, procedure, comments, and so-on.

14.1 Modify Appointment Information

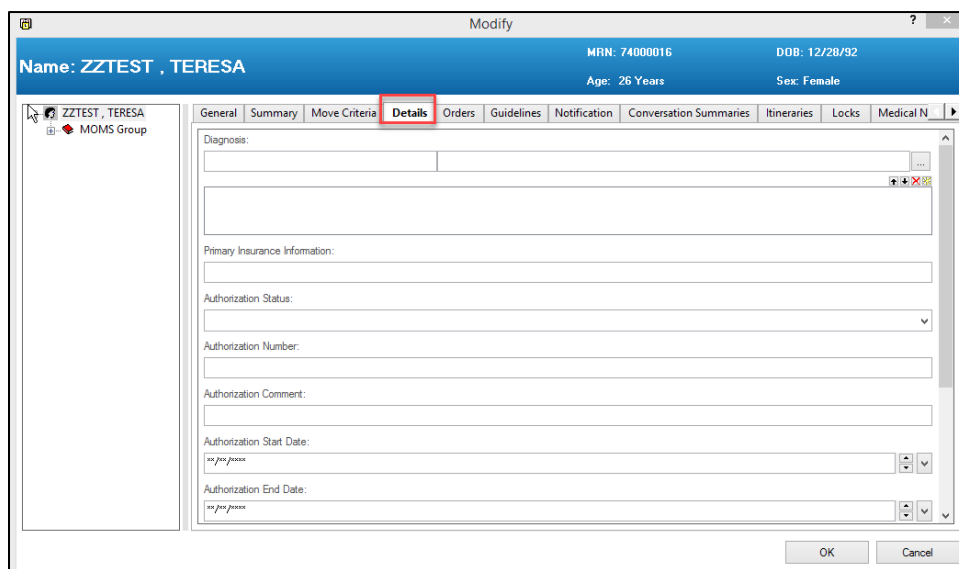
Complete the following steps to modify appointment information:

1. Right-click the appointment.
2. Click Actions.
3. Click Modify.
4. You can also click  in the toolbar.
5. The Modify window is displayed

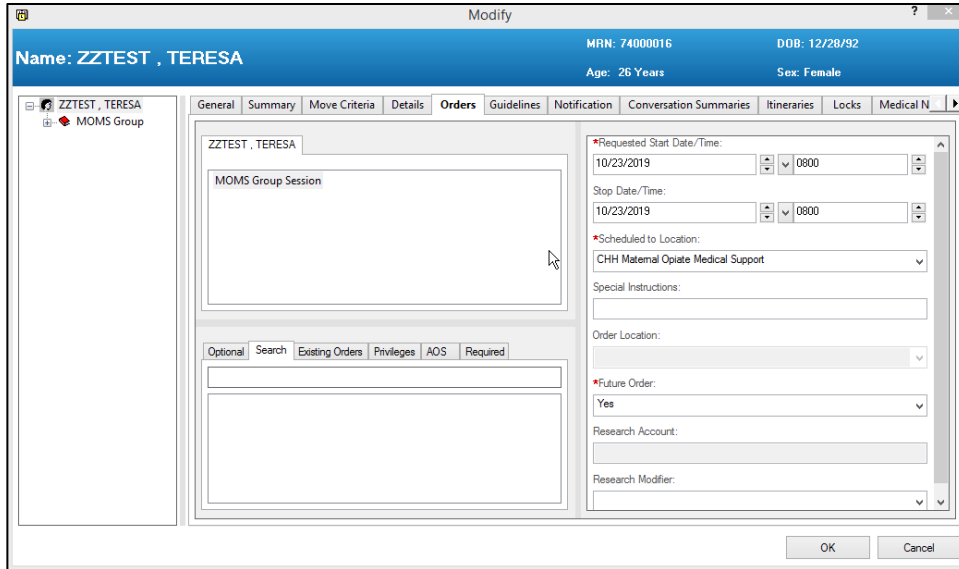




6. In the Modify Window – General tab - click a Modify Reason from the drop down
7. Click OK (if no other modifications are needed)
8. Click the “Details” tab to change appointment information
9. To search for a new diagnosis code, click the ellipsis (...) in the Diagnosis Code section
10. Select the new diagnosis code .
11. Click “OK”



12. If the appointment you are modifying has an associated order, you may need to modify details on the “Orders” tab
13. Click the “Orders” tab to update order details
14. Click OK

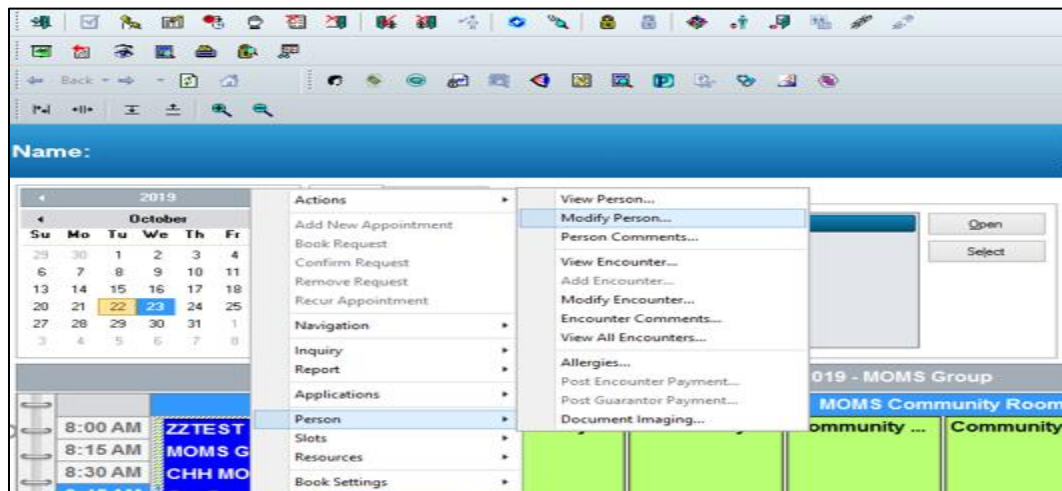


14.2 Modify Patient Information

You can also modify patient information, such as birth date, Last Name, home phone.

Complete the following steps to modify patient information:

1. Right click the patient's appointment
2. Click **Person**.
3. Click **Modify Person**.



4. Organization window opens – click Facility Name
5. Click OK

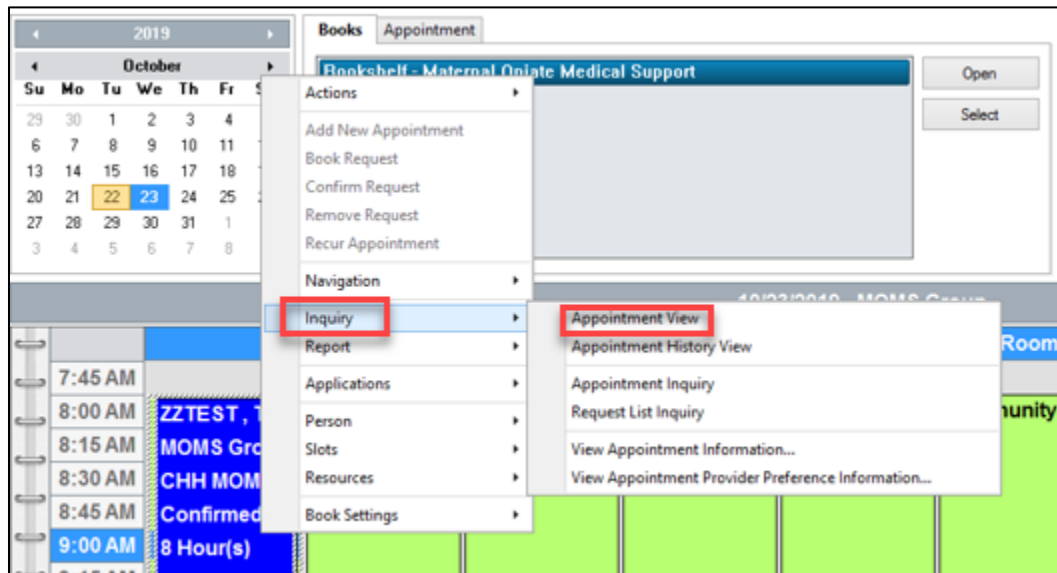
6. Add/Modify Person window opens
7. Make the changes you want
8. Click “Complete”

15 Viewing Appointment Details

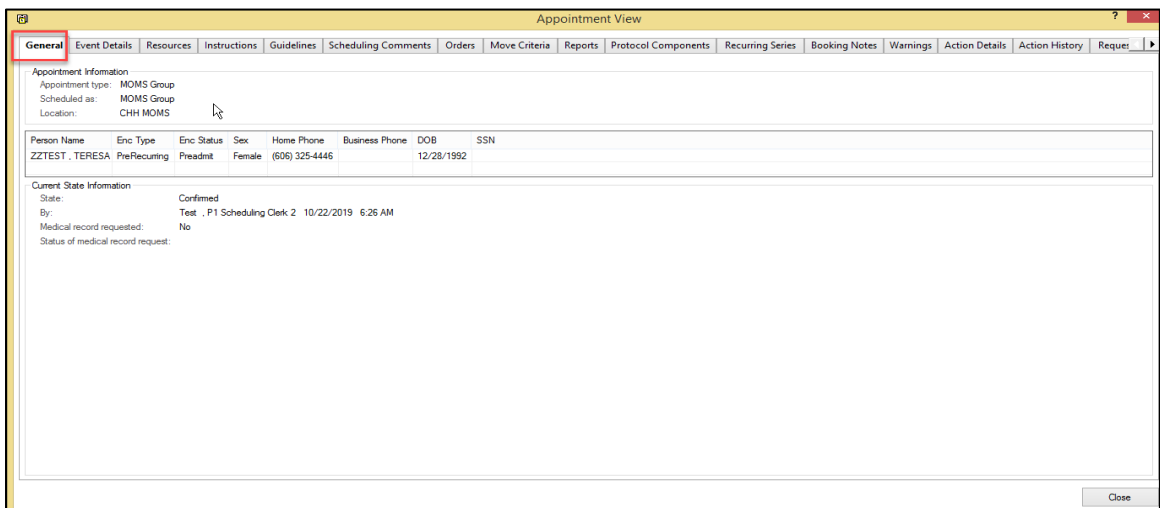
15.1 Appointment View

Complete the following steps to view details associated with an appointment:

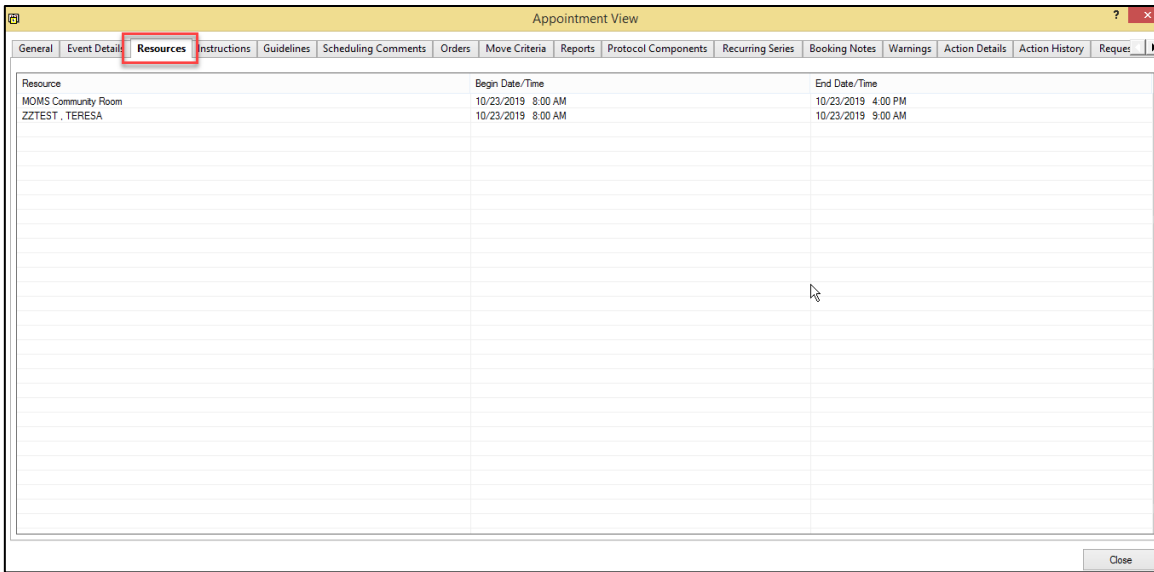
1. Right-click the appointment
2. Select **Inquiry > Appointment View**.
3. Review each tab
4. Click Close (once done reviewing the tab)



General Tab View



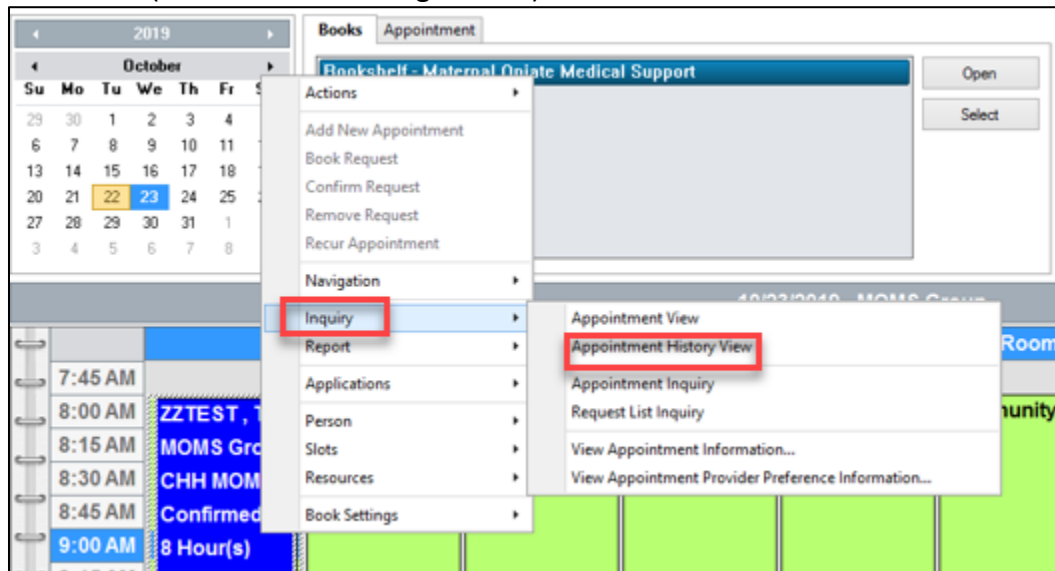
Resources Tab View



15.2 Viewing Appointment History

Complete the following steps to view details of the history of an appointment:

1. Right-click the appointment
2. Select **Inquiry > Appointment History View**.
3. Review each tab
4. Click Close (once done reviewing the tab)



General Tab

The screenshot shows the 'Appointment History View' window with the 'General' tab selected. The left sidebar contains a tree view with 'MOMS Group' and 'Schedule 1' expanded, and buttons for 'Book' and 'Confirm'. The main content area displays 'Appointment Information' with the following details:

- Appointment type: MOMS Group
- Scheduled as: MOMS Group
- Location: CHH MOMS

Below this is a table with the following data:

Person Name	Enc Type	Enc Status	Sex	Home Phone	Business Phone	DOB	SSN
ZZTEST , TERESA	PreRecurring	Preadmit	Female	(606) 325-4446		12/28/1992	

The 'Resources' tab is highlighted with a red box in the original image. A 'Close' button is visible in the bottom right corner.

Resource Tab

The screenshot shows the 'Appointment History View' window with the 'Resources' tab selected. The left sidebar is identical to the previous screenshot. The main content area displays a table with the following data:

Resource	Begin Date/Time	End Date/Time
MOMS Community Room	10/23/2019 8:00 AM	10/23/2019 4:00 PM
ZZTEST , TERESA	10/23/2019 8:00 AM	10/23/2019 9:00 AM

The 'Resources' tab is highlighted with a red box in the original image. A 'Close' button is visible in the bottom right corner.

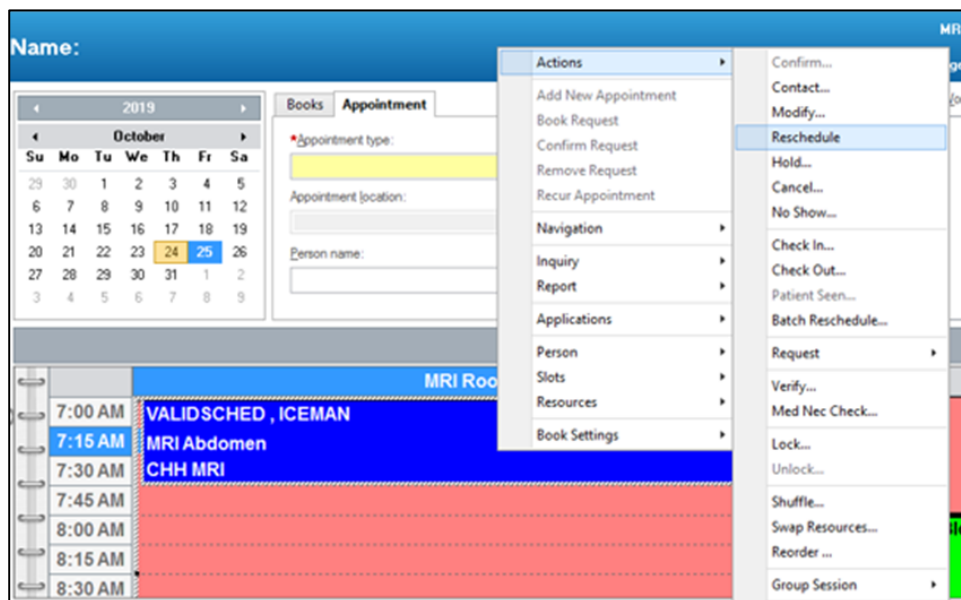
16 Retaining Encounters

Note: Users should reschedule appointments from the Change Appointment Status by Person inquiry and use the FIN column to determine whether there are other appointments tied to the same encounter.

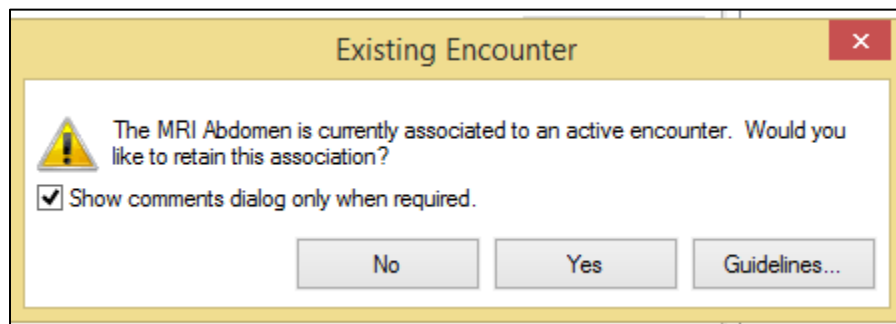
Appointments scheduled on the same day with the same diagnosis should share the same encounter.

Complete the following steps to retain encounters:

1. Reschedule patient
2. Right Click on Patient
3. Select Actions then Reschedule



4. When rescheduling an appointment that has been associated to an encounter, the following message is displayed:



5. Clicking **No** on this message will disassociate the current encounter from the appointment, and the encounter selection window will display at the action where the encounter is required.

NOTE: Respond **No** in the following situations:

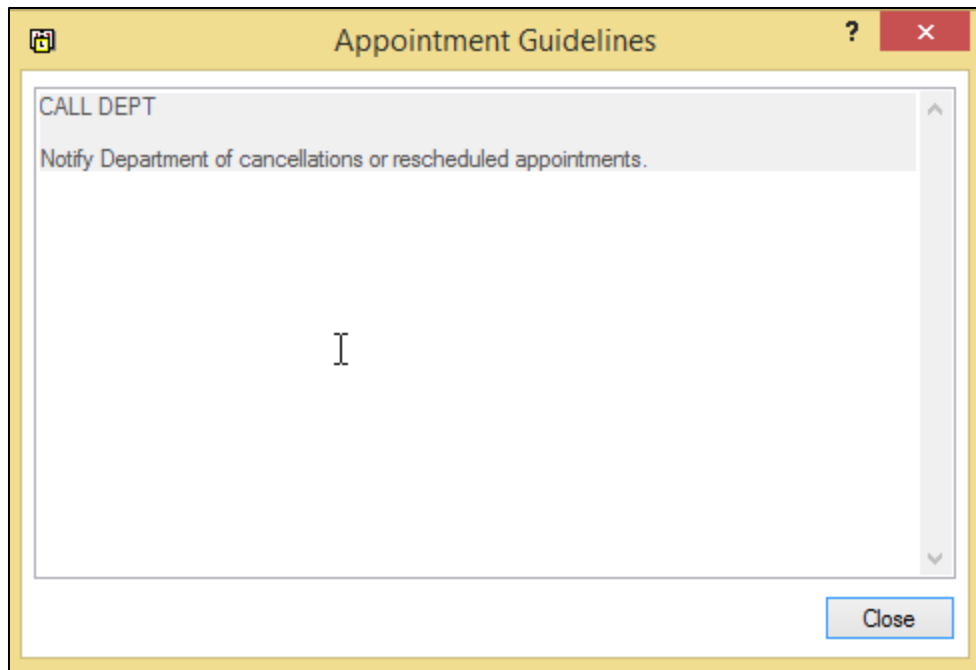
- The wrong encounter has been associated to the appointment.
 - The encounter is associated to another appointment and the other appointment is not scheduled on the same day as the rescheduled appointment.
 - The scheduler is unsure when the appointment will be rescheduled, and there is a possibility that the appointment may need to be attached to another existing encounter.
6. Responding **Yes** to this message will keep the encounter association and will update the estimated arrival date and time to the appointment date and time of the earliest appointment associated to the encounter. You are not prompted with the encounter selection window when confirming the appointment.

Note: Respond Yes in the following situations:

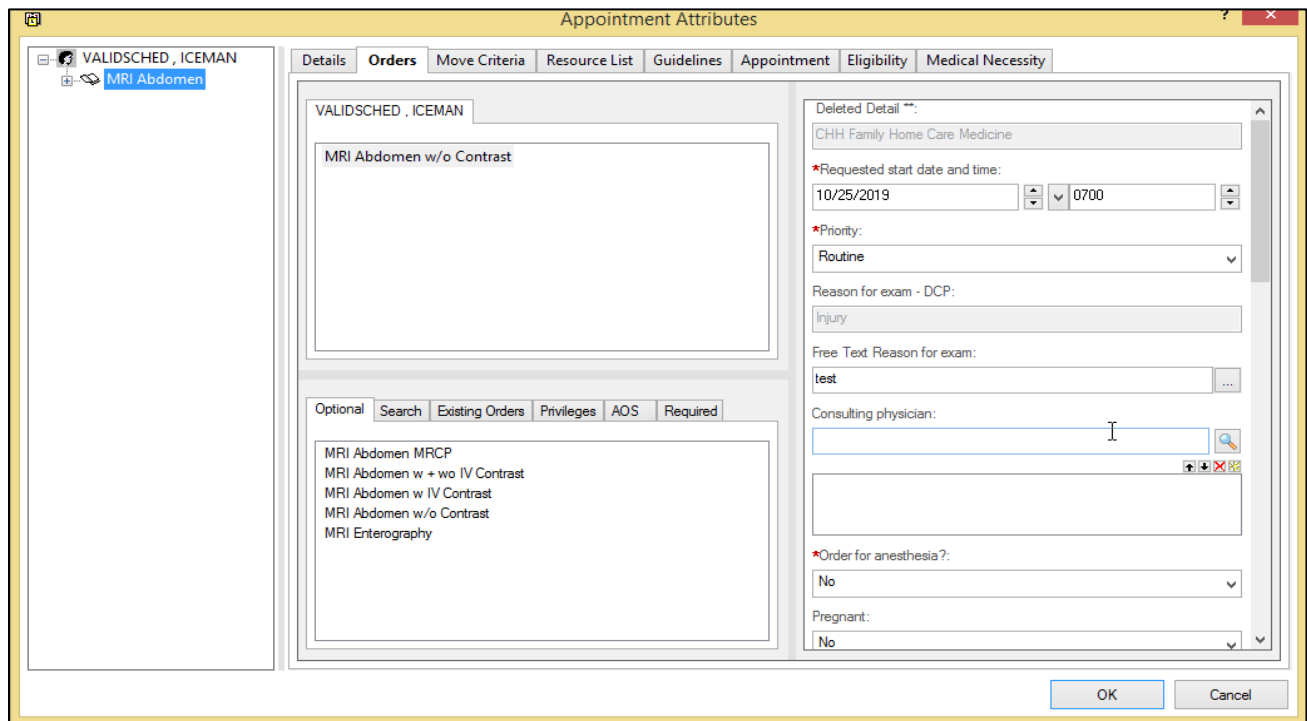
The appointment is being rescheduled to the same day.

There are no other future appointments.

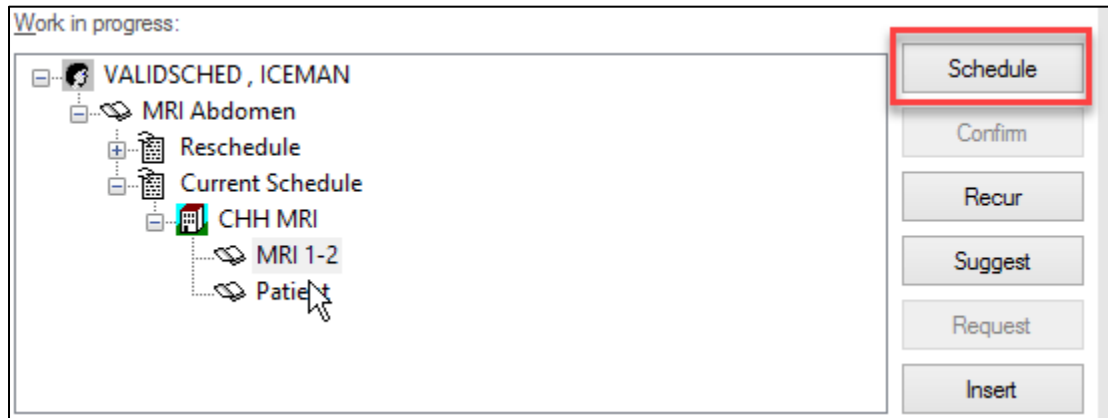
There are no other future appointments associated to an encounter that could be shared with the appointment being rescheduled. For example, all future appointments are tied to a recurring encounter and that type of encounter is not appropriate for the appointment being rescheduled. Because you have no other non-recurring encounters to choose from you would select Yes to keep the current encounter associated to the appointment.



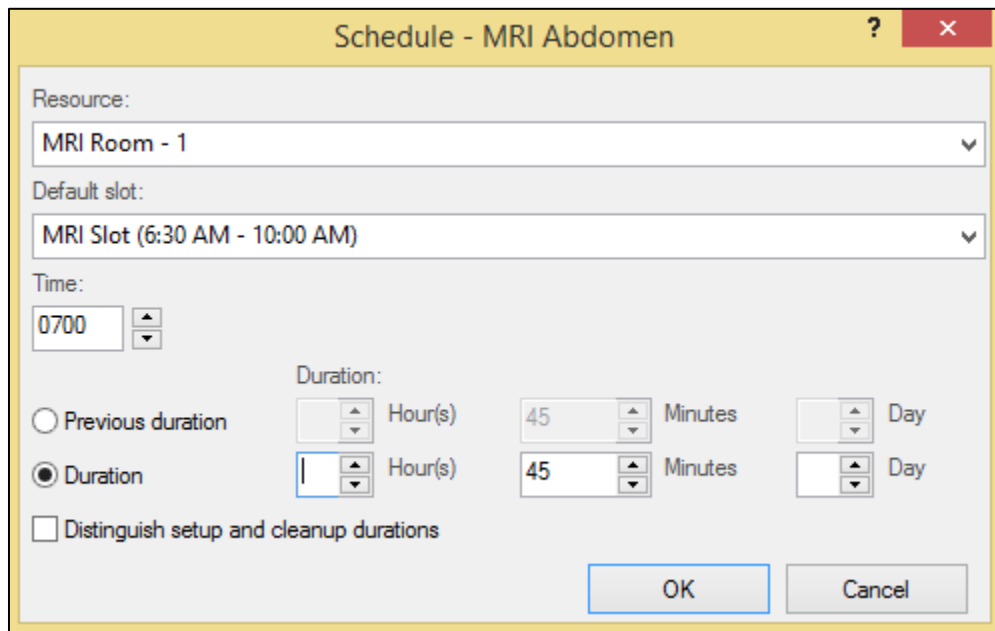
7. Follow the Appointment Guidelines
8. Appointment Attributes window opens
9. Complete any required fields (yellow highlighted/* fields)
10. Click OK



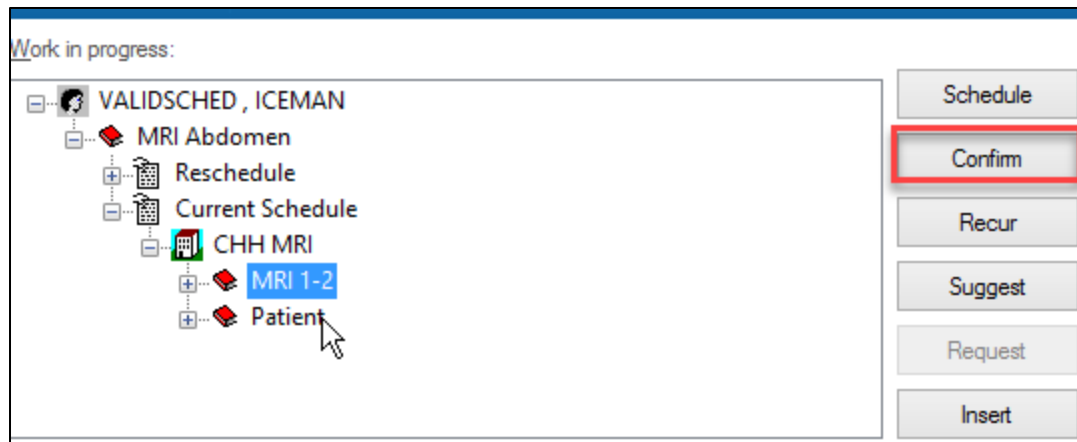
11. Work in Progress window opens with patient information
12. Click Schedule



13. Schedule – MRI Abdomen window opens
14. Review and update Resource (if applicable)
15. Review and update Default Slot (if applicable)
16. Review Time and update (if applicable)
17. Click OK



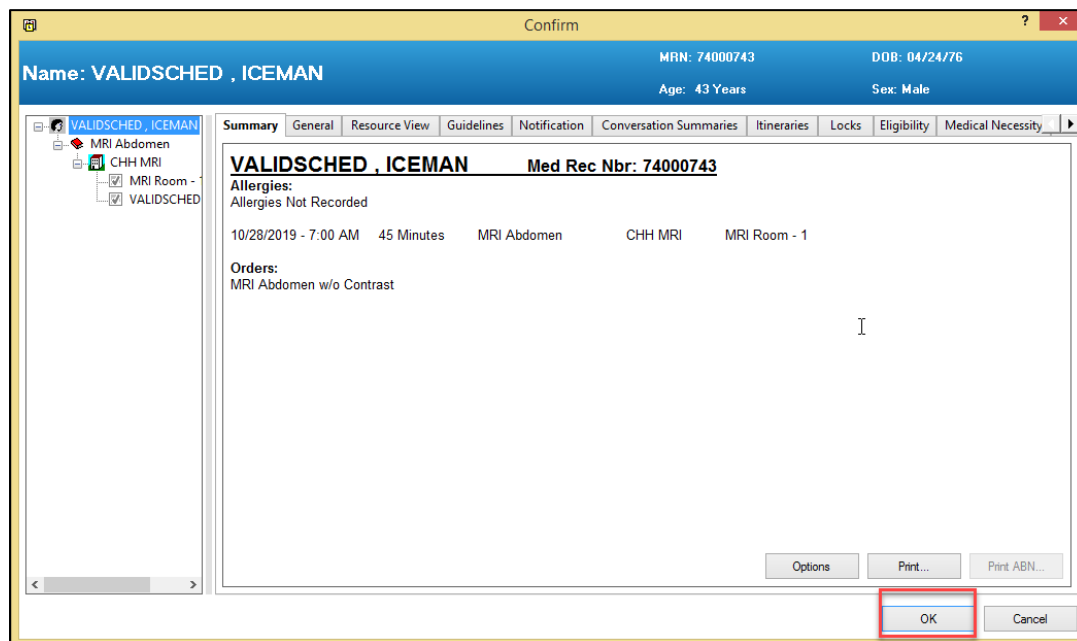
18. Work in Progress window opens with schedule in pending status (red books)
19. Click Confirm



20. Confirm window opens

21. Review Information

22. Click OK

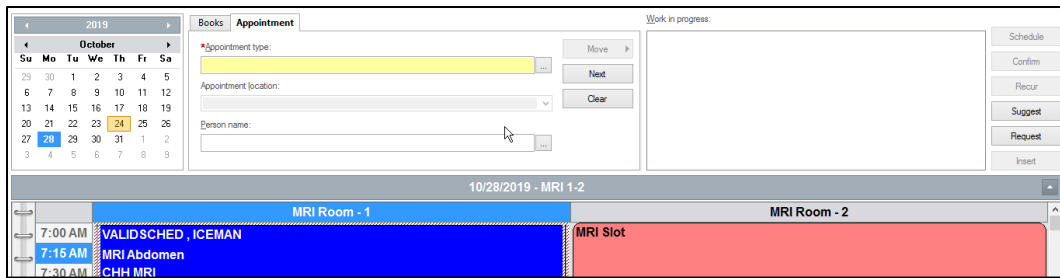
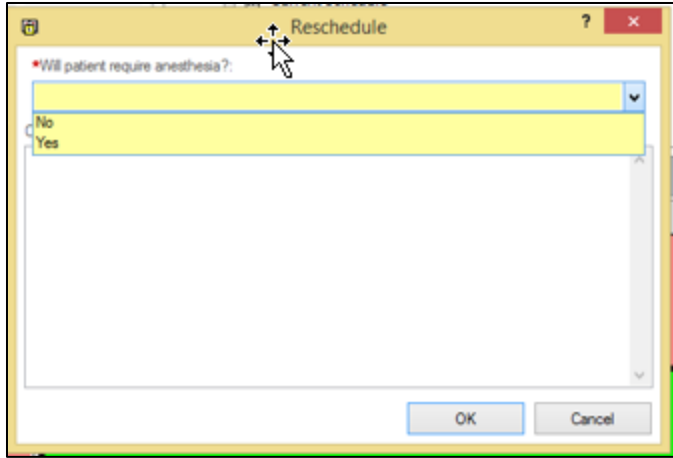


23. Reschedule window opens

24. Complete any required fields

25. Click OK

26. Patient's appointment is scheduled and WIP window is now empty



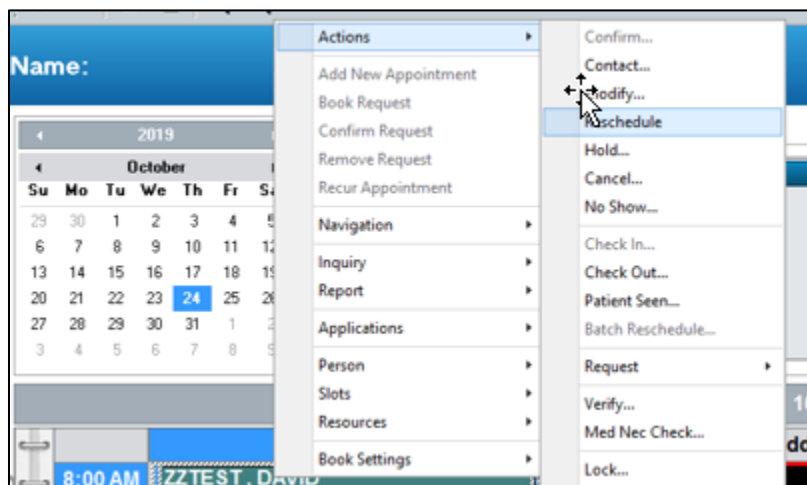
17 Associating Orders with an Encounter

Note: Once an appointment with orders has been Checked In, the order becomes active and is associated to an encounter. Also, on your appointment with orders, if the order activates at Confirm, the order becomes active and is associated to an encounter.

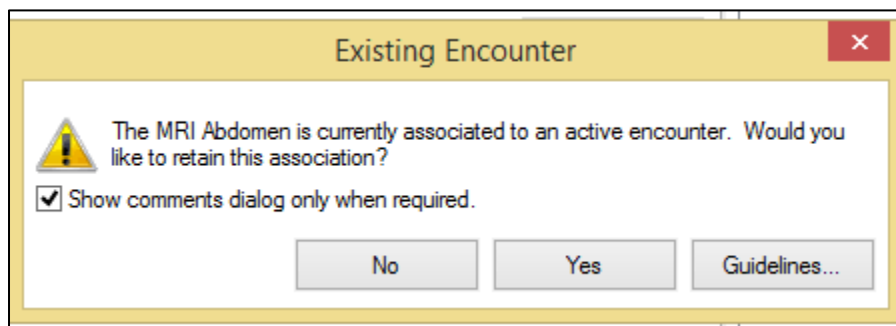
For that reason, appointments that have active orders should be Cancelled, and Not “Rescheduled”.

To reschedule an appointment that is associated with an encounter, complete the following steps:

1. Right Click on Patient
2. Select Actions then Reschedule

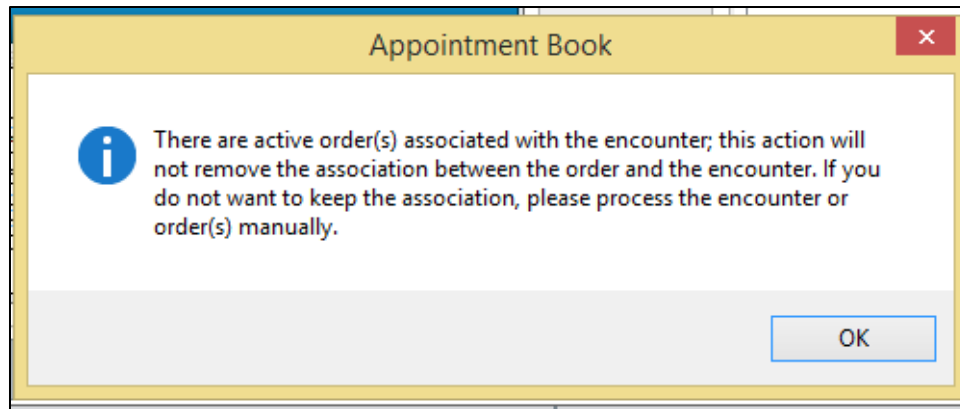


3. When rescheduling an appointment that has been associated to an encounter, the following message is displayed:



4. Clicking **No** on this message will disassociate the current encounter from the appointment, and the encounter selection window will display at the action where the encounter is

Note: If the appointment is rescheduled after the order has been activated (against *Cerner's* recommendation) and you select **No in the Existing Encounter warning, the following message displays:**



Note: At this point, manually disassociate the order from the encounter by right-clicking the order in the Appointment Attributes window and selecting **Cancel. Do not cancel out of the Appointment Attributes window without cancelling the original order and selecting a new order. Doing so will cause the order and the appointment type to be associated to different encounters.**

5. After cancelling the original order, select the same order from the **Optional** tab. After confirming the appointment and selecting an encounter, that encounter will be associated to both the appointment and the newly entered order.

Note: If the order has a required order, the **Optional tab will be blank. Use the **Search** tab to find the order.**

Following *Cerner's* recommendation of cancelling checked-in appointments rather than rescheduling the appointments eliminates the need to follow the process outlined above.

18 Prior Authorizations

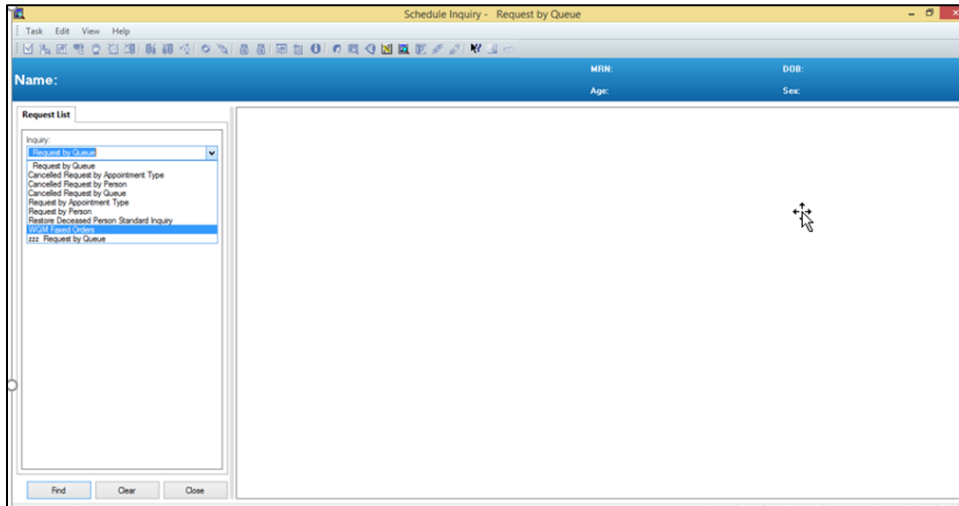
Scenario: The office or acute area that ordered the test/procedure has obtained the Prior Authorization and has documented all the Prior Authorization information. They have moved the (MRI) Request for Scheduling to the appropriate Request Queue (CHH RAD MRI).

Complete the following steps to process a request for scheduling:

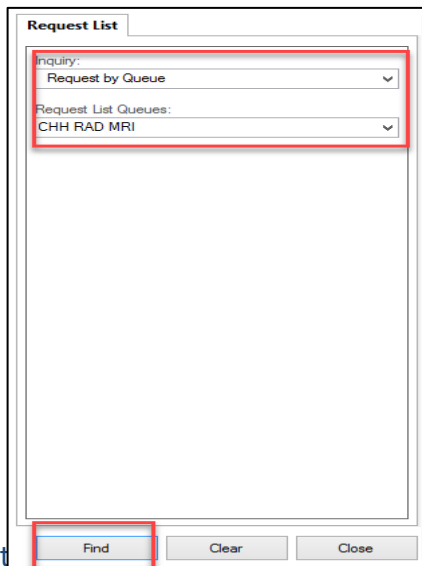
- 1. Pull up Message Center and minimize

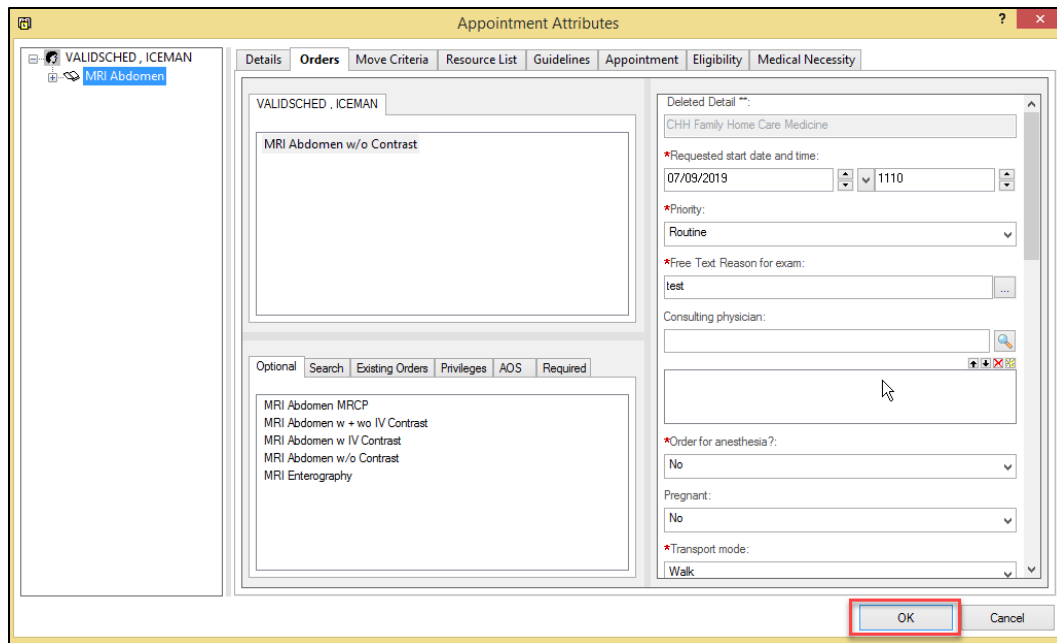


- 2. Click on Request List Inquiry
- 3. Schedule Inquiry - Request by Queue window opens



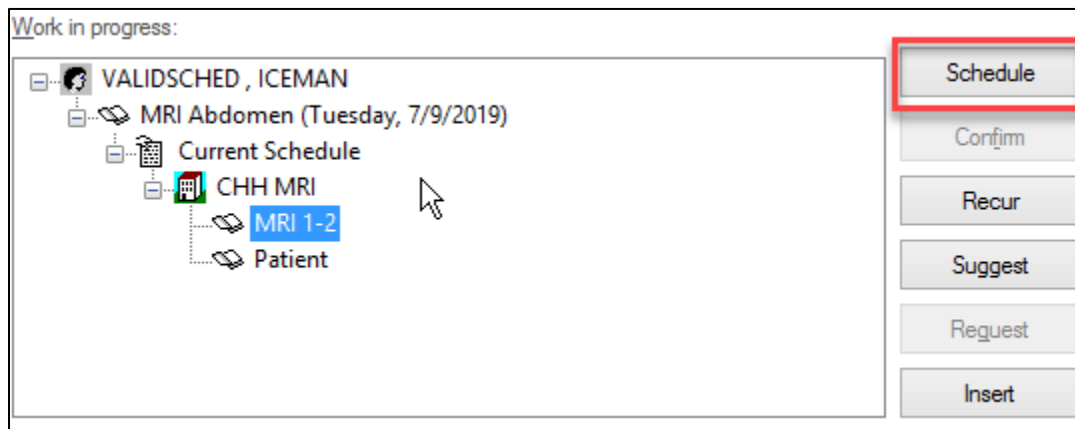
- 4. Select from Inquiry drop-down list (i.e. Request by Queue)
- 5. Select from Request List Queues (i.e. CHH RAD MRI)
- 6. Click on Find





14. Work in Progress window opens with patient information

15. Click Schedule



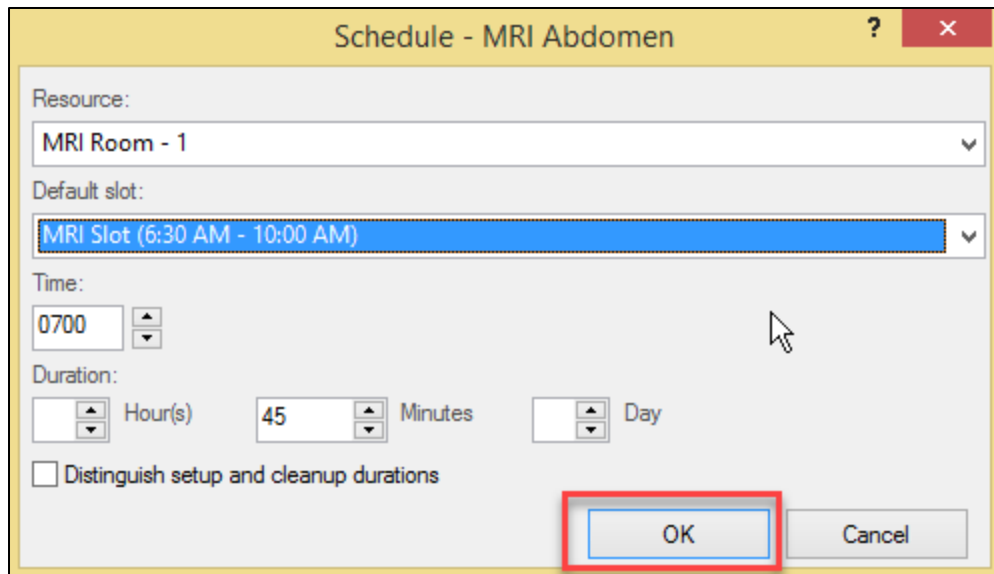
16. Schedule – MRI Abdomen window opens

17. Review and update Resource (if applicable)

18. Review and update Default Slot (if applicable)

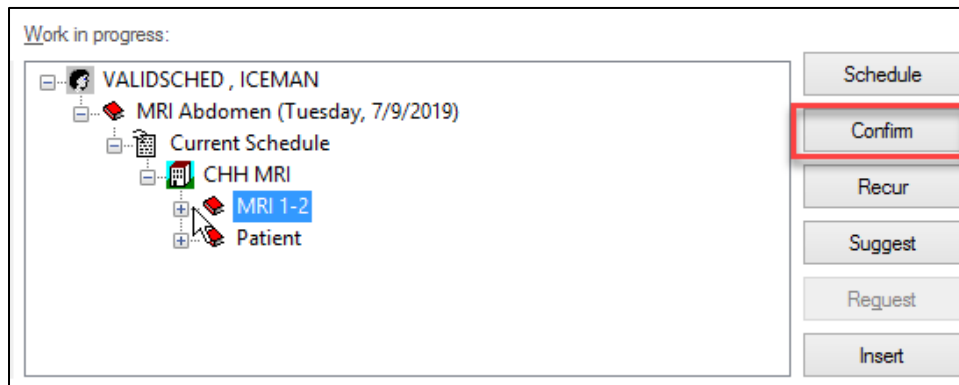
19. Review Time and update (if applicable)

20. Click OK



21. Work in Progress window opens with schedule in pending status (red books)

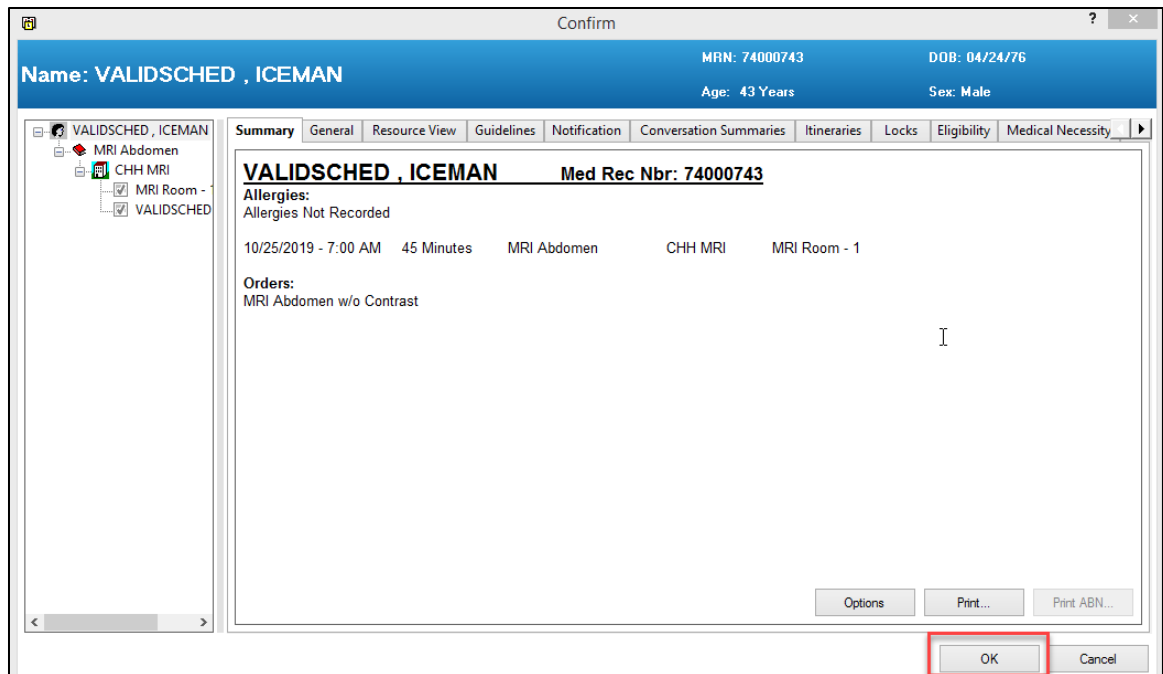
22. Click Confirm



23. Confirm window opens

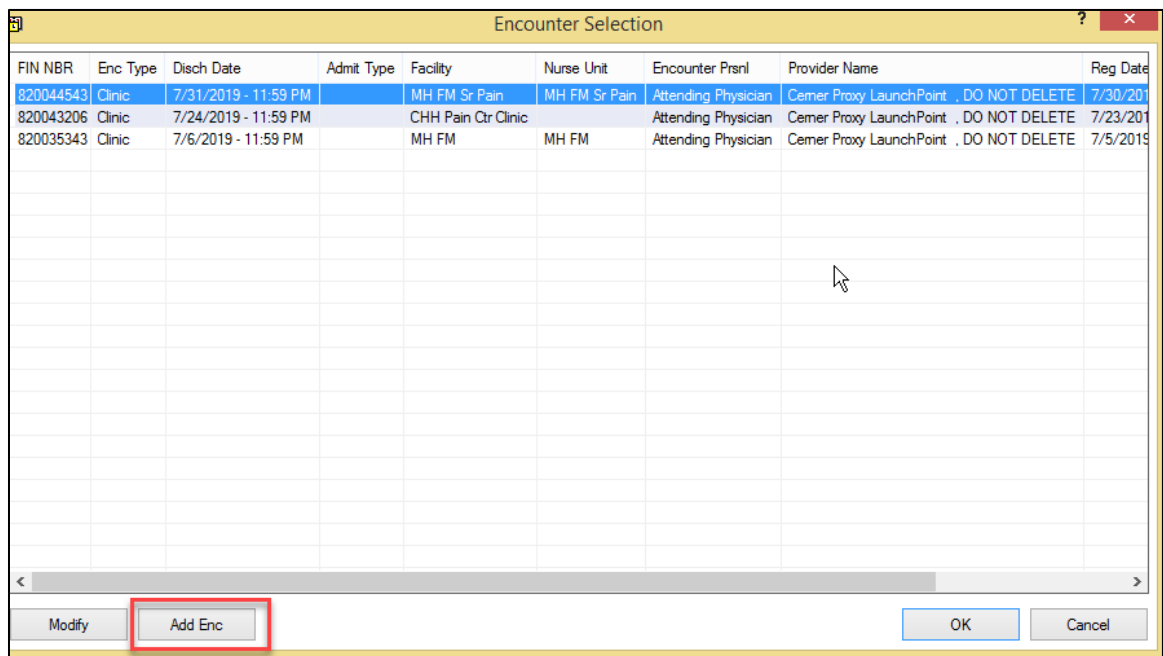
24. Review Information

25. Click OK



26. Encounter Selection window opens

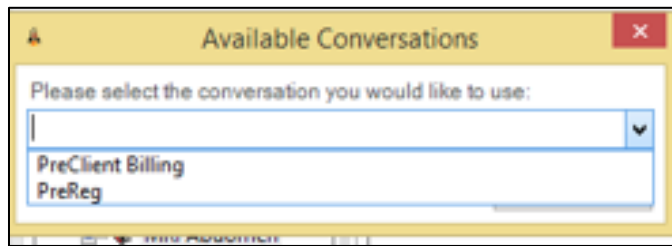
27. Click Add Enc (as there is not an Encounter yet for this appointment)



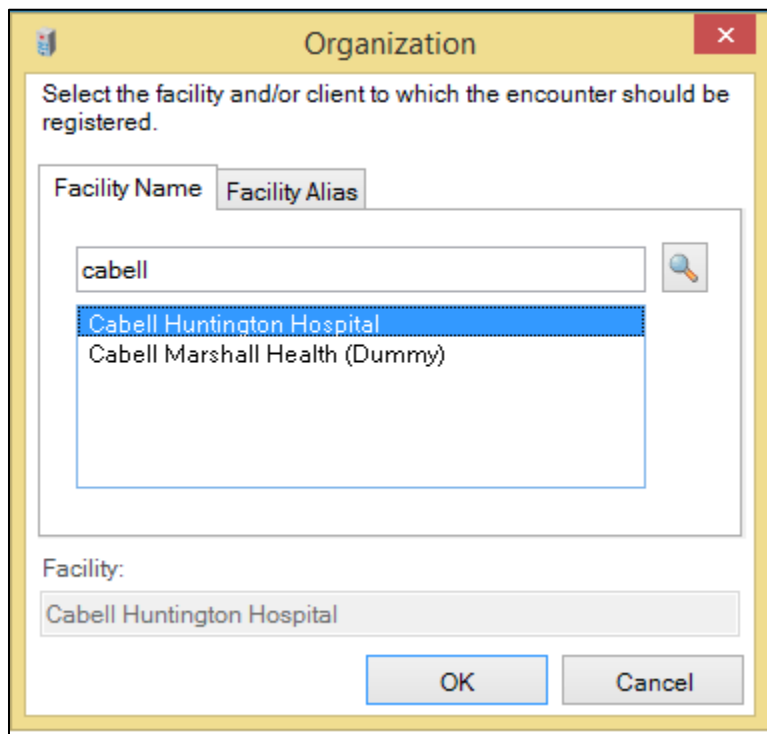
28. Available Conversation window opens

29. Select PreReg from drop down

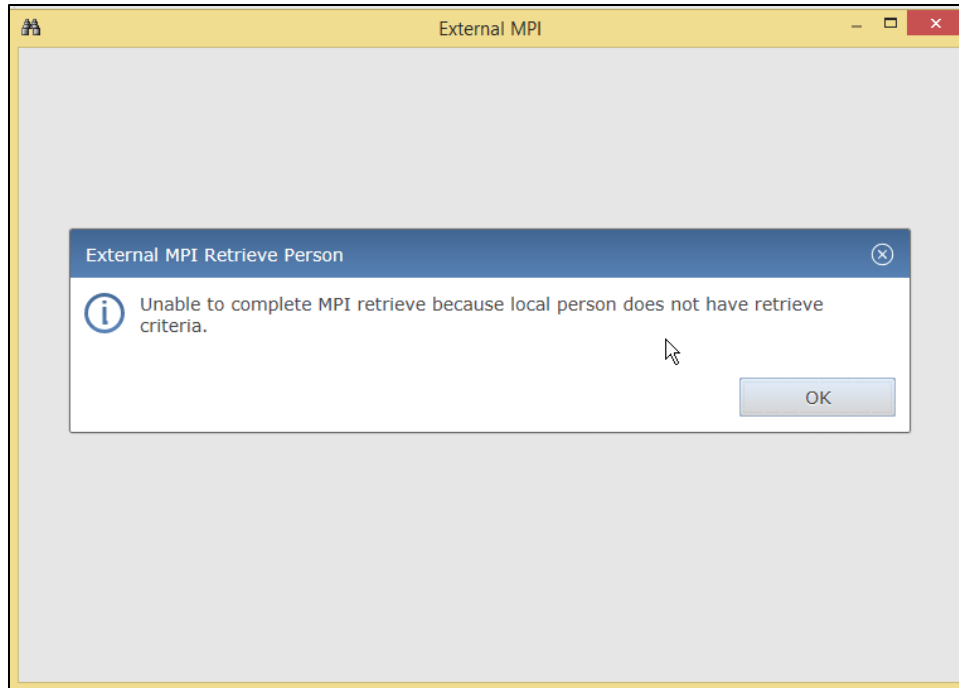
30. Click OK



31. Organization window opens
32. Type in Facility Name
33. Click OK



34. External MPI runs and shows Results
35. Click OK



36. PreReg conversation opens and complete all required fields.

37. Complete Birth Sex

38. Complete Social Security Number or Reason for No SSN

39. Patient Information Tab

- Review and update Address Information (as applicable)

 A screenshot of the "PreReg" form. The form is divided into several tabs: Patient Information, Encounter Information, Appointment Information, Guarantor Information, Insurance Primary, Insurance Secondary, Insurance Tertiary, MSP, Insurance Summary, and Additional Contacts. The "Patient Information" tab is active. Fields include:

- *Last Name: VALIDSCHEID
- *First Name: ICEMAN
- Middle Name: (empty)
- Preferred First Name: (empty)
- Previous Last Name: (empty)
- Suffix: (empty)
- *Admin Sex: Male
- *Birth Sex: (highlighted in yellow)
- *Social Security Number: (highlighted in yellow)
- Reason For No SSN: (empty)
- *Date of Birth: 04/24/1976
- Age: 43Y
- Medical Record Number: 74000743
- Financial Number: (empty)
- Estimated Patient Responsibility: \$0.00
- Medical Necessity Status: (empty)
- NOP Acknowledgement: Not on File
- *PreReg Status: Incomplete
- Arrival Comment: (empty)

 Below the tabs is the "Address Information" section, which includes:

- Address Info: (empty)
- Pt Phys Addr - Clear (c): (empty)
- Pt Alt Address - Clear (c): (empty)
- Pt Home (Mailing) Address: 2000 MARSHALL ROAD, HUNTINGTON, WV 25701...
- Pt Physical Address: (empty)
- Address Verification: (empty)
- Pt Alternate Address: (empty)

 At the bottom right of the form are "Complete" and "Cancel" buttons.

40. Encounter Information

- Complete Nurse\Ambulatory (CHH MRI)
- Patient Type (PreReg)

- Medical Service (Radiology)
- Attending/Rendering Physician (add ordering Physician)
- Estimated Arrive Date (is the date of the appointment)
- Estimated Arrive Time (is the time of the appointment)

41. Insurance Primary

42. MSP if applicable (Medicare patients only)

43. Insurance Summary

- Click Submit Eligibility icon (to run Eligibility)

44. Review Eligibility results

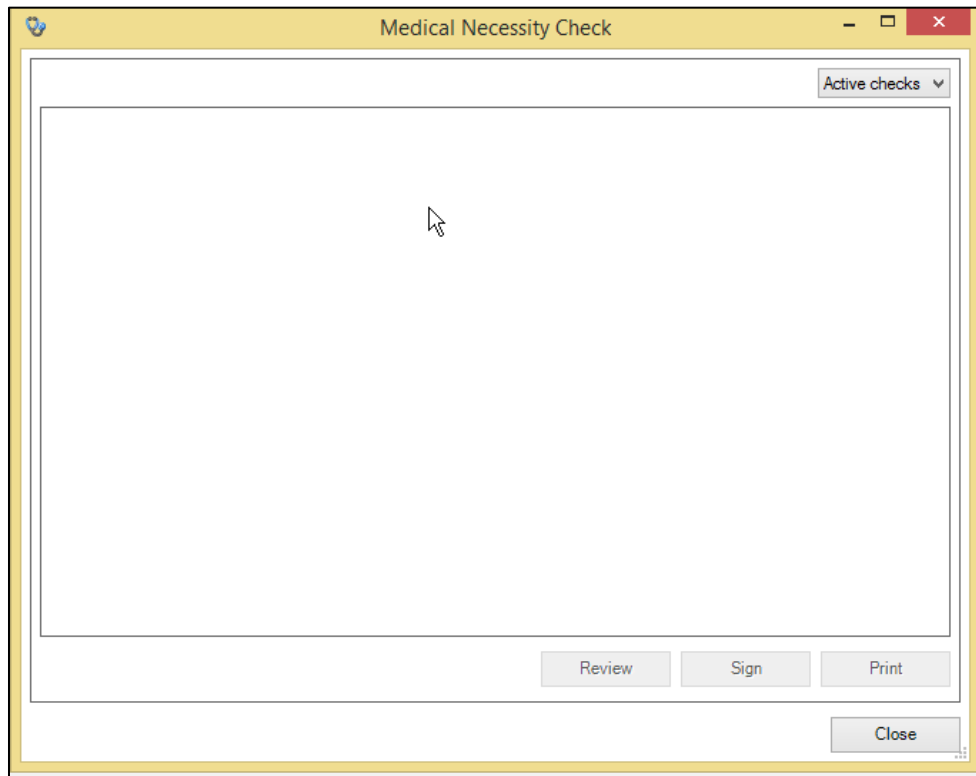
45. Click Medical Necessity icon



46. Medical Necessity Check window opens with results

47. Click Review, Sign, Print

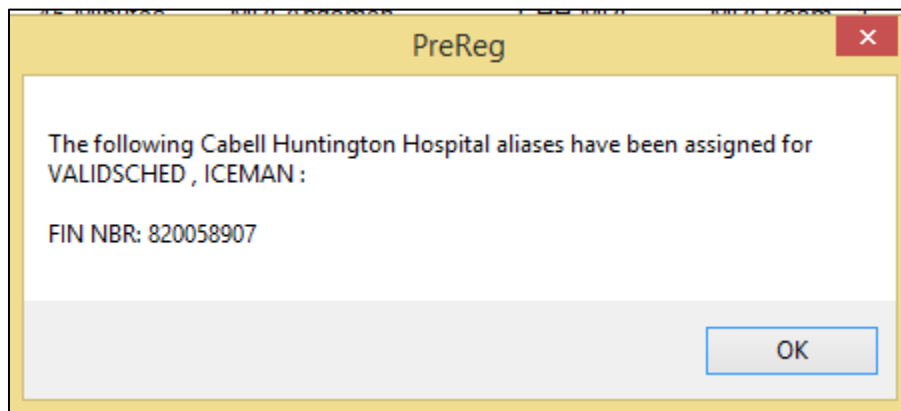
48. Click Close



49. Click Complete

PreReg window opens with FIN NBR (new encounter)

50. Patient's appointment is scheduled and WIP window is now empty



2019

October

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Books: Appointment

Appointment type:

Appointment location:

Person name:

Move

Next

Clear

Work in progress:

Schedule

Confirm

Recur

Suggest

Request

Insert

10/25/2019 - MRI 1-2

	MRI Room - 1	MRI Room - 2
7:00 AM	VALIDSCHED , ICEMAN	MRI Slot
7:15 AM	MRI Abdomen	
7:30 AM	CHH MRI	

19 Blocking Schedules (Managers Only)

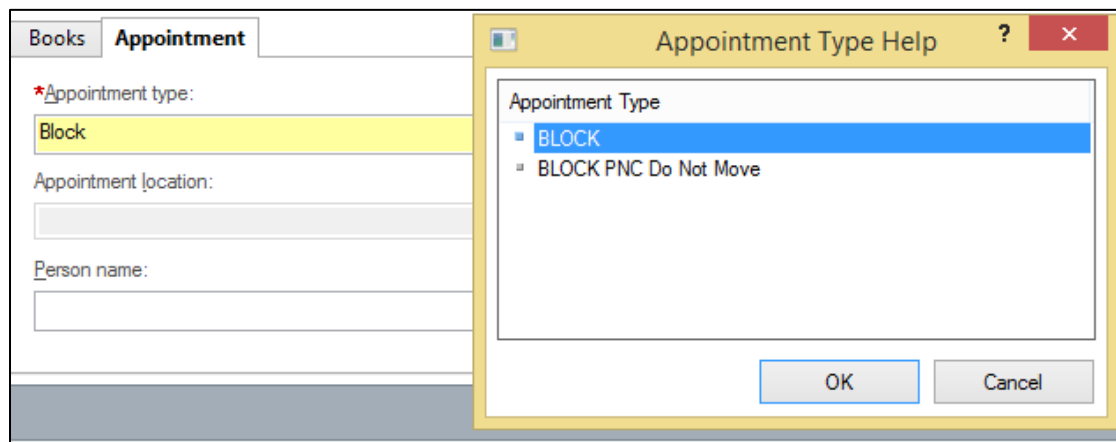
When you want to block off time for a department meeting, you can do so using an appointment type to block the time.

The appointment types to use are: Meeting and Block Time.

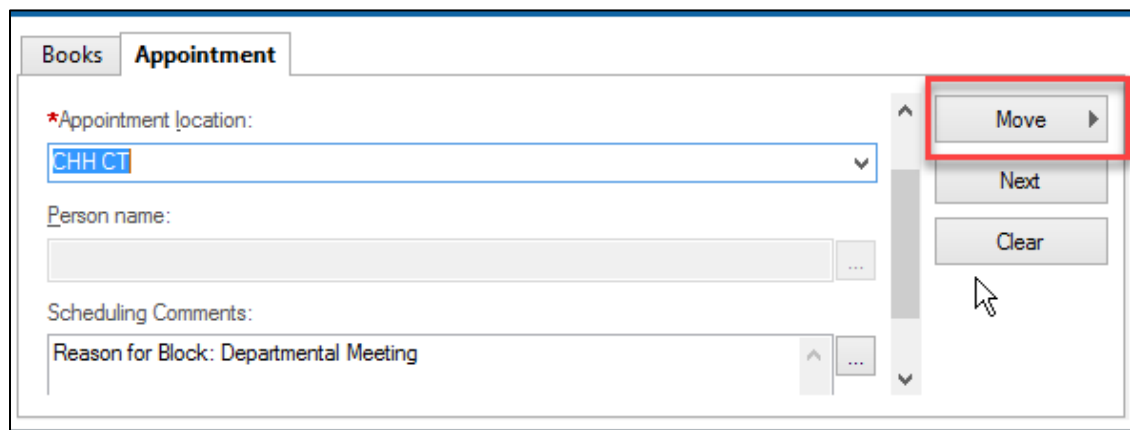
Make sure to include a comment explaining why you are blocking the time.

Complete the following to block a schedule:

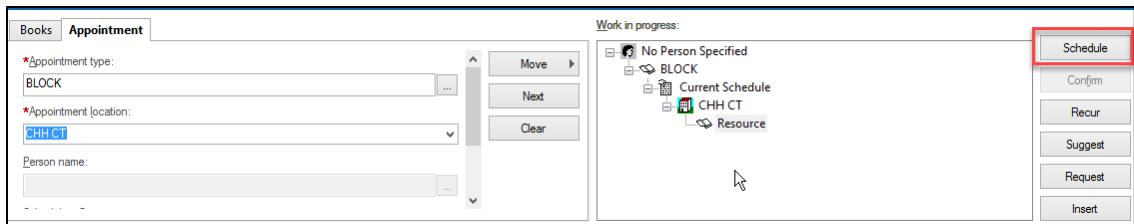
1. Select the Book (for the department or area that you want to place a Block)
2. Click on Appointment Tab
3. Select the appointment type (Block)
4. Select the Location



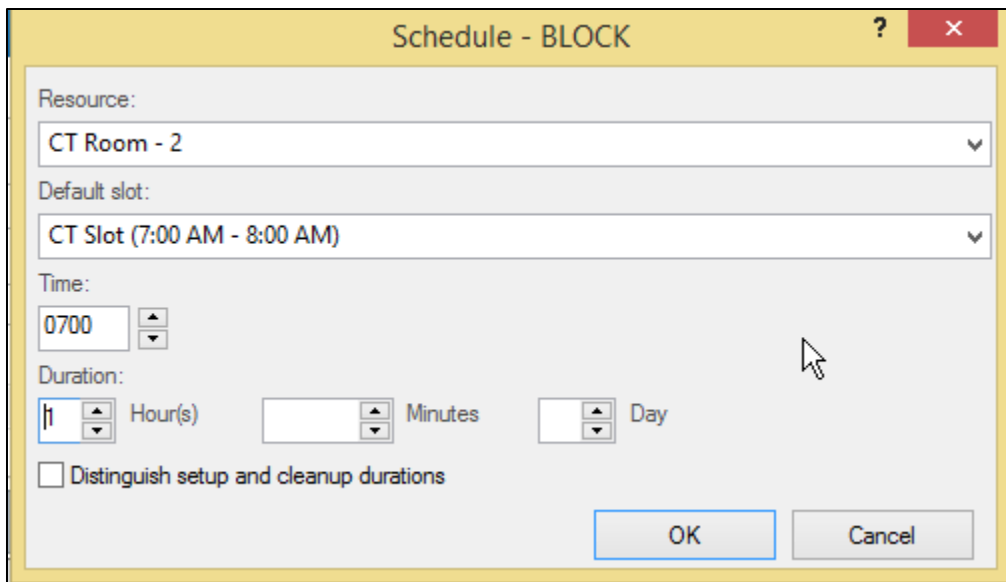
5. Enter a comment indicating why you are blocking off time and who authorized this block
6. Click **“Move”** to move the appointment into the WIP



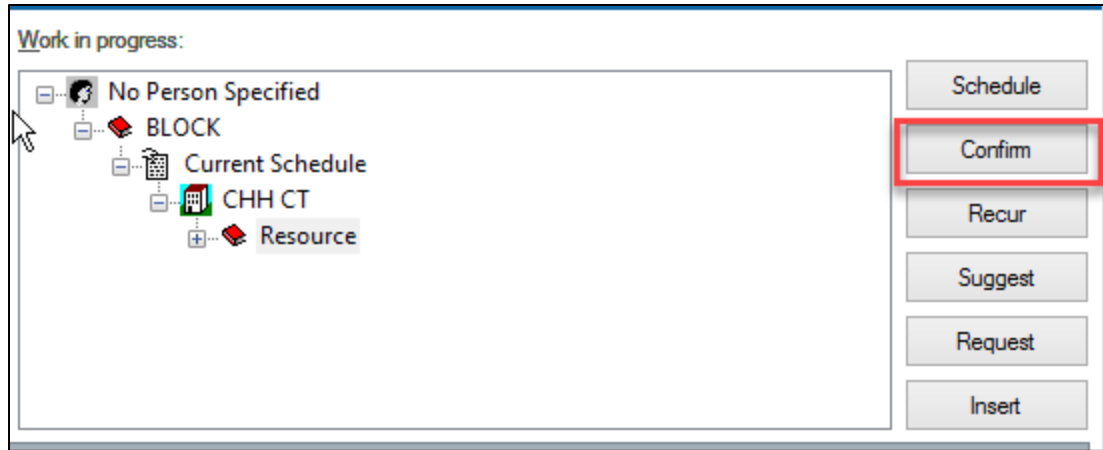
7. Click **“Schedule”** and select the resource and time slot you want to block



8. Schedule Block window opens with Resource (use drop down to change resource if applicable)
9. Default Slot (change the Slot time by using the drop down to see other times)
10. Select the duration
11. Click **“OK”**

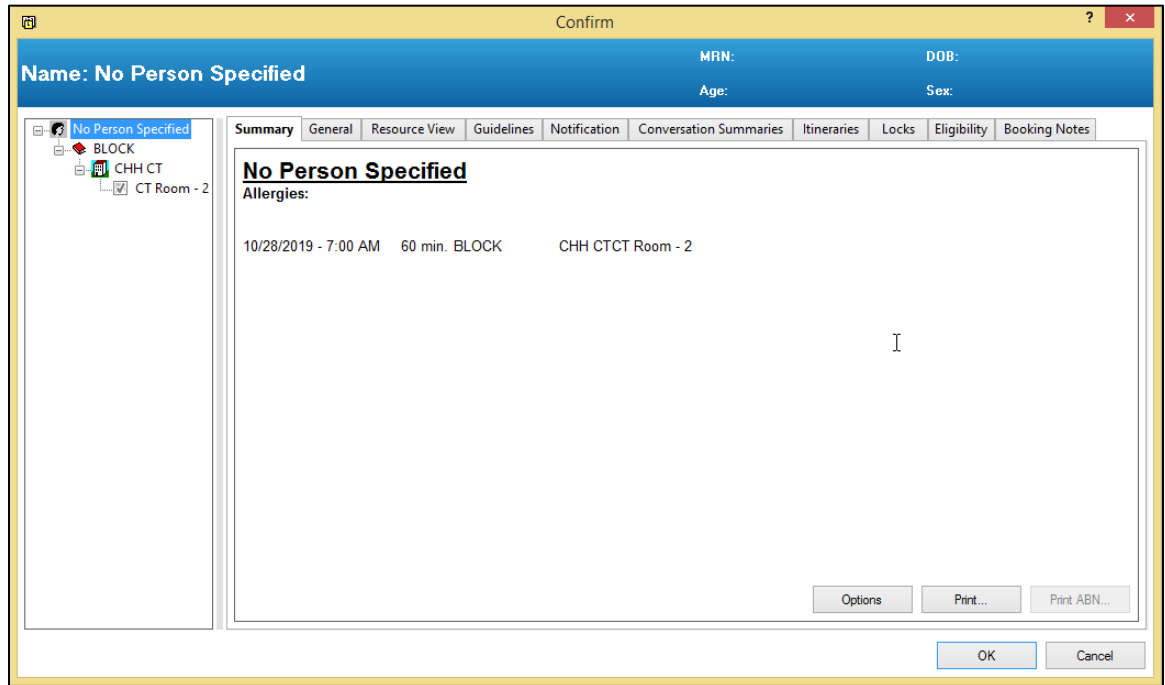


12. Confirm the block is in the same manner as any other appointment. The appointment displays as confirmed



13. Confirm window opens

14. Click OK



15. To block multiple resources, click "Next" and move multiple appointments into the WIP and schedule from there.

2019

October

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Books **Appointment**

*Appointment type:
 ... Move ▶

Appointment location:
 ... Next

Person name:
 ... Clear


10/28/2019 - CT

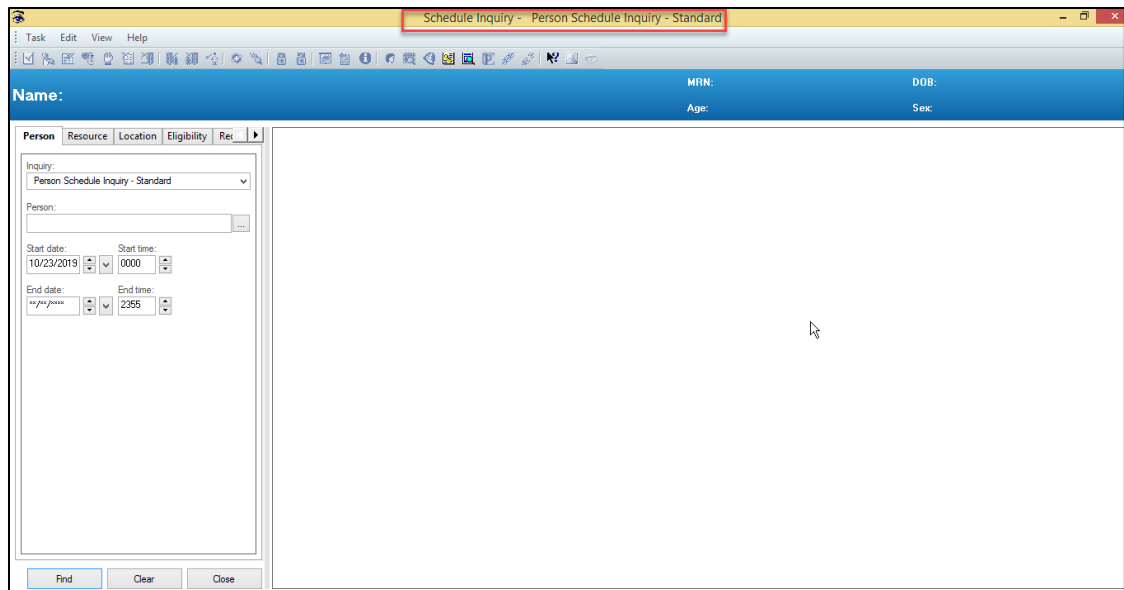
	CT Room - 2	CT Same Day Add On
7:00 AM	B BLOCK CHH CT Confirmed 1 Hour(s)	
7:15 AM		
7:30 AM		
7:45 AM		

20 Types of Schedule Inquiry

20.1 Person Inquiry

Complete the following steps to perform a person inquiry:

1. Click on the Appointment Inquiry icon (eye icon) 
2. Schedule Inquiry window opens



3. Click on Person Tab
4. Click on Inquiry Drop Down

Person Resource Location Eligibility Rec

Inquiry:
Person Schedule Inquiry - Standard

Person:
| ...

Start date: 10/23/2019 Start time: 0000

End date: */ */ * End time: 2355

Find Clear Close

5. Choose the Type of Person Inquiry
6. In Person Box, Click the Ellipsis (three dots)
7. Person Search window opens
8. Search for the Patient and Select the Patient
9. Click OK

Person Search

Account #:

Name:

MRN:

DOB:

Sex:

SSN:

Location:

Search Reset

Match %	Name	MRN	SSN	Sex	DOB	Ag
80.00	ZZTEST . TRICK	05375487	XXX-XX-2381	Male	03/11/83	36
100.00	ZZTEST . TERESA	74000016		Female	12/28/92	26

OK Cancel Preview...

10. Select the Start Date/Time
11. Select the End Date/Time
12. Click Find.

Person Resource Location Eligibility Rec

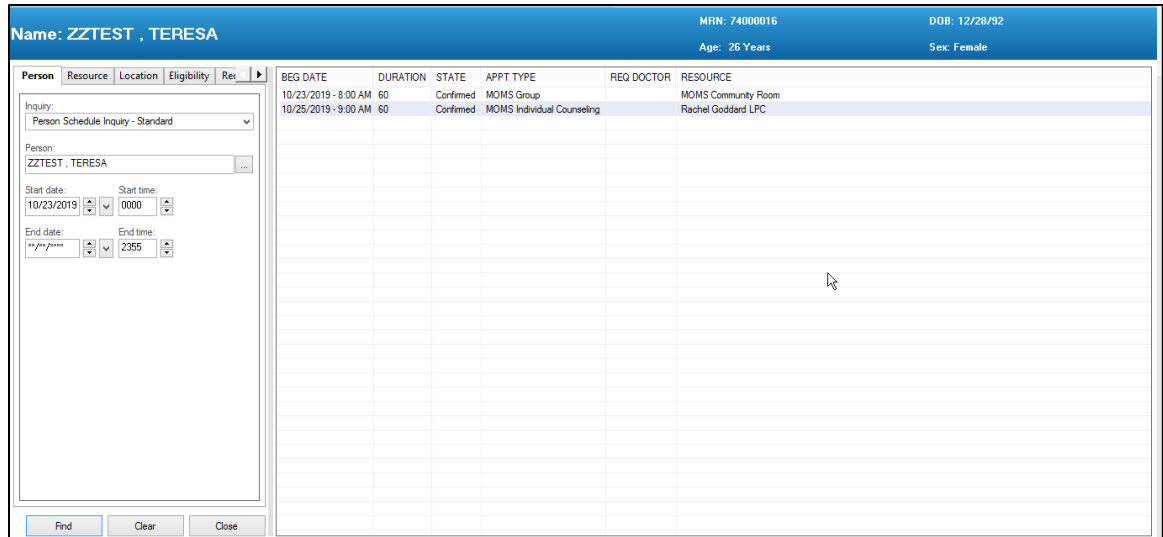
Inquiry:
Person Schedule Inquiry - Standard

Person:
ZZTEST , TERESA

Start date: 10/23/2019 Start time: 0000

End date: */ */ * End time: 2355

Find Clear Close



13. Patient Window opens with all appointment information

14. Click Close

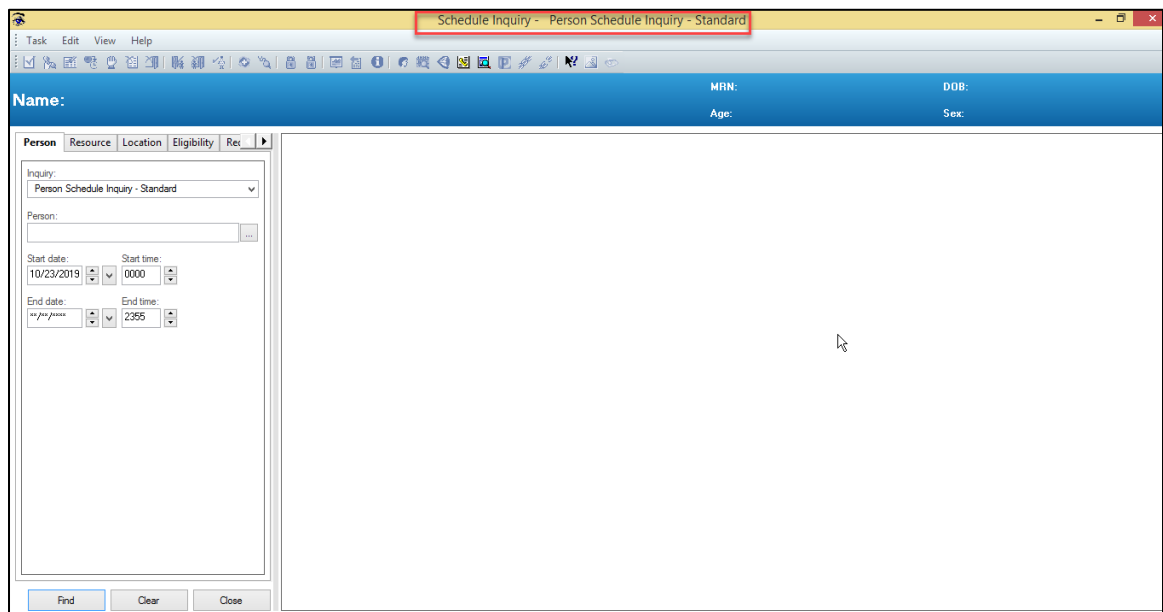
20.2 Resource Inquiry

Complete the following steps to perform a resource inquiry:

1. Click on the Appointment Inquiry icon (eye icon)



2. Schedule Inquiry window opens

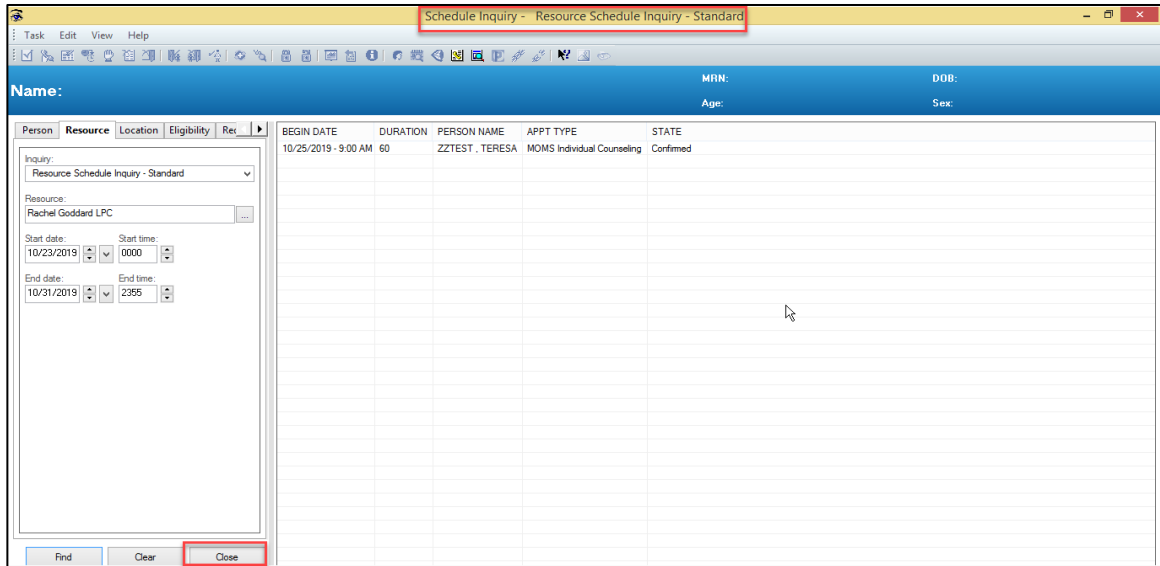


3. Click on Resource Tab
4. Click on Inquiry Drop Down
5. Choose the Type of Resource Inquiry
6. In Resource Box, type the Resource Name or Click the Ellipsis (three dots) and search

The screenshot shows a software window with a tabbed interface. The 'Resource' tab is active and highlighted with a red box. Below the tabs, there are two input fields, both also highlighted with red boxes. The first is labeled 'Inquiry:' and has a dropdown menu showing 'Resource Open Slots'. The second is labeled 'Resource:' and is an empty text box with an ellipsis button to its right. Below these are four date and time selection fields: 'Start date:' (10/23/2019), 'Start time:' (0000), 'End date:' (10/23/2019), and 'End time:' (2355). At the bottom of the window are three buttons: 'Find', 'Clear', and 'Close'.


The screenshot shows a software window with tabs for 'Person', 'Resource', 'Location', 'Eligibility', and 'Rec'. The 'Resource' tab is active. Below the tabs, there is a dropdown menu for 'Inquiry:' set to 'Resource Schedule Inquiry - Standard'. A text field for 'Resource:' contains 'Rachel Goddard LPC'. Below this, there are four date and time selection fields: 'Start date:' (10/23/2019), 'Start time:' (0000), 'End date:' (10/31/2019), and 'End time:' (2355). These four fields are enclosed in a red rectangular box. At the bottom of the window, there are three buttons: 'Find', 'Clear', and 'Close'. The 'Find' button is also enclosed in a red rectangular box.

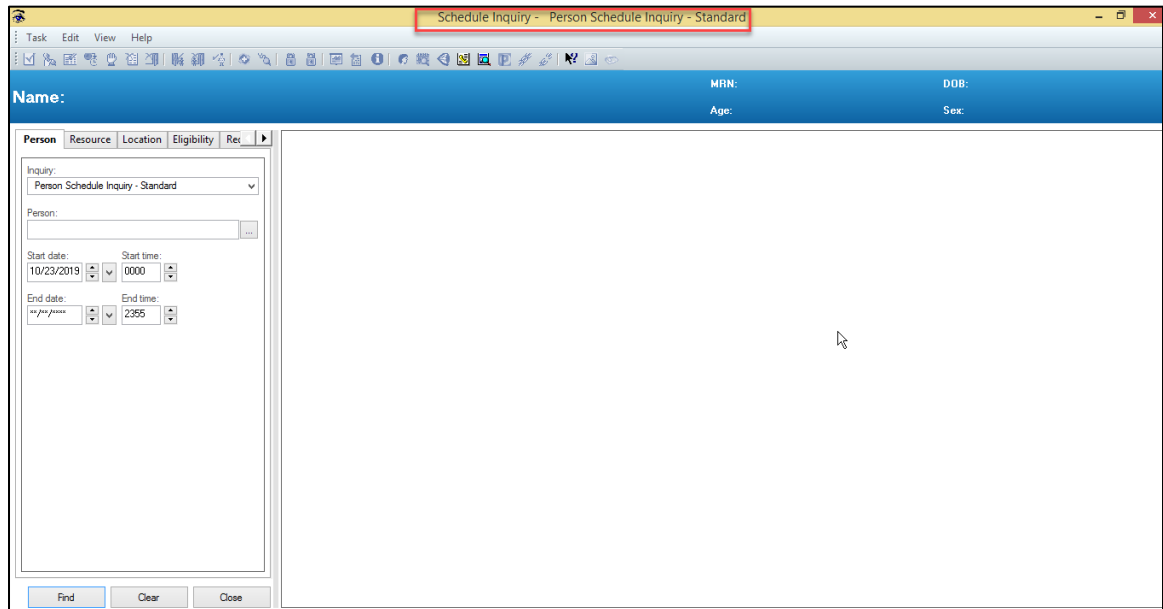
7. Select the Start Date/Time
8. Select the End Date/Time
9. Click Find
10. Schedule Inquiry - Resource Schedule Inquiry (whichever Inquiry that you chose) opens
11. Click Close (when done)



20.3 Location Inquiry

Complete the following steps to perform a location inquiry:

1. Click on the Appointment Inquiry icon (eye icon) 
2. Schedule Inquiry window opens

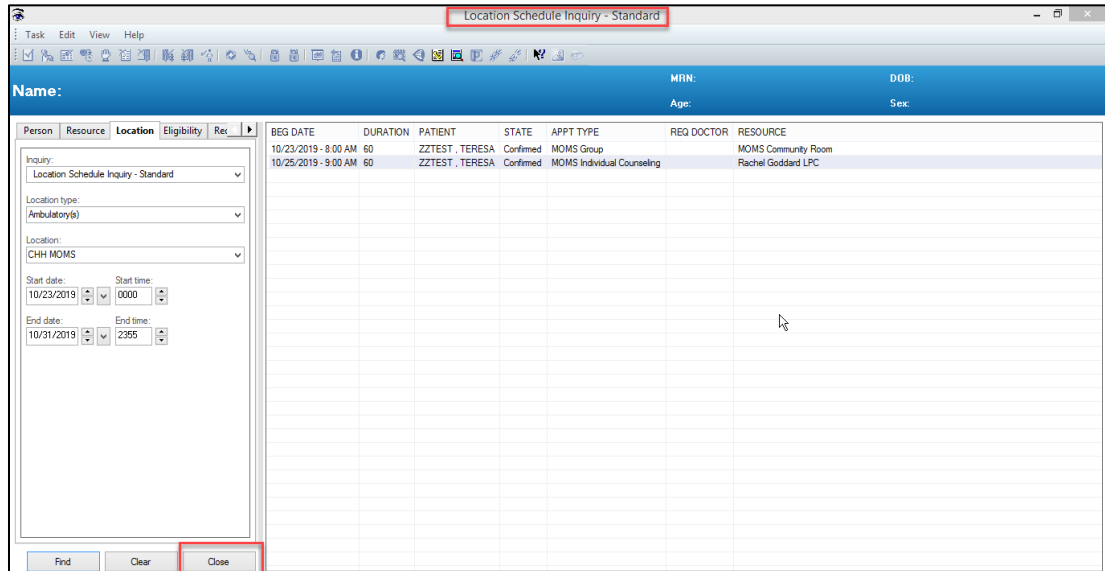


The screenshot shows a software window with a tabbed interface. The 'Location' tab is active and highlighted with a red box. Below the tabs are three dropdown menus, each also highlighted with a red box. The first dropdown is labeled 'Inquiry:' and contains the text 'Location Schedule Inquiry - Standard'. The second dropdown is labeled 'Location type:' and contains 'Ambulatory(s)'. The third dropdown is labeled 'Location:' and contains 'MH Ortho'. Below these are four date and time selection fields: 'Start date:' (10/23/2019), 'Start time:' (0000), 'End date:' (10/23/2019), and 'End time:' (2355). At the bottom of the window are three buttons: 'Find' (highlighted with a blue border), 'Clear', and 'Close'.

3. Click on Location Tab
4. Click on Inquiry Drop Down (Select the type of Inquiry)
5. Choose the Location Type (Ambulatory = Clinics)
6. In Location Box, type the location (i.e. CHH MOMS or use drop down and look for location)
7. Select the Start Date/Time
8. Select the End Date/Time
9. Click Find


10. Location Schedule Inquiry window opens with all appointment information

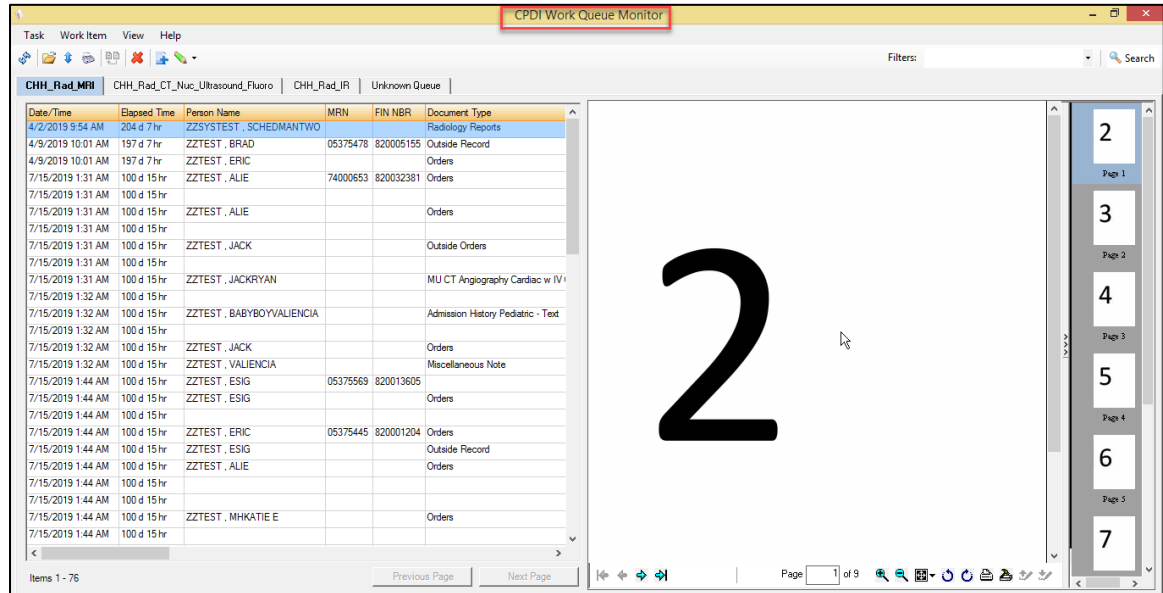
11. Click Close



21 Work Queue Monitor (WQM)

Complete the following steps to open the WQM:

1. Click on the WQM icon on toolbar 
2. CPDI Work Queue Monitor window opens



The screenshot shows the CPDI Work Queue Monitor window. The window title is "CPDI Work Queue Monitor". The menu bar includes "Task", "Work Item", "View", and "Help". The toolbar contains various icons for navigation and search. The main area displays a table with columns: "Date/Time", "Elapsed Time", "Person Name", "MRN", "FIN NBR", and "Document Type". The table lists various tasks with their respective details. A large number "2" is overlaid on the right side of the window, indicating the current page or item count. The status bar at the bottom shows "Items 1 - 76", "Previous Page", "Next Page", and "Page 1 of 9".

Date/Time	Elapsed Time	Person Name	MRN	FIN NBR	Document Type
4/2/2019 9:54 AM	204 d 7 hr	ZZSYSTEST , SCHEDMANTWO			Radiology Reports
4/9/2019 10:01 AM	197 d 7 hr	ZZTEST , BRAD	05375478	820005155	Outside Record
4/9/2019 10:01 AM	197 d 7 hr	ZZTEST , ERIC			Orders
7/15/2019 1:31 AM	100 d 15 hr	ZZTEST , ALIE	74000653	820032381	Orders
7/15/2019 1:31 AM	100 d 15 hr				
7/15/2019 1:31 AM	100 d 15 hr	ZZTEST , ALIE			Orders
7/15/2019 1:31 AM	100 d 15 hr				
7/15/2019 1:31 AM	100 d 15 hr	ZZTEST , JACK			Outside Orders
7/15/2019 1:31 AM	100 d 15 hr				
7/15/2019 1:31 AM	100 d 15 hr	ZZTEST , JACKRYAN			MU CT Angiography Cardiac w IVI
7/15/2019 1:32 AM	100 d 15 hr				
7/15/2019 1:32 AM	100 d 15 hr	ZZTEST , BABYBOYVALIENCIA			Admission History Pediatric - Test
7/15/2019 1:32 AM	100 d 15 hr				
7/15/2019 1:32 AM	100 d 15 hr	ZZTEST , JACK			Orders
7/15/2019 1:32 AM	100 d 15 hr	ZZTEST , VALIENCIA			Miscellaneous Note
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ESIG	05375569	820013605	Orders
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ESIG			Orders
7/15/2019 1:44 AM	100 d 15 hr				
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ERIC	05375445	820001204	Orders
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ESIG			Outside Record
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ALIE			Orders
7/15/2019 1:44 AM	100 d 15 hr				
7/15/2019 1:44 AM	100 d 15 hr				
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , MHKATIE E			Orders
7/15/2019 1:44 AM	100 d 15 hr				

21.1 Completing a Work Item

Complete the following steps to complete a work item:

1. Select the appropriate Queue
2. Double-Click the work item

Date/Time	Elapsed Time	Person Name	MRN	FIN NBR	Document Type
4/2/2019 9:54 AM	204 d 7 hr	ZZSYSTEM , SCHEDMANTWO			Radiology Reports
4/9/2019 10:01 AM	197 d 7 hr	ZZTEST , BRAD	05375478	820005155	Outside Record
4/9/2019 10:01 AM	197 d 7 hr	ZZTEST , ERIC			Orders
7/15/2019 1:31 AM	100 d 16 hr	ZZTEST , ALIE	74000653	820032381	Orders
7/15/2019 1:31 AM	100 d 16 hr				
7/15/2019 1:31 AM	100 d 16 hr	ZZTEST , ALIE			Orders
7/15/2019 1:31 AM	100 d 16 hr				
7/15/2019 1:31 AM	100 d 16 hr	ZZTEST , JACK			Outside Orders
7/15/2019 1:31 AM	100 d 16 hr				
7/15/2019 1:31 AM	100 d 16 hr	ZZTEST , JACKRYAN			MU CT Angiography Cardiac w IVC
7/15/2019 1:32 AM	100 d 16 hr				
7/15/2019 1:32 AM	100 d 15 hr	ZZTEST , BABYBOYVALIENCIA			Admission History Pediatric - Text
7/15/2019 1:32 AM	100 d 15 hr				
7/15/2019 1:32 AM	100 d 15 hr	ZZTEST , JACK			Orders
7/15/2019 1:32 AM	100 d 15 hr	ZZTEST , VALIENCIA			Miscellaneous Note
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ESIG	05375569	820013605	
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ESIG			Orders
7/15/2019 1:44 AM	100 d 15 hr				
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ERIC	05375445	820001204	Orders
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ESIG			Outside Record
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , ALIE			Orders
7/15/2019 1:44 AM	100 d 15 hr				
7/15/2019 1:44 AM	100 d 15 hr				
7/15/2019 1:44 AM	100 d 15 hr	ZZTEST , MHKATIE E			Orders
7/15/2019 1:44 AM	100 d 15 hr				

Items 1 - 75

Previous Page Next Page

Add/Modify Work Item

Task View Work Item Help

Patient Name: ZZSYSTEM , SCHEDMANTWO DOB: 01/01/70 Encounter Type: MRN: Age: 49 years FIN:

ZZSYSTEM , SCHEDMANTWO

Location: Cabell Huntington Hospital//Cabell Huntington Hospital//Rad Patient

Document type: Radiology Reports

Subject: Radiology Reports

Priority: NOW

modality: Magnetic Resonance Imaging

Queue Routing:

Scheduling Request List: CHH RAD MRI

Last Contact:

Referring physician:

Page 1 of 3

Route OK Cancel

3. **Add/Modify Work Item** dialog box opens

4. Click Select Patient to associate to the work item



5. Search for Patient, Select Encounter

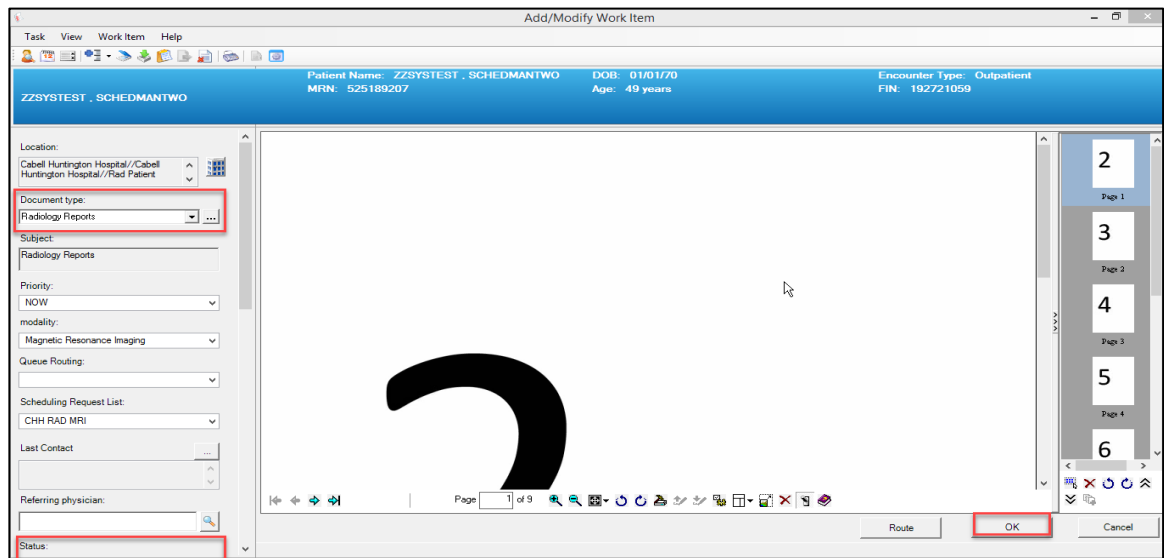
6. Click OK

7. Select Document Type

8. Select the Status to Complete

9. Click Ok, Work Item is removed from the Queue

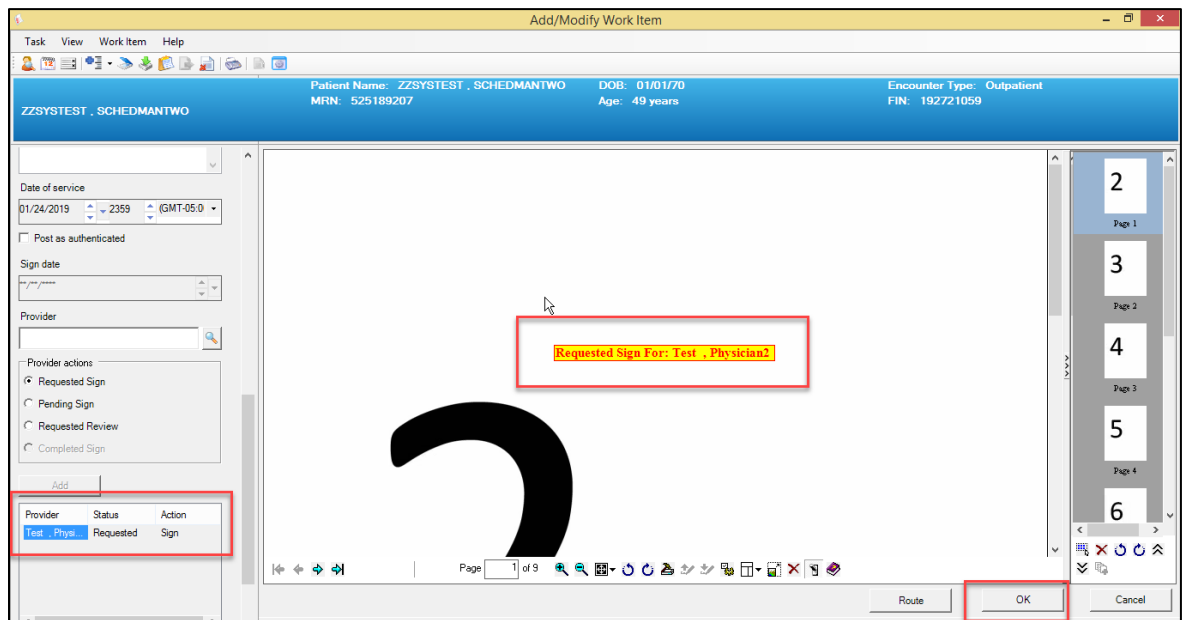
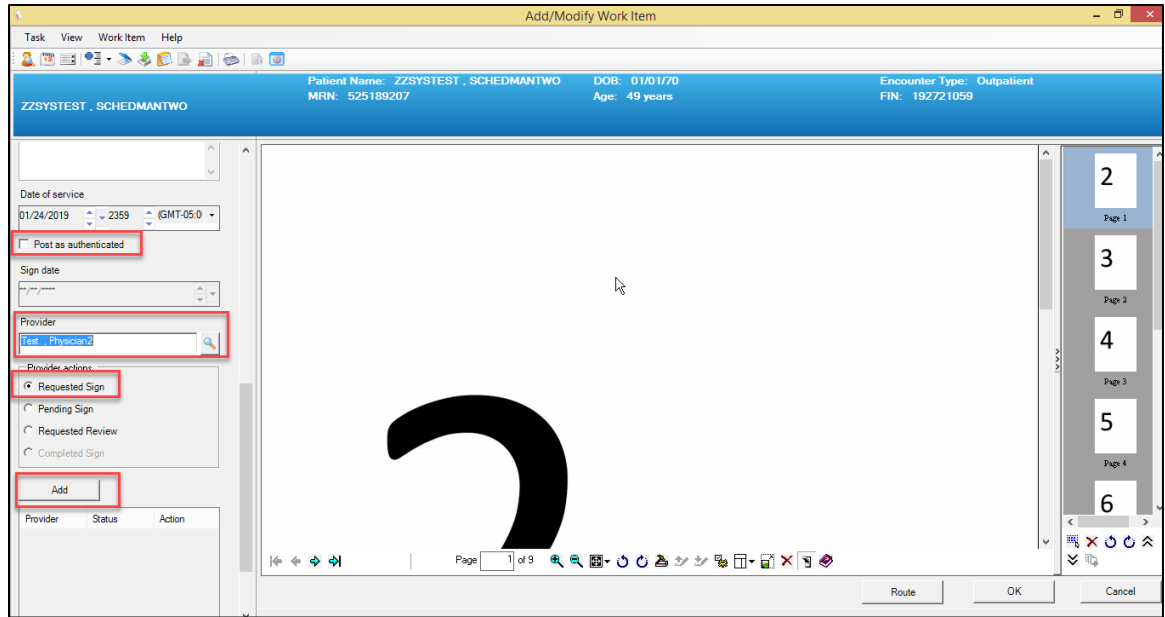
10. Displays in Patient's Chart



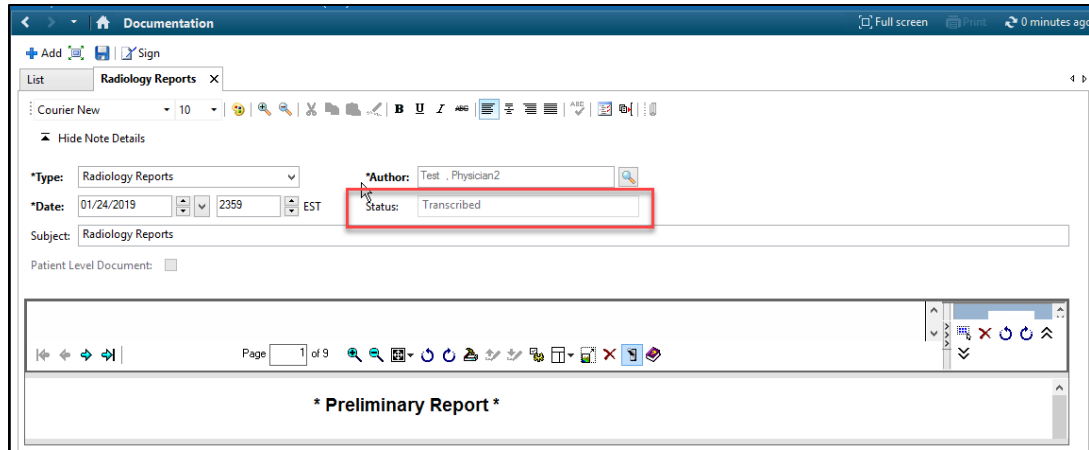
21.2 Adding a Signature Request

Complete the following steps to add a signature request:

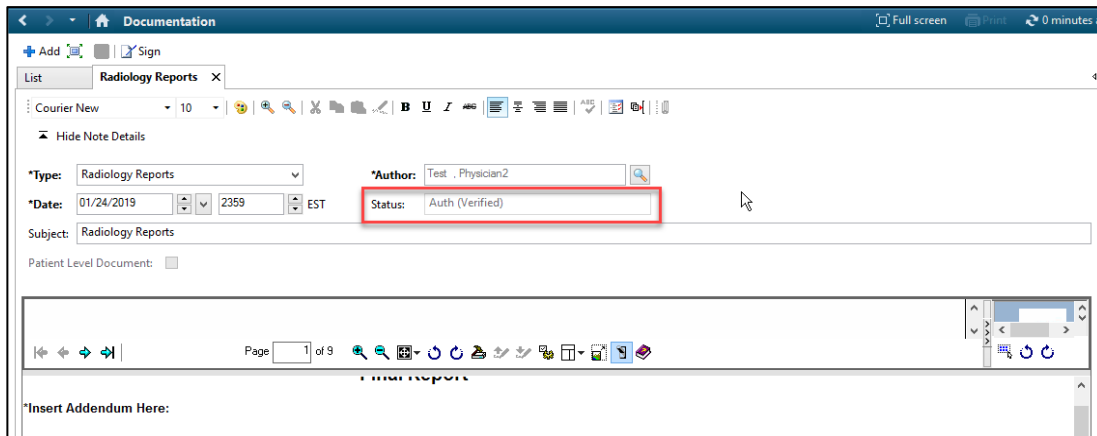
1. Deselect the **Post As Authenticated** check box
2. Enter the Name of the Provider (who must sign off the work item)
3. Ensure that the **Requested Sign** option is Selected
4. Click **Add**



5. Click anywhere on the document to display a Requested Signature box
6. Click Ok, the work item is Removed from the Queue
7. Displayed in the patient's chart in a Transcribed Status (as well as in the provider's message center)



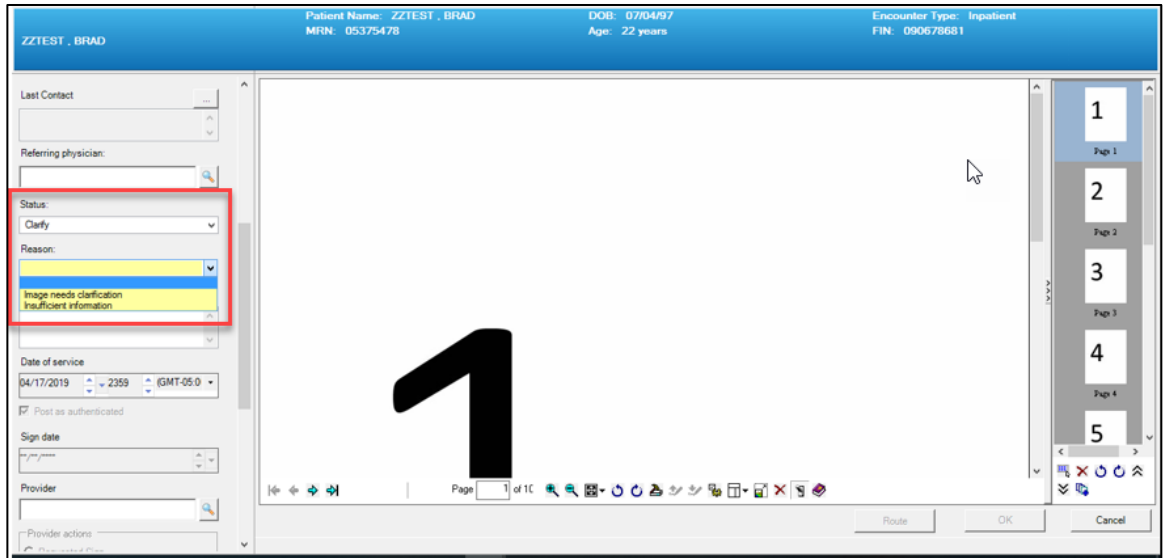
8. Once Provider signs off the document, Status is set as Auth/Verified



21.3 Indexing to Clarify Status

After Completing Steps 1-3 in Completing a Work Item Section:

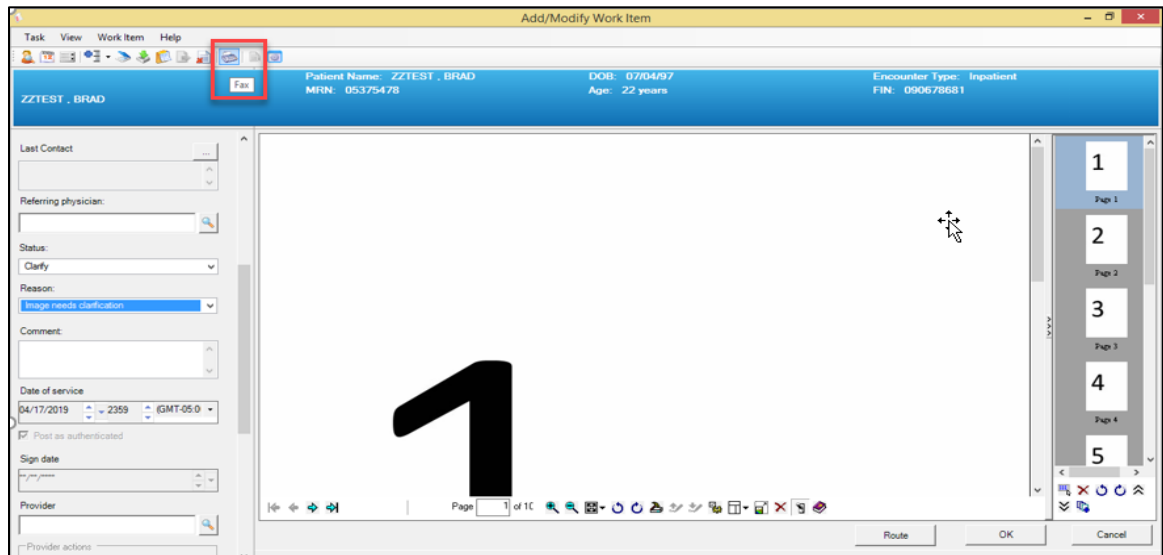
1. Change Status to Clarify
2. Select a Reason (enter any additional information in comment box)
3. Click Ok, the work item is Remains in the CPDI Work Queue Monitor in a Clarify Status until status is Changed to Complete



21.4 Faxing a Work Item

Complete the following steps in the Indexing to Clarify Status Section:

1. Click Fax icon (at the top)
2. Enter the Fax Number
3. Update the Cover Page
4. Click Fax



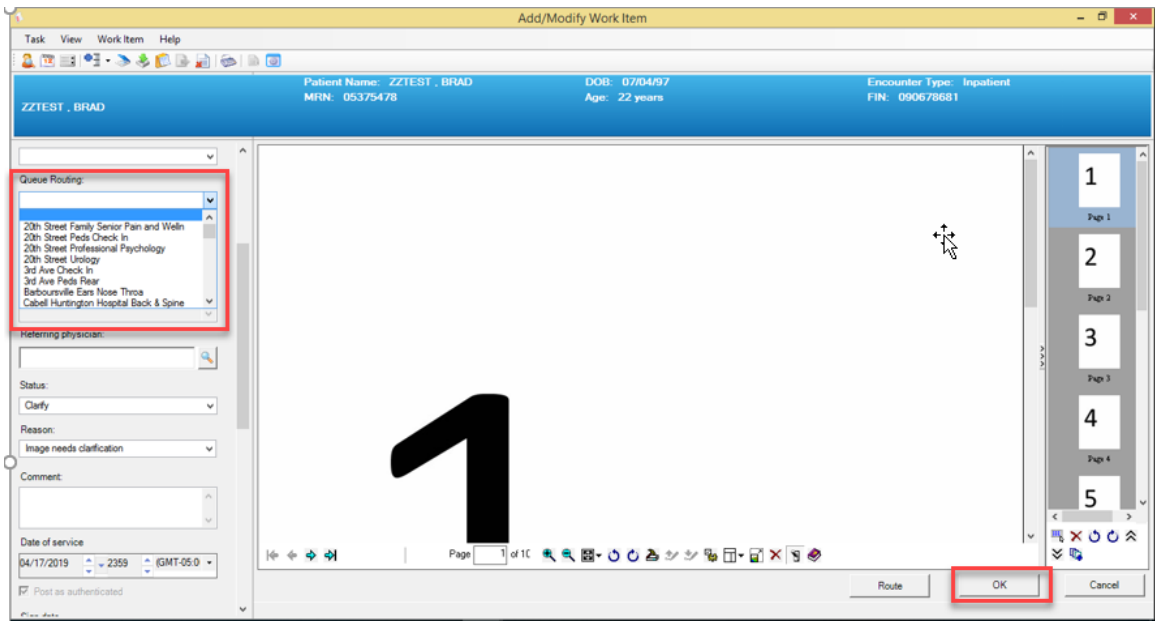
21.5 Routing a Work Item

Complete the following steps to route a work item:

1. Change Status to Clarify
2. Select a Reason (enter any additional information in comment box)

3. Change the Sending Location (to where you want to route it)
4. Select the Location
5. Click Ok

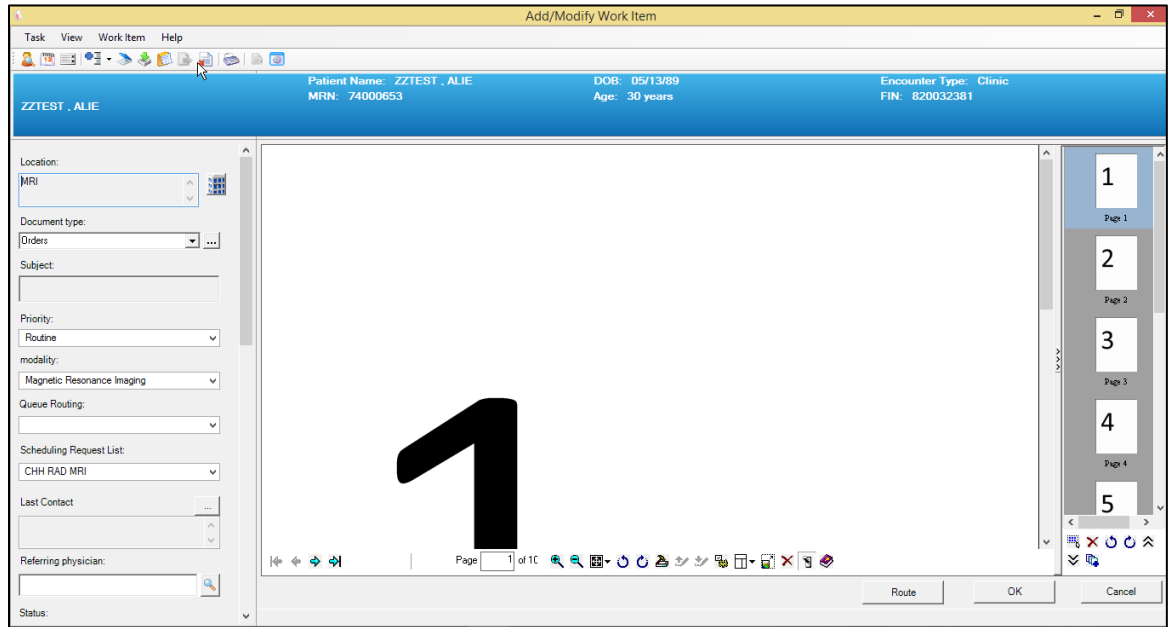
6. Work item Routes to any Queue associated with the Location

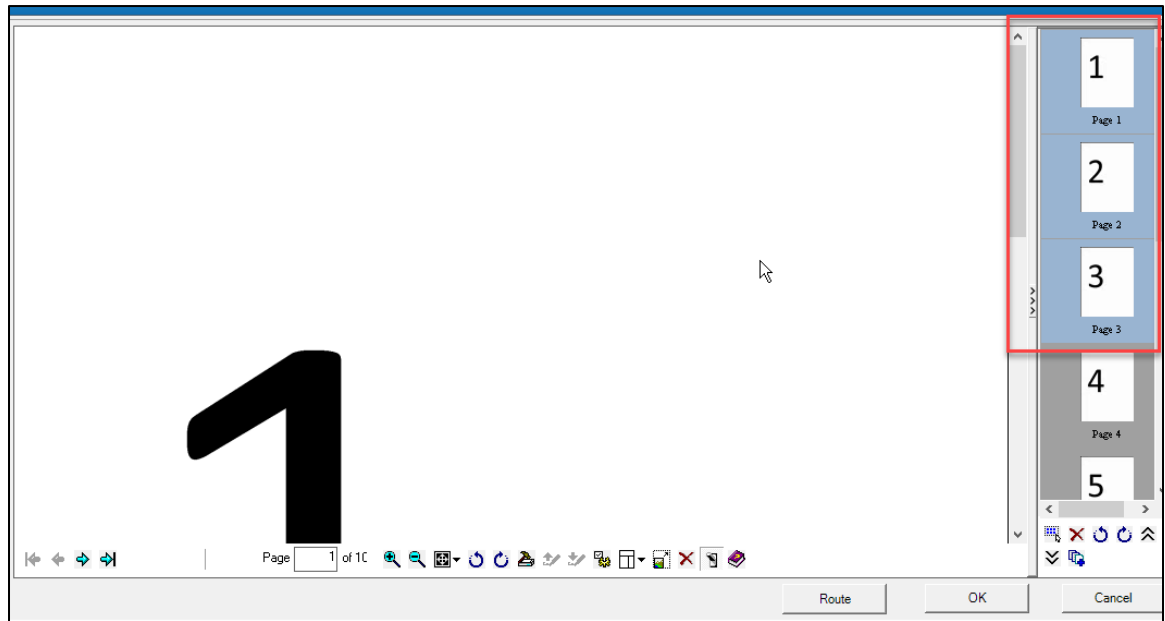


21.6 Splitting a Work Item

Complete the following steps to split a work item:

1. Select the Queue (where the work item is located)
2. Double-Click the work item
3. Add/Modify Work Item dialog box opens

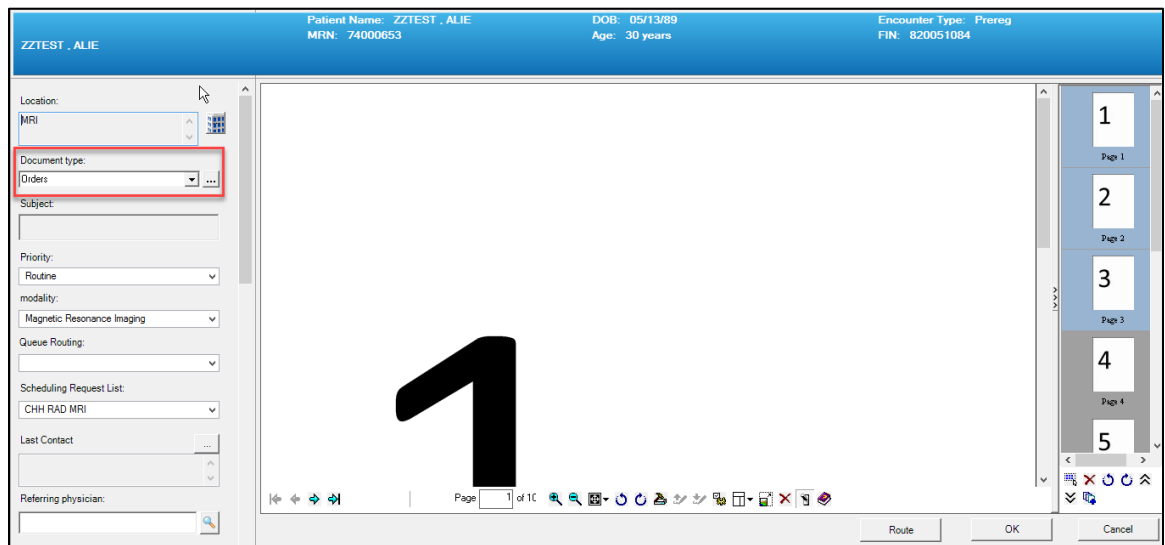


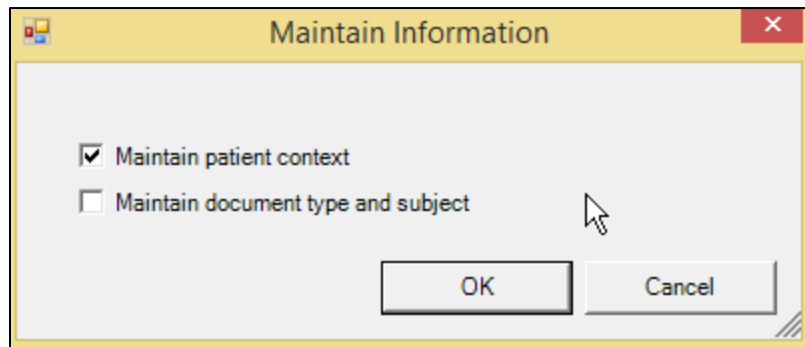


4. Step 4 Select the Pages from the Work Item (that must be Indexed) Separately
5. Click Select Patient to associate to the work item
6. Search for Patient, Select Encounter
7. Select Document Type

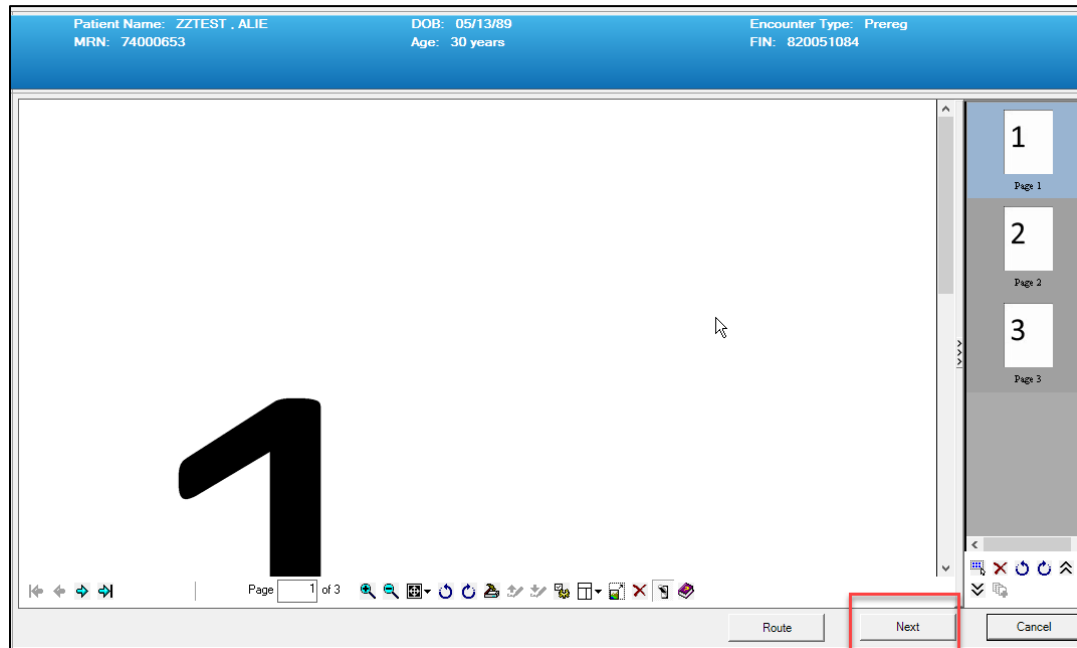


8. Click Split icon





9. Click Next to populate Maintain Information dialog box
10. Make the Selections
11. Click Ok (next page will automatically populate)

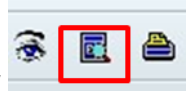


12. Finish Indexing
13. Document Type
14. Status
15. Click Ok
16. Completed Pages display in Patient's Chart
17. You can split documents as many times as needed

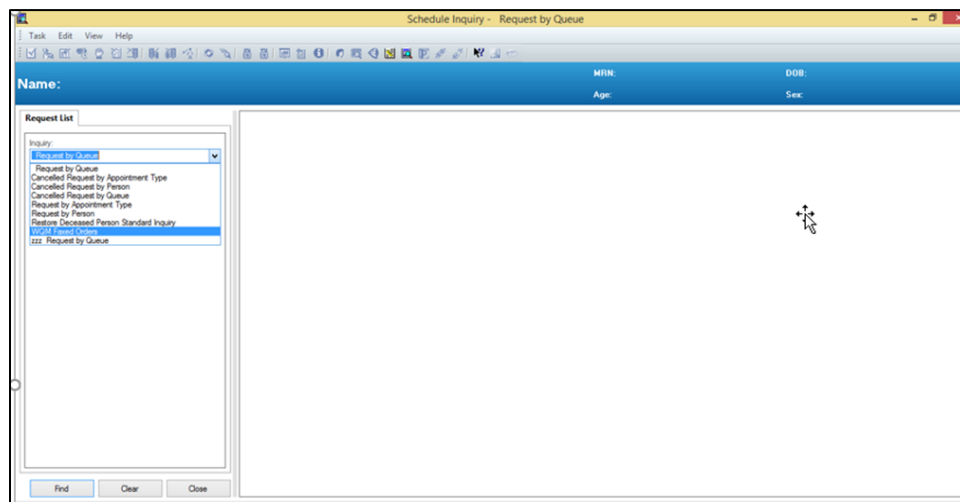
22 Scheduling Using WQM

22.1 Orders to Scheduling using the Request List Queue

Complete the following steps for Orders to Scheduling:

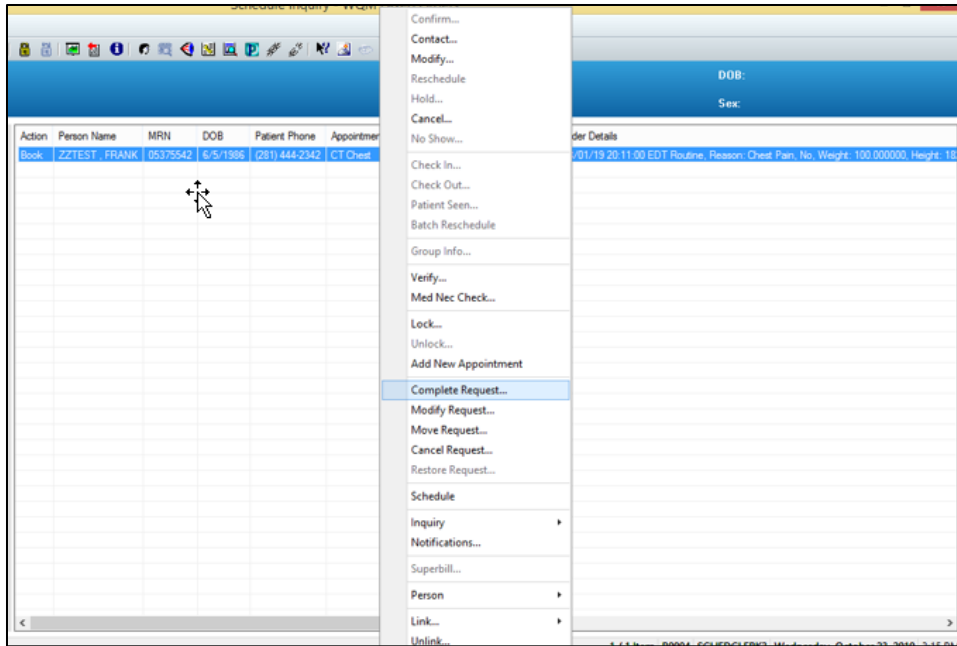


1. Click on Request List Inquiry
2. Schedule Inquiry - Request by Queue window opens

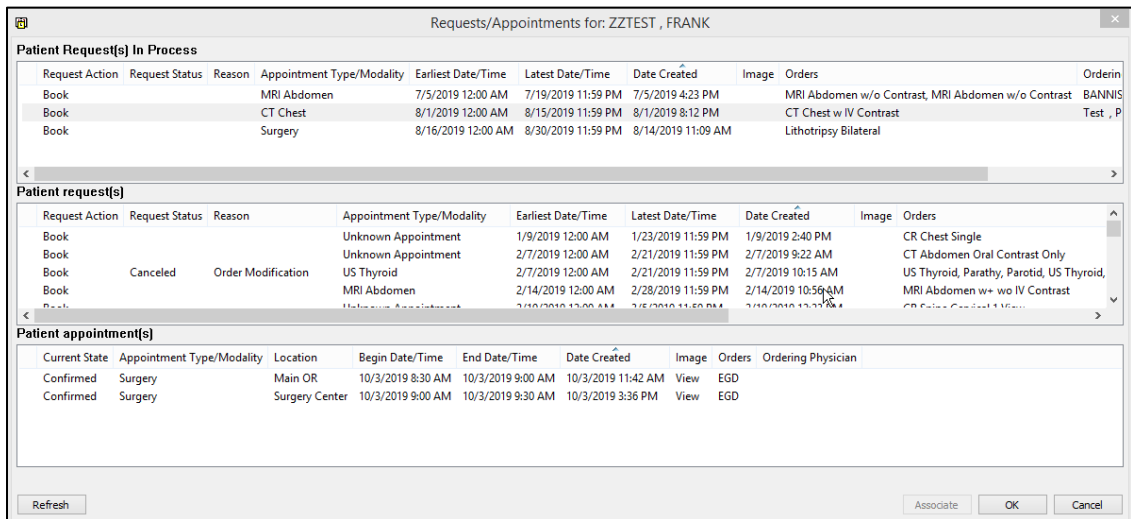


3. Select from Inquiry drop-down list (i.e. WQM Request list (Faxed Orders))
4. Select from Request List Queues (i.e. Radiology for imaging orders, CV Scheduling for Cardiology, Vascular Lab, PFTs and EEG)

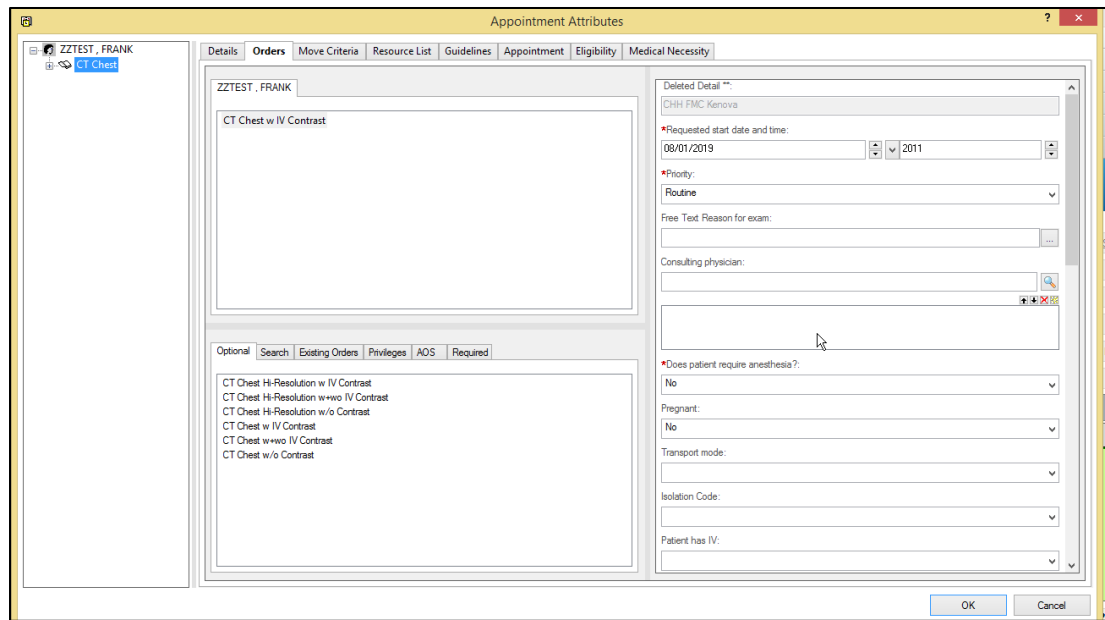
9. Right Click on an entry on the Request List
10. Click on Complete Request



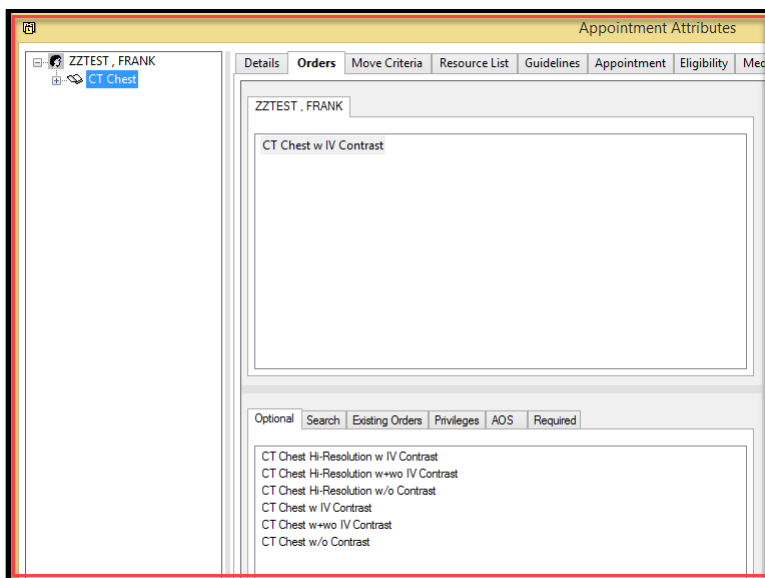
11. Future Request /Appointments for [Patient Name] will display
12. Click on OK



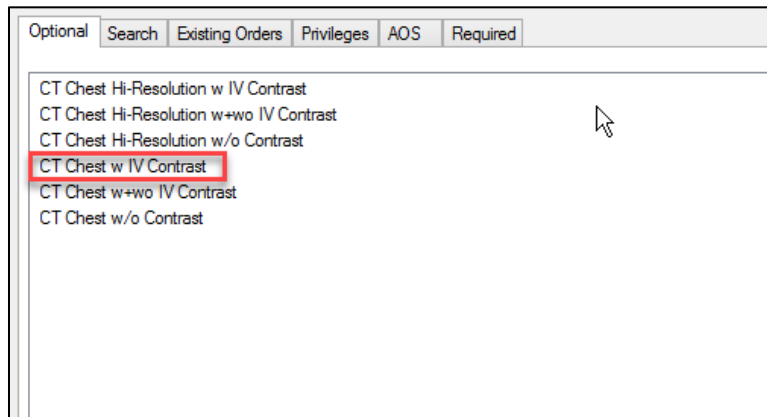
13. Appointment Attributes window opens



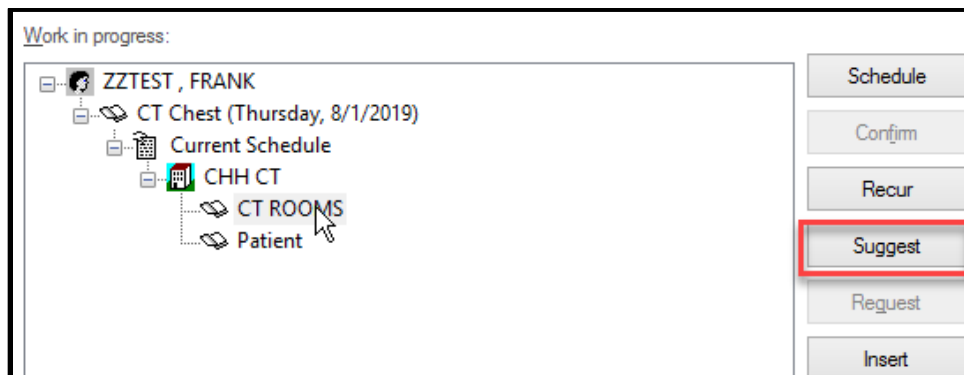
14. Click the drop down on the Schedule to Location
15. Select the Location
16. Click on Orders tab and confirm an order is populated under the patient Name
 - This will be populated from the orders placed in Power Chart.



17. If no order is present below the patient's Name, select the appropriate order from the Optional tab. Double click on the order
18. Orders that are faxed images will need the corresponding order selected.



19. Click on the Details tab and the Accept Format Fields will display
20. Complete yellow highlighted/* required fields (if not completed)
21. Scheduling Ordering Physician
22. Order Type
23. Does Patient Require Sedation?
24. Does patient Require Anesthesia?
25. Click on OK
26. Work in Progress window opens (Patient, Appointment Type, and Location)
27. Click on Suggest



28. The Patient, Appointment Location(s), Appointment Type, Order and duration will appear on the top of the Suggest Schedules page.
29. Suggest Criteria can be adjusted to return only available appointments meeting the criteria.
 - Date Range, restrictions, or schedule days into the future
 - Days of the week
 - Time of day

Note: Before continuing with the suggest function click on the Preferences Tab and change Number of Suggestions to return to 30.

30. Click on the Suggest button

Suggest Criteria Preferences

Appointment Date

Date range: 10/23/2019 11/22/2019

Schedule in: 1 Days From: 08/01/2019

Date restrictions: Next 2 Days

Mon Tue Wed Thu Fri Sat Sun Exceptions

Appointment Time

Time range: 0000 2255

Time restrictions: AM Only

Schedule as visit within 1 day(s)

Override suggested date and time

Schedule multiple persons to mixed Group Sessions

Clear Suggest

31. Appointments matching criteria will display.

32. Click on the Next or Next Day button to move to future appointments.

Next Next Day Clear Select

33. Double click on an appointment and a red check will appear in the far-left box

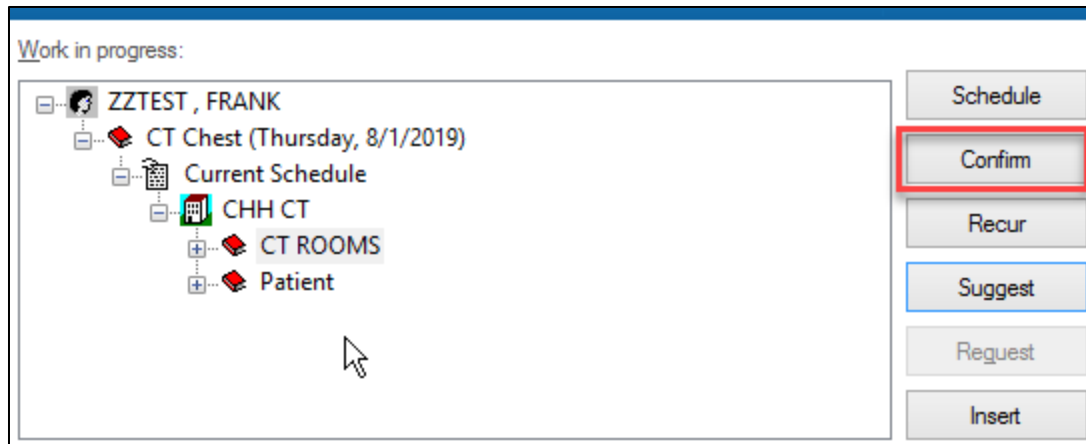
34. Click OK.

	Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order
<input type="checkbox"/>	15 Minutes	10/23/2019 - 4:30 PM	ZZTEST , FRANK	10/23/2019 - 4:30 PM	CT Chest	CT Room - 2	CHH CT	CT Chest w IV Contrast
<input type="checkbox"/>	15 Minutes	10/23/2019 - 4:45 PM	ZZTEST , FRANK	10/23/2019 - 4:45 PM	CT Chest	CT Room - 2	CHH CT	CT Chest w IV Contrast
<input type="checkbox"/>	15 Minutes	10/23/2019 - 5:00 PM	ZZTEST , FRANK	10/23/2019 - 5:00 PM	CT Chest	CT Room - 2	CHH CT	CT Chest w IV Contrast
<input type="checkbox"/>	15 Minutes	10/23/2019 - 5:15 PM	ZZTEST , FRANK	10/23/2019 - 5:15 PM	CT Chest	CT Room - 2	CHH CT	CT Chest w IV Contrast
<input type="checkbox"/>	15 Minutes	10/24/2019 - 7:00 AM	ZZTEST , FRANK	10/24/2019 - 7:00 AM	CT Chest	CT Room - 2	CHH CT	CT Chest w IV Contrast
<input checked="" type="checkbox"/>	15 Minutes	10/25/2019 - 7:00 AM	ZZTEST , FRANK	10/25/2019 - 7:00 AM	CT Chest	CT Room - 2	CHH CT	CT Chest w IV Contrast
<input type="checkbox"/>	15 Minutes	10/28/2019 - 7:00 AM	ZZTEST , FRANK	10/28/2019 - 7:00 AM	CT Chest	CT Room - 2	CHH CT	CT Chest w IV Contrast

OK Cancel

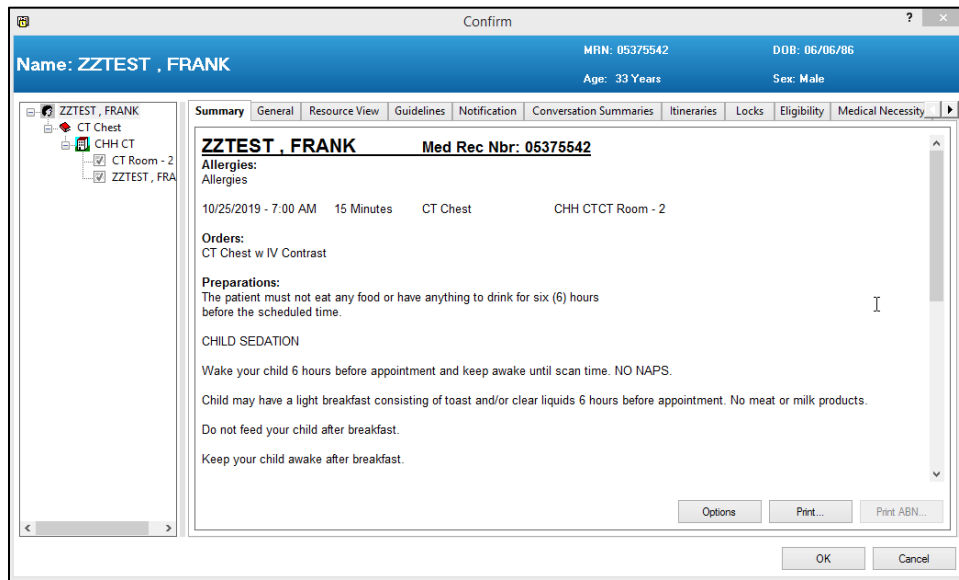
35. The Work in Progress window opens with appointment in pending status

36. Click on Confirm



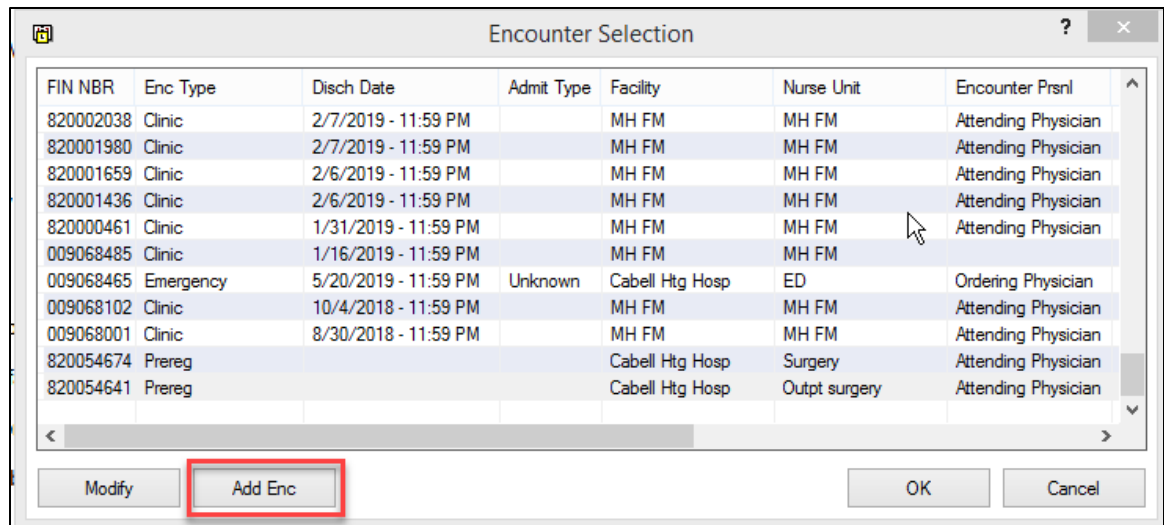
37. Patient's appointment confirmation including date, time, location and any preparation instructions will display

38. Click on OK

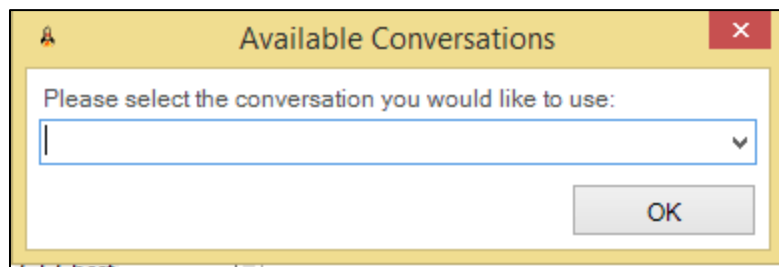


39. Encounter Selections window opens

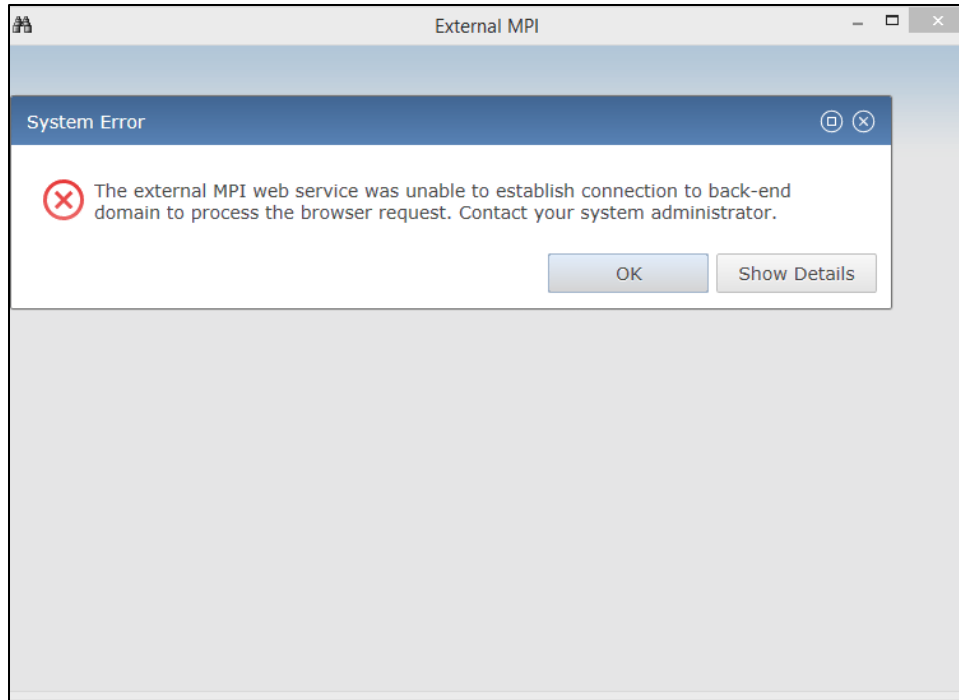
40. Click on Add Enc



41. Available Conversations window opens
42. Select PreReg from drop down
43. Click OK



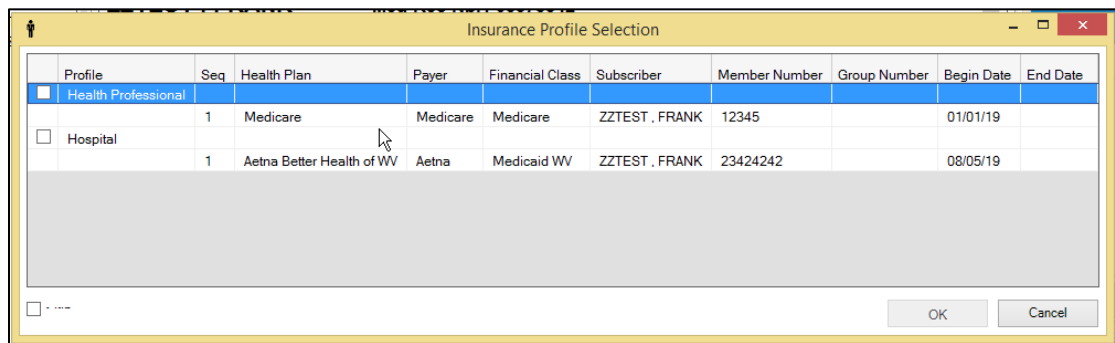
44. External MPI window opens
45. Click OK or Show Details



46. Insurance Profile Selection window opens

47. Click the box next to Hospital

48. Click OK



49. PreReg window opens (complete **required** fields in each tab)

50. Patient Information Tab

- Complete Birth Sex

The screenshot shows the 'PreReg' window with the following fields filled out:

- *Last Name: ZZTEST
- *First Name: FRANK
- Admin Sex: Male
- *Birth Sex: (highlighted)
- Reason For No SSN: Patient refused
- *Date of Birth: 06/06/1986
- Age: 33Y
- Medical Record Number: 05375542
- Financial Number: (empty)
- Estimated Patient Responsibility: \$0.00
- Medical Necessity Status: (empty)
- NOP Acknowledgement: Not on File
- *PreReg Status: Incomplete
- Arrival Comment: (empty)

Navigation tabs at the bottom include: Patient Information, Encounter Information, Appointment Information, Guarantor Information, Insurance Primary, Insurance Secondary, Insurance Tertiary, MSP, Insurance Summary, and Additional Contacts.

51. Encounter Information

- Patient Type (i.e. PreReg)
- Medical Service (i.e. Radiology)
- Reason for Visit (i.e. CT exam)
- Attending/Rendering Physician

The screenshot shows the 'Encounter Information' tab with the following fields filled out:

- *Building: Cabell Htg Hosp
- *Nurse/Ambulatory: CHH CT
- *Patient Type: (highlighted)
- *Medical Service: (highlighted)
- Admit Type: (empty)
- Referral Source: (empty)
- *Reason for Visit: (highlighted)
- Arrival Mode: (empty)
- Accident Related Visit: (empty)
- *Attending/Rendering Physician: Test, Physician2
- Primary Care Physician: (empty)
- Reason for No PCP: (empty)
- Referring Physician: (empty)
- Reason for No Referring Phys: (empty)
- Display in Directory?: (empty)
- OCM: (empty)
- Clinical Trial: (empty)

Navigation tabs at the top include: Patient Information, Encounter Information (highlighted), Appointment Information, Guarantor Information, Insurance Primary, Insurance Secondary, Insurance Tertiary, MSP, Insurance Summary, and Additional Contacts.

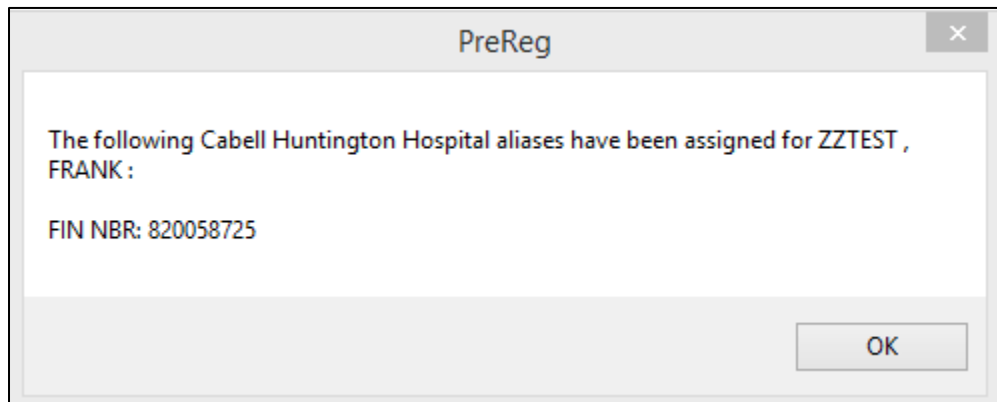
52. Guarantor Information (review and update if applicable)

53. Insurance (Primary, Secondary, Tertiary)

- When Authorization is required (Select Yes in the Authorization Required field and document using the Authorization Fields)
- Authorization Status (Select Approved)
- Authorized Service Begin Date
- Authorized Service End Date

Patient Information	Encounter Information	Appointment Information	Guarantor Information	Insurance Primary	Insurance Secondary	Insurance Tertiary	MSP	Insurance Summary	Additional Contacts
Authorization Information									
Authorization Required:	* Authorization Type:	Service Type:	* Authorization Status:	Authorization Fax Number:	Auth/Referral Phone Number:				
Yes	Authorization		Approved		() -				
Auth/Referral Contact Name:	* Authorization Number:	Number Authorized:	Number Authorized Qualifier:	Number Authorized Remaining:	* Authorized Service Begin Date:				
	12345678	0		0	10/10/2019				
* Authorized Service End Date:	Date Authorization Obtained:	Time Authorization Obtained:							
10/31/2019	10/23/2019	16:59							
Authorization Comment:									


54. Click on Complete
55. The patient will be issued a FIN Number for the appointment and encounter.
56. Click on OK.
57. Patient appointment will appear in the Location Scheduled

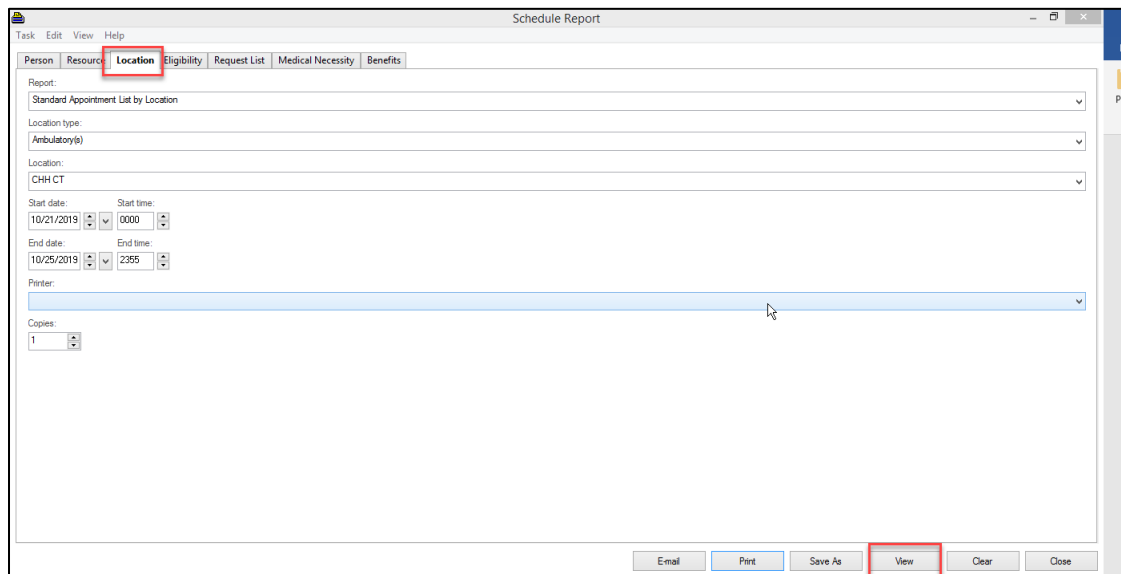


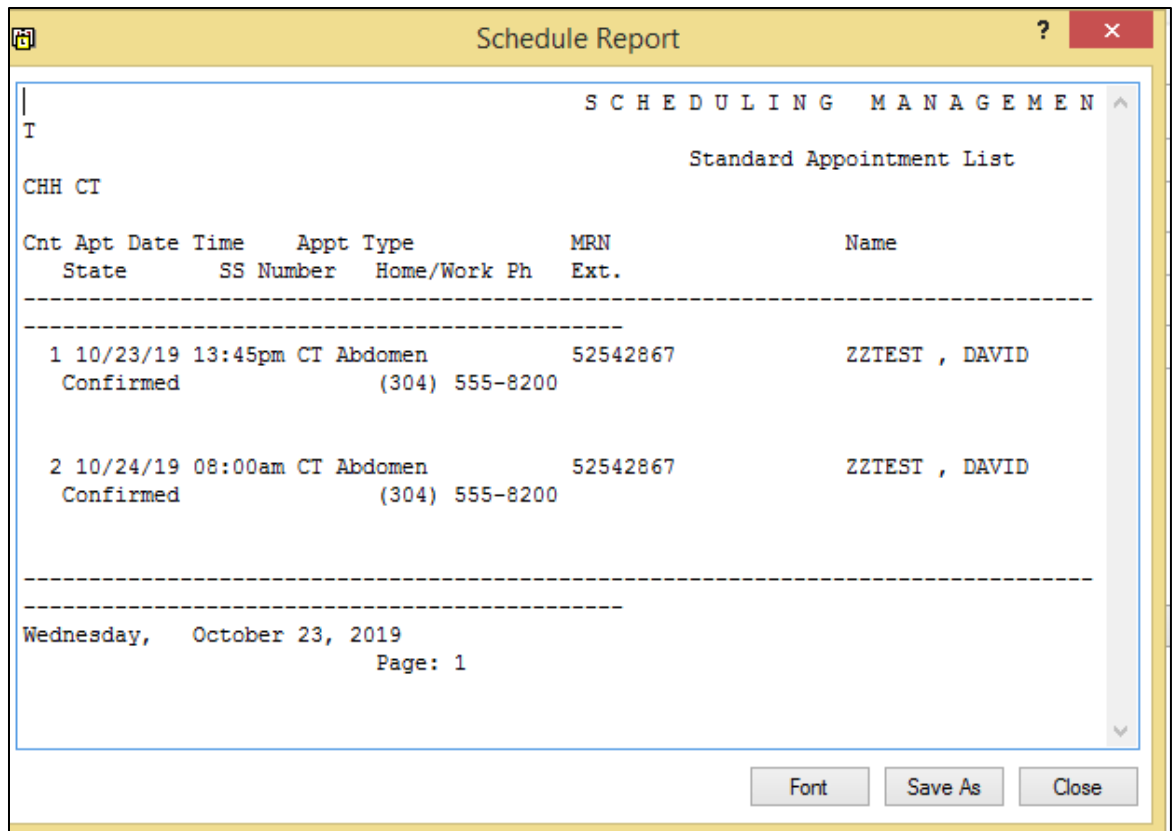
23 Print Daily Schedule Report

Note: Please Print the Daily Schedule prior to leaving for the Day in case of a Downtime

Complete the following steps to print the daily schedule:

1. Click on Appointment Report icon 
2. Schedule Report window opens
3. Click on Location Tab
4. Select the Report (i.e. Standard Appointment List)
5. Select the Location Type (i.e. ambulatory, buildings, facilities, etc.)
6. Select the Location (i.e. CHH CT)
7. Select Start Date/Time (i.e. Monday/0000)
8. Select End Date/Time (i.e. Friday/2355)
9. Click View



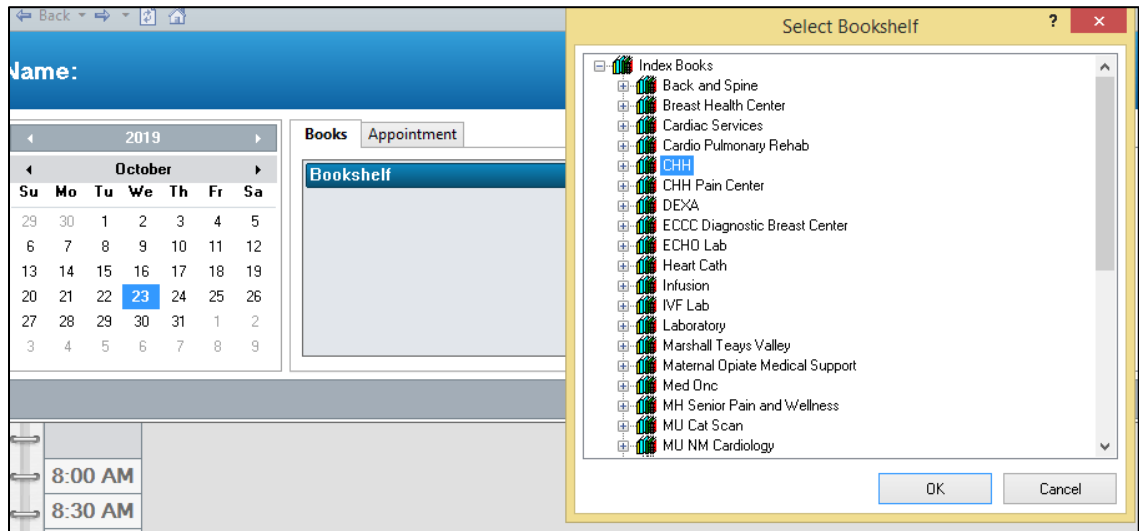


10. Schedule Report that you requested opens
11. Click Close
12. Select Printer (find your printer)
13. Click Print

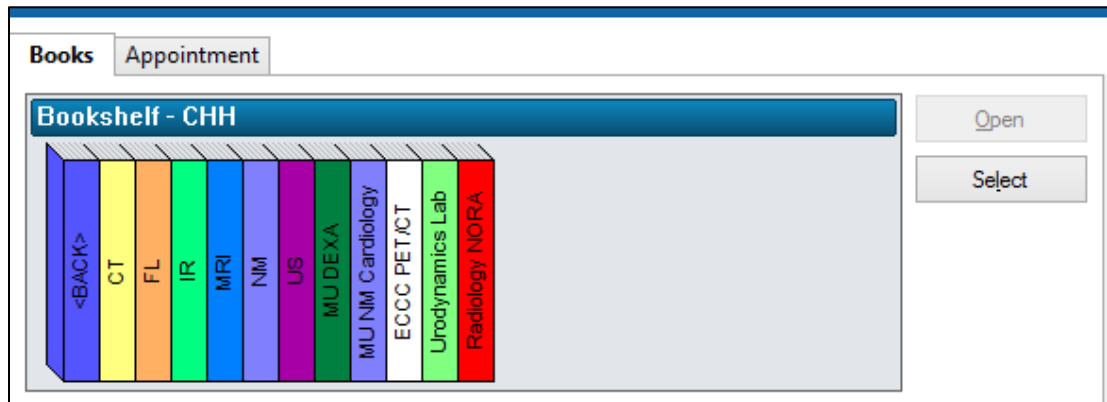
24 View Schedules Weekly vs Daily

Complete the following steps to view schedules:

1. Click Bookshelf tab
2. Select the Bookshelf (i.e. CHH)
3. Click OK




4. Select the Book (i.e. Radiology)
5. Click on Open
6. Select the Appointment Schedule (if there is more than one) (i.e. CT)
7. Click Open

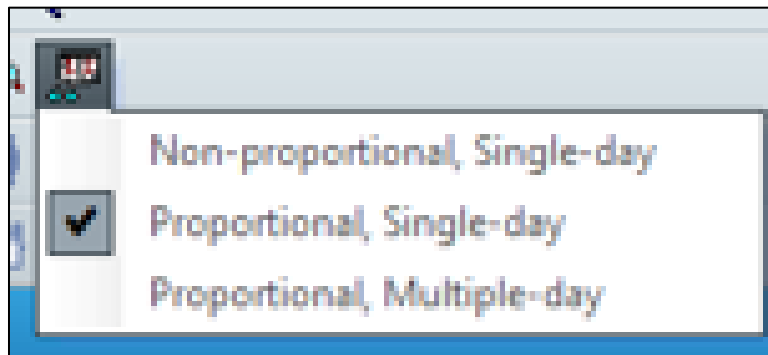


10/23/2019 - CT				
	CT Room - 2	CT Same Day Add On	MU CT Room 1	NORA Rad 1 IR
8:00 AM	CT Sedation Reg	CT Overflow		NORA Rad
8:30 AM	CT INPATIENT B	CT Overflow	MU CT 30 min	
9:00 AM	CT Slot	CT Overflow	MU CT 30 min	
9:30 AM		CT Overflow	MU CT 30 min	
10:00 AM	CT 30 minute	CT Overflow	MU CT 30 min	
10:30 AM	CT INPATIENT B	CT Overflow	MU CT 30 min	

8. Schedule Opens

9. Click on the Change View icon 

10. Click on Non-Proportional, Single-Day or Proportional, Single-Day (view the Schedule Daily)



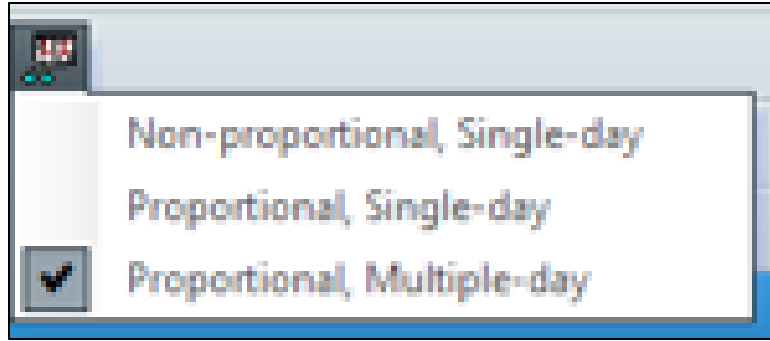
11. Proportional, Single-day Schedule opens

10/21/2019 - CT				
	CT Room - 2	CT Same Day Add On	MU CT Room 1	NORA Rad 1 IR
8:00 AM	CT 30 minute	CT Overflow		NORA Rad
8:30 AM	CT INPATIENT BLOCK		MU CT Cardiac	
9:00 AM	CT Slot	CT Overflow		
9:30 AM			MU CT 30 min	
10:00 AM	CT 30 minute	CT Overflow	MU CT 30 min	
10:30 AM	CT INPATIENT BLOCK	CT Overflow	MU CT 30 min	

12. Non-proportional, Single-day Schedule opens

10/21/2019 - CT				
	CT Room - 2	CT Same Day Add On	MU CT Room 1	NORA Rad 1 IR
8:00 AM	CT 30 minute	8:00 AM CT Overflow	8:30 AM MU CT Cardiac	8:00 AM NORA Rad
8:30 AM	CT INPATIENT BLOCK	9:00 AM	9:30 AM	
9:00 AM	CT Slot	9:00 AM CT Overflow	9:30 AM MU CT 30 min	
10:00 AM		10:00 AM	10:00 AM MU CT 30 min	
10:00 AM	CT 30 minute	10:00 AM CT Overflow	10:30 AM MU CT 30 min	
10:30 AM	CT INPATIENT BLOCK	11:00 AM	11:00 AM MU CT 30 min	

13. Click on Proportional, Multiple-Day (to see weekly or multiple days)



14. Weekly Schedule opens

The screenshot shows a weekly schedule for 'CT Room - 2' in October 2019. The interface includes a calendar on the left, a 'Bookshelf - CHH' with various colored tabs (BACK, CT, FL, IR, MRS, NM, US, BLD DRA, MULTIMODAL, ECCP PRACT, Diagnostic Lab, Specialty Lab), and a main grid showing appointment slots. The grid is organized by day (Mon, 10/21/2019 to Fri, 10/25/2019) and time (8:00 AM to 11:00 AM). The slots are color-coded and labeled with appointment types such as 'CT 30 minute', 'CT INPATIENT BLOCK', 'CT Slot', and 'CT Sedation'. A 'Work in progress' field is visible on the right side of the interface.

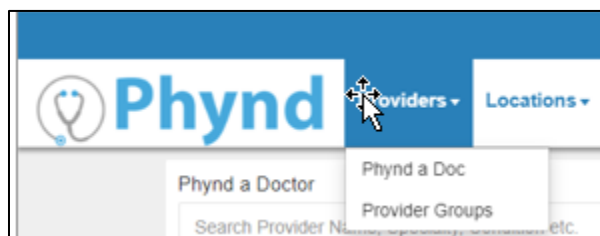
	Mon, 10/21/2019	Tue, 10/22/2019	Wed, 10/23/2019	Thu, 10/24/2019	Fri, 10/25/2019
8:00 AM	CT 30 minute	CT 30 minute	CT Sedation	ZZTEST, DAVID	CT 30 minute
8:30 AM	CT INPATIENT BLOCK	CT INPATIENT BLOCK	CT INPATIENT...	CT INPATIENT BLOCK	CT INPATIENT BLOCK
9:00 AM	CT Slot	CT Slot	CT Slot	CT Slot	CT Slot
9:30 AM					
10:00 AM	CT 30 minute	CT 30 minute	CT 30 minute	CT 30 minute	CT 30 minute
10:30 AM	CT INPATIENT BLOCK	CT INPATIENT BLOCK	CT INPATIENT...	CT INPATIENT BLOCK	CT INPATIENT BLOCK
11:00 AM					

25 Phynd

25.1 Enroll a new Provider

Complete the following steps to enroll a new provider:

1. Go to Browser and open New Tab
2. In browser address, type in Phynd.com
3. Phynd window opens
4. Log into Phynd



5. Select Phynd A Doc

Phynd a Doc

1255467155

6. Put NPI number in the search bar
7. Click Enter
8. If No Record is found
9. Type in a Zip Code and Change Within to 100 mi
10. Click Enter
11. Click on the providers Name at right of screen

City

States

States

Zip

Zip

Health Plan

Health Plan

Health Plan Company

Health Plan Company

Joyce Ann Turner, NP
Nurse Practitioner, Clinical Nurse Specialist
Sub Specialty: Adult Health
NPI: 1720352677

VIEW PROVIDER

27.9 miles away
Primary Practice Address

5490 Amelia Ln
Ellenwood, GA 30294-6621

Not Enrolled

12. Phynd Network Profile window opens up
13. Click on Enroll Provider

Phynd Network Profile

JOYCE ANN TURNER, NP

Enroll Provider

NPI: 1720352677
Professional Title: NP
Specialty: Nurse Practitioner, Clinical Nurse Specialist
Sub-specialty: Adult Health, Adult Health

Provider Details

First Name: JOYCE
Last Name: TURNER
NPI: 1720352677

Middle Name: ANN
Gender: Female

14. Confirmation window opens
15. Add any Comments
16. Click Enroll

Confirmation

Please confirm that you would like to enable JOYCE TURNER into your HS.

Comments

Enroll Cancel

17. Click through each Tab under the Provider Details and Verify Information is Correct

18. If it is not, then the address can be updated, and the License can be updated.

Provider Details

First Name: JOYCE Active Status: Active
 Middle Name: ANN Primary Phone:
 Last Name: TURNER Secondary Phone:
 Suffix: Mobile Phone:
 Professional Title: NP Primary Email:
 Gender: Female Secondary Email:
 Date Of Birth: Primary Fax:

Addresses (1)

Primary Practice Address Information: Active Edit Delete Inactivate

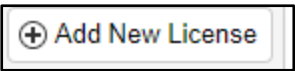
USPS Verified: ✓ Primary Phone: (404) 316-7265
 Address Type: Primary Practice Address Secondary Phone:
 Address Line 1: 5490 Amelia Ln Mobile Phone:
 Address Line 2: Primary Email:
 Address Line 3: Secondary Email:
 City: Ellenwood Primary Fax:
 County: Clayton Fax Verification Date:
 State: GA Lab Fax:
 Zip: 30294-6621 Lab Fax Verification Date:

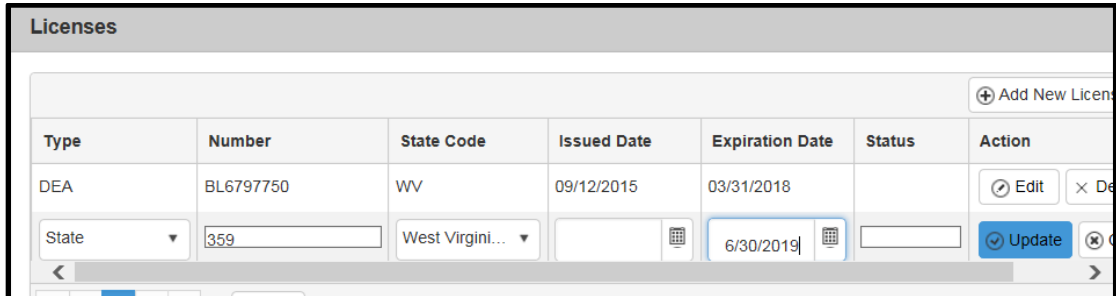
19. Update Address by Clicking on Edit

20. Locations/Address window opens

21. Make any necessary Changes

22. Click Save

23. Click  to Add any new license
24. Click Edit to edit any of the licenses showing



Type	Number	State Code	Issued Date	Expiration Date	Status	Action
DEA	BL6797750	WV	09/12/2015	03/31/2018		

State: West Virgini...
 Expiration Date:

- License information is in the Licenses section, please make sure there is an expiration date.
- If there is not, you will need to update that information. You may have to go to the state website to validate this information.



Provider Details

First Name: JOYCE
 Middle Name: ANN
 Last Name: TURNER
 Suffix:
 Professional Title: NP
 Gender: Female
 Date Of Birth:

Active Status: Active
 Primary Phone:
 Secondary Phone:
 Mobile Phone:
 Primary Email:
 Secondary Email:
 Primary Fax:

25. After information is updated, the physician can be verified by going to the Provider detail screen at the top.
26. Click the pencil in the right-hand corner
27. Click Save
28. Click Confirm

Custom Fields

Affinity: Specialty: Affinity: Taxonomy ID:

Cabell ID: Cerner: Specialty:

Cerner: Taxonomy ID:

Comments

Comments:

*Information entered in comments will be displayed in View History

Save **Cancel**

Phynd Test, User Support

Providers Locations Health Plans Reports Worklists

Provider Profile Profile last updated: 10/24/2019 by User Test

JOYCE ANN TURNER, NP **Confirm** **Your Cabell-Huntington PHYND Score**

 44%

Please confirm that you would like to send this profile information to your system.

Provider Details

First Name: Active Status:

Middle Name: Primary Phone:

Last Name: Secondary Phone:

- 29. Click Sync Profile
- 30. Click Confirm
- 31. Profiles updates have been sent
- 32. Click OK