

STAR 2000™



STAR PATIENT CARE REFERENCE GUIDE Patient Scheduling Module

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Preface

This volume of the *STAR Patient Care Reference Guide* provides a detailed explanation of the *Patient Scheduling Module*. It includes documentation for Canadian users of this product. The documentation for Canadian users appears in the online version with blue highlighting. Canadian documentation is further identified by (CN) or by (CN Only).

This volume provides information on resource maintenance, appointment processing, schedule processing, schedule census functions, chart functions, online reports/forms, midnight processing, and tables. A glossary of terms and a scheduling flow are also included for additional information.

Documentation Conventions

Documentation for McKesson's STAR 2000™ line of products follows these conventions:

Revisions

Text revisions are indicated by a change bar in the left margin. Paragraphs that contain grammatical changes that do not affect content are not marked.

Canadian Documentation

This volume may include documentation for Canadian users of this product. Complete sections of Canadian text are identified by "CN" and "CN Only."

Key Names

Named keys, such as SHIFT, CTRL, ALT, and ENTER, are displayed in this document in uppercase (capital) letters. A symbol key is written as text in this document followed by the symbol in parentheses, such as hyphen (-) and asterisk (*).

Key Chords

Key chords are key entries that require you to hold down one or more keys (typically, CTRL, ALT, or SHIFT) before pressing another key. In this document, key chords are displayed as the names of each key in the chord separated by a hyphen (-) (for example, CTRL-ALT-DEL).

Enter

ENTER is a key on a computer keyboard used to complete an entry on a STAR system. (This key may also be referred to as NEW LINE or NL in the STAR system.)

Data Entries

Letters or words you enter in response to the system are displayed in **bold** letters in this document. For example: Enter **Y** for Yes or **N** for No.

Selecting an Entry

This document often instructs you to "select an entry." The method you use to select an entry depends on whether you are using STAR from a terminal or IBM-compatible personal computer. Entry methods include:

- Entering the option number
- Using your arrow keys to highlight the option and pressing ENTER
- Clicking on the option using a mouse or other pointing device (PC only)

For more information about these options, see the *General Information Volume*.

Prompts

System prompts are displayed at the bottom of many STAR screens when the system requests an entry or displays a message. In this document, these prompts are indented and the text italicized, as shown in the following example:

Enter patient name--

Field Characteristics

STAR product documentation provides field explanation codes, in addition to a narrative description for each field on a screen. These codes display the maximum length of your entry in the field, the type of entry you make in the field, and whether the field is required. This information displays in the following format:

- DISPLAY ONLY for a field you cannot edit.
 - For X-YY-Z field types, where:
 - X is the maximum number of characters permitted in the field:
 - P for a field length determined by a Parameter
 - T for a field length determined by a Table
 - U for a field having an Undefined length
 - YY is the type of entry technique permitted in the field:
 - A for Letters only
 - AC for Letters and Punctuation only (no numbers)
 - AN for Numerals and Letters only (no punctuation)
 - C for Characters (including punctuation)
 - N for Numerals only
 - NC for Numerals and Punctuation only (no letters)
 - Z is the requirement indicator of the field:
 - C if an entry is Conditionally required or optional
 - O if an entry is Optional to complete the function
 - R if an entry is required to complete the function
- NOTE:** Facilities can designate that certain fields be Required. STAR product documentation does not display R for fields designated as Required by a facility.
- For YY-Z field types, where YY is:
 - DATE for a field subject to the date entry conventions described in the *General Information Volume*.
 - SPECIAL FORMAT for a field having data entry requirements not conforming to standard format. The field definition contains the specific data entry requirements for the field.
 - TABLE LOOKUP for a field that enables you to select from a displayed table. See the *General Information Volume* for more information regarding this entry technique.
 - TIME for a field subject to the time entry conventions described in the *General Information Volume*.

NOTE: For use of the Z position in this format, refer to the explanations for Z under X-YY-Z.

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Introduction

The *Patient Scheduling Module* is designed to automate patient scheduling, providing patients with convenient appointment slots for necessary resources. It facilitates the organization of the scheduling function in a centralized or decentralized structure, efficiently distributes patient scheduling information, and processes schedule changes and cancellations in a proficient manner.

This introduction provides a description of each chapter in this manual, as well as an overview of the Clinical Management Module and its functional/operational processes.

Chapter 1: Resource Maintenance

This chapter describes the tables and master files that are used within the STAR Patient Scheduling Module.

Chapter 2: Appointment Processing

This chapter describes the process of booking appointments in the STAR Scheduling Module. Associated functions such as Patient Appointment Inquiry, Copy Appointment, Revising Appointments, and Procedure Scheduling are also discussed.

Chapter 3: Schedule Processing

This chapter describes the resource management features of STAR Scheduling including the display and printing of Resource Schedules, Rescheduling Capabilities, Wait List, Audits, and various Scheduling Reports.

Chapter 4: Schedule Census Functions

This chapter describes various scheduling census reports such as the Station Schedule, Resource/Department Schedule, Resource Weekly Schedules, and Transportation Census.

Chapter 5: Chart Functions

This chapter describes the Chart Management features of STAR Scheduling.

Chapter 6: Online Reports/Forms

This chapter describes the online reports and forms that can be printed from the STAR Patient Scheduling Module.

Chapter 7: Midnight Processing

This chapter describes the reports available through Midnight Processing with the Patient Scheduling Module.

Appendix A: Tables

This chapter describes the fields, tables, and files used by the Patient Scheduling Module.

Appendix B: Scheduling Flow

This chapter provides flow diagrams of patient movement through the STAR Scheduling Module.

Appendix C: Information Windows

This chapter describes the Information Windows available through the STAR Scheduling Module.

Module Overview

Scheduling is an important aspect of effective resource utilization, which varies within different areas of the facility and for different types of patients. Scheduling can occur in the following areas:

- Clinics
- Ancillary Departments
- Surgery

Patients are grouped into two general categories:

- Inpatients
- Outpatients

Both inpatients and outpatients can be scheduled for the areas listed above. Inpatients are frequently seen on an unscheduled or fill-in basis; outpatients usually have a scheduled appointment. With increased attention to efficient management of patient/resource time, facilities are moving towards scheduling inpatients as they do outpatients.

Surgery scheduling is more dynamic and complex than clinic and ancillary scheduling. Timing is more critical, and the combination of resources needed for the surgical procedures makes scheduling difficult.

Depending on the hospital's appointment-making procedures, the scheduling structure can be centralized, decentralized, or a combination of the two.

A centralized structure involves making appointments through a central scheduling area or main desk. The clinic type may determine whether scheduling should be done centrally. For example, an entire outpatient clinic may work with centralized scheduling while the Psychiatric or Drug Rehabilitation clinics may remain in control of their schedules and handle their appointments directly.

In addition to efficiency and sensitivity to care, the facility type plays a role in determining the best structure to use. Public Health, county, or non-profit areas may lean toward centralized scheduling with the intent of carefully distributing the work evenly among resources. The focus of these organizations is often on providing primary care to a large population, many of whom are indigent and are not requesting elective procedures. This reduces the need for associating patients with personal physicians and increases the need for timely appointments.

Decentralized scheduling enables each clinic or department to handle its appointments directly and separately from a main scheduling area. This structure places the patient in direct contact with the area of service when the appointment is made.

A combination of centralized and decentralized structures is used by many facilities. Patients scheduling an appointment for the first time may be processed through a central area, and follow-up appointments can be scheduled with personnel within each clinic/department.

Frequently, the Administration of a facility prefers to centrally control resources while Departments prefer to individually retain control. The complexity of scheduling restrictions within departments, current procedures, administration/resource opinions, and physical layout all influence how a facility manages scheduling.

Appointment scheduling in a department or clinic involves booking appointments in handwritten schedule books. Prior to the patient's arrival, many events may occur that can result in changing the appointment. For example, the resource may need to reschedule his/her appointments or get another resource to cover, or the patient may call to cancel or reschedule the appointment. Maintaining an accurate schedule can be challenging.

Patient charts, requested from Medical Records, may need to be delivered to the patient care area prior to the patient's arrival. During the course of a schedule day, patients are arriving and checking in for their appointments. Unscheduled patients walk in and must be included in the schedule. Certain areas can handle the majority of their patient load on a *same-day* basis.

Making an appointment is often the first contact a patient has with a facility. The public relations aspect of this initial contact and the subsequent interaction between the patient and service area should not be underestimated. A patient is more likely to

return to the facility if the scheduling experience is organized, efficient, and conducive to good patient care.

For physicians, this module provides a mechanism to handle the scheduling of their patients in a flexible and timely manner. This includes the ability to inquire about patient and/or physician schedules as necessary.

For patients, the Patient Scheduling Module schedules appointments quickly, automatically avoiding conflicting appointments. If a particular resource is unavailable, the system provides a waiting list function for future processing.

Communications are improved for the appointment clerk by providing easy access to information, having legible scheduled appointments, and giving instructions during the scheduling process. Appointment clerk productivity is increased by enacting quick scheduling from all locations in the system, automating many clerical tasks, and reducing internal telephone calls. Chart pull lists, outguide cards, wait list reports, transportation schedules, nurse station schedules, and patient schedules distribute information to the people who need it in a timely manner. Cancelled, rescheduled, and copied appointments are also facilitated by the system.

To assist in the administration of the facility, the Patient Scheduling Module provides a streamlined scheduling process reducing the amount of clerical work and avoiding conflicting patient schedules. The process also captures data such as referring institution and referring physician as part of an historical database. A wide variety of reports provide tools in the management of these areas of the hospital.

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RESOURCE MAINTENANCE

Resource Maintenance is an option located on the Scheduling menu. It can also be listed under the Scheduling Tables processor on the Data Processing menu. This portion of the system provides the ability to identify resources for scheduling and to determine the characteristics and availability of each. Resources must be identified before any scheduling functions can be accomplished.

A resource is any entity for which the hospital, department, or clinic may want to schedule patient appointments. A resource could be any of the following:

- Doctor on the medical staff
- Doctor from outside the facility
- Piece of equipment
- Technician
- Nurse
- Exam room
- Any other type defined by the facility

A resource can be added to the system by completing a set of screens that make up the Resource Master. Once this is set up via the Resource Master Information function, each page can be edited individually from the Update Resource Master Information menu.

After selecting Resource Maintenance from the Scheduling menu, the Resource Maintenance Input Options menu displays as follows:

General Hospital Resource Maintenance Processor		
Fri Dec 07, 1994 03:02 pm		
Resource Maintenance Input Options		
Option No.	Option	
1	Resource Master Information	
2	Update Resource Master Information	
3	Open/Edit Schedules	
4	Display Schedule Exception List	
5	SIM Item Scheduling Instructions	
6	Procedure Scheduling Parameters	
7	Chart Functions	
8	Departmental Table Maintenance	
Print	9	Monthly Plan Report
	10	Schedule Profiles Report
	11	SIM Scheduling Instructions Report
	12	Resource Master Data Report
	13	Department Data Report
	14	Appointment Type Summary Report
	15	Procedure Scheduling Parameters
Enter option number--		

RESOURCE MASTER INFORMATION

The Resource Master Information function is an option on the Resource Maintenance menu. The screens included in the Resource Master function are the demographics, scheduling parameters, available appointment types, profiles and monthly plans.

NOTE: All the Scheduling Resource definitions, criteria, and schedule templates are maintained in the Resource Master table. These master files are referred to throughout Scheduling. The Resource Master table is located under the Scheduling Tables Maintenance option.

After you select the Resource Master Information option from the Resource Maintenance Input Options menu, the following prompt displays:

Enter first letter(s) '-' or number--

At this prompt, enter one of the following responses:

- Enter the number of the resource
- Enter the first letters of the resource's name followed by a hyphen (-)
- Press hyphen (-) and ENTER to display a list of the available resources

Resource Master Demographics

When you select the appropriate resource from the table or add a new resource, the initial Resource Master Demographic Definition screen displays for verification or entry.

General Hospital Scheduling Table Maintenance Processor				
Mon Apr 03, 2000 02:45 pm				
1 Resource Number	2 Resource Name	3 Initials		
4558	WEST	aw		
4 Address 1	5 Address 2			
6 City	7 State	8 ZIP Code		
9 Office Phone	10 Module Usage	11 Specialties		
	Sched	CAR, CT, DEN, ENT		
12 Resource Type	13 Comment			
CLIN MANAGEMENT	14 Dept	15 Shifts	16 Max Wkld	17 Station Group
18 End of Day	19 Default Outcome of Attendance			
20 Direct Assign				
Enter field number or '/' starting field number--				

NOTE: Since many of the resources used in the Patient Scheduling Module are physicians who have already been entered into the STAR Patient Care Doctor table, a mechanism exists to load this information into the Resource Master without rekeying. By keying in a valid Doctor Code, Fields 1 to 9 and 11 are copied over. These fields must be maintained through the physician master with the exception of Specialties, which is maintained through Scheduling from that point.

Field Explanations

1. RESOURCE NUMBER (DISPLAY ONLY)

The resource number you selected is displayed. This number can be up to six digits long.

2. RESOURCE NAME (25-C-R)

The name that corresponds to the resource number you selected is displayed, or you can enter a new resource name. This field does not have to be a proper name (for example, you can enter *Dialysis Machine 1*).

NOTE: The resource name is displayed, printed, and stored in uppercase, no matter what case it is entered in.

3. INITIALS (3-A-O)

The initials of the resource are displayed, or you can enter new initials.

4. ADDRESS 1 (25-C-O)

Enter the address of the resource. If the resource is a physician, enter the physician's office address.

5. ADDRESS 2 (25-C-O)

If the resource has a secondary address (for example, a suite number), enter it in this field.

6. CITY (15-C-O)

Enter the resource's city. If the city's ZIP code is in the ZIP code table and you enter it in the City field, the city, state, and ZIP code automatically fill the appropriate fields. The ZIP code you enter can be either five or nine characters (only five characters are edited against the ZIP code table entries).

If the ZIP code you enter is not in the table, it moves to the ZIP code field and the cursor remains at the City field for your freeform entry. An equal sign (=) can be entered for the system's default city, state, and five-digit ZIP.

7. STATE (2-A-O)

Enter the resource's state in the standard two-character state abbreviation format. This entry is validated with the user-defined state table. An equal sign (=) can be entered for the default state.

8. ZIP CODE (9-N-O)

Enter the resource's ZIP code. The ZIP code you enter can be five or nine characters. An equal sign (=) can be entered for the first five characters of the default ZIP code. If a nine-digit ZIP code is used, it displays with a hyphen (-) between the ZIP code and the ZIP code extension. *If a six-digit alphanumeric Canadian ZIP code is entered, it displays in a x9x 9x9 format.*

9. OFFICE PHONE (10-AN-O)

The resource's area code and office phone number is displayed, or you can enter a new area code and number. Enter the area code and phone number without the parentheses () and hyphen (-). The system automatically enters parentheses around the area code and inserts a hyphen in the phone number. If the phone number is local, it can be entered without the area code, and the system automatically enters the correct area code.

10. MODULE USAGE (5-A-R)

Enter the modules (Scheduling, Chart Management, Clinical Management, or All) that can access the resource code. Resources identified as being used by Chart Management only cannot be accessed or displayed in the Patient Scheduling Module. Resources identified as being used by Scheduling only can never be set up as chart requestors (borrowers) within the Chart Management Module. Resources identified as being used by Clinical Management only can never be set up as borrowers or used as resources in the Patient Scheduling Module.

Setting a resource to be used by Clinical Management indicates that the resource is used in the Worklisting functions. Resources identified as being used by all modules can be accessed by all.

If the chart pulling functions are being used with Scheduling, it is essential that the Resource be set up to be accessed by both Chart Management and Scheduling, regardless of whether or not the Chart Management Module is being used. It is the only way to get chart request lists out of the Patient Scheduling Module. Enter **C** for Chart Management, **S** for Scheduling, **M** for Clinical Management, or **A** for all. The default is A.

11. SPECIALTIES (TABLE LOOKUP)

This field displays the previously entered specialties of the resource, or you can enter new specialties by selecting from the Specialty table that automatically displays. Each resource can have up to six specialties.

12. RESOURCE TYPE (TABLE LOOKUP)

This field displays the previously entered resource type, or you can enter a new resource type by selecting from the table or entering the resource type code. This field is required.

13. COMMENT (36-C-O)

This field is used for clarification purposes within the Resource Maintenance functions. Enter any comment pertaining to this resource.

14. DEPT (TABLE LOOKUP)

Enter a SIM Department in this field if the Module Usage field indicates Clinical Management. If Clinical Management is not designated in the Module Usage field, you are denied access to this field. Select a SIM Department table from the displayed selection. If a SIM Department is not used by Clinical Management, *Not a Clin Mgt SIM Department!* displays. If a SIM Department used by Clinical Management is entered, the entry is accepted and access to the Valid Shifts field is allowed. If this field is left blank, the Valid Shifts field cannot be accessed.

15. SHIFTS (3-N-C)

Enter the shifts that this resource can be available. If Clinical Management is not indicated in the Module Usage field, or the Dept field has been left blank, you are denied access to this field. Press ENTER to enter the default for that SIM department, or enter the desired shift. If shifts have not been identified for the selected SIM Department, the default is one.

16. MAX WKLD (5-C-O)

Enter the maximum workload up to 999.9 that is to be assigned automatically to the resource. This field is accessed only when the Module Field is set to contain Profiling or All. The following prompt displays:

Enter the max workload to be auto assigned to this resource (999.9)--

Enter the maximum workload with or without the decimal point. If you do not enter the decimal point, it is assumed and the value is considered a whole number. The value you enter should relate to minutes, with the value after the decimal point representing a tenth of a minute. The Unassigned Orders processor uses this value to limit the amount of work that is to be assigned automatically when appropriate.

If you press ENTER, this field is left blank. The Unassigned Orders processor treats this resource as though there is no limit to the workload that can be assigned.

17. STATION GROUP (TABLE LOOKUP)

Enter the preferred Station Group for this Clinical Management resource. This field is used when assigning orders to resources to identify if the resource typically works with patients on stations within a specific station group. If Clinical Management is not indicated in the Module Usage field, you are denied access to this field.

18. END OF DAY (1-A-R)

This field identifies if End of Day processing for this resource can be done through Clinical Management in the Schedule Status processor at the time the audit schedule is completed. The prompt for this field is:

Complete End of Day processing through Audit Schedule option (Y/N) [Y]--

Enter **Y** for Yes if you want to enable the system to perform the End of Day processing through the Audit Schedule option. Enter **N** for No if you want to require that End of Day processing be completed for this resource only through the Patient Scheduling module.

19. DEFAULT OUTCOME OF ATTENDANCE (1-N-R or TABLE LOOKUP)

This field enables you to enter a predefined outcome for the scheduled visit. The option you enter is the default for the attendance outcome response when End of Day processing is done through Clinical Management (in the Schedule Status processor at the time the audit schedule is completed). The prompt for this field is:

Enter outcome of attendance --

Enter the code for the attendance outcome if you know it, or enter a hyphen (-) to select from a list of available outcomes (as defined in the Outcome of Attendance table under Table Maintenance). After you make your selection, the description for the attendance outcome is displayed in this field.

20. DIRECT ASSIGN (1-A-R)

This field enables the Direct Assignment functionality for this resource. Direct Assignment streamlines the worklist assignment process for multiple occurrences generated by the same parent order. If an earlier occurrence generated by the same parent order has already been assigned to a resource, then the new occurrence is automatically assigned to the same resource for the appropriate date and shift.

The prompt for this field is:

Allow direct assignment of occurrences to this resource? (Y/N) [N]--

- Enter **Y** for Yes if you want this resource to have sibling occurrences automatically assigned to it after an initial occurrence has been assigned to the resource.

NOTE: When transferring work from one worksheet to another, the system checks this field for the destination resource. If it is set to Yes, then all related future occurrences are also moved to that resource's future worklist.

- Enter **N** for No, or press ENTER to accept the default, if you do not want later sibling occurrences to be assigned automatically to this resource after an initial occurrence is assigned to the resource.

Impact

After you complete this screen, the following takes place:

- Resources set up to be used by Scheduling are given access to the remaining screens in the Resource Master.
- The Resource Master is defined in the system, but is unavailable for scheduling until the remaining four screens of the Resource Maintenance function are completed and the schedule is opened.

- Resources set up to be used by Scheduling are allowed access to the remaining Scheduling specific screens in the Resource Master. Upon acceptance of the demographic screen, the resource is defined in the system, but is unavailable for scheduling until the remaining screens of the Resource Maintenance function are completed and the schedule opened.
- Resources set up to be used by Chart Management or Clinical Management are not allowed access to the remaining Scheduling specific screens in the Resource Master unless this resource can be used by Scheduling as well.
- Resources set up to be used in Chart Management can now be defined as requestors (borrowers) in that module if it is in the network.

NOTE: Once a resource has been defined as a borrower (added to the Borrower File), you must delete it from that file before you can delete it from the Resource Master.

- Resources set up to be used in Clinical Management can now be used to assign work through Worklist functions.
- The Master Parameter screen displays. The Scheduling Parameters screen displays if the Module Usage field contains (S)cheduling (and scheduling is defined in the network) or (A)ll to allow creation of the resource ID codes.

Resource Master Scheduling Parameters

If this Resource Master has been defined previously, the following prompt displays:

Delete? (N)--

The default response is No. Once this screen is accepted, the Resource Master Scheduling Parameter screen displays. This screen indicates the Department/ Specialty assignments for this resource if the Module Usage field contains Scheduling as an option.

```

General Hospital Scheduling Table Maintenance Processor
                                Mon Apr 01, 1996 02:47 pm

Resource Codes
Page:01      Departments/Specialties For This Resource
( 1) CAR,CAR,4558-WEST   Active

Enter choice or add(A) [A]--

```

This screen contains the department, specialty, code, resource description, and status. Each Master Resource can contain multiple Department/Specialty assignments. This gives the system the capability of maintaining unique profiles and schedules for each. For example, an individual physician may see one type of patient in one clinic based on a particular schedule, but have an entirely different type of practice with unique scheduling needs in another department or clinic.

The three-part code that is the result of linking a resource to a department and specialty is displayed in the system to designate the available choices. If you enter **A** on the previous screen to add a resource code, the following prompt displays:

Register new Resource for number 1? (Y/N) [N]--

If you answer Yes in response to this prompt, the following detail screen displays without data and you are prompted to enter detailed information about this resource. If No is entered, you are returned to the Select Resource prompt. The Last Edited line does not appear if the screen displays without data. The screen shown here does contain data and the Last Edited line which was captured the last time a change was made.

If you selected a resource from the previous screen, the following screen displays with data which provides more detailed information about the resource you chose. Fields 1 and 2 cannot be edited once they are entered. If an error is made or a change is desired for the department or specialty codes, the resource master must be deleted and re-entered into the system.

```

      General Hospital Scheduling Table Maintenance Processor
THERAPIST-----X: FMC,SUR,32 ADAIR,FRANK C      Mon Apr 14, 1997 11:57 am

Last edited: 1053A Oct 25, 1995-#30597
 1 Department                2 Specialty                3 Auto-open Schedules
  FMC-FAMILY MEDICINE        SUR-                    Yes
 4 Max Pts/Day                5 Overbook/Slot        6 Overbook/Day
  999                        1                          4
 7 Extend Schedule            8 Insert Times          9 Sched Deadline       10 Print Open Times
  Yes                         Yes                        100                     Yes
11 Display Security           12 Requestor            13 Request by Resource 14 Require Ref Phys
  VIEW REASON                 Yes                       No                       No
15 Type of Clinic              16 Order Gen./Pat. Reg. 17 Order Default
                               Yes                          No
Enter field number or '/' starting field number--

```

Field Explanations

1. DEPARTMENT (DISPLAY ONLY)

The resource's department is displayed.

2. SPECIALTY (DISPLAY ONLY)

The resource's specialty is displayed. If this information has been selected previously, the system displays the following:

Error: Resource `DPT,SPC,#####` already exists!

where ##### indicates the selected resource's numeric code, DPT indicates the selected department code, and SPC indicates the selected specialty.

3. AUTO-OPEN SCHEDULES (1-A-R)

Yes or No is displayed, or you can enter **Y** or **N** to indicate if this schedule should be automatically opened for an additional day during midnight processing. For example, selecting Yes indicates that for each day used, you want an additional day to automatically be added onto the end of the schedule for future use. The default response is Yes to extend the schedules. If No is entered, new days must be manually opened.

4. MAX PTS/DAY (3-N-R)

The maximum number of patients that can be scheduled per day is displayed, or you can enter a new maximum number of patients per day. This limit restricts the number of actual patients that can be scheduled on a given day.

NOTE: The Maximum Patients Per Day field is the ultimate limiter on the schedule. Notepad schedules allow up to this number of patients. If the maximum patients per day is reached, the schedule displays as full or as non-searchable, and the system does not allow any appointments to be scheduled. Patients can be placed on a Wait List once this maximum is reached.

5. OVERBOOK/SLOT (2-N-R)

The maximum number of appointments that can be scheduled beyond the number of appointments defined for a particular time slot displays, or you can enter a new maximum number of appointments that can be scheduled. The default response is zero.

6. OVERBOOK/DAY (3-N-R)

The number of overbooks allowed per day is displayed, or you can enter the number of overbooks allowed per day. The number entered here cannot be less than the number entered in Field 5, Overbook/Slot. The default response is zero.

7. EXTEND SCHEDULE (1-A-R)

Yes or No is displayed, or you can enter **Y** or **N** to indicate whether an extended schedule is allowed. If Yes is entered, appointment personnel are able to schedule patients for a time beyond the last time slot, or before the first time slot on a schedule. Setting this field to Yes also allows the Appointment Length to be revised on initial entry of an appointment. On Notepad Days, appointments cannot be scheduled outside of the start and end times. The default response is No.

8. INSERT TIMES (1-A-R)

Enter **Y** or **N** to specify whether appointment personnel can insert new time slots within the established schedule. This field controls the collapsing of times and the effect on the schedule when an appointment length is changed. You must enter **N** in order to collapse schedule slots. See Collapse and Uncollapse for more information regarding this function.

9. SCHED. DEADLINE (3-N-R)

The maximum number of days into the future that you can schedule appointments for this resource is displayed, or you can enter a new maximum number of days. This field cannot exceed the department limit (defined in the Resource Department table), which is the default.

10. PRINT OPEN TIMES (1-A-R)

Yes or No is displayed, or you can enter **Y** or **N** to indicate if open times (time slots without scheduled appointments) are to print on this resource's schedule printouts. The default response is Yes.

11. DISPLAY SECURITY (TABLE LOOKUP-R)

The code that you want to use to restrict the display of patient names and/or visit reasons when other departments (as defined in a field in the CRT table) are viewing patient appointment schedules on their CRTs is displayed, or you can enter a new code. Select one of the following codes:

- View Reason - Displays the patient name and the visit reason.
- Restrict Reason - Displays the patient name, but not the visit reason.
- Restrict Name - Does not display the patient name or visit reason, but does indicate that the slot is booked.

12. REQUESTOR (1-A-R)

Yes or No is displayed, or you can enter Y or N to indicate if this resource needs to have the medical record in hand at the time of the appointment. Appointments with a non-requesting resource show on the Exception List, rather than on the Chart Pull List. This is the default for the resource, but it can be overwritten at the time an individual appointment is made.

13. REQUEST BY RESOURCE (1-A-R)

Yes or No is displayed, or you can enter Y or N to indicate if charts requested for an appointment should be requested at the resource level; or if charts are being requested at the department level. This is used in the sort of the Chart Pull List.

14. REQUIRE REF PHYS (1-A-R)

Enter **Y** for Yes or **N** for No to indicate whether or not a Referring Physician entry is required during input of appointment information. If you leave this field blank or enter **N** for No, a Referring Physician entry is not required. If you set this field to Yes, a Referring Physician entry is required at the field level, not at the screen level. This means the screen can be accepted without an entry if the field is bypassed.

15. TYPE OF CLINIC (1-N-R)

Select the type of clinic this resource services from the Table selection.

16. ORDER GEN./PAT. REG. (1-A-R)

This field allows the Resource to generate orders and admissions from the Scheduling module. Enter **Y** to allow Order Generation/Registration from Scheduling or **N** to disallow Order Generation from Scheduling. This is a required field and is automatically set to No upon installation or upgrade. This is a department parameter and can be set by hospital personnel. This field can only be set to Yes if the Schedule Order Generation field in Hospital Facility Options, Scheduling Facility Parameters is set to Yes. In a multi-facility environment, if the Resource Master file is shared across facilities, the parameter in Hospital Facility Options for the first facility must be set to Yes to allow a Yes to be entered for the Resource. When this field is accessed, the following prompt appears:

Allow order generation/patient registration for this Resource (Y/N) [N]--

17. ORDER DEFAULT (1-A-R)

The Order Default value is used to determine the default in the prompt that is used if the response to field 3 is Yes. If the response to field 3 is No, this field is bypassed. If Order Generation is active, the default prompt appears when this field is accessed.

Default response for Order Generation from Scheduling (Y?N) [N]--

If **Y** is entered at this prompt, the system defaults in the value of Yes to the following prompt when it appears within the application:

Generate an Order from this appointment (Y?N) [Y]--

If **N** is entered at this prompt, the system defaults in the value of No when the above prompt appears within the application.

Once the parameters have been set, the remainder of the enhancement is executed within the application.

COLLAPSE AND UNCROLL (OR CANCEL)

When you can cancel an appointment through Revise Patient Appointment, Check In/ Out, End of Day, or Reschedule List, you can restore a collapsed appointment to its previous format.

The following example illustrates the progression of schedule slots which are collapsed to accommodate a longer appointment, an example of an overbooked schedule slot, and uncollapsing (or cancelling) appointments:

Original Times Profile		new appt #1	new appt #2	new appt #3	new appt #4
		60 min	60 min	45 min	60 min
0900	3/0	3/1	3/2	3/3	3/4 (ovrbked)
0915	3/0	2/0	1/0	collapsed	collapsed
0930	3/0	2/0	1/0	collapsed	collapsed
0945	3/0	2/0	1/0	1/0	collapsed
1000	3/0	3/0	3/0	3/0	3/0

When your original profile permits 3 appointments per schedule slot:

0900	3/0
0915	3/0
0930	3/0

0945	3/0
1000	3/0

#1 And you schedule one 60 minute appointment beginning at 09:00 am, then your profile is revised to this:

0900	3/1
0915	2/0
0930	2/0
0945	2/0
1000	3/0

#2 When you schedule a second 60 minute appointment beginning at 09:00 am, your profile changes to:

0900	3/2
0915	1/0
0930	1/0
0945	1/0
1000	3/0

#3 When you make a third appointment for 45 minutes, the system collapses the 09:15 and 09:30 am slots leaving your profile as:

0900	3/3
0945	1/0
1000	3/0

#4 Now, when you schedule a fourth appointment for 60 minutes beginning at 09:00 am, your profile shows an overbooking of one and causes the 09:45 am slot to collapse:

0900	3/4
1000	3/0

If you *cancel* an appointment which is using a collapsed time slot, the system asks you if you want to restore the slot to its previous format. Restoring the slot to its previous format is simply a matter of reversing the progression of the profile.

With the first cancellation of one of the 0900 appointments, one of the 0900 appointments is uncollapsed from 3/4 to 3/3, as in the #3 example. With the second cancellation of one of the 3 remaining 0900 appointments, one more of the 0900 appointments is uncollapsed from 3/3 to 3/2, and so forth.

The following examples explain what the system permits depending upon the response to the Insert Times field displayed on the Resource Master Scheduling Parameters screen. These examples pertain to the Predefined Schedule Types only. Note-Pad Type schedules have hard coded parameters of *Insert=Yes* and *Extend=No*.

The Insert Times field refers to the ability to insert time slots in between those slots already defined on a particular day's schedule. Insert also refers to the ability to change the length of time allotted for an appointment type associated with a slot already defined on the schedule without collapsing any subsequent slots.

When the Insert Times field is set to Yes, the system permits the following:

- 1) You can insert time slots that are not predefined on the schedule for a particular day.
- 2) If you lengthen the time for an appointment already on the schedule or add a type that has an associated length that extends beyond the next slot, the system does not collapse the next slot(s); it just inserts the new entry.
- 3) If you choose an existing time slot but define a new type, it is added to the schedule without overwriting the existing slot. For example, a portion of a particular day's schedule is as follows:

800A FUP830A CONS900A GEN930A GEN

If you want to insert an 830A NEW appointment, you would *Modify* the schedule and enter 830A. When the prompt *Add an 830A CONS Y/N?* comes up, answer No and enter **NEW** at the *Enter new type* prompt. The modified schedule appears as follows:

800A FUP830A CONS830A NEW900A GEN930A GEN

When the Insert Times field is set to Yes and the Extend Times field is set to Yes, the system permits the following:

- 1) You can insert time slots that are not predefined on the schedule for a particular day.
- 2) If you lengthen the time for an appointment already on the schedule or add a type that has an associated length that extends beyond the next slot, the system does not collapse the next slot(s); it just inserts the new entry.

- 3) If you choose an existing time slot but define a new type, it is added to the schedule without overwriting the existing slot. For example, a portion of a particular day's schedule is as follows:

800A FUP830A CONS900A GEN930A GEN

If you want to insert an 830A NEW appointment, you would *Modify* the schedule and enter 830A. When the prompt *Add an 830A CONS Y/N?* comes up, answer No and enter **NEW** at the *Enter new type* prompt. The modified schedule appears as follows:

800A FUP 830A CONS 830A NEW 900A GEN 930A GEN

When the Insert Times field is set to No and the Extend field is set to Yes, the system permits the following:

- 1) You cannot insert new slots between existing slots on the schedule.
- 2) If you lengthen the time for an appointment already on the schedule, the system collapses any subsequent slots, provided there are no patients scheduled in those slots and the next slot is the same appointment type.

NOTE: All slots must be the same type in order to collapse. If the subsequent slot(s) cannot be collapsed because they are already filled, the new length or slot is inserted without effecting the next slot(s) and an asterisk (*) is placed in the comment field of the next slot to denote the insertion.

If the schedule allows more than one patient to be scheduled in the next slot, the system only collapses one of the *slots* (for example, the number of patients allowed is decreased by one).

- 3) If you choose an existing time slot but define a new type, the new type overwrites the old one. For example, a portion of a particular day's schedule is as follows:

800A FUP

830A CONS

900A GEN

930A GEN

If you want to change the 830A CONS appointment to an 830A NEW you could choose 830A. When the prompt *Add an 830A CONS Y/N?* comes up, answer No and enter **NEW** at the *Enter new type* prompt. The modified schedule appears as follows:

800A FUP

830A NEW

900A GEN

930A GEN

When Insert Time is set to No and Extend Time is set to No, a rigid schedule is created that does not allow for any time extension nor the ability to insert different appointment times.

The Extend Schedule field refers to the ability to extend or add an additional slot after the last defined slot or before the first defined slot on a predefined schedule type. This is not used for Note Pad schedules.

When the Extend Schedule field is set to Yes, the system permits the following:

- 1) You can add times before the first defined time slot or after the last defined slot. You also have the ability to change the length of time allotted for an appointment type associated with a slot already defined on the schedule.

When the Extend Schedule field is set to No, the system permits the following:

- 1) You cannot add times before the first defined time slot or after the last defined slot.

When any appointment is different than the established schedule slots, you must initiate the process with an *M* to modify the existing schedule.

Walk-In patient appointments are the exception to Schedule Parameters, and are not limited by the Maximum Patients per Day, Insert Y/N, or Maximum Overbooks per Day. The Insert Y/N and Extend Y/N parameters only apply to schedules with predefined schedule types. Notepad schedules have predefined parameters of *Insert = Yes* and *Extend = No*, independent of how these parameters are set for the resource. Parameter changes take effect on schedules already open, with the exception of the Maximum Patients Per Day which uses the value at the time the schedule is opened.

Summary

The Extend Schedule field and the Insert Times field can impact the type of schedule you are creating:

- If Extend is set to *No* and Insert is set to *Yes*, time extension is not permitted, but you can insert nondefined times on the resource's schedule.
- If Extend is set to *No* and Insert is set to *No*, a rigid schedule is created that does not allow for any time extension, nor the ability to insert different appointment times.

- If Extend is set to *Yes* and Insert is set to *Yes*, a very loose schedule is created that allows for time extensions, as well as for adding different time slots.
- If Extend is set to *Yes* and Insert is set to *No*, inserting times is not allowed, but extending a time slot is. This is the only type of schedule that allows for the collapsing of appointment slots.

Impact

After you complete this screen, the following takes place:

- The Resource Master parameters are defined in the system, but the resource is not available until the remaining three screens of the Resource Maintenance function are completed and the schedule is opened.
- The Appointment Type screen displays.

Resource Master Appointment Types

After you accept the previous screen, the following Resource Master Appointment Types screen displays. This screen lists the valid appointment types for this resource within this specialty/department. You can edit, add to, copy, or delete appointment types. The appointment types determine time slots on the profiles and are selected from the Appointment Type table. Appointment type lengths are defined by resource.

```

      General Hospital Appointment Types Specification Processor
TECHNICIAN-----X: CAR,CAR,4558 WEST                      Mon Apr 01, 1996 02:51 pm

                                Appointment Types
( 1) CN15 ( 15 min) Search (13) THAL ( 30 min) Search
( 2) CN30 ( 20 min) Search (14) EXAM ( 30 min) Search
( 3) CN45 ( 45 min) Search (15) SHT  ( 20 min) Search
( 4) ANGI ( 60 min) Search (16) TRMT ( 30 min) Search
( 5) ART  ( 60 min) Search (17) TMIL ( 30 min) Search
( 6) CARD ( 15 min) Search (18) CON  ( 60 min) Search
( 7) CXR  ( 15 min) Search (19) NMBS ( 30 min) Search
( 8) BRON ( 16 min) Search (20) CT30 ( 30 min) Search
( 9) EKG  ( 10 min) Search (21) BED  ( 30 min) Search
(10) EVAL ( 60 min) Search (22) CTE  ( 30 min) Search
(11) POST ( 45 min) Search (12) PRE  ( 30 min) Search

Enter type # to edit, add(A), copy master(C), delete master(D)--

```

The following is an explanation of each of the available prompt options shown on this screen:

If you select an appointment type from the previous screen by entering the number of the requested type, the following screen displays with data entered for that appointment type.

If you enter **A** to add an appointment type, the following screen displays with no data entered. The field explanations apply to both.

General Hospital Appointment Types Specification Processor		
TECHNICIAN-----X: CAR,CAR,4558 WEST		Mon Apr 01, 1996 04:50 pm
1 Appointment Type	2 Appointment Description	3 Appointment Length
CN15	15 MIN CONSULTATION	15
4 Department Instructions ->		
5 Max Appt/Day	6 Searchable	
99	Yes	
7 Letters		
(1) Appointment Reminder	Entries Defined	
(2) Appointment Revision		
(3) Attendance		
(4) Cancellation		
(5) New Appointment		
(6) No Show		
(7) Reschedule		
(8) Wait List		
Enter department instructions--		

Field Explanations

1. APPOINTMENT TYPE (TABLE LOOKUP-R)

The appointment type selected for this resource schedule is displayed, or you can enter a new appointment type. Examples are NEW, EXAM; only four characters are allowed. If an appointment type starts with an asterisk (*), the system does not allow appointments to be made (for example, *LUN).

2. APPOINTMENT DESCRIPTION (25-C-O)

The entry in this field is displayed according to the description in the Appointment Type table. The entry can be changed for use as a Visit Reason for this resource when accepted as the default on the Appointment screen.

3. APPOINTMENT LENGTH (3-N-R)

The appointment length is displayed in minutes, or you can enter the appointment length in minutes. For example, 30 for 1/2 hour, 60 for an hour. This entry is specific per resource.

4. DEPARTMENT INSTRUCTIONS (70-C-O)

Any special instructions for this appointment type are displayed, or you can enter special instructions for this appointment type. These instructions display across the

bottom of the screen when appointment types are selected while making a schedule appointment.

5. MAX APPT/DAY (3-N-R)

The maximum number of appointments per day for this appointment type is displayed, or you can enter the maximum number. The default response is 99.

6. SEARCHABLE (1-A-R)

Yes or No is displayed, or you can enter **Y** or **N** to indicate whether searches for available appointments can be made when appointments are being scheduled. If you enter **Y**, and if the time selected is filled, the system automatically reflects this appointment type when searching for the next open appointment using Super Search (see Chapter 2, Appointment Processing for details) and when generating the Next Available Appointment report (see Chapter 3, Schedule Processing and Chapter 6, Online Reports/Forms for details).

The default response is Yes. If you enter **N**, this appointment type does not appear through Super Search or the Next Available Appointment report.

As a resource is being added or revised, the system displays a list of the valid appointment types that have been assigned. The length of the appointment and its search/no search status also display on this list.

7. LETTERS (SPECIAL FORMAT)

When you select this field, a screen displays with the scheduling letter types that are available. When you indicate which of the letter types you would like to view/edit, a screen for each letter (Letter Definition Parameters screen) appears. A specific letter can be edited by selecting the associated number. Once you select a number, the system scrolls through the Letter Definition Parameters screen for each remaining letter. See the following section for more information about selecting this field and accessing the accompanying screens.

PATIENT LETTERS

When you select Field 7, Letters, from the Resource Master Appointment Types screen, several letter types display for you to use with the scheduled appointment. You have the following options in using these letters:

- You can control the letter body and can create multiple letter bodies for each type of letter.
- You can attach an addendum to the letter, giving the patient additional information as needed. Letters can be sent not only to the patient but also to their physician. Scheduling History logs a record that a letter was created for the patient appointment each time a letter is created or reprinted.
- You can print letters online as the scheduling is done and hand them to the patient or print them in a batch mode. If letters are created in a batch mode and

are being sent to the Family Doctor or Registered GP, the multiple patient letters can be combined into one letter listing many patients.

- If a patient is under a certain age, such as the age of 16, you can address the letter to the parent/guardian of the patient and the letter format can be unique for the minor.
- You can insert additional information to a specific patient letter at the time the letter is created.

When you select one of the letters, a screen similar to the following is displayed:

General Hospital Appointment Types Specification Processor			
: CAR,CAR,4558 VITA		Sat Mar 30, 1994 04:00 pm	
1 Letter Type			2 Days
Appointment Reminder			->
3 Patient?	4 Batch	5 Pt Type	6 Guardian
7 Format	8 Child Format		
9 Custom Documents		10 SIM Instructions	
11 Physician?	12 Batch	13 Pt Type	14 Individual
15 Format			
16 Custom Documents		17 SIM Instructions	
18 Edit by		19 Edit date	
Enter number of days prior to appointment date to print--			

Field Explanations

1. LETTER TYPE (DISPLAY ONLY)

This field displays the letter type selected, or accessed if scrolling. This field cannot be edited.

2. DAYS (3-N-R)

This field indicates the number of days prior to or after an action the letter should print:

New Appointment Letter - Number of days after an appointment is entered or scheduled for a patient, counting the day of entry.

Appointment Reminder Letter - Number of days prior to a scheduled appointment date, counting the appointment date.

Attendance Letter - Number of days after the patient is checked-in/out, counting the date of the appointment or the date the End of Day or Check-In/Out processor

was performed. This letter can be sent to a patient or the physician to indicate that a patient's appointment occurred as scheduled.

Reschedule Letter - Number of days after an appointment has been placed on the Reschedule list, counting the date of rescheduling.

No Show Letter - Number of days after the patient failed to attend, counting the appointment date or the date the appointment was marked a No Show or DNA (Did Not Attend)

Wait List Letter - Number of days after a patient has been added to a wait list, counting the date they were added.

Cancellation Letter - Number of days after the cancellation has been performed, counting the date the cancellation was performed. This letter can be sent to either the patient or the physician to confirm that a patient's appointment was cancelled.

Appointment Revision Letter - Number of days after the Revision or Move has been performed, counting the date the revision or move was performed. This letter can be sent to a patient or the doctor to indicate the change in Resource, Date or Time that was entered through the Revise Patient Appointment, Check In-Out, End of Day, or Reschedule/Reserve/Move functions.

No letters are generated (No Show or Attendance Letters) for patients that are marked as *Auto* because the End of Day processing and/or the Check-In/Out Processor has not been performed.

3. PATIENT? (1-A-R)

This field requests you to define whether a patient letter is associated with this type of letter. You can enter **Y** for Yes or **N** for No. If you enter **N**, all remaining patient associated fields (4-10) are bypassed, and the Physician question (Field 11) is accessed. If you enter **Y**, the cursor advances to the next field. If a Y is adjusted to an N, all patient related fields are automatically cleared after displaying a *double dare* question:

Letter is not appropriate for patients, clear associated fields? (Y/N)--

4. BATCH (1-A-R)

This field requests you to define whether letters are printed in a batch mode (**M**), online as the transaction occurs (**O**), or with both options available (**B**). When batch letters are printed, those patients who have already received these letters in an online fashion are skipped and not printed again.

5. PT TYPE (1-A-R)

This field is used to indicate whether letters of this type are applicable to Inhouse/ Inpatient patients, Outpatient patients and/or unknown patient types. The system displays the following prompt:

Do letters apply to 'I'npatient, 'O'utpatient, and/or 'U'known types? [O]--'N'one for no letters

If you enter an **I**, letters are appropriate and are printed for Inpatients. If an appointment is linked to an inpatient visit it is considered an Inpatient appointment. If the appointment has not been filled by the time the letter is printed, the Inpatient patient type flag is used from the appointment.

If an appointment has been linked and the account is an ambulatory account, the appointment is considered an Outpatient appointment. If the appointment has not been filled, the Outpatient patient type flag is used.

If the appointment has not been filled, and the patient type entered on the appointment screen is Unknown, these appointments are considered the unknown patient types.

If you enter **N** (None), none of these letters print for this resource/appointment type combination.

6. GUARDIAN (SPECIAL FORMAT)

This field is used to indicate whether the letter should be addressed *To the Parent/Guardian* of the patient. The system displays the following prompt:

The following prompt is displayed:

Enter age under which the Child format will apply [16]-- 'N'o to not use

If the patient is under a certain age, the age should be entered and anyone under that age has the letters created, using the letter body format entered in the Child Format field. Any patient that age or above does not have the Child Format letter, but rather uses the Format letter. If you select not to use the child format at all, enter **N**. The default response is the age of 16. This is a required field. If this field contains an age, then the Child Format field is required. This allows for a unique salutation and body of a letter for children or minors.

7. FORMAT (TABLE DRIVEN)

The formats that have been defined by the hospital in the Letter Format Body Builder table are displayed for selection. This field is required.

8. CHILD FORMAT (TABLE DRIVEN)

The formats that have been defined by the hospital in the Letter Utility Text Builder table are displayed for selection. This field is used to allow for a different letter text for patients under a certain specified age, such as the age of 16. A different salutation such as *To the Parents/Guardian of* is frequently used in the Child format. This field is required if an age has been entered in the Guardian field, and is bypassed and cannot be accessed if there is no age in the Guardian field. This field is cleared each time the Guardian field is edited to ensure that the proper response is entered.

9. CUSTOM DOCUMENTS (TABLE DRIVEN)

When this field is accessed, the appropriate facility should be selected if the custom documents processor is split by facility. Associated documents can be defined per facility. These documents are used for patient instructions, change of address/ information sheets, etc. If they are shared, then the associated documents display. Once the facility is selected or assumed, the existing table entries are displayed. If you want to delete any associated entries, enter the corresponding number. If you want to add documents, the following screen is displayed:

```

      General Hospital Appointment Types Specification Processor
: CAR,CAR,4558 VITA                               Sat Mar 30, 1994 05:35 pm

( 1)Category      :
( 2)Additional Documents:
( 3)Patient Name   :

Page:01                                Custom Documents          ##=Current Choices
( 1) (G)-PICC SITE & DRSG(PC)PG1
( 2) (G)-PTCA/DCA(TP)PG1
( 3) (PC)3S-AMINOPHYLLINE
( 4) 1S-DISCHARGE SUMMARY
( 5) 2E-CAPD TUBING CHANGE (PC) PG.4
( 6) 2E-CAPD TUBING CHG. (PC) PG.3
( 7) 2E-CAPD TUBING CHG. (PC) PG1
( 8) 2E-CAPD TUBING CHG. (PC) PG2

Enter choices (e.g. 1,7,5-9) or '-'choices to remove--
                                end selection(NL)  next page(//)

```

Field Explanations

1. CATEGORY (TABLE LOOKUP)

Use this field to select appropriate custom documents without having to access the entire listing of all the hospital's custom documents. When you select this field, the system displays associated custom documents. When the documents are selected, their numbers appear in the field. This can be useful in setting up a Scheduling category, for example. When lookups are performed, if the Scheduling Category is entered in this field, the custom document selection display is limited to the entries associated with the Scheduling Category.

2. ADDITIONAL DOCUMENTS (TABLE LOOKUP)

This field allows additional documents to be linked, along with those selected from the defined category. This field accesses the entire table of the facility's custom documents. If no category is selected, then this field is used to link associated documents.

3. PATIENT NAME (1-A-R)

This field is used to indicate whether the patient block information should be printed on the custom documents for the associated patient (if there is a patient block defined for

the document). Valid responses are Y (Yes) and N (No). If the response is Y, the patient block information is printed using the information entered in the patient's appointment file and associated account if the appointment has been filled.

Once this screen is accepted, the system returns to the Letter Definition Parameter screen, with *Entries Defined* displaying as a response in the Custom Documents field to indicate that the process has been performed.

The following fields on the Letter Definition Parameter screen display for you to complete:

10. SIM INSTRUCTIONS (1-A-R)

This field determines whether SIM instructions print as a trailer page, if applicable. You can enter Y (Yes) or N (No). N is the default.

11. PHYSICIAN? (1-A-R)

This field determines whether a Physician or Registered GP letter is associated with this Appointment Type letter. This field is Text Translated to *Reg GP* in the United Kingdom. Valid responses are Y (Yes) and N (No). If you enter N, the associated Physician letter fields are automatically bypassed and the letter screen is complete. If you change Y to N, then the associated fields are deleted after displaying a double dare question:

Letter is not appropriate for patients, clear associated fields? (Y/N)--

If you enter Y, the cursor advances to the next field.

12. BATCH (1-A-R)

This field determines whether letters are printed in a batch mode(M), online as the transaction occurs (O), or with both options available (B). When batch letters are printed, those patients who have already received these letters in an online fashion are skipped and not printed again.

13. PT TYPE (3-A-R)

This field is used to indicate whether letters of this type are applicable to Inhouse/ Inpatient patients, Outpatient patients and/or unknown patient types. The following prompt is displayed:

Do letters apply to 'I'npatient, 'O'utpatient, and/or 'U'nknown types? [O]-- 'N'one for no letters

If you enter an I, letters are appropriate and is printed for Inpatients. If an appointment is linked to an inpatient visit it is considered an Inpatient appointment. If the appointment has not been filled by the time the letter is printed, the Inpatient patient type flag is used from the appointment.

If an appointment has been linked and the account is an ambulatory account, the appointment is considered an Outpatient appointment. If the appointment has not been filled, the Outpatient patient type flag is used.

If the appointment has not been filled, and the patient type entered on the appointment screen is Unknown, these appointments are considered the unknown patient types.

If you enter **N** (None), none of these letters print for this resource/appointment type combination.

14. INDIVIDUAL (1-A-R)

This field indicates whether the Physician/GP should receive individual letters for each patient or one letter of this type listing all appropriate individuals.

15. FORMAT (TABLE DRIVEN)

The formats associated with this type of Physician/GP letter are displayed for selection.

16. CUSTOM DOCUMENTS (TABLE DRIVEN)

When this field is accessed, the appropriate facility should be selected if the custom documents processor is split by facility. Associated documents can be defined per facility. These documents are used for patient instructions, change of address/information sheets, etc. If they are shared, then the associated documents display. Once the facility is selected or assumed, the existing table entries are displayed. If you want to delete any associated entries, enter the corresponding number. If you want to add documents, the screen described for Field 9 displays.

17. SIM INSTRUCTIONS (1-A-R)

This field determines whether SIM instructions print as a trailer page, if applicable. You can enter **Y** (Yes) or **N** (No). **N** is the default.

18. EDIT BY (DISPLAY ONLY)

This field displays the name of the person who last edited this screen if the person signed on with security.

19. EDIT DATE (DISPLAY ONLY)

This field displays the date time the screen was edited.

After you complete the Resource Master Appointment Types screen, the following takes place:

- This appointment type becomes available to be used on this resource's schedules. This resource is not available for scheduling until the remaining two screens of the Resource Maintenance function are completed and the schedule has been opened.

If you select copy master from the Appointment Type selection screen by entering **C**, the following screen is displayed:

General Hospital Appointment Types Specification Processor	
PHYSICIAN: ANS,ANS,1 ADAMS,HAROLD R	Thu Jan 14, 1994 01:31 pm
Copy Resource	
1 Copy from Resource	2 Appointment Types
OBG,OBG,45-BROWN,ROBERT D.	Yes
3 Schedule Profiles	4 Monthly Plan
ALL	Yes
Accept this screen? (Y/N) [Y]--	

The Copy Master function is provided because the Resource Master for one resource may be identical or similar to the Resource Master for another resource. The system prompts you to specify which resource is to be used to copy the appointment types, profiles and/or day of week schedule information.

This function does not work if the maximum number of patients per day of the master is greater than the number of patients allowed on the current resource. This copied information can be modified as necessary by accessing it through the Update Resource Master Information selection on the menu (discussed in the following section).

This function is designed to copy Appointment Types, Schedule Profiles, and Monthly Plans. Copying any of the three types of information without the others must be done with extreme caution. Appointment types are used in defining profiles, and profiles are used in monthly plans, so if these three are not in synch, a potential exists for file problems. Error messages remind you of this potential for error if all three types of information are not copied at once.

Field Explanations

1. COPY FROM RESOURCE (TABLE LOOKUP-R)

Enter the first letters of the name of the resource followed by a hyphen (-), enter the number of the resource that you want to copy information from, or press hyphen (-) to display the list for selection.

2. APPOINTMENT TYPES (1-A-R)

Enter **Y** or **N** to indicate whether you want to copy appointment types from the resource. The default response is Yes. If you enter **Y** and the resource already has existing appointment types, the following message displays:

Resource already has types defined!

If you enter **N**, the following message displays:

WARNING:Problems may result if profiles are copied!

If the current appointment types for the destination resource do not include all types available for the copied from resource and the appointment types are not copied when the profiles are, invalid appointment types may be listed in the resource profile.

3. SCHEDULE PROFILES (TABLE LOOKUP)

Enter the number of the Schedule Profile(s) you want copied. The following message may display when profiles currently exist for the resource:

Warning! Existing profiles will not be copied over!

If profiles exist for the destination resource and are named the same as profiles that exist in the copied from resource, the original profiles remain. If the profiles for both resources have mutually exclusive names, then the profiles from both resources are combined.

4. MONTHLY PLAN (1-A-R)

Enter **Y** or **N** to indicate whether you want to copy the monthly plan from the resource. The default response is No. If you enter **Y**, the following message may display:

Problems may result if not all profiles are present!

If all profiles in the monthly plan do not exist for the resource, the monthly plan tries to call profiles that are invalid, causing potential problems when opening and scheduling the resource.

If you select Delete Master from the Appointment Types Specification screen by entering **D**, a screen displays containing resource information at the top and a prompt at the bottom asking if you want to delete the profiles and monthly plans for that resource.

Impact

Upon final acceptance, the following takes place:

- If you enter **C**, the appointment type information is copied from the indicated resource to the current resource.

- If you enter **D**, the indicated appointment types are deleted.
- The Master Schedule screen displays.
- The added or revised Appointment types are available.

Resource Master Schedule Profiles

After entering the desired appointment types, press ENTER and the following prompt displays:

Enter profile code--

Select the hospital-defined profile code you want to build, and a screen similar to this one displays, which is the first of the Resource Schedule Profile screens. There are two types of profiles that can be built. The first type shown here is a Notepad freeform schedule with no predefined appointment slots:

```

General Hospital Master Schedule Processor
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.          Fri Mar 20, 1994 11:24 am
Types:  NEW 20,FUP 10,GEN 5
Profile: 2 - NOTEPAD SCHEDULE
Comment: PATIENTS ARE TO BE SCHEDULED ON AN AS NEEDED BASIS
Time  Type Pats Comment
730A  *ST*  ( 0)
500P  *ED*  ( 0)

```

Enter start time, note pad day(N), edit text(E), or delete profile(D)--

ST	This is the Start Time for the schedule, after which appointment types can be added.
ED	This is the End Time for the schedule. Appointments must conclude by this time.

The second type of profile is a structured pre-set schedule using valid appointment types.

The following is an example of this profile type:

```

General Hospital Master Schedule Processor
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.          Fri Mar 20, 1994 11:24 am
Types: NEW 20,FUP 10,GEN 5
Profile: 1 - GENERAL PROFILE
Comment: NO LATE AFTERNOON APPOINTMENTS - DR. BROWN ON ROUNDS
Time  Type Pats Comment      Time  Type Pats Comment
730A  GEN  ( 1)              200P  NEW  ( 1)
735A  GEN  ( 1)              220P  NEW  ( 1)
740A  GEN  ( 1)              240P  NEW  ( 1)
800A  NEW  ( 1)              300P  NEW  ( 1)
820A  NEW  ( 1)
900A  NEW  ( 1)
920A  NEW  ( 1)
940A  NEW  ( 1)
1000A NEW  ( 1)
1100A FUP  ( 2)
1110A FUP  ( 2)
1120A FUP  ( 2)
1130A FUP  ( 2)
1140A FUP  ( 2)
1150A FUP  ( 2)
1200N FUP  ( 2)
Enter start time, note pad day(N), edit text(E), or delete profile(D)--

```

As a profile is added, the system prompts you to enter a description of that profile. This description is used in Resource Maintenance to clarify and assist in profile selection. At the prompt, enter one of the following responses:

- Enter the start time of the profile. This is the time of day that you can begin to schedule appointments.
- Enter **N** to mark the profile a Notepad Day. By making this profile a Notepad Day, no appointment types are assigned to this profile, so time slots can be inserted randomly as appointments are made. A start and stop time must be defined for this option.
- Enter **E** to edit the profile's text. The following prompt displays allowing you to change the description of the profile entered previously by entering **D**, or to add a comment to the profile by entering **C**. This profile comment displays at the top of a schedule and prints on the Resource Schedule Report and the Department/Resource Schedule Report.

Edit description(D) or comment(C)--

- Enter **D** to delete the profile.

Once the start time is defined, the next step is to determine which appointment types are to be used. For easy reference, the valid choices are listed at the top of the screen. Next, the system asks for the number of patients that can be seen within that appointment time slot. Finally, the system prompts you to define the end of the range for this appointment type by entering the last time or the multiple (number) of this type of appointment. For example, a profile can contain Consult Visits from 9:00 AM to

11:00 AM, or can be made up of 11 Consult Visit Appointments starting at 9:00 AM and lasting 15 minutes each.

As appointments slots are being added to a profile, the following options are displayed on a prompt:

COMMENT (=)

To add a short comment for display on the schedule next to the appointment. If you use an asterisk (*) as the first character in the Comment field, the system automatically changes the asterisk to a pound sign (#).

DELETE (*)

To delete previously entered appointment types.

RESERVE (+)

To highlight a particular time period. This does not prevent appointments from being scheduled. When used in conjunction with the Comment field, it can be used as a flag to meet each department's needs.

As a profile is being built, multiple appointment types and times are defined for the profile. Each resource can be given up to 35 profiles to accommodate different schedules for different days of the week or for special circumstances (for example, holiday schedules).

A profile can be added that does not include any appointment slots. This should not be confused with the Note Pad option previously discussed. If no predefined slots are entered and the profile is linked to a monthly plan, the day is opened without any predefined slots.

The slots can be added through the Appointments of Procedure Scheduling processors using the modify option. This allows a structured schedule to operate much like a Note Pad day without the restrictions of a beginning and ending time.

In order to use this type of profile, the Insert and Extend fields found on the Scheduling Parameters screen must be set to Yes. These days require End of Day processing to be run on them even if no appointment slots are added. End of Day processing for these days is only required if the department wants to generate monthly statistics.

Impact

Upon completion of this screen, the following takes place:

- This profile is defined for this resource. This resource is not available for scheduling until this profile and others are attached to Days Of The Week via the remaining screen in the Resource Maintenance function and the schedules are opened.

- Once the profile is deleted, it cannot be used for future days, and it does not affect currently open days.

Resource Master Monthly Plan

The final step in creating a Resource Master is to assign each day of the week one of the profiles that have been created. The following two screens allow you to set up a monthly scheduling plan. Following is the first screen that displays. Select the day of the week to which you want to assign profiles.

General Hospital Master Schedule Processor	
PHYSICIAN: ANS,ANS,1 ADAMS,HAROLD R	Sat May 16, 1994 10:33 am
Monthly Plan	
Page:01	Days of the Week
(1) Sunday	Plan absent
(2) Monday	
(3) Tuesday	
(4) Wednesday	
(5) Thursday	
(6) Friday	
(7) Saturday	Plan absent
Enter choice--	

As a Monthly Plan is initially being set up, the system displays Plan Absent to flag any days in the plan that are not linked to a profile. This condition may be appropriate, if schedules are not going to be created for particular days of the week (for example, Sundays).

Upon selection of the weekday on the previous screen, the following screen displays which enables you to schedule specifically for a certain day each week:

General Hospital Master Schedule Processor	
PHYSICIAN: ANS,ANS,1 ADAMS,HAROLD R	Sat May 16, 1994 10:34 am
Tuesday	
Week #1	1 Profile 1-GENERAL PROFILE
Week #2	2 Profile 2-HALF-DAY SCHEDULE
Week #3	3 Profile 1-GENERAL PROFILE
Week #4	4 Profile 1-GENERAL PROFILE
Week #5	5 Profile 1-GENERAL PROFILE
Enter field number or '/' starting field number--	

This profile by day of week matrix is created by using the above screen. Week numbers 1 through 5 are used to accommodate all possible combinations of the monthly calendar. By being week specific, the system provides for assigning a resource a unique profile for specific days of the month (for example, unique commitments of a resource on the second Tuesday of every month).

Impact

After you complete this screen, the following takes place:

- A resource has been completely defined in the system. If the resource's Auto Open parameter is set to Yes, the system checks the scheduled deadline parameter and extends the appropriate number of schedules for that resource during midnight processing once the schedule has been initially opened each day.
- The resource is available for scheduling once opened.
- Any day that has a profile linked note pad day or structured schedule must have End of Day processing run if the department wants to generate monthly statistics even if no appointments are booked to the schedule or no slots have been added.

UPDATE RESOURCE MASTER INFORMATION

The Update Resource Master Information function is an option on the Resource Maintenance Input Options menu. Selecting this option displays the following submenu from which you can access and update the resource information that you entered previously under Resource Master Information (see previous information).

General Hospital Update Resource Master Information Processor	
Update Resource Master Information Input Options	
Option No.	Option
1	Update Demographics
2	Update Scheduling Parameters
3	Update Appointment Types
4	Update Schedule Profiles
5	Update Monthly Plan

Enter option number--

Select the option that you want to update, and respond to the various prompts as they display on your screen. For descriptions and examples of these functions, refer to the section titled *Resource Master Information*.

OPEN/EDIT SCHEDULES

After you assign the monthly plan for a Resource Master, the Resource Schedules must be opened using the Open/Edit Schedule menu option which is an option on the Resource Maintenance Input Options screen. Appointments cannot be made for a schedule day until the schedules are open.

If a new resource has been defined and the Auto-Open Schedules parameter is set to Yes, the system automatically opens next appropriate day based on the schedule deadline during Midnight Processing. When a new resource is defined in the system, the Open/Edit Schedule function must be used to initially open the schedules for appointments, and again the system extends the schedule by one day during Midnight Processing.

After selecting this option and the appropriate resource, the following screen displays:

```
General Hospital Open/Edit Schedules Processor
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.      Fri Mar 20, 1994 11:31 am
Types: NEW 20,FUP 10,GEN 5,
```

```
Enter date to edit or open(O), delete(D), reset max pts/day(R)--
```

If you enter a date to edit and that date is not open, a message displays asking if you want to open the date as a Note Pad day. If you enter **N** for No, the appropriate profile from the Resource Master displays with Master Schedule flashing at the top of the screen.

Enter **Y** for Yes if you want to open the date with the displayed profile from the Resource Master. The Max Pts/Day for this newly opened day is set to the value of the parameter in the Resource Master, as if the date had been opened using the Open (**O**) option.

Enter **N** for No if you want to insert time slots using a different format than the one found in the Master.

If you entered the schedule date in order to edit that date, the opened schedule for that date can be revised or deleted without changing the master profile. This enables additions, changes, or deletions to the appointment times and types, and enables the addition of comments to the schedule. This is useful for making one-time changes (for example, deleting a physician's day off or revising a particular morning's schedule for a special meeting).

If more permanent changes are required, the master profile can be revised, and the opened days deleted and reopened to reflect the changes made to that master profile.

If you selected Open by entering **O** at the previous prompt, the function is used to open up schedules for a specified period in the future. Following is the screen that displays when you choose to open schedules:

General Hospital Open/Edit Schedules Processor		
PHYSICIAN: ANS,ANS,1 ADAMS,HAROLD R		Tue May 19, 1994 02:52 pm
Opening Schedules		
1 Start Date	2 End Date	3 Days of the Week
05/19/87	07/18/87	Mon Tue Wed Thu Fri Sat
Accept this screen? (Y/N) [Y]--		

Field Explanations

1. START DATE (DATE)

Enter the date that this schedule goes into effect. The default is today's date.

2. END DATE (DATE)

Enter the date this schedule ends. The default is the schedule deadline length established in the scheduling parameters (for example, T + 60 which is today's date plus 60 days).

3. DAYS OF THE WEEK (7-AN-R)

Enter the specific days of the week that are to be opened. After selecting this field, the following prompt displays:

Enter new day(s) of the week (S,M,T,W,R,F,A) [SMTWRFA]

The default is for all seven days of the week to be opened. Certain days can be selected by entering the letter associated with the day (for example, M,T,W can be entered to open Mondays, Tuesdays, and Wednesdays only).

After you accept this screen, a prompt displays asking if holidays are to be opened. The holidays to be observed by the facility are defined in the Holiday table. However, this prompt overrides those parameters if you enter **Y** for Yes.

Open Holidays? (Y/N) [N]--

All holidays are opened when you enter **Y** to the above prompt. If you enter **N** for the default of No, the system uses the Holiday table to determine which holidays to open. Once you make an entry, the system displays the following prompt:

Proceed to open schedule? (Y/N) [Y]--

The default is Yes. If you answer Yes, processing begins; each day in the time period you specified flashes on the screen and the schedule is opened.

If you selected the delete option by entering **D** at the prompt, the screen that displays is the same format as the open option screen. This function selectively deletes schedules based on the information entered. Opened days with scheduled appointments cannot be deleted without first rescheduling the appointments. The system displays days not deleted due to scheduled patient appointments.

If you enter **R** to adjust the setting of the Maximum # Patients/Day for a specific date or date range, the screen displays in the same format as when you are deleting or opening schedules. You are prompted to enter a start date, end date, and specific days of the week. For additional information on specific field explanations, please refer to the example screen shown under the open option.

The following prompt displays prompting you to enter the new Maximum # Patients/Day to set the specified days in the schedule:

Enter new maximum # of patients per day for these schedules [100]--

You can enter up to three digits. The default is the value contained in the Max Pts/Day parameter in the Scheduling Parameters screen of the Resource Master. You can alter the default value to exceed the master parameter.

After you enter the Max Pts/Day, the following prompt displays for verification:

Reset open days from 05/26/94 - 06/07/94 on "SMTWRFA" to 100 pts/day? (Y/N)

These dates represent the start and end dates entered in the previous screen. The letters SMTWRFA represent the days of the week previously entered. The 100 represents the number entered for the new maximum number of patients per day in the previous prompt.

If you enter **N** for No, the dates are not updated. If you enter **Y** for Yes, the following message displays:

Processing!

The schedules are updated for all days that fall between the dates you specified on the days of the week listed. An audit report is generated on the default printer associated with the requesting PC. Please refer to the online reports chapter for an example of this report under Patient Per Day Adjustment Report.

Impact

After you complete this screen, the following takes place:

- The resource's schedules are opened (closed or deleted) as designated. These schedules are then reflected online for appointment processing.
- The maximum number of patients per day are updated as designated. The Patient Per Day Adjustment Report is generated on the default printer associated with the requesting PC.
- Changes made to a specific date are reflected in that resource's schedule for online processing of appointments. These changes do not update the resource's master.
- The changes made to the available schedules for a resource are not reflected in the calendar display until the next midnight processing is run.

DISPLAY SCHEDULE EXCEPTION LIST

The Display Schedule Exception List function is an option on the Resource Maintenance Input Options screen. This function serves as an audit for the days that have not been opened for a given resource. It displays information up to the schedule deadline limit. The following is an example of the Display Schedule Exception List:

```

General Hospital Display Schedule Exception List Processor
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.           Fri Mar 20, 1994 11:32 am
                                           Schedule Deadline: Jun 28, 1994

                        Schedule Exception List
Sun Mar 22, 1994      Sun Jun 28, 1994
Sun Mar 29, 1994
Sun Apr 05, 1994
Sun Apr 12, 1994
Fri Apr 17, 1994
Sun Apr 19, 1994
Sun Apr 26, 1994
Sun May 03, 1994
Sun May 10, 1994
Sun May 17, 1994
Sun May 24, 1994
Mon May 25, 1994
Sun May 31, 1994
Sun Jun 07, 1994
Sun Jun 14, 1994
Sun Jun 21, 1994
Days with no masters display in DIM!
Please schedule master days as soon as possible!

Enter hardcopy(H) or (NL)-- |

```

Enter **H** to obtain a hard copy, or press ENTER to display the following prompt:

Schedule Monitoring Complete

Output

After you accept this screen, the following prints:

- The Schedule Exception List prints on the printer associated with the report definition if H is entered in the prompt (See Chapter 6: Online Reports/Forms for further details).

MONTHLY PLAN REPORT

The Monthly Plan Report function is an option on the Resource Maintenance Options screen. This function prints a hard copy of the resource monthly plan which assists in modifying and managing that schedule. The printout resembles the screen display accessed through Resource Master Information or Update Monthly Plan. After selecting this option, the following screen displays which enables you to specify exactly what you want to print:

```
General Hospital Print Monthly Plan Processor
                                Tue May 19, 1994 05:13 pm

Resources

Enter name`-`, number, current resource(=), dept, or print all(ALL)--
```

The default is All, which means that if you press ENTER, all monthly plans print. If you select one of the other responses, only the monthly plan for the resource you specify prints. Selection of a department prints monthly plans for all resources in that department. For an example of a monthly plan, refer to Chapter 6: Online Reports/Forms in this manual.

Output

After you accept this screen, the following prints:

- The Monthly Plan prints on the printer associated with the report definition.

PRINT SCHEDULE PROFILES

The Print Schedule Profiles function is an option on the Resource Maintenance Input Options screen. This function prints a hard copy of the Resource Schedule Profiles report for a desired resource. The report displays each of the profiles linked to the resource, including the description and comment. Information about each appointment on the profile includes: appointment time and type, number of patients that can be scheduled, length of time in minutes, reserved or not, and appointment slot specific comments.

After selecting this option, the following screen displays which enables you to specify exactly what you want to print:

```
General Hospital Print Schedule Profiles Processor
                                Tue May 19, 1994 05:34 pm

Resources

Enter name`-`, number, current resource(=), dept, or print all(ALL)--
```

The default is All, which means that if you press ENTER, all schedule profiles print. If you select one of the other responses, only the schedule profiles for the resource you specify prints. Selection of a department prints the schedule profiles for all resources in that department. For an example of a schedule profile, refer to Chapter 6: Online Reports/Forms in this manual.

Output

After you accept this screen, the following prints:

- The Schedule Profiles print on the printer associated with the report definition.

SIM ITEM SCHEDULING INSTRUCTIONS

The SIM Item Scheduling Instructions function is an option on the Resource Maintenance Input Options screen. The Visit Reason field on the Appointment screen can accommodate the use of Service Item Master (SIM) codes for the scheduling of exams, tests and procedures. In addition, the system enables a particular department to build SIM item specific instructions that display on the screen as SIM codes are used.

The first step in setting this up is to build department specific headers via Scheduling table maintenance. For example, one of the Radiology department headers might be Special Dietary Considerations. Via the SIM Item Scheduling Instructions function, up to two lines of special instructions can be entered for each of five headers for each individual SIM code used in the Visit Reason field.

Continuing the Radiology example, the special dietary instructions for a Barium Enema might be *Liquid diet for 24 hours prior to exam* and *Consult Physician for patient tolerance*. As the scheduling clerk is making the patient appointment, these instructions display on the screen after the SIM code is entered in the Visit Reason field.

These instructions can be conveyed to the patient while scheduling the appointment, and any appropriate comment can be entered to note patient responses. The prompt requests the entry of the Appointment Comment, and the Appointment screen redisplay on the CRT after completion of the Appointment Comment field, while scheduling an appointment with SIM Item Scheduling Instructions.

```

                                General Hospital Department Preps Processor
                                Fri Mar 20, 1994 11:35 am
Department : (A) Radiology
Item       : 1222 1222 TEST

                                DEPARTMENT INFORMATION-----X
( 1)INFO: special lab test
( 2)INFO: Prepare patient 30 minutes in advance
                                PATIENT INFORMATION-----X
( 3)INFO:
( 4)INFO:
                                PREP INSTRUCTIONS-----X
( 5)INFO:
( 6)INFO:
                                POST PROCEDURE INSTRUCTIONS-----X
( 7)INFO:
( 8)INFO:
                                ADDITIONAL INSTRUCTIONS-----X
( 9)INFO:
(10)INFO:

Enter item instructions --

```

After you accept this screen, the following takes place:

- The entered SIM Scheduling Instructions are available for use during the scheduling process.

PRINT SIM SCHEDULING INSTRUCTIONS

The Print SIM Scheduling Instructions function is an option on the Resource Maintenance Input Options screen. This function enables you to print the instructions that were set up in the previous function, SIM Item Scheduling Instructions. After selecting this option, the following screen displays:

General Hospital Print SIM Scheduling Instructions Processor

Mon Mar 07, 1988 11:12 am

Enter department description`-` or code--

Enter the department or the code of the department (if known) for which the SIM Scheduling Instructions should print. After you enter the department and press ENTER, the following message displays:

Printing!

Output

After you accept this screen, the following prints:

- The SIM Scheduling Instructions are printed on the default printer for the requesting CRT. See Chapter 6: Online Reports/Forms for details.

PROCEDURE SCHEDULING PARAMETERS

The Procedure Scheduling function enables resources to be scheduled as a by-product of the selected SIM Item. One or multiple SIM items can be entered or selected for scheduling. If multiple items are being scheduled, they are resequenced based on the Department and Procedure Scheduling Priority.

Once the SIM Item/Order is selected to schedule, a list of applicable resources (primary, secondary, additional) displays. The Procedure Scheduling Priority and applicable resources are defined in the Procedure Scheduling Parameters function. This section describes the screens/processing of the Procedure Scheduling Parameters processor that enables you to define the priority and applicable resources.

To access the Procedure Scheduling function, select Resource Maintenance from the Scheduling main menu, and then select Procedure Scheduling Parameters from the submenu. If the requesting PC is set up to access more than one facility and this table is set up as split by facility, the valid facilities display. The prompt asks you to select one of the displayed facilities. If only one facility is defined, or if the PC is only allowed access to one facility, that one facility is assumed and that screen is bypassed. If this table is set up as shared, the facility question is also bypassed.

After you determine the facility, the following prompt displays prompting you to enter the SIM Department if this PC is able to access more than one SIM Department as defined in the SIM Department field of the CRT table:

Enter SIM department code, '-' to list--

If only one SIM Department is defined in the CRT Table, the previous prompt is bypassed and that one department is assumed. Enter the SIM Department code if you know it. If you enter an invalid code, the following error message displays:

Error: Department code not found!

The original prompt redisplay. If you enter a code that is not valid for the selected facility, the following error message displays:

Error: Department does not belong to this facility

The original prompt redisplay. If you enter a code that is not valid for this CRT as defined in the SIM Department field in the CRT table, an error message displays.

If you do not know the SIM Department code, you can display an alphabetical listing of SIM department codes by pressing hyphen (-) and ENTER. This list reflects the valid departments for this CRT as defined in the SIM Department field in the CRT table.

After you determine the department, the header Department: followed by the description displays in the top left corner of the screen in dim reverse color. The following prompt displays enabling entry of the SIM item code:

Enter first letters`-` to list or code--

Enter the SIM item code if you know it. If you enter an invalid code, the following error message displays prior to redisplaying the original prompt:

Error: Invalid!

If you do not know the SIM item code, you can enter a portion of the description followed by a hyphen (-) to display a list of SIM items beginning with the entered characters. You can then select one of the items from the displayed list.

After you identify the SIM item, it is checked to determine if parameters already exist. If parameters have already been established, the Procedure Scheduling Parameters screen displays enabling revision of the priority, length, and resource group information if the code is active. If the code is not active, the following prompt displays to enable you to activate the parameters or delete them from the file:

Enter delete(D) from file or activate(A)--

If you enter **A**, the parameters are activated before returning you to the prompt allowing you to enter the SIM code. If you enter **D**, the system asks for verification before deletion occurs.

If parameters do not exist, the description of the selected SIM item is centered at the bottom of the screen. The following prompt displays below the SIM item description allowing parameters to be added or copied from another item within the same SIM Department:

No parameters for this item. Copy(C) from another item or add(A) [A]--

If you enter **C** for copy, the following prompt displays allowing selection of the item from which parameters should be copied:

Enter first letters`-` to list or code to copy parameters from--

Enter the SIM item code if you know it. If you enter an invalid code, the following error message displays prior to redisplaying the original prompt:

Error: Invalid!

If you do not know the SIM item code, you can enter a portion of the description followed by a hyphen (-) to display a listing of SIM items beginning with the entered characters. You can then select one of the items from the displayed list.

After you select the SIM item from which to copy, it is checked to insure that parameters have already been identified. If no parameters have been identified, the following error message displays prior to redisplaying the prompt allowing you to enter **C** to copy or **A** to add.

Error: No parameters available!

If parameters have been defined for the selected SIM item, the following prompt displays for verification:

Copy parameters from `SIM ITEM DESCRIPTION'? (Y/N) [Y]--

The description of the SIM item is included in the prompt. If you enter **N** for No, the prompt enabling entry of **C** to copy or **A** to add redisplay. If you enter **Y** for Yes, or press ENTER, the parameters are copied and the following message displays:

Filed!

The new parameters are now established for the Copy To SIM item and they display for revision.

If you enter **A** for add, or press ENTER, the Procedure Scheduling Parameters screen displays enabling entry of the Procedure Scheduling Priority, Length and Resource Group Information.

When you are revising or adding Procedure Scheduling Parameters, the following screen displays.

General Hospital Procedure Scheduling Parameters Processor			
Wed Aug 26, 1994 04:11 pm			
Department	:Radiology		
Service Item	:ABDOMEN FLAT KUB		
1 Scheduling Priority	2 Length	3 Edit By	4 Edit Date
1.0 priority one	60	Smith, Sam	07/28/94
5 Resource Groups	Type	Length	Starting
Rooms	PRI	60	0 min
Technicians	ADD'L	30	+10 min
Equipment	ADD'L	60	0 min
Enter field number or '/' starting field number--			

The Department header and description display, followed by the Service Item header, code, and description. Both display in reverse dim color.

Field Explanations

DEPARTMENT (DISPLAY ONLY)

The SIM department description displays and cannot be edited. It displays as soon as you identify the department and remains until the prompt enabling selection of another department redispays.

SERVICE ITEM (DISPLAY ONLY)

The SIM item code and description display and cannot be edited. This field displays as soon as you identify the SIM item and remains until the prompt enabling selection of another SIM item redispays.

1. SCHEDULING PRIORITY (TABLE LOOKUP-O)

When multiple SIM items are being scheduled through the Procedure Scheduling function, the system reviews the priority of each and resequences the selected items in numerical order according to the priority indicated in this field. If blank, the item is treated as the lowest priority and items with the same priority (blank or numeric) display in alphabetic order.

The field allows selection of one entry from the Procedure Scheduling Priority table. The following prompt displays:

Enter priority code or '-' for list-- |

Enter the Procedure Scheduling Priority code if you know it. If you enter an invalid code, the following error message displays prior to redisplaying the original prompt:

Error: Invalid!

If you do not know the priority code, you can enter a hyphen (-) to display a list of valid codes. Only procedure scheduling priority codes defined for the SIM department entered display for selection. Select one of the displayed items.

2. LENGTH (3-N-O)

Enter the length of the appointment. This field is used to automatically change the length of the appointment. This field is not used to adjust the length if resource groups are defined for this item. This field is used both by Appointments and the Procedure Scheduling processors to adjust the length. If this field is left blank, the length associated with the selected appointment slot is used in the Appointments processor.

3. EDIT BY (DISPLAY ONLY)

The name of the person who last edited the table displays if you selected an existing code for revision. If you are adding a code, the field is blank. The next time the code is accessed, it contains the name of the person who added or last revised the code.

4. EDIT DATE (DISPLAY ONLY)

The date the code was last edited displays if you selected an existing code for revision. If you are adding a code, the field is blank. The next time the code is accessed, it contains the date the code was added or last revised.

5. RESOURCE GROUPS (TABLE LOOKUP-O)

When one or multiple SIM items are being scheduled through the Procedure Scheduling function, a list of Valid Resource Groups displays as defined in this field. The individual resources contained in each of these groups are defined in the Resource Group table. When this field is accessed, the system is using the scrolling screen driver. The prompt does not automatically display. To display the prompt, enter a question mark (?) and press ENTER. The standard scrolling screen driver entries are available. Please refer to the Information Entry Techniques section of the *STAR Patient Care Reference Guide General Information Volume* for more information. If a question mark is entered, the following prompt displays:

Enter the resource group code or '-' to list

Enter the resource group code if you know it. If you do not know the code, you can enter a hyphen (-) to view a list of the valid resource group codes defined for this SIM department. Only resource groups defined for the selected SIM department display for selection. If you enter an invalid code, the error message

Invalid!

displays before redisplaying the original prompt. If you press ENTER, the remaining fields are not accessed; they are bypassed and are not accessible.

Resource groups are defined in order beginning with the primary, followed by the secondary, and then the additional groups.

6. TYPE (1-A-C)

After you enter the resource group, define the type of group by Primary(P), Secondary(S), or Additional(A). You can enter **P**, **S**, or **A**. Any other character is invalid. This field is required if a Resource Group was defined, and is not accessible if one was not defined. There is no default. Enter period (.) and press ENTER to exit the field.

This field is used for displaying the list of valid resources in the Procedures Scheduling function to identify the type of resource being listed. The following prompt displays if a question mark (?) is entered when the field is accessed:

Primary (P), Secondary (S) or Additional (A)

Only one primary and one secondary type can be specified for any given SIM item. You must define at least the primary if you are using Resource Groups. A secondary is not required. When you are entering multiple resource groups, the system checks to ensure that you only have one primary and/or a secondary defined. If you enter **P** for Primary, other resource groups already entered for this item are checked. If any are set to Primary, the error message:

Error: Only one primary allowed!

displays before redisplaying the prompt. The same is done for secondaries replacing the word primary with secondary.

You can only define a secondary resource group if a primary resource group has been established. If you enter a Secondary type, a check is performed to insure that a primary type exists. If a primary type does not exist, the following error message displays:

Error: Primary resource group must be defined first!

You cannot define additional resource groups without the existence of a primary resource group. If you enter an Additional type, a check is performed to insure that a primary type exists. If a primary type does not exist, the following error message displays:

Error: Primary resource group must be defined first!

7. LENGTH (3-N-C)

After you enter the type, enter the length of time required by this resource during the entire appointment length. This time becomes required if a group is defined. This field is not accessible if the Resource Group has not been defined. The default for this field is the contents of the procedures length defined in the previous Length field. When you access this field, the following prompt displays if you entered a question mark (?):

Enter the length of time required by this resource group (999) [procedures]--

8. STARTING (5-C-C)

This field is used to identify the time within the entire appointment length that a resource from this group is needed based on the time the primary or secondary is scheduled. For instance, a nurse may be needed 10 minutes before the primary resource is scheduled. If this is the case, then the starting time for the nurse would be -10. This indicates that another resource is needed 10 minutes before the primary is scheduled. If a primary is not scheduled and a secondary is selected, then the time is based on the beginning time for the secondary.

This field allows entry of numerical characters as well as plus (+) and minus (-) signs. This enables you to specify the time period during the entire appointment that a resource in this group is needed. You can enter up to 4 numerical digits and either a plus (+) or minus (-) sign. The default is zero. The following prompt displays:

Enter # min(M)/hours(H)/days(D) to schedule before(-)/after(+)primary[0M]--

This information is currently display only in the Procedure Scheduling function. Amounts of time entered with **D** display as ## days, **H** as hours and **M** as minutes after the increment of time entered. If you do not enter a character, it is assumed to be minutes.

If a resource group is identified, then you must specify the type, the length, and the Starting time before the screen can be accepted. If groups are defined, then the group information displays during the Procedure Scheduling processor. The length associated with each group is used as the appointment length. If groups are not defined, then the procedure's overall length (field #2) is used as the appointment length if entered. Without defined groups, the system allows selection of the resource in the same manner as found in the Appointments processor.

Once you have exited the screen, the following prompt displays to allow you to delete these scheduling parameters.

Delete? (N)

If you enter **Y** for Yes, the following prompt displays to allow you to delete the parameters or file them as deleted.

Enter delete(D) from file or file(F) as deleted. [F]--

If you enter **D**, the selected parameters are deleted. If you enter **F**, the selected parameters are filed as deleted. They can be reactivated at a later date for future use.

If you entered **N**, or pressed ENTER at the delete question, the entry is not deleted and you are returned to the prompt allowing entry of another code.

Impact

After you complete the screen, the following takes place:

- Any updates made to existing codes are reflected in the Print Procedure Scheduling Parameters functions.
- Any updates are reflected when SIM items are scheduled through the Procedure Scheduling function.
- Any updates to the procedure's overall length (field #2) are reflected in the Appointments processor. They are also reflected in the Procedure Scheduling processor if no resource groups are defined for the procedure.

PROCEDURE SCHEDULING PARAMETERS PRINT

The Procedure Scheduling Parameters function contains the procedure's priority, length, and valid resource groups used during procedure protocoling and resource selection in the Procedure Scheduling function and during Appointments processing in determining the length. The Print Procedure Scheduling Parameters function enables printing of the information contained in this file. This section describes the screens/processing of the Print Procedure Scheduling Parameters processor.

To access the Print Procedure Scheduling function, select Resource Maintenance from the Scheduling main menu, then select Print Procedure Scheduling Parameters from the submenu. If the requesting PC is set up to access more than one facility, the valid facilities display for selection.

If only one facility is defined or the PC is only allowed access to one facility, that facility is assumed and this screen is bypassed. After you determine the facility, the following prompt displays enabling entry of the SIM department if the PC is set up to access more than one SIM Department as defined in the SIM Department field of the CRT Table:

Enter SIM department code, '-' to list--

If this PC is only able to access one SIM Department, the previous prompt is bypassed. From this prompt, enter the SIM department code if you know it. If you enter an invalid code, the error message:

Error: Department code not found

displays before redisplaying the original prompt. If you enter a code that is not valid for the selected facility, the error message:

Error: Department does not belong to this facility

displays before redisplaying the original prompt.

If you do not know the SIM department code, you can display an alphabetical list by entering a hyphen (-) and pressing ENTER. You can then select one of the displayed department codes.

After you determine the department, the header Department displays followed by the description in the top left corner of the screen. Both the header and description display in dim reverse color. The following prompt displays enabling entry of the SIM item code(s):

Enter first letters '-' to list, code or [All]--

If you press ENTER, a list of all SIM items with defined parameters prints after verification. The list does not include SIM items that do not have parameters defined.

If only one SIM item is to print, you can enter the SIM Item code if you know it. If you enter an invalid code, the error message

Error: Invalid!

displays prior to redisplaying the original prompt.

If you do not know the SIM item code, you can enter a portion of the description followed by a hyphen (-) to display a list of SIM items beginning with the entered characters. Only SIM items with parameters defined display for selection. You can select one or multiple items from the list using standard selection routines.

If you enter a valid SIM item code that does not have parameters defined, the error message:

Error: Parameters do not exist!

displays prior to redisplaying the original prompt. After you define the item(s), the following prompt displays for verification:

Print parameters for "9999 - SIM Item Description" (Y/N) [Y]--

If you select one item to print, the SIM item code and description is included in the prompt.

If you select multiple selections from an alphabetical display, the prompt contains Multiple Items in place of the SIM item code and description.

If you select all SIM items within the department to print, the prompt contains All Items in place of the SIM item code and description.

If you enter **Y** for Yes or press ENTER, the system displays the following message and the Procedure Scheduling Parameters for the appropriate SIM item(s) print on the default printer associated with the requesting PC:

Printing!

If you print ALL SIM items within a SIM department, the prompt enabling entry of another department redisplay. If you print only one or multiple SIM items, the prompt enabling entry of another SIM item redisplay.

If you enter **N** for No, the prompt enabling entry of a different SIM item redisplay.

To exit the function, press period (.) followed by ENTER.

Output

- Upon completion, the report prints on the default printer for the requesting CRT. See Chapter 6, Online Reports/Forms for a more detailed explanation of the report, as well as an example of the report.

RESOURCE MASTER DATA REPORT

The Resource Master Data report documents the resources entered into the system. This is essentially a hard copy of the information entered for a resource via the Resource Master Information function. It is useful for comparing resources and for determining what information may be missing from the Resource Masters as the system is being set up. This report is also helpful when using the CopyMaster function which provides a way to create new resources without rekeying the data.

The Resource Master Data reports can be printed individually by entering a specific resource/department ID, or the system defaults to all resources. One resource prints per page. The information on the upper right of the reports are the demographics of the resource. The upper left contains the Scheduling parameters as they are currently set up in the system.

The Appointment Types listed are those available for patients being scheduled for this resource. The Profile Types are those that can be used in building the Monthly Plans. For a more detailed explanation of the data on this report, see the Resource Maintenance chapter of this document.

Once this function is selected, the following prompt displays:

Enter resource/departments ID or All (A)--

If you enter a hyphen (-), the system displays a list of all the resources defined in the system. If you enter a three-digit department code, the resources defined for that department display for selection. If you enter **A**, this report prints for all resources. Once selected, the system displays the following prompt:

Print Data for All Departments (Y/N)--

If you enter **Y** for Yes, the system displays a Printing message, and returns you to the original screen for another resource selection. Selecting **N** for No also causes the system to return to the original screen for another resource selection.

Output

- Upon completion, the report prints on the default printer for the requesting CRT. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

DEPARTMENT DATA REPORT

The Department Data report is a list of the resources that exist for a particular department. This is a hard copy of what displays when a hyphen (-) is entered to display the available resources in the system. The information available on this report includes resource ID, name, type (doctor vs. machine, etc.) and whether or not the resource requests charts for their appointments. The information on this report can be modified through the Resource Maintenance functions.

After you select this option, the system displays a list of the resource departments and the following prompt:

*Select department(s) or all (A) --
end selection (NL)*

One or more departments can be selected, or you can enter **A** for all departments to print. The default is to select no departments. Upon completion, the system displays a Printing message, and returns you to the Reports Menu.

Output

- Upon completion, the report prints on the default printer for the requesting CRT. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

APPOINTMENT TYPE SUMMARY REPORT

The Appointment Type Summary report is a list of the appointment types used by the various resources within the department. This report can be used to verify which doctors are accepting new appointments. The Searchable Y/N field indicates whether searches for available appointments can be made when appointments are being scheduled.

After selecting this option, the following prompt asks you to enter the three-character Department Code, or to enter **A** for All.

Enter department code or all (A)--

The system default is to make no selection and then return to the Reports Menu. If an entry is made, the system displays Printing and then returns you to the Reports Menu.

Output

- Upon completion, the report prints on the default printer for the requesting CRT. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

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INTRODUCTION

The Appointment Processing chapter of the *STAR Patient Care Patient Scheduling Module* explains how appointments can be scheduled in advance for specific resources for a specific date, time, appointment type, and procedure. In addition, this chapter contains a discussion of the six functions used in processing patient appointments.

The Appointments function is an option on a Scheduling Menu. It enables appointments to be scheduled in advance for specific resources for a specific date, time and appointment type. This option also enables scheduling for patients that walk in to the department or clinic and need an appointment immediately.

There are two basic sequences for making appointments. If you are scheduling resources for many different patients, follow these steps:

- Select the resource(s)
- Select the date
- Examine the schedule and select a time and visit type
- Select the appropriate patient

If you are scheduling multiple appointments for individual patients, follow these steps:

- Select the patient
- Select the resource(s)
- Select the date
- Examine the schedule and select a time and visit type

The screens used and the end results are the same for both sequences. The first sequence described above is used as an example. After selecting the Appointments option from the menu, select the resource for which the appointment is to be scheduled.

The Super Search portion explains how to search through the system for the next available appointment based on 18 different types of search criteria. This function provides you with a quick way to find the most appropriate appointment slot available in the system. This also includes the processing of the Appointments function.

The Multiple Resource Search portion explains how to search through the system for the next available searchable appointment based on the same 18 different types of search criteria used in the Super Search.

The Walk-In Appointments portion explains how to place unscheduled patients on a resource schedule for the department or clinic that cannot schedule all of their appointments in advance. This function provides you with an accurate historical account of appointments.

The Copy Appointment portion explains how to copy the appointment detail of one appointment to the schedule of another resource or to another date of the original resource. This function was designed to aid in the scheduling of multiple therapy appointments.

The Patient Appointment Inquiry/Audit portion explains how to view patient appointments, including an audit trail of information that was changed on the detail appointment from the Revise Patient Appointment function. This enables quick confirmation of appointments by patient name rather than by resource and a detailed means of identifying revisions, who made them, and when they were made.

The Revise Patient Appointment portion explains how to display and revise historical and pending appointment information.

The Check In-Out portion refers to the documenting of times the patients actually arrive or leave the clinic or department for their appointment.

The Procedure Scheduling portion explains how to schedule appointments for patients based on SIM Item selection. This enables multiple department, SIM Item, and Order Selection which are protocolled based on the department's priority and SIM Item priority.

APPOINTMENTS

Super Search

When you access the Appointments Processor, the following prompt displays:

*Enter Resource, 'P' for Patient, or '***' for Multiple Resource Search--*

You can schedule an appointment by selecting the resource(s) first, or by selecting the patient. If you want to select the resource(s) first, you can use one of three methods at this prompt:

- Enter the resource name or the first characters of the resource name. When you enter the first characters, the system displays a list of resources with like characters from which you can choose.
- Enter the resource(s) based on the 18 search options listed below.
- Enter two pound signs (**##**) to use the Super Search function.

The following is a list of 18 search options you can use. Enter an asterisk (*), the resource department code, the resource specialty code, and the resource code, all separated by commas (,), for example, ***MED,OB,900**.

*DEPARTMENT, SPECIALTY, RESOURCE	Lists dates for specified department, specialty, and resource from given date
*DEPARTMENT	Lists resource and time slots for date in specified department
*,SPECIALTY	Lists dates and resources for specified specialty starting from given date
*DEPARTMENT, SPECIALTY	Lists dates and resources for specified specialty and resource starting from given date
*,SPECIALTY, RESOURCE	Lists dates and resources from specified specialty and resource starting from given date
*,DEPARTMENT, SPECIALTY, RESOURCE,F	Returns the first date for department, specialty, resource
*DEPARTMENT, SPECIALTY,,F	Returns the first date and resource for department and specialty
*,SPEC,,F	Returns the first date and resource for specialty
*,,RES,F	Returns the first date and resource for specialty
*,,ALPHA,F	Lists resources starting with alpha, after selections returns first date and resource for resource number

DEPT,F,TYPE	Returns list of the first available slots and dates for specified department and type from given date
DEPT,F	Returns list of first available slots and dates for specified department from given date
DEPT,,TYPE	Returns resource and date of first available slot for specified department and type
DEPT	Returns list of resources in department
RESOURCE NUMBER	Returns list of resources for resource number (if just one, no list)
DEPT,SPECIALTY, RESOURCE NUMBER	Returns resource

To use the Super Search function, enter two pound signs (##) at the initial prompt, and the following screen displays:

General Hospital Appointments Processor		
Fri Jan 27, 1995 11:42 am		
SUPER SEARCH		
1 Resource/Department	2 Start Date	3 End Date
BROWN, ROBERT D.	Mar 20, 1995	May 19, 1995
4 Day(s)	5 Begin Time	6 Ending Time
Sun Mon Tue Wed Thu Fri Sat	1200M	1159P
7 Appointment Type(s)		
All		
Accept this screen? (Y/N) [Y]--		

Field Explanations

1. RESOURCE/DEPARTMENT (TABLE LOOKUP-R)

Enter the resource or department for which you are searching.

2. START DATE (DATE)

Enter the date that you want the appointment search to begin. This narrows the search to dates that are convenient to the patient. Pressing ENTER displays today's date.

3. END DATE (DATE)

Enter the date that you want the appointment search to end. This narrows the search to dates that are convenient to the patient. Pressing ENTER displays the date 60 days past the start date.

4. DAY (S) (7-A-R)

Enter the letter(s) corresponding to the day(s) you want to include in the search. The following prompt displays:

Enter days(s) ['SMTWRFA']--

The letter *R* represents Thursday, and the letter *A* represents Saturday. Pressing ENTER defaults to all the days of the week.

5. BEGIN TIME (TIME)

Enter the time you want the search to begin (without a colon). Enter **A** or **P** after the time to designate AM or PM. Pressing ENTER displays the default time which is midnight (12:00 M).

6. ENDING TIME (TIME)

Enter the time you want the search to end (without a colon). Enter **A** or **P** after the time to designate AM or PM. Pressing ENTER displays the default time which is one minute before midnight (11:59 PM).

7. APPOINTMENT TYPE(S) (TABLE LOOKUP-R)

Select the appointment type(s) you are searching for by entering the number(s) of the type(s) from the list displayed on the bottom of the screen, or by entering **A** to display all types.

When you enter the resource(s) or accept the Super Search screen, the system displays a table of open dates that meet the criteria specified:

```

General Hospital Appointments Processor
                                Fri Feb 23, 1994 04:18 pm

                                SUPER SEARCH
1 Resource/Department          2 Start Date          3 End Date
  COLEMAN,MICHAEL G           Feb 23,1994          Apr 24,1994
4 Day(s)                      5 Begin Time        6 Ending Time
  Sun Mon Tue Wed Thu Fri Sat 0800A                1000A
7 Appointment Type(s)
  CON

                                Searching
                                Open Dates
Page:01
( 1) Thu Feb 22 0900 CON      (10) Wed Mar 07 0900 CON      (19) Tue Mar 20 0900 CON
( 2) Fri Feb 23 0900 CON      (11) Thu Mar 08 0900 CON      (20) Wed Mar 21 0900 CON
( 3) Mon Feb 26 0900 CON      (12) Fri Mar 09 0900 CON      (21) Thu Mar 22 0900 CON
( 4) Tue Feb 27 0900 CON      (13) Mon Mar 12 0900 CON      (22) Fri Mar 23 0900 CON
( 5) Wed Feb 28 0900 CON      (14) Tue Mar 13 0900 CON      (23) Mon Mar 26 0900 CON
( 6) Thu Mar 01 0900 CON      (15) Wed Mar 14 0900 CON      (24) Tue Mar 27 0900 CON
( 7) Fri Mar 02 0900 CON      (16) Thu Mar 15 0900 CON      (25) Wed Mar 28 0900 CON
( 8) Mon Mar 05 0900 CON      (17) Fri Mar 16 0900 CON      (26) Thu Mar 29 0900 CON
( 9) Tue Mar 06 0900 CON      (18) Mon Mar 19 0900 CON      (27) Fri Mar 30 0900 CON

Enter choice--

                                next page (/)

```

When you select a date, the following screen displays a list of the regular schedule of appointments available for the resource on the selected day. These appointments are listed by time and type, and reflect the profiles set up in Resource Maintenance. Only schedules that were opened in Resource Maintenance are displayed.

The following screen is an example of a regular schedule of appointments:

```

General Hospital Copy Appointment Processor
PHYSICIAN: MED,CAR,8 TONGEN,LYLE A           Tue Mar 29, 1994 09:30 am
Types:   CBC 10,FUP 30,CONS 60,GEN 30,LNCH 45
Date:    Tue Mar 29, 1994
Comment: NO LATE AFTERNOON APPOINTMENTS - DR. BROWN ON ROUNDS
Time  Type Pt/Fd Comment   Time  Type Pt/Fd Comment
900A  CONS  1/ 0           300P  CONS  1/ 0
900A  GEN   2/ 0           300P  GEN   2/ 0
930A  GEN   2/ 0           330P  GEN   2/ 0
1000A  CONS  1/ 0           400P  CONS  1/ 0
1000A  GEN   2/ 0           400P  GEN   2/ 0
1030A  GEN   2/ 0           430P  GEN   2/ 0
1100A  CONS  1/ 0           500P  CONS  1/ 0
1100A  GEN   2/ 0           500P  GEN   2/ 0
1130A  GEN   2/ 0
1200N  LNCH  0/ 0
100P  CONS  1/ 0
100P  GEN   2/ 0
130P  GEN   2/ 0
200P  CONS  1/ 0
200P  GEN   2/ 0
230P  GEN   2/ 0
Select appt time, new date, view(V), modify(M) or calendar(C) (900A)--

```

Appointments that display in dim reverse are already full. *Pt* (patient) indicates the number of patients normally scheduled for that slot. *Fd* (filled) indicates the number of

patients already scheduled for that slot. If an appointment has been reserved, the slot is denoted with an "r" in the Pt/Fd column. The resource's appointment types display at the top of the screen. The time of the original appointment in the series displays in parentheses.

The prompt shown on this screen enables you to select an appointment time, enter a new date, view an appointment slot, modify an appointment slot, or view a four-month calendar.

Appt Time

This option is used to select the time for which the appointment is to be made. You are prompted to add an appointment for that time using the first appointment type available. If more than one appointment type is available for a particular time slot, **N** can be entered, and the system accepts an alternate appointment type.

New Date

You can enter a new date which enables you to look at the schedule for the same resource for another day. Dates can be entered in a variety of formats. Refer to the Information Entry Techniques chapter in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details.

View

You can view the patients already scheduled for that day. This option displays in the following format:

General Hospital Appointments Processor									
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.					Fri Mar 20, 1994 11:53 am				
Types: NEW 20,FUP 10,GEN 5									
Date: Fri Mar 20, 1994									
Page:01		Appointments							
Time	Type	Stat	Unit#	Patient	Reason	Acct#	Prio		
730A	GEN		A000100102	HARPER,DAFNE	REGULAR PREGNANCY	990000667078	M		
735A	GEN		A000100101	DEAN,THERESA	GENERAL	990000659400			
740A	GEN	OPEN	(1)						
800A	NEW	OPEN	(1)						
820A	NEW		A000100099	FREEMAN,BETH	REGULAR CHECKUP	990000637078			
900A	NEW	OPEN	(1)						
920A	NEW			STEVENS,CARLA	NEW APPOINTMENT				
940A	NEW	OPEN	(1)						
1000A	NEW	OPEN	(1)						
1100A	FUP		A000100104	ANDREWS,COURTNE	8296 ENDOMETRIAL BIO	990000690078	R		
1100A	FUP			ANDERSON,LEAHAN					
1110A	FUP	OPEN	(2)						
1120A	FUP	OPEN	(2)						
1130A	FUP		A000100103	HARRIS,SALLY	8254 CARDIAC MONITOR	990000677078			
Press NL--									
next page(/)									

Information from the original scheduling screen is displayed, as follows:

Field Explanations

TIME

This field contains the appointment time.

TYPE

This field contains the type of appointment that was selected.

STAT

This field contains the status of the appointment slots.

UNIT #

This field contains the unit number of the scheduled patient, if applicable.

PATIENT

This field contains the name of the patient with the appointment.

REASON

This field contains the reason the patient has the appointment. When orders are evaluated and scheduled through Clinical Management, multiple items can be scheduled in one appointment slot. A plus sign (+) may display in the blank space prior to the current Visit Reason field. In this instance, the plus sign displays if the Add'l Items indicator is set to Yes to indicate that there are other SIM items associated with this appointment. If + Multiple displays in the Visit Reason field, it indicates that multiple SIM items are associated with this appointment and no primary was indicated. For more information on scheduling through Clinical Management, refer to the *STAR Patient Care Reference Guide Clinical Management Module*.

ACCT #

This field contains the patient's account number, if applicable.

PRIO

This field contains the priority of the appointment if one was entered on the scheduling screen.

NEXT PAGE

This option takes you to the second page of the schedule, if there is one.

Modify

This is a series of prompts used to change the existing schedule. If the Schedule Insert field is set to Y, this is a Schedule Insertion. If not set to Y, the screen displays Schedule Adjustment. If you want to replace an existing appointment, first delete that appointment, then insert the new one. Any appointment that varies from the established schedule must be initiated with the Modify option. For example, all appointments for Notepad days begin with Modify.

Calendar

This option displays a four month calendar that shows the current month with today's date blinking on the screen. Past days display in dim, and future open days are bright.

Unopened days are shown as hyphen (--). Future filled days are shown in dim. This calendar is updated each night during midnight processing. This enables a brief review of up to four months of available days for a resource.

Following is an example of a calendar:

General Hospital Appointments Processor													
PHYSICIAN: MED,CAR,8 TONGEN,LYLE A										Wed Jan 20, 1994 01:03 pm			
Types: CBC 10,FUP 30,CONS 60,GEN 30,LNCH 45													
Feb 1994							Mar 1994						
•-----┐							•-----┐						
• S M T W T F S•							• S M T W T F S•						
• 1 2 3•							• 1 2 ---•						
• 4 5 6 7 8 9 10•							•-- 5 6 7 8 9 --•						
•11 12 13 14 15 16 17•							•-- 12 13 14 15 16 --•						
•18 19 20 21 22 23 --•							•-- 19 20 21 22 23 --•						
•-- 26 27 28 •							•-- 26 27 28 29 30 --•						
•-- •							• •						
•-----┐							•-----┐						
Apr 1994							May 1994						
•-----┐							•-----┐						
• S M T W T F S•							• S M T W T F S•						
• 1 2 3•							• 1 2 3 4 --•						
•-- 2 3 4 5 6 --•							•-- 7 8 -- -- -- --•						
•-- 9 10 11 12 -- --•							•-- -- -- -- -- --•						
•-- 16 17 18 19 20 --•							•-- -- -- -- -- --•						
•-- 23 24 25 26 27 --•							•-- -- -- -- -- --•						
•-- 30 •							• •						
•-----┐							•-----┐						
Press NL--													

After you select the Resource, Date, and Appointment Time/Type, you need to select the patient to be scheduled in order to complete the appointment.

The standard MPI inquiry or patient lookup prompt displays. Select a patient using the standard Information Entry Techniques discussed in the *General Information Volume* of the *STAR Patient Care Reference Guide*.

After you select a patient from the MPI or enter **A** to add a new patient, the patient demographic screen is displayed to allow revisions. If adding a new patient, they are added to the MPI without a unit number. The unit number is assigned when the patient is registered/admitted.

NOTE: The format of some of the fields may vary based on the needs of the hospital's financial system. Following is the screen that is used with STAR Financials:

General Hospital Appointments Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000003402	TATE,CLARISSA	F	02/14/50			
1	Name		2 Soc Sec Number			
	TATE,CLARISSA					
3	Birthdate	Age	4 Sex	5 Race	6 Address Line 1	
	02/14/1950	55Y	FEMALE	1 CAUCASIAN	322 NORTH	
7	Address Line 2			8 City	9 State	
				CITYFORMODELHOS	GA	
10	ZIP Code	11 Phone	12 Phone Message		13 Alt/Confidential Add-Ph	
	30346				Yes No	
14	Primary Care Physician					
	1 ADAMS,JAY M					
15	Invalid Address/Phone					

Enter field number or '/' starting field number--

Field Explanations

1. NAME (37-C-R)

Enter the patient's name in the format of LAST, FIRST MIDDLE with no special characters in the last name. The first name must follow the comma (,) with no spaces. All information entered after the first space is considered the middle name by the system; however, there are no restrictions regarding entry on this portion of the patient's name.

If you change the name, the following prompt is displayed after you accept the screen:

*Retain `NAME,PREVIOUS` in the MPI? (Y/N)--
It will be available when searching the MPI and as an `Other Name`.*

Enter **N** for No to simply change the name in the MPI.

Enter **Y** for Yes to retain the previous name in the Other Names section of MPI Inquiry, MPI Revision, and MPI Review. Both names (old and new) are retained for use in searching. The individual whose name changed is displayed under the Changed section of the MPI Activity Report.

If you enter Y, an additional prompt is displayed:

Enter name type or '-' to list--

- Enter the appropriate code for the name type of the patient's previous name.

- Enter a hyphen (-). The system displays the Name Type table with the codes and descriptions for selection.

When you select a name type, an additional prompt for verification is displayed:

*Retain 'NAME,PREVIOUS' in the MPI
with a name type of 'PREVIOUS'? (Y/N)--*

If you enter **Y**, the name and name type are saved. If you enter **N**, the original prompt is repeated.

2. SOC SEC NUMBER (9-N-O)

Enter the patient's social security number. If you enter it without hyphens, the system inserts them. If you the social security number you enter has already been assigned to another patient, the system displays the following error message:

This SS# is assigned to Last,First MI! Accept anyway? (Y/N) [N]--

where Last,First MI is the name. If this takes place and the patient names are the same, you should consider exiting this function and select the patient from the MPI rather than entering a new one.

Verify the social security number entered, and do one of the following:

- Press **N** or ENTER for No to enter another social security number.
- Press **Y** for Yes to override the error and enter the social security for the current patient anyway.

NOTE: Some or all digits of the social security number may be masked by letters or symbols, depending on parameter settings at the system, facility, department, or employee level.

(CN) When you access this field, the system displays a subscreen at the bottom of the page:

General Hospital Appointments Processor							
Thu Jul 28, 2005 10:34 pm							
No.	Name	Sex	BD	Room	Physician	SVC	Status
0000901382	OPPI,REBECCA	F	05/05/55				
1	Name			2 Prov HC#/Version/Exp Date			
	OPPI,REBECCA			-> ON 6767-676-767 A3 12/31/07			
3	Birthdate	Age	4 Sex	5 Ethnic Origin	6 Address Line 1		
	1955/05/05	50Y	FEMALE	5 CAUCASIAN	8309 MAIN ST		
7	Address Line 2			8 City	9 Prov.		
				HAMILTON	ON		
10	Postcode	11 Phone	12 Phone Message	13	Alt/Confidential Add-Ph		
	H7G 6F5	(888)999-7777	Yes	Yes	No		
14	Family Physician						
15	Invalid Address/Phone						
1	HC Prov.	2 Health Card #	3 Version	4 Exp Date			
	ON	6767-676-767	A3	07/12/31			
5	Validation		6	Val Date/Time			

Enter field number or '/' starting field number--

Subscreen Field Explanations

1. HC PROV (2-C-R)

Enter the two-character province abbreviation where the health card was issued. The default is the province associated with the patient's address.

2. HEALTH CARD # (16-N-O)

Enter the patient's health card number. If you enter a health card number that has already been assigned to another patient, the system displays the following error message:

This HC# is assigned to Last,First MI! Accept anyway? (Y/N) [N]--

where Last,First MI is the name of another patient.

Verify the health card number entered, and do one of the following:

- Press **N** or ENTER for No to enter another number.
- Press **Y** for Yes to override the error and enter the health card number for the current patient anyway.

If the health card number has been changed or deleted, the system displays the following message:

Changed or deleted HC#! Accept Anyway? (Y/N) [N] --

- Press **N** or ENTER for No to enter another number.
- Press **Y** for Yes to override the message and enter the health card number for the current patient anyway.

3. VERSION (2-AN-O)

Enter the version number of the health card. This number indicates that a new health card has been issued to the patient. For example, a patient with a name change would be issued a new card with a version number.

(BC) 3. UNIT CODE OR SUFFIX (2-N-O)

Enter the unit code/suffix of the health card.

BC: For newborns, this field is named Suffix. If the newborn has his/her own Personal Health Number (PHN), enter 54 as the suffix. If the newborn has been assigned the PHN of the mother, enter 66 as the suffix. Multiple births that have the mother's PHN are accommodated by assigning in descending order suffixes of 66, 65, 64, 63, 62, and 61.

4. EXP. DATE (DATE)

Enter the expiration date of the patient's health card.

5. VALIDATION (DISPLAY ONLY)

The validation code returned from the Ministry and the description of the code as entered in the Validation Code table are displayed. If no validation has ever been received, this field is blank. This field always displays the most recent validation code.

If the current Admission did not start with a card swipe, but the patient was retrieved from the MPI, then this field shows the previous validation code and description. At the conclusion of the Patient page, a validation for this visit is sent, and these fields are updated once the response is received. If this admission started with a card swipe, then as soon as a response from the Ministry is received, these fields are updated. You must exit and re-enter the health card data subscreen before the validation data is updated if you are viewing the subscreen at the time a response is received.

6. VAL DATE/TIME (DISPLAY ONLY)

The date and time that the validation was received from the Ministry is displayed. If no validation has ever been received, this field is blank. This field always displays the most recent validation date and time.

If the current Admission did not start with a card swipe, but the patient was retrieved from the MPI, then this field shows the previous validation date and time. At the conclusion of the Patient page, a validation for this visit is sent, and these fields are updated once the response is received. If this Admission started with a card swipe, then as soon as a response from the Ministry is received, these fields are updated. You must exit and re-enter the health card data subscreen before the validation data is updated if you are viewing the subscreen at the time a response is received.

Field Explanations cont.

3. BIRTHDATE AGE (DATE)

Enter the patient's date of birth. The system automatically calculates the age. The system does not accept an invalid or future date. Age is calculated in days up to two months, in months up to two years, and in years for any ages over two.

4. SEX (1-A-R)

Enter the patient's sex as M or F, which displays as MALE or FEMALE.

5. RACE/ETHNIC ORIGIN (TABLE LOOKUP)

Enter the code that describes the patient's race/ethnic origin. The code and the description are displayed.

6. ADDRESS LINE 1 (25-C-R)

Enter the patient's home address.

7. ADDRESS LINE 2 (25-C-O)

If the patient has a secondary address (for example, apartment number) enter it in this field.

8. CITY (18-C-R)

Enter the patient's city. If the city's ZIP code is in the ZIP code table and you enter it in the city field, the city, state and ZIP code automatically fill the appropriate fields. The ZIP code you enter can be either five or nine characters (only five characters are edited against the ZIP code table entries). If the ZIP code you enter is not in the table, it moves to the ZIP code field and the cursor remains at the city field for your freeform entry. An equal sign (=) can be entered for the system's default city, state and five-digit ZIP.

9. STATE/PROVINCE (2-A-R)

Enter the patient's state in the standard two-character state/province abbreviation format. This entry is validated with the user-defined state/province table. An equal sign (=) can be entered for the default state/province.

10. ZIP CODE (9-N-R)

Enter the patient's ZIP code. The ZIP code you enter can be five or nine characters. An equal sign (=) can be entered for the first five characters of the default ZIP code. If a nine-digit ZIP code is utilized, it displays with a hyphen (-) between the ZIP code and the ZIP code extension. If a six-digit alphanumeric Canadian ZIP code is entered, it displays in a "x9x 9x9" format.

(CN) 10. POSTCODE (6-AN-O or 9-N-O)

Enter the postcode of the patient's employer. If you enter an equal sign (=), the system automatically fills the field with the default postcode. The system displays the postcode in a "X9X9X9" format. You can also enter a U.S. ZIP code in this field. If you enter a nine-digit ZIP code, the system automatically puts a hyphen between the code and the extension.

11. PHONE (10-NC-O)

Enter the patient's area code and home phone number without the parentheses () and hyphen (-). The system automatically enters the parentheses around the area code and inserts a hyphen in the phone number. You can enter the phone number without the area code if it is a local number, and the system automatically enters the area code. You can also enter the number in one of the following formats, if desired: (404)393-6000 or 404/393-6000. You can enter any special characters between the area code and prefix, or between the prefix and suffix.

12. PHONE MESSAGE (1-A-O)

When you access this field, the following prompt is displayed:

Is it okay to leave a message at this phone number? (Y/N)--

Enter **Y** for Yes or **N** for No to indicate that the patient has authorized leaving a message at this phone number.

13. ALT/CONFIDENTIAL ADD-PH (1-A-O)

When you access this field, the following prompt is displayed:

Edit the Patient's Additional/Alt Address information? (Y/N) [N]-- |

Do one of the following:

- Press ENTER or enter **N** for No if you do not want to add or edit this information.
- Enter **Y** for Yes to add or edit additional information or an alternate address.

NOTE: If an active visit exists for this patient, you cannot edit this field. You must use the Revise Admission or Admission function to change this information.

This field is a two-part field:

- In the **Alt** field, Yes is displayed if any information has been entered on the subscreen for this patient, and No is displayed if all fields on the subscreen are blank.
- In the **Confidential Add-Ph** field, whatever is entered (Yes, No, or blank) in the **Confidential Add-Ph** field on the Alternate Address subscreen is displayed here. If Yes is displayed here, the alternate address and phone number should be used to contact the patient.

If you enter **Y** to edit alternate address information, the Alternate Address subscreen is displayed:

General Hospital Appointments Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000003403	TERRY, CLAIM B	M	05/25/90			
Alternate	1 Address Line 1			2 Address Line 2		
	->					
	3 City		4 St	5 ZIP Code	6 County	
	7 Country		8 Residence Type	9 Phone		
10	Invalid Address/Phone					
11	Mother's Name			12 Father's Name		
13	Phone Message	14	Mail To Address?	15	Confidential Add-Ph	
16	Alt Phone					
Enter alternate address line 1--						

Enter the necessary information and accept the screen. The alternate address information is stored with the patient's data and is available upon admission.

NOTE: This screen is identical to the screen in the admission process. For an explanation of these fields, see Chapter 1: Admission in the Patient Processing Module of the *STAR Patient Care Reference Guide*.

14. PRIMARY CARE PHYSICIAN (TABLE LOOKUP-O)

Enter the patient's primary care physician by using a code from the Physician table, by doing a table lookup, or by typing the physician's name not on staff, preceded by a hyphen (-).

(CN) 14. FAMILY PHYSICIAN (TABLE LOOKUP-O)

Enter the patient's family physician by using a code from the Physician table, by doing a table lookup, or by typing the name of the physician not on staff, preceded by a hyphen (-).

NOTE: Adding or revising the patient's primary care/family physician in this field updates the patient's MPI level primary care/family physician information. If an active visit exists for this patient, you cannot edit this field; you must use the Revise Admission function to change the primary care/family physician.

15. INVALID ADDRESS/PHONE (TABLE LOOKUP-O)

Enter the code to indicate that either the alternate address or phone number on this screen is invalid. You can enter the code if you know it, or enter a hyphen (-) to do a table lookup.

NOTE: This field may be updated automatically when an incomplete address is received from an inbound interface. If your facility has installed the Address/Credit Check Module, this field may also be updated automatically upon an address/credit check.

If this field contains an entry and you later update the address fields, you are prompted to remove this flag. The address includes Address Line 1, Address Line 2, City, State, Zip Code/postcode, and, optionally, Country.

Impact

After you complete this screen, the following takes place:

- For patients who have never been admitted or registered in the hospital system before, a new record is created in the MPI. This record does not contain a medical record number until the patient is admitted through the appropriate functions. This patient appears on the Unassigned Unit Numbers List until the admission is completed.
- If the patient was previously placed in the MPI, revisions or edits to this information update the MPI. If the patient name field has changed, a prompt displays asking if the previous name is to be retained as cross-reference for the MPI.
- If Order Generation/Patient registration is allowed for the facility/resource, the following prompt appears:

Enter (R) to Register patient or enter to continue -

If **R** is entered, the Patient Type table displays for selection and an admission can be performed. For details on admission, refer to the *STAR Patient Care Reference Guide, Patient Processing Module*.

- After the screen is accepted, the appointment screen appears for entry of detail information regarding the appointment.

The next step in making an appointment is to view any pending appointments that have already been made for this particular patient. This screen only displays after the patient demographic screen if you selected the resource/date/time prior to selecting the patient. If the patient is selected first, this screen doesn't display until after selection of the resource/date/time.

If there are no pending appointments, the system continues with the next step. If there are pending appointments, the following information displays for assistance in scheduling additional appointments for the patient.

General Hospital Appointments Processor						
PHYSICIAN: OBG, OBG, 45 BROWN, ROBERT D.				Thu Mar 05, 2009 04:43 pm		
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000100102	HARPER, DAFNE	F	03/03/45			
Pending/Suspended Appointments For This Patient						
Date & Time	Resource	Visit Reason	Status			
Fri 03/20-810A	FLOR, CARL (ANS, ANS, 99)	NEW APPOINTMENT	Pending			
Mon 03/23-1230P	CT SCANNER (RAD, 101, 205)	GENERAL APPOINT	Pending			
Note time conflicts above!						
Proceed with making appointment? (Y/N) [Y]--						

After the patient and the appointment time are selected, the system checks for and indicates patient appointment conflicts. A conflict is defined as any other appointment between one hour prior to the appointment start time, and one hour after the appointment start time plus the length of the appointment. The following warning message flashes indicating that this conflict exists, but the scheduling of the appointment is permitted.

Note time conflicts above!

Proceed with making appointment? (Y/N) [Y]--

The following prompt displays if you are scheduling an appointment for a patient who already has an appointment scheduled at the same time with the same resource:

Two appointments at the same time. Press NL to select new time/date.

If you are booking two appointments for the same patient, date, and time with different resources, this prompt does not display. This enables you to schedule several different resources for the same patient; for example, a room, a piece of equipment, and a technician.

NOTE: If more than nine pending appointments exist, the system prompts you to select the page to view the appointment:

*Proceed with making appointment? (Y/N) [Y]--
/next page*

Field Explanations

DATE & TIME (DISPLAY ONLY)

This field displays the day, date, and time of existing appointments.

RESOURCE (DISPLAY ONLY)

This field displays the description, department, specialty, and code number of the resource previously selected.

VISIT REASON (DISPLAY ONLY)

This field contains the reason the patient has the appointment. When orders are evaluated and scheduled through Clinical Management, multiple items can be scheduled in one appointment slot. A plus sign (+) may display in the blank space prior to the current Visit Reason field.

In this instance, the plus sign displays if the Add'l Items indicator is set to Yes to indicate that there are other SIM items associated with this appointment. If + Multiple displays in the Visit Reason field, it indicates that multiple SIM items are associated with this appointment and no primary was indicated. For more information on scheduling through Clinical Management, refer to the *STAR Patient Care Reference Guide Clinical Management Module*.

STATUS (DISPLAY ONLY)

This field displays the status of the pending appointment.

The final step in scheduling an appointment is to complete the following screens. The second screen contains Scheduling Letter Options that have been defined to print online for the resource.

General Hospital Appointments Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000001001	JACKSON, LISA	F	05/14/59			
1 Resource	FLUOROSCOPY ROOM 1 (SCHD)			2 Visit Type	3 Appointment	
				FLE	Thu 05/25/00 0100P	
4 New Visit	5 Account	6 Service Department		7 Visit Reason		
Yes		(A) Radiology		FLUOROSCOPY EXAM		
8 Ord #	9 Length	10 Comment				
	30					
11 Add'l Items	12 Referring Source		13 Referring Physician			
	12 BAPTIST HOSPITAL		32 ADAIR, FRANK C			
14 Ref Date	15 Transport	16 Priority	17 Display		18 Chart	
05/16/00	W/C	ASAP	VIEW REASON		No	
19 Additional Comment #1			20 Additional Comment #2			
21 Working Diagnosis						
Enter fieldnumber or '/' starting fieldnumber--						

Field Explanations

1. RESOURCE (DISPLAY ONLY)

This is the name of the resource being scheduled. This is entered by the system based on the previous selection.

2. VISIT TYPE (DISPLAY ONLY)

This is the type of visit selected from the resource schedule. This is entered by the system.

3. APPOINTMENT (DISPLAY ONLY)

This is the day of the week, date and time of the appointment being scheduled. This is entered by the system.

4. NEW VISIT (1-A-R)

Enter **Y** for Yes or **N** for No to indicate if the patient has not yet been processed through Admissions. If you enter **N**, the system displays a list of active account numbers for selection. If you press ENTER or enter **N** for the default and there are no active account numbers in the system, the following error message displays:

Patient not active!

The screen is repainted and the same prompt redisplay. The default is No. If you enter Y, the following prompt displays:

Enter type of patient - Inpatient(I), Outpatient(O) or Unknown(U) [U]--

If you enter **I** (inpatient) or **O** (outpatient), it indicates that this appointment is associated with a new inpatient or new outpatient visit, and that the admission has not yet been completed. Entering **U** (unknown) indicates that the patient has not yet been admitted, and the person scheduling the appointment is not sure what type of visit this is.

If this appointment is being scheduled through Clinical Management, then this field is display only and is not accessible.

5. ACCOUNT (10-N-C)

This is the account number associated with the visit that is being scheduled. This number is entered as the result of entering No in the New Visit field at the time the appointment was made initially, or after the patient was admitted as an outpatient or an inpatient into STAR Patient Care. This field is required if **N** is entered in field 4. If a new visit is indicated in field 4, then field 5 is bypassed.

If this appointment is being scheduled through Clinical Management, then this field is display only and is not accessible.

6. SERVICE DEPARTMENT (3-A-R or TABLE LOOKUP)

Each resource may have a default department set up per scheduling department, or another department can be entered. This field controls which SIM items are available for selection in the Visit Reason field.

7. VISIT REASON (20-C-R)

Enter the reason why this appointment is being made using the following prompt:

Enter visit reason, or '-' access Service Dept [FUP]--

Enter your reason as a freeform entry, or select a SIM item code for the department listed in Field 8, Service Department. For instance, entering **S** followed by a hyphen (S-) displays all SIM items that begin with S. If a SIM code is used, such as a specific exam code, the system has the ability to store and display scheduling instructions built via the SIM Item Scheduling Instructions table. (Using a SIM code does not result in a STAR Patient Care order for that item or test. Also, if a SIM code is entered, the appointment length can be set to a value that has been assigned to the item through SIM Maintenance, if one exists, and adjusts the schedule accordingly.)

Pressing ENTER defaults the Visit Type description as the visit reason. If this appointment is being scheduled through Clinical Management, it displays the ordered SIM item and is display only. If multiple items were scheduled in this one appointment, then the field displays a plus sign (+) prior to the SIM item. If multiple items are being scheduled and a primary item was not identified, then the field contains + Multiple and all ordered items can be viewed under the Add'l Items field.

8. ORD # (DISPLAY ONLY)

This field displays the order number the appointment is linked to when scheduled through Clinical Management.

9. LENGTH (3-N-R)

This is the length of time for this appointment based on the visit type selected previously. This is entered by the system and can be adjusted if the Insert Times field in Resource Maintenance is set to Yes.

10. COMMENT (45-C-O)

This is a freeform field. Any comment entered here displays and/or prints on resource schedules and reschedule lists.

11. ADD'L ITEMS (DISPLAY ONLY)

This field contains the additional SIM Items scheduled through Clinical Management. This field displays No when additional items do not exist. If this field is accessed and there are no additional items, the system displays an error message "Additional SIM Items do NOT exist!" and redisplay the detail screen. If additional items do exist, then the items display when the field is accessed.

12. REFERRING SOURCE (TABLE LOOKUP)

Enter the code that describes the referring source. The table can be overridden by entering a hyphen (-) followed by a freeform entry. This enables you to enter a referring source that is not on the table. This field is optional.

13. REFERRING PHYSICIAN (TABLE LOOKUP)

Enter the code that specifies the physician that referred the patient for the appointment. This table can be overridden by entering a hyphen (-) followed by a freeform entry. This enables you to enter a physician's name not on the table. Entering an equal sign (=) defaults to the attending physician associated with the account number entered previously.

If this appointment is not linked to an account number, the equals (=) option does not display in the prompt. This field is typically optional; however, it is required if the Reg Ref Physician field is set to Yes in the Scheduling Parameters screen of the Resource Master.

14. REF DATE (SPECIAL FORMAT-O)

This field contains the reference date for the appointment.

15. TRANSPORT (TABLE LOOKUP)

Enter the code that describes the type of transportation the patient requires. If an entry is made in this field, and the appointment is being made for a date in the future, the patient is placed on the Transportation Schedule. If the appointment is for the same day, a Transportation Notice prints on the printer identified by the department in the Resource Department table.

16. PRIORITY (TABLE LOOKUP)

This field enables additional flagging of appointments. For example, the department or clinic may want to flag appointments that have been overbooked or rescheduled from the past. Leave this field blank for routine appointments, allowing the priority appointments to stand out.

17. DISPLAY (TABLE LOOKUP)

This field controls the security on the display of appointment information for departments other than the department associated with the CRT. The patient name and/or reason for the visit can be restricted (see Resource Maintenance). The default appears, which can be overridden for this specific appointment by going back into the field and entering another selection.

18. CHART (1-A-R)

Enter **Y** or **N** to indicate if the patient's chart is needed for this appointment. Entering **Y** causes the appointment to print on the Pull Chart List and the Outguide Cards in Medical Records. The initial value of this field is the value of the Requestor field in Resource Maintenance, but it can be adjusted if necessary. The default is pulled from the Resource Master.

19. & 20. ADDITIONAL COMMENTS 1 & 2 (36-C-O)

These two fields are freeform. This space is provided for two additional comments pertaining to this appointment. This information prints on resource schedules, and is retained for detail viewing in the patient appointment and revise appointment processor.

21. WORKING DIAGNOSIS (34-AN-R)

This is a table-driven field. The default response is the working diagnosis. If the working diagnosis is the valid diagnosis, press ENTER and the working diagnosis automatically displays in the field. If the diagnosis is different than the working diagnosis, enter the code that describes the patient's diagnosis.

If you do not know the code and intend to use the table lookup to search, please be aware of the following. Because there are so many possible diagnosis codes in the system, the table lookup for this field has been expanded. There are hospital-defined pointer tables which help you specify how to search for commonly used codes.

When entering actual codes, you can enter leading zeros or decimal points, but the system does not require them. For example, you can enter one of the following to initiate a code search:

- Enter **U** and a hyphen (U-) to display the entire pointer table in alphabetic order. Make your selection from this table.
- Enter **U**, an alpha character or characters, and a hyphen (UA-, UB-, etc.) to display the pointer table that begins with a specific alpha character. For example, entering UAN-, might cause the codes for Aneurysm, Angina, and Ankle Fracture to display if they have been built into the pointer table. Make your selection from this table.
- Enter a numeric digit (or digits) and a hyphen (22-, 250-, etc.) to display the diagnosis table by specific numeric range of codes. For example, if you know that the code you are searching for begins with 22, enter 22- and all the codes beginning with 022.0 (CUTANEOUS ANTHRAX) are displayed. Make your selection from this table.
- Enter a hyphen (-) to display the entire diagnosis table in numeric code order, i.e., starting with 001.0 (CHOLERA D/T VIB CHOLERA).

The code and the diagnosis description display. To override the table, enter a hyphen (-) followed by a freeform entry. If you enter a number which exists in the DSM® Pointer table, the system displays the number followed by its corresponding description. This enables you to enter an admitting diagnosis that cannot be defined by an ICD code.

On this screen, fields 1, 2, 3, 7, 8, 17 and 18 are entered by the system based on the appointment selected and resource defaults. Field 4 is required, and fields 8 and 9 have defaults built in. The other fields on this screen are optional with the exception

of field 13 which may be required based on the resource's scheduling parameters. Each scheduling department should decide what information procedurally needs to be collected. High volume areas may decide to exit and accept this screen after field 9 is entered.

When you accept this screen, the following screen is displayed:

General Hospital Procedure Scheduling Processor						
Scheduled Appointment Screen Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
400000316	JACKSON, LISA	F	03/19/57			
Resource				Appt Type	Appointment	
ADAIR, FRANK				CN30	Mon 01/14/02 0730A	
1 ADDITIONAL COMMENT #3						
01						
02						
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
Page:01		Scheduling Letter Options			##=Current Choices	
(1) New Appointment for Patient						
Enter choices (e.g. 1,7,5-9) or '-'choices to remove--						
end select(NL)						

You must enter through the comment lines before the Scheduling Letter Options appear. At the prompt for selecting Scheduling Letter Options, enter the option number of the Patient Letter you want to generate. The system displays the following prompt:

Annotate New Appointment letter? (Y/N) [N]

If you enter **Y**, you can enter additional text to the predefined letter. This text prints in addition to the predefined letter. If you enter **N**, the following prompt displays:

Generate an order from this appointment? (Y/N) [Y]--

After completing the Scheduling Letter Options, the screen does not change but the prompt does, as shown in the following screen:

```

General Hospital Procedure Scheduling Processor
Scheduled Appointment Screen Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD  Room  Physician  SVC ICD Status
400000316 JACKSON,LISA  F  03/19/57
Resource
ADAIR,FRANK
Appt Type  Appointment
CN30       Mon 01/14/02 0730A

1 ADDITIONAL COMMENT #3

01|
02|
03|

2 ADDITIONAL COMMENT #4

01|
02|
03|

More for same (R)es, (I)tem, (D)ept, (P)at, (C)opy multiple or (N)ew pat--

```

If **C** to Copy Multiple is entered, after selecting the Resource or entering "=" for same resource, the following screen displays:

```

General Hospital Procedure Scheduling Processor
PHYSICIAN-----X: FMC,SUR,32 ADAIR,FRANK K Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD  Room  Physician  SVC ICD Status
01050-00002 JACKSON,LISA  1  F  03/19/57 4102-01 ADAIR,FRANK  MED 10 PED
19
1 Appointment Series Start Date      2 Appointment Series End Date
03/01/09                             03/04/09

3 Appointment Days
->
Page:01                                ##=Current Choices
( 1) Sunday
( 2) Monday
( 3) Tuesday
( 4) Wednesday
( 5) Thursday
( 6) Friday
( 7) Saturday

Enter choices (e.g. 1,7,5-9) or '-'choices to remove--
end select(NL)

```

Field Explanations

1. APPOINTMENT SERIES START DATE (DATE-R)

Enter the start date for the appointment series. You may enter the current date or a future date to begin the appointment series.

2. APPOINTMENT SERIES END DATE (DATE-R)

Enter the end date for the appointment series. You may enter the current date or a future date to end the appointment series, but the end date must be later than the start date.

3. APPOINTMENT DAYS (TABLE LOOKUP-R)

Enter the specific days of the week for this series of appointments. Multiple days may be chosen.

NOTE: Once multiple days are selected, the schedule for each day is displayed for selection of the appointment time. Once the appointment time is entered, the user is prompted to copy the appointment, and the system then goes to the next requested day. Once all multiple appointments are booked, a summary screen may display based on a parameter setting in Hospital Facility Options, Scheduling Parameters.

Impact

After you complete this screen, the following takes place:

- The appointment process is complete.
- The patient appointment information entered in the system can now be accessed through the patient, resource, department or nurse station functions available throughout the system.

Output

- If the New Visit field was completed with I, O, or U, this appointment information appears on the New Visit report.
- If the Referral Source field was completed, this patient appointment information appears on the Monthly Referral report.
- If the Transportation field was completed, this appointment information appears on the Transportation Schedule Census. If the appointment is being made for the same day, an online transportation notice prints on the department's designated printer as identified in the Resource Department table.
- If the Chart Request field is Yes, this appointment information appears on the Chart Pull List and Outguide List when they are prepared. If the appointment

is being made on the same day, a Stat Chart Pull Notice prints in Medical Records online.

- An online appointment notice or audit copy print as determined by the parameters set up in the Resource Department table.

If the patient has an active account, the Service Department field indicates a valid SIM department, and a valid SIM item is entered in the Visit Reason field, the following prompt displays to allow order generation.

Generate an order from this appointment (Y/N) [N]--

If Yes is entered, the system presents the Department Order screen associated with the department that was entered in the Service Department field on the appointment screen.

If performing Order Generation from Appointments, the items that are non-orderable can be selected for scheduling purposes (as the Visit Reason in the appointment) but can not be ordered. Upon completion of the appointment, if a non-orderable item was selected as the visit reason and **Yes** is then entered to generate an Order, the following error message displays:

"Error: Item not found!"

For example if the service department that was entered was Radiology, the following order screen appears for order entry:

General Hospital Department Orders Processor											
(A) Radiology Order											
Thu Mar 05, 2009 04:43 pm											
No.	Name	Sex	BD	Room	Physician	SVC	ICD	Status			
96-16900006	NAPLES,MARY	F	06/20/93	4101-01	DOCTOR,ATTEND	MED	10	I/P	3		
AKA: ABD SUPINE & UPRIGHT										1	
1 Item					2 L/R	3 Initials					
7420 XR ABD SUPINE & UPRIGHT 74020123 VMN											
4 Priority	5 Frequency	6 Schedule Days									
ASAP	ONCE	ONCE									
7 Times											
8 Start Date	9 Start Time	10 Duration	11 Stop Date		12 Stop Time						
03/05/09	11:54pm	1 Occur	03/05/09		11:54pm						
13 Ordering Physician	14 Performing Physician										
300 DOCTOR,ATTENDINGXXXXX											
15 Transportation	16 Prompt Response / Message										
STRETCHER											
17 Ordering Diagnosis	18 Comment										
Enter field number or '/' starting field number--											

The previous screen, which is available for order entry from the nursing units, **is not** presented in this work flow. Only the actual Order screen appears with the SIM Item defaulted in from the scheduling Visit Reason field. Additional orders may be placed after the first order is accepted. The fields on this screen are standard Order Entry fields and have not been modified for this enhancement. All of the Order Management fields are detailed in the *Order Management/Charge Processing Volume* of the *STAR*

Patient Care Reference Guide. For additional information regarding these fields please consult this volume.

The system defaults in the following:

- Date and time from the appointment scheduled
- Order Screen for the Department entered in the Service Department field
- SIM Item entered as the Visit Reason for the appointment
- Priority associated with the SIM Item
- Frequency associated with the SIM Item
- Requesting Physician (if filled in on the appointment screen)

All ordering errors and defaults are also referenced in that manual and apply to orders placed from scheduling. All orders follow Order Management routing to the proper departments.

Once the Order screen has been accepted, the system prompts for any additional orders with the standard Order Management prompt to allow additional orders for other departments to be placed. The prompt appears as follows:

Order # 65 assigned. Enter additional orders? (Y/N) [N]--

If you enter **Y**, the system continues the Order management process until all orders are entered.

If you enter **N**, following prompt appears for the continuation of the scheduling process.

Enter same resource(R), patient(P), 'RP' OR (NL) proceed--

All Schedule output associated with this department/resource is generated. These include the following:

- Schedule Notices
- Audit Notices
- Resource Schedules
- Patient/Physician Letters
- Order Requisitions (in Order Department)

If the patient does not have an active account, a valid SIM department is not entered in the Service Department field, the Visit Reason field does not contain a valid SIM item, or N is entered at the prompt to generate an order, the following prompt displays.

Enter same resource(R), patient(P), or [NL]proceed--

Select one of the following options:

- Enter **R** to schedule another patient's appointments for the same resource, defaulting to the same day.
- Enter **P** to schedule another appointment for the same patient with a different resource. This retains the same patient but enables selection of a different resource.
- The following fields are retained for the next appointment: New Visit, Account, Referring Source, Referring Physician, Priority, Additional Comment (1), Additional Comment (2), and Working Diagnosis. The Resource, Visit Type, and Appointment Date/Time display based on the newly selected resource and appointment slot. The Display and Chart fields are pulled forward from the new resource's master information.
- Enter **RP** to schedule a second appointment using the same resource and patient, defaulting to the same day. The following fields are retained: Resource, New Visit, Account, Length, Service Department, Visit Reason, Comment, Referring Source, Referring Physician, Transport, Priority, Additional Comment (1), Additional Comment (2), and Working Diagnosis. The Display and Chart fields are pulled from the resource's master information, not the previous appointment.
- Press ENTER to continue with another resource and patient.

During the appointment making process, if a resource's schedule is full for the date selected, the following prompt displays:

Enter wait list(W), display(D), calendar(C)

or (NL) next day(/) previous day(/P)/[--

Select one of the following options:

- Enter **W** to place the patient on a wait list for that resource, indicating that the patient is waiting for a cancellation in the schedule, for an unopened date to become available, or for further appointment processing via the Wait List function (See Resource Scheduling). The system prompts you to enter a comment about this appointment request (for example, on vacation) which displays on the Wait List.

- Enter **D** to display the schedule so you can see why it is considered full. The View (**V**) option enables you to look at further details about the appointments already scheduled to consider rebooking or adjustment of the existing schedule.
- Enter slash P (**/P**) to display the previous day's schedule for that resource so you can determine what is available that might meet the patient's appointment needs.
- Enter a slash (**/**) to display the resource schedule for the next day so you can determine appointment availability.

Multiple Resource Search

To access the Multiple Resource Search screen, enter two asterisks (**) at the initial appointments processor prompt which also contains 18 search options which apply to Super Search as well as to Multiple Resource Search. The following screen displays enabling you to find the next available searchable appointment according to the criteria you enter on the screen. An appointment type is defined as searchable according to the parameter setting of the Resource Master Appointment Type.

General Hospital Appointments Processor			
Fri Jan 27, 1995 02:34 pm			
Multiple Resource Search			
1 Resources	2 Resource(s)	3 Resource(s)	4 Resource(s)
5 Start Date	6 Start Time	7 End Date	8 End Time
9 Day(s)	10 Appointment Type(s)		
11 Include Reserved Time Slots			
Enter a Resource code, first letter(s) '-' or dept code--			

Field Explanations

1. RESOURCES (TABLE LOOKUP-R)

Enter the resource/department/group for which you are searching. If you enter a hyphen (-), a table displays all resources from all departments from which you can make your selection. If you enter a partial resource description followed by a hyphen (-), a list of all resources that begin with the specified letter(s) displays. Resources entered in the same field are grouped together in the display of schedules.

2. RESOURCE(S) (TABLE LOOKUP-O)

Enter the resource/department/group for which you are searching. If you enter a hyphen (-), a table displays all resources from all departments from which you can make your selection. If you enter a partial resource description followed by a hyphen (-), a list of all resources that begin with the specified letter(s) displays. Resources entered in the same field are grouped together in the display of schedules.

3. RESOURCE(S) (TABLE LOOKUP-O)

Enter the resource/department/group for which you are searching. If you enter a hyphen (-), a table displays all resources from all departments from which you can make your selection. If you enter a partial resource description followed by a hyphen (-), a list of all resources that begin with the specified letter(s) displays. Resources entered in the same field are grouped together in the display of schedules.

4. RESOURCE(S) (TABLE LOOKUP-O)

Enter the resource/department/group for which you are searching. If you enter a hyphen (-), a table displays all resources from all departments from which you can make your selection. If you enter a partial resource description followed by a hyphen (-), a list of all resources that begin with the specified letter(s) displays. Resources entered in the same field are grouped together in the display of schedules.

5. START DATE (DATE-R)

Enter the date on which you want the appointment search to begin. This narrows the search to dates that are convenient to the patient. Pressing ENTER displays today's date.

6. START TIME (TIME-R)

Enter the time at which you want the search to begin (without a colon). Enter **A** or **P** after the time to designate AM or PM. Pressing ENTER displays the default time which is midnight (12:00 M).

7. END DATE (DATE-R)

Enter the date on which you want the appointment search to end. This narrows the search to dates that are convenient to the patient. Pressing ENTER displays the date 10 days past the start date.

8. END TIME (TIME-R)

Enter the time at which you want the search to end (without a colon). Enter **A** or **P** after the time to designate AM or PM. Pressing ENTER displays the default time which is one minute before midnight (11:59 PM).

9. DAY(S) (7-A-R)

Enter the letter(s) corresponding to the day(s) you want to include in the search. The following prompt displays:

Enter day(s) ['SMTWRFA']--

The letter R represents Thursday and the letter A represents Saturday. Pressing ENTER defaults to all the days of the week.

10. APPOINTMENT TYPE(S) (TABLE LOOKUP)

Select the appointment type(s) you are searching for by entering the number(s) of the type(s) from the list displayed at the bottom of the screen, or by entering A to display all types.

11. INCLUDE RESERVED TIME SLOTS (1-A-O)

This field allows the ability to include or exclude the Reserved Time Slots while performing the specific Multiple Resource Search. The following prompt displays:

*Include Reserved Time Slots ***? (Y/N) [N]*

To include Reserved Time Slots, enter Y. Pressing ENTER defaults to (N)o.

When you enter a hyphen (-) to perform the search in the first four fields, the following screen displays a list of possible resources:

General Hospital Appointments Processor	
Fri Jan 27, 1995 02:34 pm	
Page:01	Resources
(1) ADAMS,HAROLD RM	
(2) ADMISSION RESERV (SCHED)	
(3) BABB,GARY H	
(4) CT SCAN ROOM 1 (SCHED)	
(5) CT SCAN ROOM 2 (SCHED)	
(6) DIAGNOSTIC RADIOLOGY RM	
(7) FLUOROSCOPY ROOM 1 (SCHED)	
(8) PHYSICAL THERAPY ASST	
(9) RYAN,GEORGE	
(10) WHIRLPOOL	
Enter choice--	next page(/)

The data in the title of the page heading of the screen differs depending upon your entry in the Resource field. If you enter a department code, the title of the page contains the name of the department. If you enter a hyphen (-), the screen displays similar to the example shown above. If you enter initial letters followed by a hyphen (-), then a list of resources that begin with the specified letter(s) displays. You are prompted to enter only one choice. If you select a resource that is linked to more than one department and/or specialty, you are provided with the option of selecting one or all of the items on the list.

When you enter a department code, for example RAD, the Resource Group table is checked for any Resource Groups in the first field and for any Resource Groups defined for that department. If Resource Groups are defined for the specified

department, you are given the option of selecting from the Resource Group table, or you can select all resources within that department. The following prompt displays:

Select from the Department's Resource Groups(G) or Resources(R) [R]--

If the Resource Group table is checked and there are no groups defined for the entered department, this prompt is bypassed.

Enter **R** to display all resources within the given department, as shown in the following screen:

```

General Hospital Appointments Processor
                                Fri Jan 27, 1995 02:37 pm

Multiple Resource Search
Page:01      Resources in RADIOLOGY DEPARTMENT (ALL)-----##=Current Choices
( 1) RAD,CT,9111      ROOM----- CT SCAN ROOM 2 (SC
( 2) RAD,FL,9173      ROOM----- FLUOROSCOPY ROOM 1
( 3) RAD,FL,9174      ROOM----- FLUOROSCOPY ROOM 2
( 4) RAD,MRI,9121     ROOM----- MRI ROOM 2 (SCHED)
( 5) RAD,NM,9130     ROOM----- NUC MED ROOM 1 (SC
( 6) RAD,NM,9131     ROOM----- NUC MED ROOM 2 (SC
( 7) RAD,NM,8721     PHYSICIAN--- RADIOLOGIST,DR.
( 8) RAD,RAD,9100     CLINIC----- RADIOLOGY RM 3 (DX
( 9) RAD,RAD,9102     ROOM----- RADIOLOGY RM 5 (DX
(10) RAD,RAD,9101     ROOM----- RADIOLOGY RM 4 (DX
(11) RAD,RAD,543      ROOM----- NUC MED ROOM 1
(12) RAD,RAD,9821     ROOM----- NM ROOM 2
(13) RAD,SP,9170     ROOM----- SPEC PROCED RM1 (S
(14) RAD,SP,9172     ROOM----- SPEC PROCED RM2 (S
(15) RAD,STR,9120     ROOM----- MRI ROOM 1 (SCHED)

Enter choices (e.g. 1,7,5-9), '-'choices to remove or all(A) --
                                end selection(NL)

```

You can select multiple resources from the list. If you only select one resource, the code displays in the Resources(s) field (for example, LAB,HEM,9102). If you select multiple resources from the list, the department code displays followed by the word Mult; for example, RAD Dept-Mult.

If a resource is linked to more than one department and/or specialty, the resource ID displays followed by the word Mult; for example, 2122-Mult. The following screen is an example of the resource being linked to more than one department and/or specialty:

```

                                General Hospital Appointments Processor
                                Fri Jan 27, 1995 02:45 pm
Page:01      Department/Specialties for Resource #2122  ##Current Choices
( 1) MED,FAM,2122      Physician      Kraft,Everett C.
( 2) MED,PED,2122      Physician      Kraft,Everett C.
( 3) PNC,PED,2122      Physician      Kraft,Everett C.
( 4) BWM,PED,2122      Physician      Kraft,Everett C.

Enter choices (e.g. 1,7,5-9), '-'choices to remove or all(All) --
                                end selection (NL)

```

If resource groups are defined for the entered department, the following prompt displays:

Select from the Department's Resource Groups(G) or Resources(R) [R]--

If you enter **G** to select from the department's resource groups, a list of resource groups defined for the entered department displays, as shown in the following screen:

```

                                General Hospital Appointments Processor
                                Fri Jan 27, 1995 03:26 pm
                                Multiple Resource Search
Page:01      Resource Groups in RADIOLOGY DEPARTMENT (ALL)-----##=Current Choices
( 1) CT SCAN GROUP
( 2) RAD GROUP
( 3) FLUORO GROUP
( 4) MRI GROUP
( 5) NM GROUP
( 6) DIAG RAD GROUP

Enter choices (e.g. 1,7,5-9), '-'choices to remove or all(A) --
                                end selection(NL)

```


You can select one, several, or all groups. After you select the group(s), the following screen displays listing the resources contained in each group:

```

General Hospital Appointments Processor
                                Fri Jan 27, 1995 03:26 pm

Multiple Resource Search
Page:01   Resources in RADIOLOGY DEPARTMENT (ALL)-----X B##=Current Choices
( 1) RAD,NM,8721   PHYSICIAN--- 1      RADIOLOGIST,DR.
( 2) RAD,RAD,543   ROOM----- 2      NUC MED ROOM 1
( 3) RAD,RAD,9821  ROOM----- 2      NM ROOM 2
( 4) CAR,STR,99    PHYSICIAN--- AMNIO   ZELLER,HECTOR C
( 5) RAD,RAD,9101  ROOM----- AMNIO   RADIOLOGY RM 4 (DX
( 6) RAD,SP,9170   ROOM----- AMNIO   SPEC PROCED RM1 (S
( 7) FMC,SUR,32    PHYSICIAN--- PHYS   ADAIR,FRANK C
( 8) PT,PT,432     THERAPIST--- PHYS   BABB,GARY H
( 9) RAD,NM,8721   PHYSICIAN--- PHYS   RADIOLOGIST,DR.
(10) RAD,FL,9173   ROOM----- ROOM    FLUOROSCOPY ROOM 1
(11) RAD,FL,9174   ROOM----- ROOM    FLUOROSCOPY ROOM 2
(12) US,US,9140    ROOM----- ROOM    ULTRASOUND RM1 (SC
(13) MED,PUL,4444  ASSISTANT TH TECH  RT AST THPST SHFT

Enter choices (e.g. 1,7,5-9), '-'choices to remove or all(A) --
                                end selection(NL)

```

All resources from the selected group(s) display on this screen. Resources can appear in duplicate if they are attached to multiple groups. The fields that display are different than for group selection in that this screen displays the resource, the resource type, the resource group, and the resource description.

You are sequenced through all resources until you make selections for each selected group. When you finish making your selections, you can remove a previously selected choice by entering a hyphen (-) before the option. Press ENTER to end the selection process and return to the main super search screen.

If you select multiple resources, the Resources field is filled with the department name followed by Group-Mult. If you select all resources, the Resources field is filled with the department name followed by Group-All as shown on the following screen:

```

General Hospital Appointments Processor
                                Fri Jan 27, 1995 03:26 pm

Multiple Resource Search
1 Resources          2 Resource(s)      3 Resource(s)      4 Resource(s)
  LAB,LAB,123456      RAD Group-All      RAD Group-Mult
5 Start Date        6 Start Time        7 End Date         8 End Time
  Mar 20,1995         9:00am            Mar 24,1995
9 Day(s)            10 Appointment Type(s)
  Sun Mon Tue Wed Thu Fri Sat      All

Enter a Resource code, first letter(s) '-' or dept code--

```

Many options can display in the Resources field, depending on your selection. The following is a list of some examples:

- One group, many resources = RAD Group-Mult
- One group, all resources within the group = RAD Group-All
- Many groups, many resources = RAD Group-Mult
- One resource = RAD,CT,9112
- One resource, many depts/specialties = 9112-Mult
- One resource, all depts/specialties = 9120-All
- Many resources, one dept/specialty = RAD Dept-Mult

After you enter all desired fields, you are prompted to accept the screen. Enter **N** for No if you want to edit any of the field criteria. Enter **Y** for Yes, or press ENTER to accept the screen.

If you accept the screen and none of the resources match the requested appointment types, the following error message displays:

Error: None of the selected resources match requested types

If you accept the screen and a match is found, the following messages display before the table of opened dates displays:

Loading <Dept,Spec,Resource ID> on Month/Day/Year

Loading Information for Day

The system checks for duplication of resources for each Resource field, but not for all other fields.

The table of opened dates displays as follows:

General Hospital Appointments Processor													
Wednesday Sep 30, 1994 10:20 am Page:01													
Beginning at 0900 am on Wed Sep 30, 1994													
<-	0900	0930	1000	1030	1100	1130	1200	1230	1300	1330	1400	1430	->
(1)	EKG,EKG,654321	Room				Cardiology Room 1				(3)			
CAR	3--2-----3-----	O----- -----				4----- -----							
(2)	RAD,DX,333333	Room											
		Radiology Room 1				(4)							
DX	-----1--2----- ----- ----- -----												
		2--2--2--2--2--(3)				RAD,RAD,444444							
Room		Radiology Room 2				(2)							
DXP	-----2-----3----- -----					(4)							
	RAD,DX,555555	Tech				Jones, Sheila				(40)			

Enter option(s), new date, new begin time or Next Avail Date(N)--
Right(R), Left(L), next page(/), prev page(/P), end selection (NL)

Field Explanations

BEGINNING AT <TIME> ON <DATE> (DISPLAY ONLY)

The beginning time and date search criteria you entered on the Multiple Resource Search screen displays. Six hours of the day display across the top of the screen in half hour increments beginning with the start time entered on the search screen.

DAYS (DISPLAY ONLY)

The search days previously entered display here.

Left and right arrows (<-, ->) display on the respective sides of the six hour time line to notify you if there is more information available for viewing to the right and/or left of the screen.

RESOURCE ID CODE (DISPLAY ONLY)

This field displays the resource's specialty, and resource ID code information which was previously selected. Resources are grouped by type within the field. All resources within the same field are grouped together.

RESOURCE TYPE (DISPLAY ONLY)

The resource's type, which is defined for each resource, displays in this field.

RESOURCE GROUP (DISPLAY ONLY)

This field contains the resource's group, if selected from a group. This field displays only if the resource was selected from a defined group.

RESOURCE DESCRIPTION (DISPLAY ONLY)

This field is the resource's name that is defined for each resource.

APPT TYPES (DISPLAY ONLY)

This field displays under the option number to denote the types of appointments available for this resource. If more than 17 appointment types exist, the first 16 appear on the screen and the remaining types display on the next page of information.

SLOTS BOOKED (DISPLAY ONLY)

This field displays next to the resource's name. It shows the number of patients that can be booked for this resource.

SLOT AVAILABILITY (DISPLAY ONLY)

This field is defined as appointment time slot availability. It displays beneath the time grid at the top of the screen. Each slot can display in any of the following ways:

Available Slots

The available slots are highlighted and contain numbers or asterisks (*).

'n' The n is a number ranging between 1-9 and can only handle single digits. This number signifies the amount of available slots for that time. If the time contains more than 9 slots, it is denoted by an asterisk (*). The dash marks (-) delimit each 5 minute interval of the appointment slot. For example, 2-- is an example of a 15 minute slot that is available, and 2----- is an example of two 30 minute slots that are available. An example of an available appointment where more than 9 slots are present is *---.

R The R marks the appointment slots which are reserved, but are still available.

Unavailable Slots

The unavailable slots are dim.

| The slot is full.

O The slot is overbooked (does not show double or triple booked).

R When the R displays in dim, it marks the appointment slots which are reserved and booked.

Other

N The N marks the appointment slots which are from a Note Pad day. The words Note Pad display next to the resource. Any times which are opened for this type of daydisplay in the same manner as previously described with the number of available appointments opened as highlighted, and the filled appointments as dim.

<blank> A blank space marks a slot in 5 minute intervals when an appointment slot is NOT defined or blocked. For example, Lunch could be blocked from any appointments being made. This includes appointment types that are preceded with an asterisk (*) such as *LUN.

Qualification - If none of the search criteria for the resource qualifies, a message displays to the right of the resource as No date match, No type match, or No date/type match.

As the resources display, you are prompted to enter one of the following:

- Enter the one or multiple options from the screen that is displayed. The selections chosen remain selected regardless of whether paging has taken place.
- Enter a new date to search or **N** to display the next available day. This is only available if no selections have been made. If you enter a new date, you are returned to the screen displaying open slots for the new date.
- Enter a new begin time to start the display of the same information beginning with the new time for a period of six hours.
- Enter slash (/) for the next page or slash P (/P) for the previous page to view more information. If there is no next page, the slash (/) next page option does not display. If there is no previous page, the slash P (/P) previous page option does not display.
- Enter **R** for Right or **L** for Left to view more time slots available for selected resources. If applicable, a right or left search displays the next six hours of time slots available while still displaying the previous six hour time slots. For example, if the time was displayed from 9:00 am to 3:00 pm and you entered **R** to move the screen to the right, the new block of time would display from 3:00 pm to 9:00 pm.
- Enter a period (.) and press ENTER to exit this function and return to the main Multiple Resource Search screen. All fields are filled, with the exception of the resources.
- Press ENTER to end your selections and begin the appointment selection screen(s).

NOTE: Appointment types of Walk-In and Wait Listed do not display on the screen.

After you select all resources, all Appointment Scheduling or Procedure Scheduling screens display for you to select the appointment time, select a different date, view existing appointments, modify appointment times/types, or view the calendar. These options are the same as the options discussed previously in the Super Search function.

For each resource selected from the Multiple Resource Search screen, you are prompted to select one of the following: enter an appointment time, view the appointments, select a new date for the resource, modify the times for selection, or view the calendar. If you decide not to make an appointment for this resource, you can

enter period (.) and press ENTER to skip this resource and proceed to the next resource.

If you selected multiple resources, after the first resource appointment time is entered, you are prompted to select a patient from the standard MPI patient lookup prompt as follows:

*Enter Unit No, name, '=' for current--
'-' Social Security No., '#' Corporate No., '%' name for soundex, '**'Account No.*

Select a patient using the standard Information Entry Techniques discussed in the *General Information Volume* of the *STAR Patient Care Reference Guide*.

If you chose to make an appointment by selecting the patient first at the initial prompt, after you entered **P** for Patient, this standard MPI patient lookup prompt displays.

The processing for the remainder of the appointment scheduling is the same for both multiple resources and patient after you select the desired patient.

After you enter the patient demographics, you are prompted to enter the detailed appointment information.

If previous appointments for the patient are pending or wait listed, the following example conflict checking screen displays:

General Hospital Appointments Processor						
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.				Thu Mar 05, 2009 04:43 pm		
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000100102	HARPER,DAFNE	F	03/03/45			
Pending/Suspended Appointments For This Patient						
Date & Time	Resource	Visit Reason	Status			
Fri 02/27-810A	FLOR,CARL (ANS,ANS,99)	NEW APPOINTMENT	Pending			
Mon 03/02-1230P	CT SCANNER (RAD,101,205)	GENERAL APPOINT	Pending			
Note time conflicts above!						
Proceed with making appointment? (Y/N) [Y]--						

When you enter **N** to stop appointment processing, you are returned to the appointment time entry screen. If you accept the screen to proceed with making the appointment, the appointment detail screen displays as follows.

NOTE: If more than nine pending appointments exist, the system prompts you to select the page to view the appointment:

Proceed with making appointment? (Y/N) [Y]--
/next page

The following screen contains Scheduling Letter Options that have been defined to print online for the resource:

General Hospital Appointments Processor									
Scheduled Appointment Scre Thu Mar 05, 2009 04:43 pm									
No.	Name	Sex	BD	Room	Physician	SVC	ICD	Status	
000001487	HARDERSEN, DARRON	M	02/03/04						
1 Resource				2 Visit Type	3 Appointment				
RADIOLOGY RM 3 (DX) (SCH)				UGI	Fri 02/23/01 1030A				
4 New Visit	5 Account	6 Service Department			7 Visit Reason				
Yes		(A) Radiology			UPPER GI SERIES				
8 Ord #	9 Length	10 Comment							
	30								
11 Add'l Items	12 Referring Source				13 Referring Physician				
	11 REGIONAL HOSPITAL				32 ADAIR, FRANK C				
14 Ref Date	15 Transport	16 Priority	17 Display		18 Chart				
02/18/09	PORT	ASAP	VIEW REASON		Yes				
19 Additional Comment #1			20 Additional Comment #2						
21 Working Diagnosis									
011.60-TB PNEUMONIA-UNSPEC									
Enter field number or '/' starting field number--									

If you select one or more Scheduling Letter options to generate, the following prompt is displayed:

Annotate letter? (Y/N) [N] --

When you accept the default, a predefined letter prints. If you enter Y (Yes), you can enter additional text to the predefined letter. This text prints in addition to the predefined letter.

After you accept the detailed appointment screen, and if multiple appointments were selected, the following prompt is displayed:

Copy the above detail to all appointments (Y/N)?

This prompt provides you with two options. When you enter Y for Yes, the detail information on the screen is copied to all of the other resource appointments previously selected, with the exception of the Visit Type and Length fields. The Visit Type and Length fields default to the current resource of the appointment time you have just selected. All other fields default to data entered for the first appointment if more than one resource/appointment is selected.

Enter **N** for No to have the appointment detail screen display for each selected appointment. The appointment data from the first appointment displays in each subsequent appointment (information is retained from appointment to appointment) and is available for any necessary changes.

If the department stays the same across appointments, you are prompted to enter only the visit reason. All copied information remains the same for subsequent appointments. If the department changes for the resource, you are prompted for the Service Department, Visit Reason, and Transportation fields.

If you are using Procedure Scheduling and the department changes, the Service Department defaults to the new department, the Visit Reason stays the same as the selected SIM item, and you are prompted for the Comment and Transportation fields. The system enables you to change defaults for all fields whether you are prompted to enter new information for the field or not.

You are sequenced through selecting appointment times for each resource until all selections have been made. When you press ENTER, the system takes you to the next day for the resource. Press period (.) and ENTER to skip the current resource and continue to the next resource for appointment time selection. If no other resources are awaiting time entry, or when all appointments are completed, you are exited from the Multiple Resource Search function.

If you are using Appointment Scheduling, you are returned to the following prompt:

*Enter Resource, 'P' for Patient, or '***' for Multiple Resource Search --*

You can begin the appointment scheduling process again, or press period (.) and ENTER to exit the Appointment Scheduling processor.

If you are using the Multiple Resource Search option while in the Procedure Scheduling Processor, when you select a SIM item, the REQ/SCH DTE/TME field is automatically filled with the last appointment date/time if multiple resources were selected for one SIM item.

If you are using Procedure Scheduling, you are returned to the following prompt:

More for the same item(I), dept(D), patient(P) or new patient(N) --

You can begin the procedure scheduling process again, or press period (.) and ENTER to exit the Procedure Scheduling Processor.

WALK-IN APPOINTMENTS

The Walk-In function is an option on a Scheduling Menu. It provides a mechanism to place unscheduled patients on a resource schedule for the department or clinic that cannot schedule all of their appointments in advance.

This function overrides the parameters set up for a resource via the Resource Maintenance function. Walk-In appointments can be entered for the current day or for days in the past, in the event that appointments were never entered in the system. A benefit of this function is that it provides you with an accurate historical account of appointments.

After you select the Walk-In function, the following prompt asks you to enter a date:

Enter appointment date [T]--

Dates can be entered in a variety of formats. Refer to the Information Entry Techniques chapter in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details. The default is today's date. The following is then displayed:

Enter Resource--

Enter a resource code, or press hyphen (-) and ENTER to display a table from which you can select the resource.

The system then prompts you to select a patient, as follows:

Enter Unit No, name, '=' for current--

*'-' Social Security No., '#' Corporate No., '%' name for soundex, '**'Account No.*

This prompt represents the standard MPI inquiry function (refer to the appropriate STAR Patient Care Reference Guide Patient Processing Module for details). After you select a patient from the MPI or enter **A** to add a new patient, the system displays the patient demographic screen to allow revision. If adding a new patient, they are added without a unit number. The unit number is assigned when the patient is registered/ admitted.

This is a sample patient demographic screen:

```

General Hospital Walk-In Processor
THERAPIST-----X: FMC,SUR,32 ADAIR,FRANK C    Thu Mar 05, 2009 04:43 pm
  No.      Name      Sex  BD   Room   Physician   SVC ICD Status
000003402   TERRY,CLAIM A    F  02/14/50
 1 Name                      2 Soc Sec Number
  TERRY,CLAIM A
 3 Birthdate Age   4 Sex      5 Race      6 Address Line 1
  02/14/1950  55Y    FEMALE    1 CAUCASIAN    322 NORTH
 7 Address Line 2          8 City          9 State
                           CITYFORMODELHOS      GA
10 ZIP Code   11 Phone      12 Phone Message 13 Alt/Confidential Add-Ph
  30346                                     No
14 Primary Care Physician
  1 ADAMS,JAY M
15 Invalid Address/Phone

Accept this screen? (Y/N) [Y]--

```

This screen is the same one as described in the Appointments processor. For specific field explanations, please refer to that section in this document.

When you press continue, the patient's insurance information is displayed.

```

General Hospital Walk-In Processor
THERAPIST-----X: FMC,SUR,32 ADAIR,FRANK C    Thu Mar 05, 2009 04:43 pm
  No.      Name      Sex  BD   Room   Physician   SVC ICD Status
000000926   TATE,ANNE      F  01/11/66
Page:01                      Master Insurance
( 1) 100300 P MEDICARE PART B ONLY          02/28/09      COB 1

Enter choice , (Q) MSP--

Search(TAB)

```

Make your selection. If insurance is assigned to an active account, the following screen is displayed.

```

General Hospital Walk-In Processor
THERAPIST-----X: PT,PT,9150 PHYSICAL THRPST A Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD  Room  Physician  SVC ICD Status
000002405  TANNER,LUCY H  F  01/06/66
1 Carrier-Plan                2 Same As
MEDICARE PROFESSIONAL COMPONENT Patient
3 Insured Name                4 Entitle  5 Sex      6 Relation to Insured
TANNER,LUCY H                  FEMALE    1 PATIENT IS INSURED
7 Insured's Birthdate          8 Claim Number          9 Group Phone  10 Ext.
01/06/66  36Y                (404)555-1212  1234
11 Mail To                    12 Mail to Person
Plan                          CONTACT PERSON FOR MEDICARE PT. A
13 Mail To Company            14 Address Line 1
TEST COMPANY                  ADDRESS FOR MEDICARE PT.A
15 Address Line 2            16 City          17 St  18 ZIP Code  19 Cn
ADDRESS LINE 2 MEDICARE A    CITY FOR MEDICARE A  TN    99383
20 Comment

Press NL--
next screen(/) or previous screen(/P) [/]

```

After acceptance of the patient demographics and insurance information, the system also displays the patient's other appointments for that day, if there are any, as follows:

```

General Hospital Walk-In Processor
THERAPIST-----X: FMC,SUR,32 ADAIR,FRANK Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD  Room  Physician  SVC ICD Status

Patient Has The Following Appointments Beginning On Fri Feb 13, 31779
Time      Resource      Appt. Type      Status
02/13 1200M ADAIR,FRANK C (FMC,SUR)      Walk-In

Proceed? (Y/N) [Y]--

```

NOTE: If more than nine pending appointments exist, the system prompts you to select the page to view the appointment:

Proceed with making appointment? (Y/N) [Y]--
/next page

If you enter **N** in response to this prompt, the system prompts you to select a new resource. If you enter the default **Y**, the system proceeds with the final step in the Walk-In function which is to complete the Unscheduled Appointment screen, as

follows. This screen is almost identical in appearance and functionality to the Scheduled Appointment screen discussed earlier.

General Hospital Walk-In Processor						
Unscheduled Appointment Screen Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000000191	SMITH, JOE	M	10/12/59			
1 Resource			2 Visit Type	3 Appointment		
	*JACKSON, STEVE			~CN30	Tue 03/03/09 0913A	
4 New Visit	5 Account	6 Service Department		7 Visit Reason		
Yes		Department Consults		30 MIN CONSULTATION		
8 Length	9 Comment					
90						
10 Referring Source	11 Referring Physician		12 Ref Date			
11 REGIONAL HOSPITAL	2080 *COLE TAYLOR & ASSOC		03/03/09			
13 Transport	14 Priority	15 Display		16 Chart		
WALK--X	ASAP-----	VIEW REASON		Yes		
17 Additional Comment #1	18 Additional Comment #2					
->						
19 Working Diagnosis						
Enter additional comment #1--						

Field Explanations

1. RESOURCE (DISPLAY ONLY)

This is the name of the resource being scheduled. This is entered by the system based on selection.

2. VISIT TYPE (TABLE LOOKUP)

This field is selected from the list of valid appointment types defined for this resource. Walk-In (~WI), Emergency (~E), and Telephone Consult (~TC) are added to the appointment types available for this resource. The tilde (~) is used to identify Walk-In patients so they can be easily distinguished from scheduled appointments.

3. APPOINTMENT (20-C-R)

This is the time of the Walk-In. The system defaults to the current time. You can manually enter any time.

4. NEW VISIT (1-A-R)

Enter **Y** for Yes or **N** for No to indicate if the patient has not yet been processed through Admissions. If you enter **N**, the system displays a list of active account numbers for selection. If you enter **N** or press ENTER for the default, but there are no active account numbers in the system, the following error message displays:

Patient not active!

The system, the screen is repainted and the same prompt redisplay. The default is No. If you enter **Y**, the following prompt displays:

Enter type of patient - Inpatient (I), Outpatient(O) or Unknown(U) [U]--

Entering **I** (inpatient) or **O** (outpatient) indicates that this appointment is associated with a new inpatient or new outpatient visit, and that the admission has not yet been completed. Entering **U** (unknown) indicates that the patient has not yet been admitted, and the person scheduling the appointment is not sure what type of visit this is.

5. ACCOUNT (DISPLAY ONLY)

This is the account number associated with the visit that is being scheduled. This number is entered as the result of entering No in the New Visit field at the time the appointment was made initially, or after the patient was admitted as an outpatient or an inpatient into STAR Patient Care. This field is required if No is entered in Field 4. If a new visit is indicated in Field 4, then Field 5 is bypassed.

6. SERVICE DEPARTMENT (3-A-R)

This is a table-driven field. Each resource can have a default department set up per Scheduling Department, or another department can be entered. This field controls which SIM items are available for selection in the Visit Reason field.

7. VISIT REASON (20-C-R)

Enter the reason why this appointment is being made using the following prompt:

Enter visit reason, or '-' access Service Dept [FUP]--

Enter your reason as a freeform entry, or select a SIM item code for the department listed in the Service Department field. For instance, entering **S** followed by a hyphen (**S-**) displays all SIM items that begin with S. If a SIM code is used, such as a specific exam code, the system has the ability to store and display scheduling instructions built via the SIM Item Scheduling Instructions table. (Using a SIM code does not result in a STAR Patient Care order for that item or test.)

Also, if a SIM code is entered, the appointment length can be set to a value that has been assigned to the item through SIM Maintenance, if one exists, and adjusts the schedule accordingly. Pressing ENTER defaults the Visit Type description as the visit reason.

8. LENGTH (3-N-O)

Enter the duration of the Walk-In visit. This field can be bypassed.

9. COMMENT (45-C-O)

This is a freeform field. Any comment entered here displays and/or prints on resource schedules and reschedule lists.

10. REFERRING SOURCE (TABLE LOOKUP)

Enter the code that describes the referring source. The table can be overridden by entering a hyphen (-) followed by a freeform entry. This enables you to enter a referring source that is not on the table. This field is optional.

11. REFERRING PHYSICIAN (TABLE LOOKUP)

Enter the code that specifies the physician that referred the patient for the appointment. This table can be overridden by entering a hyphen (-) followed by a freeform entry. This enables you to enter a physician's name not on the table. Entering an equal sign (=) defaults to the attending physician associated with the account number entered previously. If this appointment is not linked to an account number, the equals (=) option does not display in the prompt. This field is typically optional; however, it is required if the Reg Ref Physician field is set to Yes in the Scheduling Parameters screen of the Resource Master.

12. REF DATE (15-AN-O)

Enter the date of referral.

13. TRANSPORT (TABLE LOOKUP)

Enter the code that describes the type of transportation the patient requires. If an entry is made in this field, and the appointment is being made for a date in the future, the patient is placed on the Transportation Schedule. If the appointment is for the same day, a Transportation Notice prints on the department's designated printer. Leave this field blank if the patient is arriving for the appointment without the assistance of the hospital's Escort Service.

14. PRIORITY (TABLE LOOKUP)

This field enables additional flagging of appointments. For example, the department or clinic may want to flag appointments that have been overbooked or rescheduled from the past. Leave this field blank for routine appointments, allowing the priority appointments to stand out.

15. DISPLAY (TABLE LOOKUP)

This field controls the security on the display of appointment information for departments other than the department associated with the CRT. The patient name and/or reason for the visit can be restricted (see Resource Maintenance). The default appears, which can be overridden for this specific appointment by going back into the field and entering another selection.

16. CHART (1-A-R)

Enter **Y** or **N** to indicate if the patient's chart is needed for this appointment. Entering **Y** causes the appointment to print on the Pull Chart List and the Outguide Cards in Medical Records. The initial value of this field is the value of the Requestor field in Resource Maintenance, but it can be adjusted if necessary. The default is pulled from the Resource Master.

17. & 18. ADDITIONAL COMMENTS 1 & 2 (36-C-O)

These two fields are freeform. This space is provided for two additional comments pertaining to this appointment. This information prints on resource schedules, and is retained for detail viewing in the patient appointment and revise appointment processor.

19. WORKING DIAGNOSIS (34-AN-R)

This is a table-driven field. The default response is the working diagnosis. If the working diagnosis is the valid diagnosis, press ENTER and the working diagnosis automatically displays in the field. If the diagnosis is different than the working diagnosis, enter the code that describes the patient's diagnosis.

If you do not know the code and intend to use the table lookup to search, please be aware of the following. Because there are so many possible diagnosis codes in the system, the table lookup for this field has been expanded. There are hospital-defined pointer tables which help you specify how to search for commonly used codes.

When entering actual codes, you can enter leading zeros or decimal points, but the system does not require them. For example, you can enter one of the following to initiate a code search:

- Enter **U** and a hyphen (**U-**) to display the entire pointer table in alphabetic order. Make your selection from this table.
- Enter **U**, an alpha character or characters, and a hyphen (**UA-**, **UB-**, etc.) to display the pointer table that begins with a specific alpha character. For example, entering **UAN-**, might cause the codes for Aneurysm, Angina, and Ankle Fracture to display if they have been built into the pointer table. Make your selection from this table.
- Enter a numeric digit (or digits) and a hyphen (**22-**, **250-**, etc.) to display the diagnosis table by specific numeric range of codes. For example, if you know that the code you are searching for begins with 22, enter **22-** and all the codes beginning with 022.0 (CUTANEOUS ANTHRAX) are displayed. Make your selection from this table.
- Enter a hyphen (-) to display the entire diagnosis table in numeric code order, i.e., starting with 001.0 (CHOLERA D/T VIB CHOLERA).

The code and the diagnosis description display. To override the table, enter a hyphen (-) followed by a freeform entry. If you enter a number which exists in the DSM Pointer table, the system displays the number followed by its corresponding description. This enables you to enter an admitting diagnosis that cannot be defined by an ICD code. If the number is not in the DSM Pointer table but is in the ICD Diagnosis Pointer table, the system displays the number followed by its description from the ICD Diagnosis Pointer table.

After you complete this screen, the following prompt is displayed:

Accept this screen? (Y/N/D) [Y]

When you accept this screen, the following screen is displayed:

General Hospital Walk-In Processor						
Unscheduled Appointment Screen Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
100004312	HARDERSEN, DUSTIN	M	02/03/05			
Resource				Appt Type		Appointment
ADAIR, FRANK				~ANGI		Tue 03/03/09 1102A
1 ADDITIONAL COMMENT #3						
01						
02						
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
Enter same resource(R), same date(T), both(B) or (NL)--						

This screen contains multiple lines of additional comment space that can be used for technical and clinical information (freeform text) about the appointment. This information is available for viewing and editing and is retained with the patient's appointment until that appointment is purged.

Impact

After you complete this screen, the following takes place:

- The appointment process is complete.
- The patient appointment information entered in the system can now be accessed through the patient, resource, department or nurse station functions available throughout the system.

Output

- If the New Visit field was completed with I, O, or U, this appointment information appears on the New Visit report.
- If the Referral Source field was completed, this patient appointment information appears on the Monthly Referral report.
- If the Transportation field was completed, this appointment information appears on the Transportation Schedule. If the appointment is being made for the same day, an online transportation notice prints on the department's designated printer.

- If the Chart Request field is Yes, this appointment information appears on the Chart Pull List and Outguide List when they are prepared. If the appointment is being made on the same day, a Stat Chart Pull Notice prints in Medical Records online.
- An online appointment notice or audit copy print as determined by the parameters set up in the Department Scheduling Code table.
- Walk-ins are totalled separately on the Clerk Productivity report.
- All appointments that are walk-ins and that are listed on reports are easily identified by the tilde (~).

After you complete and accept this screen, the following prompt displays:

Enter same resource(R),same date(T),both(B)or (NL)--

- Enter **R** to enter another Walk-In appointment for the same resource.
- Enter **T** to enter another Walk-In appointment for the same date on a different resource.
- Enter **B** to enter another Walk-In appointment for the same resource and same date.
- Press ENTER to return to the facility selection prompt, if applicable.

COPY APPOINTMENT

The Copy Appointment function is an option on a Scheduling Menu. This option enables the appointment detail of one appointment to be copied to the schedule of another resource or to another date of the original resource.

After selecting the Copy Appointment option, the following screen is displayed:

General Hospital Copy Appointment Processor
Mon May 06, 1994 05:03 pm

Copy from
Resources

Enter first letter(s)`, number, dept or `=` for current resource--

At this prompt, enter one of the following responses:

- Enter the first letters of the resource's name followed by a hyphen (-)
- Enter the number of the resource
- Enter the resource's department
- Enter an equal sign (=) to display the Copy From resource that is currently loaded in memory
- Press hyphen (-) and ENTER to display a list of the available resources

Upon selection of the resource, the following screen displays showing the departments and specialties for that resource.

```
General Hospital Copy Appointment Processor
                                Tue Mar 22, 1994 09:40 am

Copy from
Resource Codes
Page:01                      Departments/Specialties For This Resource
( 1) ANS,ANS,1-ADAMS,HAROLD R   Active
( 2) MED,CAR,1-ADAMS,HAROLD R   Active

Enter choice--
```

Enter the number that corresponds to your choice and a screen displays the selected resource's code and description in the top left corner of the screen. The following prompt asks you to enter the date:

Enter date [Today]--

The default is today's date. Press ENTER to automatically enter the default. Dates can be entered in a variety of formats. Refer to the Information Entry Techniques chapter in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details.

If there are no entries for the resource and date selected, a screen displays containing the following message:

No Entries Defined

If there are entries for the resource and date selected, the following screen is displayed:

```

General Hospital Copy Appointment Processor
PHYSICIAN: ANS,ANS,1 ADAMS,HAROLD R          Fri Mar 25, 1994 03:10 pm
Copy from
Page:01
Appointments for ADAMS,HAROLD R on 03/25/88
( 1) 100P FUP      20 DEAN,THERESA          A000101602          1E 2101-1
      FOLLOW UP

( 2) 200P FUP      20 MCCOY,LEONARD          A000101617          No Location
      FOLLOW UP

( 3) 300P FUP      20 JONES,DIANE            A000101614          No Location
      FOLLOW UP

Enter choice--

```

After you select the appointment to be copied, the following screen displays, enabling you to view the information to be copied. This information cannot be edited.

```

General Hospital Copy Appointment Processor
ROOM-----X: RAD,FL,9173 FLUOROSCOPY ROOM Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD   Room  Physician  SVC ICD Status
0013700001 JACKSON,LISA  F  05/14/59      ADAIR,FRANK C MED 10 OPT
1 Resource      2 Visit Type 3 Appointment
FLUOROSCOPY ROOM 1 (SCHD)      FLE      Thu 03/05/09 0100P
4 New Visit 5 Account      6 Service Department 7 Visit Reason
Yes      (A) Radiology      FLUOROSCOPY EXAM
8 Ord #      9 Length      10 Comment
30
11 Add'l Items      12 Referring Source      13 Referring Physician
      12 BAPTIST HOSPITAL      32 ADAIR,FRANK C
14 Ref Date      15 Transport      16 Priority      17 Display      18 Chart
02/16/09      W/C      ASAP      VIEW REASON      No
19 Additional Comment #1      20 Additional Comment #2

21 Working Diagnosis

Copy this appointment from RAD,FL,9173? (Y/N) [Y]--

```

Field Explanations

For detailed field explanations for this screen, see the Appointment Processor screen under Super Search.

Enter **Y** or press ENTER to copy this appointment information to another appointment.
Enter **N** to return to the previous screen.

If you entered **Y** in response to the previous prompt, the following screen displays the selected **COPY FROM** resource in the top left corner of the screen:

```

                                General Hospital Copy Appointment Processor
                                Mon May 06, 1994 05:03 pm

Copy to
Resources

Enter first letter(s) ` - ` , number, dept or ` = ` for current resource--

```

The prompt allows entry of the resource to which you want to copy the appointment. The standard search options are available to locate a resource. You can enter an equal sign (=) to default to the **COPY FROM** resource. This option is typically used when copying an appointment for the same resource to a different date/time for recurring scheduled treatments.

If you entered a resource's code and several resource ID codes exist, they display for selection. The following screen is an example of all the resource ID codes defined for resource #8, Tongen, Lyle A. If only one resource ID code is defined, this screen is bypassed.

```

                                General Hospital Copy Appointment Processor
PHYSICIAN: ANS,ANS,1 ADAMS,HAROLD R                                Mon Mar 28, 1994 03:49 pm

Copy to
Resource Codes
Page:01                                Departments/Specialties For This Resource
( 1) MED,MED,8-TONGEN,LYLE A    Active
( 2) MED,CAR,8-TONGEN,LYLE A    Active
( 3) OBG,MED,8-TONGEN,LYLE A    Active

Enter choice--

```

Enter the number that corresponds to the department/specialty to which you want appointment information copied, and the selected resource's code and description to which you are copying displays in the upper left corner of the screen. The following prompt asks you to enter the date:

Enter date [Today]--

The default is today's date. Press ENTER to automatically enter the default. Dates can be entered in a variety of formats. Refer to the Information Entry Techniques chapter in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details.

After you define the resource and date, the following screen displays:

```

                                General Hospital Copy Appointment Processor
PHYSICIAN: MED,CAR,8 TONGEN,LYLE A                                Tue Aug 7, 2001 09:30 am
Types:   CBC 10,FUP 30,CONS 60,GEN 30,LNCH 45
Date:    Tue Aug 7, 2001
Comment: NO LATE AFTERNOON APPOINTMENTS - DR. BROWN ON ROUNDS
Time  Type Pt/Fd Comment      Time  Type Pt/Fd Comment
900A  CONS  1/ 0              300P  CONS  1/ 0
900A  GEN   2/ 0              300P  GEN   2/ 0
930A  GEN   2/ 0              330P  GEN   2/ 0
1000A  CONS  1/ 0             400P  CONS  1/ 0
1000A  GEN   2/ 0             400P  GEN   2/ 0
1030A  GEN   2/ 0             430P  GEN   2/ 0
1100A  CONS  1/ 0             500P  CONS  1/ 0
1100A  GEN   2/ 0             500P  GEN   2/ 0
1130A  GEN   2/ 0
1200N  LNCH  0/ 0
100P  CONS  1/ 0
100P  GEN   2/ 0
130P  GEN   2/ 0
200P  CONS  1/ 0
200P  GEN   2/ 0
230P  GEN   2/ 0
Select appt time, new date, view(V), modify(M) or calendar(C)  (900A)--

```

The time of the original appointment in the series displays in parentheses. Respond by entering one of the following options:

- Enter the appointment time (without a colon)
- Enter a new date
- Enter **V** to view the appointment of your choice
- Enter **M** to modify the appointment of your choice
- Enter **C** to view the calendar for this resource

For detailed descriptions of the options listed above, refer to the first part of this chapter.

Select an appointment time from the previous screen and the following appointment verification screen is displayed:

```

                                General Hospital Copy Appointment Processor
PHYSICIAN: MED,CAR,8 TONGEN,LYLE A                               Thu Mar 31, 1994 11:39 am
Types:   CBC 10,FUP 30,CONS 60,GEN 30,LNCH 45
Date:    Thu Mar 31, 1994
Comment: COMMENT
Time  Type Pt/Fd Comment      Time  Type Pt/Fd Comment
 900A  CONS  1/ 0              300P  CONS  1/ 0
 900A  GEN   2/ 0              300P  GEN   2/ 0
 930A  GEN   2/ 0              330P  GEN   2/ 0
1000A  CONS  1/ 0              400P  CONS  1/ 0
1000A  GEN   2/ 0              400P  GEN   2/ 0
1030A  GEN   2/ 0              430P  GEN   2/ 0
1100A  CONS  1/ 0              500P  CONS  1/ 0
1100A  GEN   2/ 0              500P  GEN   2/ 0
1130A  GEN   2/ 0
1200N  LNCH  0/ 0
 100P  CONS  1/ 0
 100P  GEN   2/ 0
 130P  GEN   2/ 0
 200P  CONS  1/ 0
 200P  GEN   2/ 0
 230P  GEN   2/ 0
Add CONS-CONSULTATION for 03/31/88 1000A ? (Y/N) [Y]-- |

```

If you want to add this appointment to this resource's schedule by copying it from the original schedule, enter **Y** or press ENTER for the default (which is Y). If N is entered, the system returns to the prompt on the previous screen, prompting you to select a new appointment slot.

Entering **Y** on the previous screen causes the following screen to display. This screen provides another verification opportunity before actually copying the appointment information.

```

                                General Hospital Copy Appointment Processor
PHYSICIAN: MED,CAR,8 TONGEN,LYLE A                               Thu Mar 31, 1994 11:39 am

Copy 10:00am CONS on 03/31/88 with ANS,ANS,1-ADAMS,HAROLD R
to 10:00am CONS on 03/31/88 with MED,CAR,8-TONGEN,LYLE A

Accept? (Y/N)--

```

If you enter **Y**, the screen is accepted and the appointment information is copied from the first resource to the second resource. A copied message displays on your screen. After the last appointment screen in the series is accepted, the following summary screen is displayed:

General Hospital Multiple Appointment Summary Processor											
Thu Mar 05, 2009 04:43 pm											
No.	Name	Sex	BD	Room	Physician	SVC	ICD	Status			
000001840	JACKSON,LISA	M17 F	01/01/41								
#	Day	Date	Time	Type	Dpt	Resource	Reason	Status			
Page:01											
(1)	Wed	03/11	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(2)	Mon	03/16	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(3)	Wed	03/18	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(4)	Mon	03/23	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(5)	Wed	03/25	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(6)	Mon	03/30	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(7)	Wed	04/01	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(8)	Mon	04/06	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
(9)	Wed	04/08	0900A	TRMT	PT	PHYSICAL	THRPST A	TREATMENT	Pending		
Enter choice or `P` to print--											

If an appointment needs to be modified, you may enter the option number for that appointment and modify the appointment. Enter **P** to print the summary screen, which prints to the default printer for the CRT.

Impact

After you complete this screen, the following takes place:

- The appointment process is complete.
- The patient appointment information entered in the system can now be accessed through the patient, resource, department or nurse station functions available throughout the system.

Output

- If the New Visit field was completed with a Y, I, or O, this appointment information appears on the New Visit report.
- If the Referral Source field was completed, this patient appointment information appears on the Monthly Referral report.
- If the Transportation field was completed, this appointment information appears on the Transportation Schedule Census. If the appointment is being made for

the same day, an online transportation notice prints on the department's designated printer as identified in the Resource Department table.

- If the Chart Request field is Yes, this appointment information appears on the Chart Pull List and Outguide List when they are prepared. If the appointment is being made on the same day, a Stat Chart Pull Notice prints in Medical Records online.
- An online appointment notice or audit copy print as determined by the parameters set up in the Resource Department table.

PATIENT APPOINTMENT INQUIRY/AUDIT

The Patient Appointment Inquiry/Audit function is an option on the Scheduling menu. This function enables you to view patient appointments, providing a mechanism for quick confirmation of appointments by patient name rather than by resource. The print function provides a hard copy of a patient's appointment history or of pending appointments and the audits made to those appointments.

Once the patient is identified through the MPI search, you are prompted to enter **E** to edit the demographics (see the first part of this chapter) or press ENTER to continue.

The screens that are displayed specify which department, resource, and date are to be accessed, as follows:

```

General Hospital Patient Appointment Inquiry/Au Processor
                                Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD   Room  Physician  SVC ICD Status
000003057  TATE,ANNE  F  11/10/59
 1 Department Code      2 Resource      3 Date
->

Page:01                                Departments
( 1) ANESTHESIA (CHART/SCHED)----- (13) RDC JJJ
( 2) ARTHRITIS CLINIC (ALL)----- (14) MEDICINE (ALL)-----
( 3) TEST DEPARTMENT                (15) NURSE STAFF OFFICE (ALL)-----
( 4) CARDIOLOGY (CHART/SCHED)----- (16) OCCUPATIONAL THERAPY (ALL)----
( 5) CLINICAL NUTRITION              (17) PHYSICIAN (CHART/SCHED)-----
( 6) CODING/ANALYSIS (ALL)----- (18) DEPARTMENT PPP LOWER CASE
( 7) CHART ROOM                     (19) PSYCHIATRIC CLINIC (ALL)-----
( 8) CHART ROOM                     (20) PHYSICAL THERAPY (ALL)-----
( 9) CAT SCAN (CHART/SCHED)----- (21) VITAS TEST
(10) EKG DEPARTMENT (ALL)----- (22) RADIOLOGY THREE
(11) CHECK FFF DESCRIPTION          (23) RELEASE OF INFORMATION (ALL)--
(12) FAMILY MEDICINE CLINIC (ALL)-- (24) RRR LOWER CASE

Select a department or all(A) --
                                next pg(/ or PG DN)  Search(TAB)

```

```

General Hospital Patient Appointment Inquiry/Au Processor
Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD   Room  Physician  SVC ICD Status
000003057  TATE,ANNE    F  11/10/59
1 Department Code      2 Resource      3 Date
  PHYSICAL THERAPY (ALL)-- ->

Page:01                      Resources
( 1) *JOHNNIE ENGLISH
( 2) DOCTOR,FACILITY A
( 3) PHYSICAL THRPST A (ALL)-X
( 4) PHYSICAL THRPY ASST (ALL)
( 5) PHYSICAL THRPY DPT (ALL)X
( 6) WHIRLPOOL (ALL)-----X
( 7) ZELLER,HECTOR C

Enter choice--

```

```

General Hospital Patient Appointment Inquiry/Au Processor
Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD   Room  Physician  SVC ICD Status
000003057  TATE,ANNE    F  11/10/59
1 Department Code      2 Resource      3 Date
  PHYSICAL THERAPY (ALL)--  PT,PT,9150 PHYSICAL THRPST A (ALL)- ->

Enter history(H) or start date [Today]--

```

Field Explanations

1. DEPARTMENT CODE (TABLE LOOKUP-R)

Enter the department appointments you want to review. Either select the department code from the list that is displayed, or enter **A** to view all the department appointments for this patient.

2. RESOURCE (TABLE LOOKUP)

If a specific department was entered in the Department Code field, you are prompted here to select the particular resource you want to review. Select the resource's code from the list that is displayed. If you entered **A** in the Department Code field, this field is bypassed.

3. DATE (10-C-R)

If you enter **H**, the system displays the patient's appointment history, beginning with the first appointment. The retention time of historical information is defined during system design. If a specific date in the past is entered as the start date, the system only displays the patient's appointment history from that date to today. The system default is today's date, which displays the patient's pending appointments, along with letter information. This pending or historical information is displayed in the following format:

General Hospital Patient Appointment Inquiry/Au Processor									
Thu Mar 05, 2009 04:43 pm									
No.	Name	Sex	BD	Room	Physician	SVC	ICD	Status	
000003057	TATE, ANNE	F	11/10/59						
#	Day	Date	Time	Type	Dpt	Resource	Reason	Status	
Page:01									
(1)	Mon	03/09	0730A	CN15	FMC	OPEN, NEXT	-TEST AUDIT	Auto	
(2)	Thu	03/12	0900A	CN30	FMC	ADAIR, FRANK K	7691 MM MAMMOGRAM BI	Auto	
(3)	Sun	03/15	0100P	TRMT	PT	WHIRLPOOL (ALL)---	206 BODY WHIRLPOOL I	Auto	
(4)	Wed	03/18	1100A	TRMT	PT	WHIRLPOOL (ALL)---	TREATMENT	Resched	
(5)	Fri	03/20	0200P	TRMT	PT	WHIRLPOOL (ALL)---	TREATMENT	Cancel	
(6)	Sat	03/21	0300P	TRMT	PT	WHIRLPOOL (ALL)---	TREATMENT	Auto	
(7)	Mon	03/23	1130A	CTE	CT	CT SCAN ROOM 1 (SC	7831 NM BONE SCAN LI	Cancel	
(8)	Wed	03/25	0200P	TRMT	PT	WHIRLPOOL (ALL)---	BECAUSE	Resched	
(9)	Thu	03/26	0900A	CTN	CT	CT SCAN ROOM 1 (SC	7420 XR ABD SUPINE &	Resched	
Enter choice or `P` to print--									
next pg(/ or PG DN) Search(TAB)									

The appointments on this screen are listed in chronological order. Possible status indicators include no-show, filled, cancelled, pending, wait list, rescheduled, checked in, and checked out. Historical appointments may have the Auto status displaying. *Auto* (automatically) indicates that the status of that appointment was not logged, and during midnight processing the system automatically set the status.

Letter information on this screen includes the type of letter, the date it was generated, and the print status of either *printed* or *not printed*. This flag is a mechanism to note unfinished record keeping without maintaining a number of appointments with the pending or no show status. It can be updated through End of Day processing for days within the recent past (14 days).

If you enter **P**, the appointment list prints at the default printer for the CRT or is downloaded to the physician's PC. The system then returns to the appointment list.

The prompt asks you to enter your choice of appointment to be viewed. If any information on the appointment has been changed at any time, the following screen displays the appointment information along with the dates and times of the change, the ID code and initials of who made the changes, and the items that were edited. An audit is created when the appointment is created, revised, rescheduled, or canceled from the Appointment, Revise Patient Appointment, Procedure Scheduling, or Reschedule/ Reserve/Move and Reschedule List functions.

General Hospital Patient Appointment Inquiry/Au Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000001001	JACKSON, LISA	F	05/14/59			
1 Resource			2 Visit Type	3 Appointment		
FLUOROSCOPY ROOM 1 (SCHD)			FLE	Thu 03/05/09 0500P		
4 New Visit	5 Account	6 Service Department		7 Visit Reason		
Yes		(A) Radiology		FLUOROSCOPY EXAM		
8 Ord #	9 Length	10 Comment				
	30					
11 Add'l Items	12 Referring Source		13 Referring Physician			
	12 BAPTIST HOSPITAL		32 ADAIR, FRANK C			
14 Ref Date	15 Transport	16 Priority		17 Display		18 Chart
03/04/09	W/C	ASAP		VIEW REASON		No
19 Additional Comment #1			20 Additional Comment #2			
21 Working Diagnosis			22 Check-In Time		23 Check-Out Time	
Page:01 Action Date			Entered By		Reason/Edit Fields	
(1) 03/05 0445P			#22193 K B		*Cre-Pend*	
Select # to display Audit, 'P' to Print or NL to continue						

Field Explanations

For detailed field explanations (except fields 21 and 22) for this screen, see the Appointment Processor screen under Super Search.

The Check-In Time and Check-Out Time fields reflect the time the patient arrived and departed the clinic or department, as entered via the Check-in function.

The system does not allow nursing stations to access any patients via this function except those that are currently on their station or those that were there previously. There is no access to the demographic screen for nursing stations.

This information is available for viewing only. Any revisions of this information must be performed through the Revise Patient Appointment function described in the next portion of this chapter.

If no information on the appointment has been revised, the following message is displayed at the bottom of the screen:

No Audits Exist!

When an appointment is created, it lists in the audit summary with a reason of *Cre-Pend*. If this item is selected, no additional screens are displayed since there is no revision information to show.

If a specific edit option is selected, the following screens display both the previous and current versions of any fields changed:

General Hospital Patient Appointment Inquiry/Au Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
001200905	TATE, ANNE	F	01/01/32			
		Previous		Revised		
Ref Phys.....	JEKYL, JONAS J			*WOODSTOCK GROUP		
Transport.....				WHLCHR		
Priority.....				ASAP		
Appt Length.....	30			45		
Revised By: Oliver, Mindy On 12/10/01 16:13						Revised Pending
Enter Next Page() <NL> exit						

General Hospital Patient Appointment Inquiry/Au Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
001200905	TATE, ANNE	F	01/01/32			
Addl Comment #1:			Previous		Revised	
S/W PT. EXPRESSED CONCERN RE. WATER						
Diagnosis/Complaint:			Previous		Revised	
724.5-BACKACHE NOS						
724.8-OTHER BACK SYMPTOMS						
Revised By: Oliver, Mindy On 03/04/09 16:13						Revised Pending
Enter Previous Page(/P) Next Page(/) <NL> exit						

General Hospital Patient Appointment Inquiry/Au Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
001200905	TATE, ANNE	F	01/01/32			
Comment #3: Previous						
CONTACT DR.'S NORTHSIDE OFFICE FOR SPECIFIC INSTRUCTIONS						
Revised						
CONTACT DR.'S FRANKLIN OFFICE FOR SPECIFIC INSTRUCTIONS						
Comment #4: Previous						
Revised						
Revised By: Oliver, Mindy On 12/10/09 16:13						
Revised Pending						
Enter Previous Page(/P) <NL> exit						

The following screen is displayed regardless of whether there are audits to the appointment.

General Hospital Patient Appointment Inquiry/Au Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
001200905	TATE, ANN	F	01/01/32			
Resource				Appt Type	Appointment	
CARDIAC REHAB				CN45	Mon 03/14/09 0400P	
1 ADDITIONAL COMMENT #3						
01	CONTACT DR. FRANKLIN'S OFFICE FOR SPECIFIC INSTRUCTIONS					
02						
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
Press NL--						

REVISE PATIENT APPOINTMENT

The Revise Patient Appointment function is an option located on a Scheduling Menu. It is used to review, edit or cancel patient appointments. As with the Patient Appointment Inquiry/Audit function, the selection of the patient, an option to edit demographics, and the specification of the department, resource and dates to be accessed are entered to access the revision screen. (See previous information in this chapter for detailed descriptions and examples of these capabilities.) Both historical and pending appointment information can be displayed and revised through this function.

The Check-In and Check-Out fields can be edited here, but initial data cannot be entered through the Revise Patient Appointment function. The appointment status can only be set to check-in or check-out by using the Check-In or End of Day functions.

If an historical appointment is selected, the following prompt displays:

Enter field number or '/' starting field number--

Select the field number of the data to be edited.

After selecting the appointment you want to revise, the following screens are displayed. If Scheduling Letters are defined to print online for this resource, the Scheduling Letter Options are available for selection. For information on this function, see the material immediately preceding the Impact statement.

General Hospital Revise Patient Appointment Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
100004312	HARDERSEN, DUSTIN	M	03/19/57			
1 Resource			2 Visit Type	3 Appointment		
FLUOROSCOPY ROOM 1 (SCHD)			FLE	Thu 03/05/09 0100P		
4 New Visit	5 Account	6 Service Department		7 Visit Reason		
Yes		(A) Radiology		FLUOROSCOPY EXAM		
8 Ord #	9 Length	10 Comment				
	30					
11 Add'l Items	12 Referring Source		13 Referring Physician			
	12 BAPTIST HOSPITAL		32 ADAIR, FRANK C			
14 Ref Date	15 Transport	16 Priority	17 Display		18 Chart	
02/16/09	W/C	ASAP	VIEW REASON		No	
19 Additional Comment #1			20 Additional Comment #2			
21 Working Diagnosis			22 Check-In Time		23 Check-Out Time	
Enter field number or '/' starting field number--						

You can make revisions to the appointment length from the Revise Patient Appointment function if the Extend Schedule field for the Maintenance Resource is set to Yes. If the Extend Schedule field for the Maintenance Resource is set to No, and you attempt to revise the appointment length, the following error message displays:

Error: Time adjustments not permitted!

If the Insert Times field for the Maintenance Resource is set to Yes, the appointment length is revised upon acceptance of the screen, and no collapsing of the schedule is performed. If the Insert Times field is set to No, the collapsing process that is already in place when the appointment length is modified during initial appointment entry is applied.

If the appointment length is increased and the appointment slots following the appointment being revised are the same appointment type, the slots are automatically collapsed. If an appointment slot has been collapsed and the appointment length is decreased, the following question is asked upon exiting the field:

Slot was collapsed, restore previously collapsed slot? (Y/N).

If you enter Y, the slots that were previously collapsed are restored.

General Hospital Revise Patient Appointment Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
100004312	HARDERSEN,DUSTIN	M	03/19/57			
1 ADDITIONAL COMMENT #3						
01						
02						
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
Change resource(R), time/date(T), cancel appointment(C), or continue(NL)--						

General Hospital Revise Patient Appointment Processor						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
100004312	HARDERSEN, DUSTIN	M	03/19/57			
Resource				Appt Type	Appointment	
CARDIAC REHAB				CN45	Mon 03/02/09 0900A	
1 ADDITIONAL COMMENT #3						
01						
02						
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
Change resource(R), time/date(T), cancel appointment(C), or continue(NL)--						

Field Explanations

For detailed field explanations for these screens, see the Scheduled Appointment screen under Super Search.

The Check-In Time and Check-Out Time reflect the time the patient arrived and departed the clinic or department, as entered via the Check-in function.

The system does not allow nursing stations to access any patients via this function except those that are currently on their station or those that were there previously. There is no access to the demographic screen for nursing stations.

Once the screen is accepted, the system returns you to the Appointment Selection screen. If no edits are made to the appointment screen and you press ENTER at the *Enter field number or '/' starting field number* prompt, the system displays the following prompt:

Change resource(R),time/date(T),cancel appointment(C),or continue(NL)--

You can then select one of the following options:

CHANGING RESOURCE (R)

The system asks for a new resource and date, then displays the appointment screen needed to process a new appointment for this patient.

CHANGE TIME/DATE (T)

If the same resource is to be scheduled, but for a different time and/or date, this option takes you through the appointment screen for a new appointment.

CANCEL APPOINTMENT (C)

Select this option if the patient wants to cancel their appointment without rescheduling another one.

ENTER

If ENTER is pressed, the system returns you to the prompt for selecting another scheduling department for appointment revision.

For each of these options, the system cancels the old appointment before making a new appointment. The slot for the initial appointment is reopened for availability to another patient, if the appointment selected was a pending appointment.

NOTE: When you cancel an appointment which is collapsed from multiple slots into a single slot, the system displays the following prompt:

This slot was collapsed, restore previously collapsed slots? (Y/N) --

Enter **N** to restore only one appointment slot. Enter **Y** to restore the appointment to the number of slots defined in the Resource's Master. Enter **Y** to restore the collapsed appointment to its original number of slots.

The following example illustrates:

An exam appointment type length is 30 minutes. All appointment slots allow two patients per slot. A 9:30 am and a 10:00 am slot each have one patient scheduled.

Using the (#/#) format, the first number indicates the total number of possible appointments for the slot. The second number indicates the number of patients assigned to the slot.

Prior to scheduling an appointment, the time slots are available as follows:

0930 EXAM (2/1)

1000 EXAM (2/1)

1030 EXAM (2/2)

1100 EXAM (2/0)

1130 EXAM (2/1)

When an appointment is needed for 60 minutes instead of 30, a 9:30 am and 10:00 am slot is collapsed into one 60 minute slot at 9:30 am. To reflect the collapsed appointment on the schedule, the number of patients at 9:30 is increased by one and the number of possible slots at 10:00 am is reduced by one. After a 60 minute appointment is made at 9:30 am, the schedule displays the time slots as follows:

0930 EXAM (2/2)

1000 EXAM (1/1)

1030 EXAM (2/2)

1100 EXAM (2/0)

1130 EXAM (2/1)

The original profile of the Resource's Master is set-up as follows:

0930 EXAM (2/0)

1000 EXAM (2/0)

1030 EXAM (2/0)

1100 EXAM (2/0)

1130 EXAM (2/0)

When the 0930 appointment is cancelled, the appointment length (which has been collapsed to 60 minutes) is compared to the normal length of an appointment for the appointment type being cancelled. In this example, the normal length of an EXAM appointment is 30 minutes. The length of 60 minutes is greater; therefore, the system assumes a collapse has occurred.

Restoring the collapsed appointment to its original format from the Resource's Master reduces the number of patients by one for the 9:30 am appointment. Simultaneously, the number of possible patients for the 10:00 am appointment increases by one. After a cancellation of a collapsed appointment, when the slots have the same appointment type, the schedule displays as follows:

0930 EXAM (2/1)

1000 EXAM (2/1)

1030 EXAM (2/2)

1100 EXAM (2/0)

1130 EXAM (2/1)

For more information regarding the ability to collapse and uncollapse (or cancel) schedule slots, refer to the Insert Times field of the Resource Master Scheduling Parameters located in the Resource Maintenance chapter of this manual.

If the Scheduling Letter Options function is available and you select one or more options to generate, the system displays the following prompt:

Annotate letter? (Y/N) [N] --

When you accept the default, a predefined letter prints. If you enter **Y** (Yes), you can enter additional text to the predefined letter. This text prints in addition to the predefined letter.

Impact

After you accept this screen, the following takes place:

- Any revisions to appointment information or cancellation of appointments appear as appropriate through the online inquiry function throughout the product.
- If an appointment is cancelled, and another patient exists on a wait list for this resource, the system displays a reminder message to process the patient from the wait list, now that an appointment slot is available.

Output

After you accept this screen, the following prints:

- If any of the appointment information is revised, a Revised Appointment Notice and/or Revised Audit Notices may print based on the department's parameters identified in the Resource Department table.
- If the appointment is cancelled through this function, a Cancel Appointment Notice and/or a Cancel Audit Notice print based on the department's parameters identified in the Resource Department table.

- If the TRANSPORT field is revised, a revision Transportation notice prints on the printer identified for the department in the Resource Department table. The old and new transportation prints on the notice.
- The Monthly Status report reflects the cancellations.

CHECK IN-OUT

The Check-In and Check-Out functions are used to process patients on the day of their appointment. These functions refer to the documenting of times the patients actually arrive or leave the clinic or department for their appointment. The completeness and accuracy of this information helps to optimize the use of the statistical and reporting features of the system.

When STAR Radiology is in the network, check-ins can be automatically updated in the *Patient Scheduling Module*. Any orders placed, either through STAR Patient Care or STAR Radiology, that are checked in on the Radiology system are automatically checked-in in the *Patient Scheduling Module* if the patient has a corresponding appointment.

The patient's appointment must have the same department and SIM code as the Radiology order. The system takes the check-in date sent by the Radiology system and searches for an available appointment for the same date, department, and SIM code. It checks in the first appointment it finds regardless of the time, resource or account number.

If the appointment is already linked to an account number, the status is changed to Filled and Checked In (F/I). If there is not an account number linked to the appointment, the status is changed to Checked-In only. These must be manually filled through the Check In/Out or End of Day processors.

If the Radiology system is checking in multiple SIM items under the same check-in, the Scheduling system searches through available appointments for each of the SIM items to see if the appointment exists for each. It checks in only one appointment for each SIM item. If a patient has multiple appointments with the same SIM item, it only checks in the first appointment it finds.

In order for this to occur, the department code used as the Scheduling department and Radiology SIM department must be the same. If the STAR Patient Care department is the same as well, the check-in is also updated under the Visit Check-In Processor. The STAR Patient Care function only shows one check-in per department per day regardless of the number of appointments/orders actually checked in.

After selecting this option, a screen displays containing the following prompt:

Enter `R` for Resource or `P` for Patient selection [R]--

Check-In and Check-Out can be performed by accessing the resource or the patient. The default is R for resource; you can press ENTER or enter **R**. If you select the resource, the system displays the appointments that are available for selection. At this point, the procedure becomes the same as if a patient had been selected. The following example assumes that you are selecting the patient option (**P**).

The following prompts prompt you to select the patient through the MPI Inquiry function.

Enter Unit No, name, '=' for current--

'-'Social Security No, '#'Corporate No, '%'name for soundex, '*' Account No

This prompt represents the standard MPI inquiry function (refer to the appropriate *STAR Patient Care Reference Guide, Patient Processing Module* for details). After you select a patient, the system displays a list of the patient's appointments for today's date only, as shown below. You can select up to 10 appointments from the list for processing. A *No Entries Defined* message displays if no appointments have been defined for the selected patient.

General Hospital Check In-Out Processor							
						Thu Mar 05, 2009 04:43 pm	
No.	Name	Sex	BD	Room	Physician	SVC	ICD Status
0004700004	TATE, ANNE	F	11/10/59	100-01	JAMES, STEVEN	10	PTA 91
Page:01		Appointments				##=Current Choices	
Time	Type	Resource	Reason	Account#	Status	Priority	
(1) 0900A	SUR	FMC, SUR, 32	SURGERY	0004700004	Pending		
Enter choices (e.g. 1,7,5-9) or '-'choices to remove--							
end select(NL)							

The following screen displays after you select the appointment(s) you want to check in or out, edit, or cancel:

General Hospital Check In-Out Processor
Wed Mar 16, 1994 01:47 pm

1000A GENERAL for DEAN,THERESA Pending
Enter cancel(C), edit(E), check in(I), check out(O) or continue(NL)--

The following options are available for each appointment:

- Enter **C** to cancel the appointment. The system asks for verification.

For information regarding the cancellation option, see [Revise Patient Appointment](#).

- Enter **E** (edit) to change any of the appointment data or to enter a check in/out time. The current system time is the default for the Check-In time field. The Check-Out time field must be entered manually. If the appointment is linked to an account number, accessing the appointment with this function causes the display to change to Filled, which means the patient appointment is checked in and an account number linked.

The Edit function can be used to link the visit to the proper account number if it was not done at the time the appointment was made. Change the New Visit field to No and select the proper account number from the list that displays.

The Edit function can also be used to cancel or change an appointment. This is not actually done in Edit mode, but by pressing ENTER and entering Y when you are asked if this appointment is to be deleted. The system begins working like the Revise Patient Appointment function, by either accepting R to reschedule the appointment for another resource and time, by accepting T for the same resource at a different time and/ or date, or by accepting C to cancel the appointment.

If you enter **E** (Edit) the following screen displays. For detailed field explanations (except fields 21 and 22) for this screen, see the Appointment

Processor screen under Super Search. For information on revising the appointment length, see [“REVISE PATIENT APPOINTMENT” on page 2-68](#)

General Hospital Check In-Out Processor									
Appointment Check-in Screen Thu Mar 05, 2009 04:43 pm									
No.	Name	Sex	BD	Room	Physician	SVC	ICD	Status	
0004700004	TATE, ANNE	F	11/10/59	100-01	DOCTOR, ADMITT			PTA 91	
1 Resource			2 Visit Type		3 Appointment				
ADAIR, FRANK C			SUR		Tue 03/10/09 0900A				
4 New Visit	5 Account	6 Service Department			7 Visit Reason				
No	0004700004	MISCELLANEOUS			SURGERY				
8 Ord #	9 Length	10 Comment							
	30								
11 Add'l Items	12 Referring Source				13 Referring Physician				
14 Ref Date	15 Transport	16 Priority			17 Display		18 Chart		
					VIEW REASON		Yes		
19 Additional Comment #1				20 Additional Comment #2					
21 Working Diagnosis				22 Check-In Time			23 Check-Out Time		
Enter field number or '/' starting field number--									

- Enter **I** (Check-In) to enter the current system time which is the default for this field. The status becomes Checked-In if no account number has been entered, or F/I (filled in) if an account number has been linked to the appointment. This option is a quick way to check a patient in without viewing the patient appointment data screen. This field is conditional.
- Enter **O** (Check-Out) to enter the current system time which is the default for this field. The status becomes Checked-Out if no account number has been entered, or F/I/O (filled/check-in/check-out) if an account number has been linked to the appointment. This option is a quick way to check a patient out without having to view the patient appointment data screen. This field is conditional.
- Press ENTER to make no changes and to return to the prompt for selection of another patient or resource.

Impact

After you accept this screen, the following takes place:

- If the status of an appointment is changed to Checked-Out, this appointment no longer appears on the Check-In/Out processing list.
- A hospital-defined parameter determines if check-ins performed in Scheduling should be automatically updated in the STAR Patient Care Visit Check-in Processor. If this parameter is set to yes, the department associated with the appointment being checked in is logged as a check-in in STAR Patient Care.

For this to occur, the Scheduling departments and STAR Patient Care departments must match.

Output

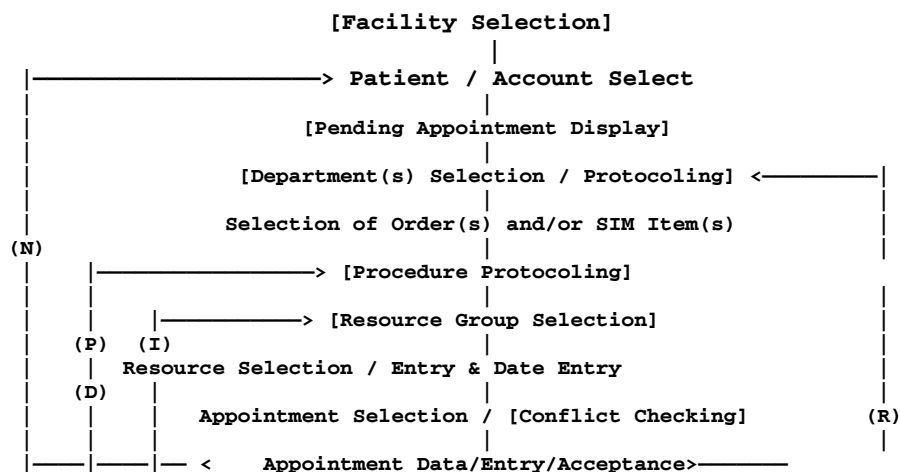
- The patient appointment status reflects any updates throughout the reports as appropriate.

If the appointment data is revised, appropriate appointment, audit, and transportation notices print as if the data had been revised through the Revise Patient Appointment processor.

PROCEDURE SCHEDULING

This section describes the purpose and processing of the Procedure Scheduling function which allows appointments to be scheduled or placed on a Wait List based on the procedure rather than by requiring the selection of a resource first. You can select one or multiple SIM item(s) and/or Order(s) from multiple departments for scheduling. If multiple items are being scheduled, they are resequenced based on the department's priority defined in the Department Scheduling Priority table and the procedure's priority defined in the Procedure Scheduling Parameters functions.

After you select the procedure to schedule, the listing of resource groups (primary/secondary/additional) displays for selection if defined in the Procedure Scheduling Parameters processor. Once selected, the resources contained in that group display for selection as defined in the Resource Group table. The following describes the flow and process upon selection of the Procedure Scheduling function.



Items in brackets [] indicate conditional or optional steps that may or may not display based on file setup and patient activity.

The (R) option is conditional based on the use of Resource Groups.

Facility Selection

If the hospital is set up as multifacility and the PC is set up to access more than one facility, the system displays the valid facilities and the prompt enables selection of the appropriate facility. This is not based on whether or not the Resource file is split by facility.

If only one facility is defined, or if the PC can only access one facility, the facility contained in the CRT table is assumed, and the facility selection screen is bypassed. Press period (.) and ENTER to return to the menu.

Patient/Account Selection

After you select the facility, the following prompt displays asking you to identify the patient for whom the appointment(s) are being scheduled:

Enter Unit No, name, '=' for current--

*'-' Social Security No, '+' Corporate No, '%' name for soundex, '**' Account No*

This prompt represents the standard MPI inquiry function (refer to the *STAR Patient Care Reference Guide General Information Volume* for details). You can access the patient through any of the options described in the prompt. If you cannot locate the patient in the MPI, you can enter **A** to add the patient to the MPI without a unit number.

The unit number assignment takes place when the patient is admitted or issued by Medical Records based on your procedures. If you select a patient or enter **A** to add a patient, the Patient Demographic screen appropriate for your financial system displays enabling you to enter patient data. If a patient is selected that does not have a unit number for the selected facility, the following message:

No medical record # for this facility!

displays prior to displaying the patient demographic screen. If you did not select a patient or enter **A** to add and press ENTER or period (.) ENTER was entered, you are returned to the MPI search prompt to enter other search criteria.

The following screen is an example of the demographic screen displayed when STAR Financials is the financial system:

General Hospital Procedure Scheduling Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000003402	TERRY, CLAIM A	F	02/14/50			
1	Name		2 Soc Sec Number			
	TERRY, CLAIM A					
3	Birthdate	Age	4 Sex	5 Race	6 Address Line 1	
	02/14/1950	55Y	FEMALE	1 CAUCASIAN	322 NORTH	
7	Address Line 2			8 City	9 State	
				CITYFORMODELHOS	GA	
10	ZIP Code	11 Phone	12 Phone Message		13 Alt/Confidential Add-Ph	
	30346				No	
14	Primary Care Physician					
	1 ADAMS, JAY M					
15	Invalid Address/Phone					
Accept this screen? (Y/N) [Y]--						

If the screen contains fields that have not been completed, the cursor goes to the first blank field and processes each remaining field as entries are made. If you do not want

to enter any data, press period (.) ENTER and the prompt enabling selection of a field displays as in the previous example screen. If all fields are completed, the insurance screen displays.

```

General Hospital Procedure Scheduling Processor
Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD  Room  Physician  SVC ICD Status
000000926  TATE,ANNE    F  01/11/66
Page:01      Master Insurance
( 1) 100300 P MEDICARE PART B ONLY      02/27/09      COB 1

Enter choice , (Q) MSP--

```

Make a selection at this prompt to display the listing of the patient's active accounts.

If the patient has current active accounts, they display for selection. If the patient does not have any active accounts, this screen is bypassed and the appointment to be scheduled is assumed to be associated with a new visit.

The following screens are examples of what displays when the patient has active accounts. The display can be one line or two, depending on the settings of the Diagnosis and Admission Times fields in Admission and General Parameters. If either field is set to Yes, the display is two lines.

One-line display:

```

General Hospital Appointments Processor
Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD  Room  Physician  SVC ICD Status
000002570  TATE,TOM      M  01/01/65

Pb ID Number  Type  Physician      Svc FC  Adm Date  Expected  ELT
1 @ A 0417700001  O/P  MAURY,JENNIFER  MED S  02/25/09  02/25/09  10:49
2 ! A 0413900001  LIC  BABB,GARY H     CAR L  02/18/09           37

Select account # or NEW LINE if appointment is for a new visit [NEW VISIT]--

```

Two-line display:

General Hospital Appointments Processor								
Thu Mar 05, 2009 04:43 pm								
No.	Name	Sex	BD	Room	Physician	SVC	ICD Status	
000002570	TATE,TOM	M	01/01/65					
Pb	ID Number	Type	Physician	Svc	FC	Adm Date	Expected	ELT
1	@ A 0417700001	O/P	MAURY,JENNIFER 791.1-CHYLURIA	MED	S	02/25/09	09/25/09 11:19	10:49
2	! A 0413900001	LIC	BABB,GARY H 300.23-SOCIAL PHOBIA	CAR	L	02/18/09		37

Select account # or NEW LINE if appointment is for a new visit [NEW VISIT]--

The prompt enables selection of one of the displayed accounts if the appointments to be scheduled relate to one of these accounts. If the appointments relate to a new visit, press ENTER.

If an account is selected, the New Visit field in the Appointment Detail screen is automatically set to No and the ACCOUNT # field set to contain the selected account number. Selecting an account number also enables the selection of existing orders from Order Inquiry for scheduling. The patient heading line is replaced with Active Account information. The Unit Number is replaced by the Account Number. The patient's room, physician, medical service and status now display.

If you press ENTER, the New Visit and Account # fields are accessed when the Appointment Detail screen displays. The NEW VISIT field must be accessed so that you can indicate if the new visit relates to an inpatient, outpatient or unknown. This option does not enable selection of an order since the appointment is going to relate to a new visit that has yet to be created or any orders placed.

If you press period (.) ENTER, you are returned to the Facility Selection screen.

If you select an account or press ENTER, the patient's appointment activity beginning with the current date is checked.

If the patient has appointment information starting with the current date (not historical), the following screen displays. If no activity exists, this screen is bypassed.

General Hospital Procedure Scheduling Processor									
Thu Mar 05, 2009 04:43 pm									
No.	Name	Sex	BD	Room	Physician	SVC	ICD	Status	
000000926	TATE, ANNE	F	01/11/66						
Page:01									
#	Day	Date	Time	Type	Dpt	Resource	Reason	Status	
(1)	Thu	04/23	1200M		FMC	ADAIR, FRANK C		Walk-In	
(2)	Thu	04/23	1241P	~WI	FMC	ADAIR, FRANK C	WALK-IN	Walk-In	
(3)	Thu	04/23	1253P	~WI	FMC	ADAIR, FRANK C	WALK-IN	Walk-In	
Enter choice to view detail or NEW LINE to continue [continue]--									

The prompt enables you to select an appointment to view the detail or press ENTER to continue processing. If an appointment is selected, the Appointment Detail screen displays enabling you to view information entered for the appointment. No revisions can be made to the displayed data. Press ENTER to return to the listing of appointments.

Appointment data is secured from displaying and from being accessed in the same manner as found in other Scheduling functions. You are only allowed to select appointments associated with departments that this PC is allowed to access as defined in the Scheduling Departments field of the CRT Table. If an appointment is selected from a department not contained in this field for this PC, the following message displays:

Wrong Department!

The list of appointments remains and the original prompt redisplay.

If an appointment has display security set (Restrict Reason or Restrict Name), then the summary information displayed on the screen is restricted if it is from a department that this PC is not allowed to schedule for. For additional information on the screen displayed or field processing, please refer to the Patient Appointment Inquiry/Audit section of this document.

SIM Department Selection/Protocols

After you identify the patient and view the appointment information, the system displays the list of SIM departments contained in the Ordering Departments field in the CRT table for this PC.

The following screen displays enabling selection of one or multiple departments:

General Hospital Procedure Scheduling Processor							
Thu Mar 05, 2009 04:43 pm							
No.	Name	Sex	BD	Room	Physician	SVC	ICD Status
9808900001	TATE, ANNE	F	01/11/66	CCU-03	SILVA, MD A	MED	CCU 31
Page:01		Departments to Schedule				##=Current Choices	
(1) (A) Radiology				(17) DIETARY (A)			
(2) (B) Cat Scan				(18) DIETARY (B)			
(3) (B) Diag Imaging				(19) EEG			
(4) (B) MRI				(20) EMER DPT PHYSICIANS			
(5) (B) Nuclear Medicine				(21) EMERGENCY DEPARTMENT			
(6) (B) Ultrasound				(22) INTENSIVE CARE UNIT			
(7) (C) CV Lab				(23) LABOR & DELIVERY			
(8) (C) Diag Imaging				(24) Laboratory			
(9) (C) Nuclear Medicine				(25) LABORATORY 2			
(10) ANESTHESIA				(26) LABORATORY 3			
(11) CARDIOLOGY				(27) MEDICAL/SURGICAL			
(12) CENTRAL SERVICES				(28) MISCELLANEOUS			
(13) CLINICAL NUTRITION				(29) Nourishments			
(14) CORONARY CARE UNIT				(30) NURSERY			
(15) Department Consults				(31) OBSTETRICS/GYNOCOLOG			
(16) DIETARY				(32) OCCUPATIONAL THERAPY			
Enter choices (e.g. 1,7,5-9) '-' to remove [All]--							
end select(NL) next pg(/ or PG DN) Search(TAB)							

The prompt enables you to enter one or multiple departments using standard entry techniques or press ENTER for all displayed SIM departments. This screen displays only if the Ordering Departments field in the CRT Table contains multiple SIM departments for this PC.

If only one SIM Department is defined, the department is assumed and this screen bypassed. This also bypasses the Department protocoling process since only one department is identified. Press period (.) and ENTER to return to the list of the patient's active accounts. Once all selections have been made, press ENTER to end department selection and resequence the departments in priority order.

If you selected multiple departments, they are resequenced (protocolled) based on the priority of the SIM department set up in the Department Scheduling Priority table. Any departments with the same priority are considered equal and are retained in alphabetical order. If a department does not have a priority defined, it is treated as if it were the lowest priority.

The resequenced departments redisplay enabling selection of the department to process first. The following prompt displays enabling selection of the department you want to schedule first:

Enter Choice--

Select the department to be used in selecting orders/SIM items to be scheduled.

If you selected only one department, or if the CRT only has ordering capabilities for one department, then department resequencing (protocoling) is bypassed. The single department is used in remaining processing.

Upon completion of the Department Selection and Protocoling process, the Order/SIM Item selection process begins.

Order/SIM Item Selection

Once the SIM Department to schedule is identified, the system displays the orders entered for the selected department if an account number was selected. This screen is bypassed if an account number was not selected or if there are not any orders for the selected department.

If orders have been entered for the selected department, the following screen displays in the same manner as found in Order Inquiry beginning with today's date:

```

General Hospital Procedure Scheduling Processor
                                     Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD   Room  Physician  SVC ICD Status
90172-00001  DAVISON,HAROLD  M  02/02/45  1107-1  SMITH,RICHARD  MED 10  I/P 104

Orders for  Selected Departments During the 24 Hours Ending  03/05/09

No Ord# Dep Description                      Ord'd  Req'd  Type      Status
      (~`=recurring,`^`=1st recurring)
1  001  RAD CHEST ENHANCED                      04:20P  05:00P  Order-Cmp
2  001  RAD ABDOMEN COMB ORAL CONT              04:20P  06:00P  Order-Cmp

                                     End of orders for above date

Enter number to view detail/schedule --
                                     End selection(NL), next page(/)

```

The patient's orders for the selected department display beginning with today's date. If more orders exist for this date than can fit on one screen, the system allows you to enter slash (/) and ENTER to view the next page of orders. Once all orders for that date display, the message *End of orders for above date* displays above the prompt. Once all orders for all dates have been displayed, the message *No more orders!* displays above the prompt. Press period (.) ENTER to return to the list of protocolled departments.

If you select an order, the order detail displays. The screen that displays is the same screen that is used with Order Inquiry Detail, which can vary between SIM departments. The following prompt displays:

```

Enter Schedule(s)--
      (0 orders selected) next order(/) [/]--

```

The screen displays the order detail and enables entry of **S** to select the order for scheduling. If the order isn't going to be scheduled, press period (.) and ENTER to return to the summary display of orders, or press ENTER to view the detail on the next ordered item. If you enter **S** to schedule a displayed order, the item is retained for later scheduling and the next order displays.

As orders are selected for scheduling, the number of orders selected to that point are incremented. The total number of orders selected displays below the prompt. You cannot schedule more than 14 items in the same scheduling session. This includes both orders and other SIM Items that can be added in the next process. To end order selection, press ENTER at the summary listing of orders. The following screen displays showing the orders you selected for scheduling:

General Hospital Procedure Scheduling Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
90172-00001	DAVISON, HAROLD	M	02/02/45	1107-1	SMITH, RICHARD	MED 10 I/P 104
Department : Radiology						
Service Item(s):				Ord #	Req'd Date/Time	

(1)	1111 CHEST ENHANCED			001	03/05/09 500P	
(2)	2222 ABDOMEN COMB ORAL CONT			001	03/05/09 600P	
Enter description`-` or item codes sep. by ','s to add items--						

The screen displays the Department, Service Item Code & Description, the Order Number, and the Requested Date/Time associated with the selected order(s). The prompt enables you to select additional SIM Items to be scheduled from the same SIM Department as the ordered item(s).

You can enter the SIM Item codes if you know them separated by commas or enter a part of the SIM Item description followed by a hyphen (-) to select one or multiple items from a partial listing. If you enter an invalid code, the following error message displays before redisplaying the original prompt:

Error: Invalid Code!

As items are added, the screen is updated with the new SIM Items.

When performing Procedure Scheduling from a "nursing CRT," the SIM items marked as "non-orderable" or "suppress from nursing" do not display when performing an alpha lookup to place orders. "Suppress from nursing" items are accessible if the SIM code is entered directly. A "nursing CRT" is defined as a CRT which cannot charge for the selected department.

Press ENTER once all items to be scheduled have been entered. If you press period (.) and ENTER to return to the screen displaying the patient's orders. If you return to the order summary screen, any items already selected are retained unless deleted.

Up to a maximum of 14 items can be selected for scheduling during one scheduling session. If you select more than 14 entries, the following error message displays:

Error: Maximum # of entries exceeded!

If you selected more than one SIM item to be scheduled, the system resequences the selected items in priority order based on the procedure's scheduling priority entered in the Priority field in the Procedure Scheduling Parameters processor. If you selected only one SIM item, the resequencing process (Procedure Protocols) is bypassed and the Resource Selection process begins.

Procedure Protocols

If you selected more than one SIM Item to be scheduled, they are protocolled based on the procedure's Scheduling Priority contained in the Procedure Scheduling Parameters function.

If you entered only one SIM item, the Procedure Protocol process is bypassed and the Resource Selection process begins by displaying the Resource Groups (if defined).

Procedure protocols resequences the SIM Items based on the following criteria:

- **Priority Defined** - SIM items are resequenced in numerical order by Procedure Scheduling Priority. The highest priority is 0.1.
- **Priority Blank** - SIM items that do not have a Procedure Scheduling Priority indicated are considered the lowest priority and are listed last.
- **Same Priority** - SIM items with the same priority (numerical value or blank) are kept in the order they were previously displayed.

The following screen displays showing the resequenced SIM Items for verification.

General Hospital Procedure Scheduling Processor							
Thu Mar 05, 2009 04:43 pm							
No.	Name	Sex	BD	Room	Physician	SVC	ICD Status
90172-00001	DAVISON, HAROLD	M	02/02/45	1107-1	SMITH, RICHARD	MED 10	I/P 104
Department : Radiology							
Service Item(s)				Ord #	Prior	Lgth	Req/Sch Dte/Tme

(1)	1111 CHEST ENHANCED			001	0.1	60	03/05/09 0500p
(2)	2222 ABDOMEN COMB ORAL CONT			001	999.9	30	03/05/09 0600P
(3)	3333 ANKLE					15	
Enter add (A), delete (D) or accept (Y) [Y]--							

Enter **A** to add additional items, **D** to delete any of the items displayed or press ENTER to accept the displayed list.

If you enter **A**, the prompt allowing entry of more SIM Items displays. If you enter **D**, the prompt allows selection of the displayed SIM Items to remove them from the listing. Press ENTER to accept the listing of items.

Once you have accepted the listing of items, the prompt displayed allows selection of one of the displayed SIM Items to schedule. This prompt is required. Press period (.) and ENTER to return to the order summary screen to select more orders. Any items currently selected are retained unless manually deleted.

Field Explanations

DEPARTMENT (DISPLAY ONLY)

This field contains the description of the SIM department.

SERVICE ITEM (DISPLAY ONLY)

This field contains a list of the selected SIM items in protocol order. Each displayed SIM item can be selected for scheduling one at a time.

ORD # (DISPLAY ONLY)

If you selected the displayed item through the Order Selection Process, the associated order number displays. This order number is linked with the Appointment in the Ord # field of the Appointment Detail screen. This field is blank if you added the SIM item manually.

PRIOR (DISPLAY ONLY)

The Procedure Scheduling Priority for each SIM item as defined in the Procedure Scheduling Parameters function displays. It can be up to five positions including a decimal point. The minimum is 0.1, with the maximum being 999.9. The highest priority is considered 0.1.

LGTH (DISPLAY ONLY)

The Appointment Length as defined in the Procedure Scheduling Parameters processor displays. This is the length for the overall procedure, not the length for an individual resource contained in a group. It can be up to three numeric characters.

REQ/SCH DTE/TME (DISPLAY ONLY)

If you selected the displayed item through the Order Selection process, the Requested Date/Time of the order displays. Otherwise, this field remains blank until the item is scheduled. The Requested Date/Time displays in normal color. Once the item is scheduled and you return to this screen, this field displays the Scheduled Date/Time in Bright Reverse Color.

If you are using the Multiple Resource Search function, the last date/time of the Resource requested time displays if multiple resources are selected.

Since items can have multiple resource groups defined, the date/time displayed when the item is scheduled is based on the primary or secondary resource that is scheduled.

After you select an item, the system displays any Scheduling Instructions defined for this SIM Item as defined in the SIM Item Scheduling Instructions processor. If no instructions are defined for the selected SIM Item, the screen is bypassed. The following screen displays to allow viewing of the instructions and entry of the appointment comment that is retained for the Appointment Detail screen:

General Hospital Procedure Scheduling Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
90172-00001	DAVISON, HAROLD	M	02/02/45	1107-1	SMITH, RICHARD	MED 10 I/P 104
RAD 2000 CHEST						
DEPARTMENT INFORMATION						
Make sure to schedule with 30 minutes transportation time.						
PATIENT INFORMATION						
If patient has previous X-Rays, please bring them with the patient.						
PREP INSTRUCTIONS						
Make sure that patient is not wearing any jewelry or metal in upper chest area						
POST PROCEDURE INSTRUCTIONS						
ADDITIONAL INSTRUCTIONS						
Make sure to schedule the room and technician						
Enter appointment comment--						

The prompt enables you to enter an appointment comment if desired. If one is entered, it is retained for display and revision in the Appointment Detail screen. If you do not enter a comment, the instructions redisplay in the Appointment Detail. This is due to the screen processing that occurs in entering blank fields.

Since the comment field is blank, it is accessed in the Appointment Detail screen. If you enter a comment and subsequently go back to the listing of SIM Items, the comment is retained and the SIM Item Scheduling Instructions do not display again. If it is necessary to view the SIM Item Scheduling Instructions, it can be done in the Appointment Detail screen by selecting the Comment field.

Resource Selection/Date Entry

After you select a SIM item, the associated code, description and length are displayed. The prompt that is displayed depends upon whether valid resource groups have been identified in the Procedure Scheduling Parameters processor.

If valid resource groups have not been defined for the selected SIM item, the following prompt is displayed, enabling you to select a resource:

*Enter Resource or *** for Multiple Resource Search--*

This prompt works in the samemanner as in the Appointments processor. Please refer to the Super Search and/or Multiple Resource Search selection of this document for information on this prompt.

Procedure Scheduling

After selection of the SIM item, if groups are defined for the SIM item, the screen displays the defined groups. This enables you to view the schedules for each defined group (Primary, Secondary, and Additional). You can use the screen by selecting the primary and indicating a date. If a multiple search is needed, you can enter two asterisks (**) at the following prompt:

Enter choice --

If you enter two asterisks (**), the Super Search screen displays with the first Resource field already filled with <Dept name> Group-All. You then enter the start and end dates and times and continue processing.

NOTE: If you desire the original Super Search screen, enter two pound signs (##) to invoke the screen and all the original functionality for both Appointment Scheduling and Procedure Scheduling.

If multiple resource groups are defined, the following screen displays enabling you to select the appropriate group:

General Hospital Procedure Scheduling Processor							
Thu Mar 05, 2009 04:43 pm							
No.	Name	Sex	BD	Room	Physician	SVC	ICD Status
90172-00001	DAVISON, HAROLD	M	02/02/45	1107-1	SMITH, RICHARD	MED	I/P 104
Department : Radiology				Primary's Req/Sched Dte/Tme: 03/05/09 05:00p			
Service Item: 1111 CHEST ENHANCED				Procedure Length: 60			
Resource Groups:		Group Type		Res Length		Starting	

(1)	Diag Rooms	Primary		60		0 min	
(2)	O/P Diag Rooms	Secondary		60		0 min	
(3)	Technicians	Add'l		60		0 min	
(4)	Radiologists	Add'l		30		+30 min	
(4)	Consultants	Add'l		30		2 days	
Enter choice--							

The SIM Department, SIM Item, and Procedure Length display as explained on the previous screen. The order's requested date and time displays above the procedure's length. The requested date/time display until the order is scheduled. At that time, this field is updated with the scheduled date/time of the primary.

This field displays at the top of the screen for each resource group selected to schedule as a reminder of the primaries scheduled date and time. It remains until another SIM Item is selected. The following field explanations describe the fields displayed for each resource group.

Field Explanations

RESOURCE GROUPS (DISPLAY ONLY)

The resource groups defined for this SIM Item in the Procedure Scheduling Parameters processor display for selection. The description displays followed by the group type. You can only select one group at a time. The primary group displays followed by the secondary and then any additional groups. If more resource groups exist than can fit on one screen, you can use the standard next (/) and previous (/P) paging options.

GROUP TYPE (DISPLAY ONLY)

The Group Type (Primary, Secondary, Add'l) for the group displays.

RES LENGTH (DISPLAY ONLY)

The length of time required by this resource during the entire Procedure Length displays. The Procedure Length may exceed the amount of time required by a resource in the group. For instance, the length required for the procedure may be 60 minutes, but the technician is only needed for 20 minutes of that time. When groups

are defined for a SIM Item, the resource's length is used as the appointment length in the Appointment Detail screen, not the procedure length.

STARTING (DISPLAY ONLY)

The starting time required for a resource defined in the group in the Procedure Scheduling Parameters processor displays. The number that displays indicates the starting time (during the entire procedure's length) that a resource from this group is needed. The time entered is a variance from the starting time for which the primary/secondary is scheduled.

In the previous example discussed, the procedure required 60 minutes, but the technician was only needed for 20 minutes. In this example, the starting time that displays is based on when during that 60-minute period the resource is needed. If the technician is needed 10 minutes after the primary or secondary is booked, then you should look for an open slot 10 minutes after the starting time of the primary or secondary.

For instance, if you booked a primary resource (a room) for 60 minutes beginning at 10:00am, the technician is needed at 10:10, meaning 10 minutes after the primary resource is booked. The technician is not needed at 10:00am, but 10 minutes later. This is not automatically calculated once the primary or secondary is booked, but should be taken into consideration when searching for open appointment slots for additional resources.

Entry of zero indicates the additional resource is needed beginning at the same time as the primary or secondary. Entry of a plus sign (+) indicates that the additional resource is needed a specific number of minutes/hours/days after the primary or secondary. Entry of a minus sign (-) indicates that the resource is needed a specific number of minutes/hours/days prior to the primary or secondary resource.

After you select the resource group, the following prompt displays enabling entry of the date:

Enter Requested Date [05/07/94]--

Date, F indicates first available beginning with the entered date

The prompt enables entry of the requested date to display open appointment slots for the resource(s) contained in the selected group. It allows entry of standard Patient Care date routines. It also allows entry of a date followed by a comma, then followed by F or f to indicate you want the first date with open searchable appointment slots to display beginning with the date entered.

The default in the prompt varies based on whether or not a primary or secondary resource has already been scheduled and whether the selected item is associated with an order.

- Primary/Secondary Booked - If an Additional resource group is being booked, the default in the prompt contains the scheduled date for the primary or secondary resource.
- Item has Order # - If booking a primary or secondary resource group, and the selected item has an order number, then the default in the prompt contains the order's requested date/time.
- Item doesn't have Order # - If booking a primary or secondary resource group and the selected item does not have an order number, the default in the prompt contains the current date.
- Press ENTER to accept the default.

Press period (.) and ENTER to return to the previous screen of resource groups to view/select an alternate group. If only one group was defined, you are returned to the list of protocolled SIM items.

Upon entry of the date or the date followed by **F**, the resources defined for the selected group display for selection. The main difference between using **F** and not is that when a date is entered, that date is used. If you enter **F** after a date, the system searches through the resources in the group to find the first available slot on a date after the date given. That date then displays in the same format as if you initially entered the date without **F**. This enables you to search for an open date in the future if the date you want isn't open for any resource in the group.

The following screen is displayed to show the resources within the selected group:

```

General Hospital Procedure Scheduling Processor
                                Thu Mar 05, 2009 04:43 pm
No.      Name                     Sex   BD   Room  Physician  SVC ICD Status
90172-00001  DAVISON,HAROLD      M   02/02/45  1107-1  SMITH,RICHARD MED  I/P 104
Department : Radiology
Service Item: 1111 CHEST ENHANCED
Resource Groups: ROOMS      Group Type: Pri Res Length:60  Starting : 0 min
Page: 01
Resources
-----
( 1 ) RAD,RAD,111111-Rad Room One(3)  0900 1200 1630 1700
( 2 ) RAD,RAD,222222-Rad Room Two(18) 0900 0930 1000 1030 1100 1130 1300 1330
      1400 1430 1500 1530 1600 1630 1700 1730 1800 1830
( 3 ) RAD,RAD,333333-Rad Room 3 (0)   Full or Non-Search
( 4 ) RAD,RAD,444444-Rad Room 4 (18)  0900 0930 1000 1030 1100 1130 1300 1330
      1400 1430 1500 1530 1600 1630 1700 1730 1800 1830
( 5 ) RAD,RAD,555555-Rad Room 5 (10)  0900 0930 1000 1030 1100 1130 1300 1330
      1400 1430 1500 1530 1600 1630 1700 1730 1800 1830

Enter choice or new date [Next Day]--
                                Next Page(/) or Previous Page (/P)

```

While the system is searching schedules for open appointments, you can enter period (.) ENTER to stop the search. This screen contains the information selected on the previous screen of resource groups. If resource groups are not defined, this screen does not display.

The heading includes the SIM Department, the Search Date, the SIM Code and Description, the Procedure's Length, the Resource Groups Code, the Group Type, the Resource's Length and the Starting time indicator. Each resource defined in the group displays followed by the number of available appointments, followed by each individual time slot open on that date.

The prompt enables selection of one of the valid resources displayed, entry of a different date or viewing of the next day's schedule by pressing ENTER. If you enter a minus sign (-) prior to a number, then that number of days prior to the current displayed date displays. This same option is available when displaying the resource's schedule in Appointments. If there are more resources than can display on one page, then the screen also allows entry of next (/) and previous paging (/P).

If the resource's schedule for the requested date is full or only contains non-searchable available appointment slots, then Full or Non-Search displays instead of any appointment time slots.

If the resource's schedule for the requested date is not open, Not Open displays instead of any appointment time slots.

Press period (.) and ENTER to return to the screen containing the resource groups for selection of another group. If only one group was defined, you are returned to the listing of protocolled procedures.

If trying to coordinate multiple appointments for different resources, it is suggested that each resource group be viewed and an appropriate time noted prior to scheduling any one group. This prevents you from having to cancel an appointment once you find the additional resources are not available. The Protocolled SIM Item screen and the Resource Group Selection screen display were designed to allow you to easily move from a group to group and between multiple SIM Items to help in locating the most appropriate appointment time for each of these procedures.

After you select a resource, the Scheduling Departments field in the CRT table is checked to ensure that this PC is allowed to schedule appointments for the scheduling department associated with the selected resource.

If you select a resource that is full or not open, the Wait Listing Process begins and looks the same as found in the Appointment Processor. This enables appointments to be placed on a wait list or an open schedule. For more information, please refer to the Appointments section of this document.

If the Scheduling Department associated with the selected resource is not contained in the Scheduling Departments field for the requesting PC, the following error message is displayed prior to the list of valid resources being redisplayed:

Error: Wrong department!

If the requesting PC is allowed to schedule appointments for the Scheduling department associated with the selected resource, the resource's schedule for the displayed date displays for selection of the time. The Appointment Selection process begins.

Appointment Selection

The date in the resource's schedule displays based on the method used to identify the resource and date. The screen is the same as the one used in the Appointment processor.

The following screen is displayed:

```

General Hospital Procedure Scheduling Processor
PHYSICIAN-----X: FMC,SUR,32 ADAIR,FRANK K      Thu Mar 05, 2009 04:43 pm
  No.      Name      Sex      BD      Room      Physician      SVC ICD Status
Date:      Fri Mar 9, 2001      Primary's Req/Sch Dte/Tme:Mon Mar 09, 900A
Comment:NO SURGERY ON TUESDAYS
Time  Type Pt/Fd Comment      Time  Type Pt/Fd Comment
0700A CN30 1/ 0      0300P CN30 1/ 0
0730A CN30 1/ 0      0330P CN30 1/ 0
0800A CN30 1/ 0      0400P CN30 1/ 0
0830A CN30 1/ 0      0430P CN30 1/ 0
0900A CN30 1/ 0
0930A CN30 1/ 0
1000A CN30 1/ 0
1030A CN30 1/ 0
1100A CN30 1/ 0
1130A CN30 1/ 0
1200N CN30 1/ 0
1230P CN30 1/ 0
0100P CN30 1/ 0
0130P CN30 1/ 0
0200P CN30 1/ 0
0230P CN30 1/ 0
Select appt time, new date, view(V), modify(M) or calendar(C) (0900A)--|

```

The prompt enables selection of a displayed schedule slot, entry of another date, viewing of appointments already scheduled, modifications to the schedule, or display of the resource's calendar. The time of the original appointment in the series displays in parentheses. The appointment time is not defaulted.

Press period (.) ENTER to stop appointment processing for this resource's schedule. The following prompt displays enabling you to continue processing with the same SIM Item (I), department (D), patient (P), or a new patient (N).

More for same item(I), dept(D), patient(P) or new patient(N)--

This allows you to exit the process without having to back out of each screen processed so far. The options for this prompt are explained later in this chapter after the appointment has been scheduled and accepted. Please refer to this later discussion for information on the processing of this prompt.

When you select an appointment time, a prompt displays for verification. After you accept the entry, the Appointment Data Entry screen displays enabling entry of the appointment data.

Appointment Date Entry/Acceptance

If you select a schedule slot, the prompt asking for acceptance displays. The patient's pending appointments display and are checked to determine if conflicts exist. Any appointments one hour before the start and one hour after the end of the selected appointment are highlighted as a conflict. A prompt displays asking if you want to proceed or abort based on the patient's current appointment schedule.

If you enter **N** for No to this prompt, the resource's schedule redisplay allowing selection of another schedule slot. If you enter **Y** for Yes to this prompt, the scheduling department, SIM item and appointment length are retained for automatic display in the Scheduled Appointment Detail screen. The following screen is displayed. See information about using this function following the Field Explanations for these screens:

General Hospital Procedure Scheduling Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000001001	Williams, Janet	F	05/14/59			
1 Resource				2 Visit Type	3 Appointment	
SPEC PROCED RM1 (SCHED)-X				SPR	Fri 03/05/09 1000A	
4 New Visit	5 Account	6 Service Department		7 Visit Reason		
Yes		(A) Radiology		7429 FL COLON BE		
8 Ord #	9 Length	10 Comment				
	30					
11 Add'l Items	12 Referring Source		13 Referring Physician			
	12 BAPTIST HOSPITAL		32 ADAIR, FRANK C			
14 Ref Date	15 Transport	16 Priority		17 Display	18 Chart	
03/05/09	W/C	ASAP		VIEW REASON	No	
19 Additional Comment #1			20 Additional Comment #2			
21 Working Diagnosis						
003.1-SALMONELLA SEPTICEMIA						
Press NL--						

The processing of these screens is the same as that found in the Appointment processor.

Data being retained from previous appointments displays based on the criteria discussed at the end of this chapter. If the last appointment's data relates to a different SIM item, then the ordering information relating to the new item being scheduled overlays the existing data being retained. If the order's data is null, then the data entered in the previous appointment is retained. It is only overlaid if the next order's data exists.

Field Explanations

1. RESOURCE (DISPLAY ONLY)

This is the name of the resource being scheduled. This information is entered by the system based on the previous selection.

2. VISIT TYPE (DISPLAY ONLY)

This is the type of visit selected from the resource schedule. This information is entered by the system.

3. APPOINTMENT (DISPLAY ONLY)

This is the day of the week, date, and time of the appointment being scheduled. This information is entered by the system.

4. NEW VISIT (1-A-R)

This field enables you to specify whether this is a new visit or if it relates to an active account number. If an account number was selected earlier in the process, this field is automatically set to No. If this appointment is being scheduled from an ordered SIM Item, this field is not accessible.

If an account number was not selected earlier, the prompt allows you to indicate if this is a New Visit. Enter **Y** for Yes and **N** for No. If you enter No, the Account field is accessed to enable a selection of an account number. If you enter Yes, an additional prompt displays to allow you to indicate the type of visit as Inpatient (**I**), Outpatient (**O**) or Unknown (**U**).

5. ACCOUNT (TABLE LOOKUP)

This field enables you to specify the account number that this appointment is related to. It is not accessible if the New Visit field is set to Yes or the appointment is being scheduled from an ordered SIM Item. If an account number was selected earlier in the process, it is contained in this field automatically and cannot be changed if scheduling an ordered item.

6. SERVICE DEPARTMENT (DISPLAY ONLY)

The SIM department previously selected displays.

7. VISIT REASON (DISPLAY ONLY)

The selected SIM item code and description display.

8. ORD # (DISPLAY ONLY)

If the SIM item being scheduled is selected from an order, then the appointment is linked to that order number. Specific order information is brought forward from the order to display and allow editing. This field is blank if the item being scheduled was not selected from an order.

9. LENGTH (3-N-R)

The length of the appointment displays and can be edited. The contents displayed is based on whether resource groups were defined and whether a length was given to the procedure in the Procedure Scheduling Parameters processor. If resource groups

are defined, a length needed by that resource is displayed. That length displays if this resource was selected from a Resource Group.

If the procedure did not have resource groups defined, then the length is taken from the length given to the overall procedure defined in the Procedure Scheduling Parameters processor. If a length is not defined for this procedure, then the length reflects the length associated with the appointment slot that was selected from the resource's schedule.

If the displayed length is greater than the length of the appointment slot selected, then subsequent appointment slots are collapsed into one slot if this resource uses the collapsing feature. This works in the same manner as found in the Appointments processor.

If the Resource Master has the Insert field on the Scheduling parameters screen set to No, then appointment slots are collapsed. If this field is set to Yes, then slots are not collapsed. For more information on the collapsing feature, please refer to the Appointments section of this document under Super Search.

10. COMMENT (45-C-O)

You can enter a freeform comment up to 45 characters. This field is automatically completed from the order or from the SIM Item Scheduling Instructions screen displayed earlier. If instructions are defined, then they display when this field is accessed. The comment can be entered in the prompt displayed at the bottom of the screen.

Earlier in the process, instructions display and allow entry of a comment after selection of the SIM Item. If comments are entered, they automatically display in this field. If this SIM Item was selected to be scheduled from an order, then the comment entered in the order screen displays. The comments entered from the instruction screen overlays the comments that may have been entered by the order.

11. ADD'L ITEMS (DISPLAY ONLY)

This field contains any additional SIM items scheduled and is only accessible through Clinical Management. This field displays No when additional items do not exist. If this field is accessed and there are no additional items, the system displays the following error message and redispays the detail screen:

Additional SIM Items do NOT exist!

This field is not used in Procedure Scheduling and displays No.

12. REFERRING SOURCE (TABLE LOOKUP)

Enter the code that describes the referring source. You can override the table by entering a hyphen (-) followed by your freeform entry. This enables you to enter a referring source that is not on the table. Appointments with this field completed appear on the Monthly Referral Report when generated.

13. REFERRING PHYSICIAN (TABLE LOOKUP)

If the item being scheduled is selected from an order, the ordering physician automatically displays when entered in this field. It can be selected for revisions if necessary. If the field is blank, you can enter the code for the Referring Physician if you know the code. If the code is not known, then you can enter a portion of the physician's name followed by a hyphen(-) to select from the table. You can override the table by entering a hyphen(-) followed by your freeform entry. This allows you to enter a physician that is not on the table

14. REF DATE (SPECIAL FORMAT-O)

This field contains the reference date for the appointment.

15. TRANSPORT (TABLE LOOKUP)

If the item being scheduled was selected from an order, the transportation entered in the order automatically displays in this field. It can be selected for revision if necessary. When it is accessed, you can enter the transportation code if you know it.

If the code is not known, a hyphen (-) can be entered to display a list of available codes. The entries displayed are based on the Ordering Department's Transportation table entered in Patient Care. If the department being scheduled does not have their own Transportation table for ordering, then the common Scheduling Transportation table is used. If the department does, then their transportation table displays for selection.

After you accept the appointment data, the following message displays in the same manner as in the Appointment process if the appointment is for a new visit and the patient is inactive:

Inactive patient! Please complete Admission.

If the item just scheduled is from the Radiology department and STAR Radiology is in the Network, then any ordering preps defined for this SIM item by STAR Radiology display. The system is at this point networked to the STAR Radiology system. The prompt asks you to press ENTER until all pages have been viewed. At that point, the prompt says you are at the end of the display to press ENTER.

Once you have viewed all Radiology Ordering Preps and pressed ENTER the following prompt displays to allow entry of additional appointments:

More for same resource(R), item(I), dept(D), patient(P) or new patient(N)-- |

This prompt is required and has no default. Enter one of the following characters (upper/lowercase): **R,I,D,P**, or **N**.

- **(R)** Resource - This option only displays in the prompt if the SIM item last scheduled did not have any resource groups defined. If you enter **R** for the same resource, the system displays the resource's schedule for the date of the last appointment. All data with the exception of the Visit Type, Appointment Date/Time, Display and Chart are retained for the next appointment.

- **(I) Item** - This option displays the listing of resource groups defined for this SIM item. If resource groups have not been defined, then the following prompt displays enabling selection of the new resource, date, and time:

Enter Resource--

All data with the exception of the following fields are retained for the next appointment: Resource, Visit Type, Appointment Date/Time, Display, and Chart.

- **(D) Department** - This option displays the listing of procedures to select another item. The previously scheduled item displays with the scheduled date/time. This allows selection of more SIM items. All data with the exception of the following fields are retained for the next appointment: Resource, Visit Type, Appointment Date/Time, Ord #, Length, Visit Reason, Display, and Chart.

If you select an item that was selected from an order, that order's data replaces what is currently being retained. Please note that the Comment field may be cleared if the New SIM item selected has scheduling instructions defined.

- **(P) Patient** - This option displays the list of valid departments to select another department and begin the process again. If only one department is valid for this department, that one department is assumed and the orders for that department/patient display for selection.

All data with the exception of the following fields are retained for the next appointment: Resource, Visit Type, Appointment Date/Time, Ord #, Length, Service Department, Visit Reason, Transport, Display, and Chart. If you select an item that was selected from an order, then that order's data replaces what is currently being retained.

- **(N) New Patient** - This option enables you to quickly exit to the patient MPI selection prompt. This indicates that you do not want to process any more appointments for this current patient. It is at this point data is no longer retained from the last one appointment.

16. PRIORITY (TABLE LOOKUP)

This field enables additional flagging of appointments. For example, the department or clinic may want to flag appointments that have been overbooked or rescheduled from the past. It is suggested that this field be left blank for routine appointments, allowing the priority appointments to stand out on displays/printouts.

17. DISPLAY (TABLE LOOKUP)

This field controls the security on the display of appointment information for departments other than the department associated with the CRT. The patient name and/or reason for the visit can be restricted (see Resource Maintenance). The default appears, which can be overridden for this specific appointment by going back into the

field and entering another selection. This field is reset with each appointment. It is not retained.

18. CHART (1-A-R)

Enter **Y** or **N** to indicate whether the patient's chart is needed for this appointment. Entering **Y** causes the appointment to print on the Pull Chart List and the Outguide Cards in Medical Records. The initial value of this field is the value of the Requestor field in Resource Maintenance, but it can be adjusted if necessary. The default is pulled from the Resource Master. This field is reset with each appointment; it is not retained.

19. & 20. ADDITIONAL COMMENTS 1 & 2 (36-C-O)

These two fields are freeform. This space is provided for two additional comments pertaining to this appointment. This information prints on resource schedules, and is retained for detail viewing in the patient appointment and revise appointment processor. This field is retained when appropriate.

21. WORKING DIAGNOSIS (34-AN-O)

This field is automatically set to diagnosis entered in the order if one was entered and this item was selected for scheduling from an order. If necessary, the field can be accessed for revision or entry. This is a table-driven field. The default response is the working diagnosis.

If the working diagnosis is the valid diagnosis, press ENTER and the working diagnosis automatically displays in the field. If the diagnosis is different than the working diagnosis, enter the code that describes the patient's diagnosis. If you do not know the code and intend to use the table lookup to search, please be aware of the following:

Because there are so many possible diagnosis codes in the system, the table lookup for this field has been expanded. There are hospital-defined pointer tables which help you specify how to search for commonly used codes. When entering actual codes, you can enter leading zeros or decimal points, but the system does not require them. For example, you can enter one of the following to initiate a code search:

- Enter **U** and a hyphen (**U-**) to display the entire pointer table in alphabetic order. Make your selection from this table.
- Enter **U**, an alpha character or characters, and a hyphen (**UA-**, **UB-**, etc.) to display the pointer table that begins with a specific alpha character. For example, entering **UAN-**, might cause the codes for Aneurysm, Angina, and Ankle Fracture to display if they have been built into the pointer table. Make your selection from this table.
- Enter a numeric digit (or digits) and a hyphen (**22-**, **250-**, etc.) to display the diagnosis table by specific numeric range of codes. For example, if you know that the code you are searching for begins with 22, enter **22-** and all the codes beginning with 022.0 (CUTANEOUS ANTHRAX) are displayed. Make your selection from this table.

- Enter a hyphen (-) to display the entire diagnosis table in numeric code order, i.e., starting with 001.0 (CHOLERA D/T VIB CHOLERA).

The code and the diagnosis description display. To override the table, enter a hyphen (-) followed by a freeform entry. If you enter a number which exists in the DSM Pointer table, the system displays the number followed by its corresponding description. This enables you to enter an admitting diagnosis that cannot be defined by an ICD code. If the number is not in the DSM Pointer table but is in the ICD Diagnosis Pointer table, the system displays the number followed by its description from the ICD Diagnosis Pointer table.

When you accept this screen, the following screen is displayed:

General Hospital Procedure Scheduling Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
01050-00002	JACKSON, LISA	F	02/19/10			
Resource				Appt Type	Appointment	
ADAIR, FRANK				CN30	Fri 03/18/09 0700A	
1 ADDITIONAL COMMENT #3						
01	.					
02	.					
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
Page:01		Scheduling Letter Options			##=Current Choices	
(1) New Appointment for Patient						
Enter choices (e.g. 1,7,5-9) or '-'choices to remove--						
end select(NL)						

You must enter through the comment lines before the Scheduling Letter Options appear. At the prompt for selecting Scheduling Letter Options, enter the option number of the Patient Letter you want to generate. The system displays the following prompt:

Annotate New Appointment letter? (Y/N) [N]

If you enter **Y**, you can enter additional text to the predefined letter. This text prints in addition to the predefined letter. Upon completion of the letter, or if you enter **N** at the above prompt, the following screen is displayed:

General Hospital Procedure Scheduling Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
01050-00002	JACKSON,LISA	F	02/19/10			
Resource				Appt Type	Appointment	
ADAIR,FRANK				CN30	Fri 03/06/09 0700A	
1 ADDITIONAL COMMENT #3						
01	.					
02	.					
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
Generate an order from this appointment? (Y/N) [Y]--						

If you enter **N**, the following screen is displayed:

General Hospital Procedure Scheduling Processor						
Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
01050-00002	JACKSON,LISA	F	02/19/10			
Resource				Appt Type	Appointment	
ADAIR,FRANK				CN30	Fri 03/06/09 0700A	
1 ADDITIONAL COMMENT #3						
01	.					
02	.					
03						
2 ADDITIONAL COMMENT #4						
01						
02						
03						
More for same (R)es, (I)tem, (D)ept, (P)at, (C)opy multiple or (N)ew pat--						

If you enter **C** for Copy Multiple, after selecting the Resource or entering "=" for same resource, the following screen displays:

```

General Hospital Procedure Scheduling Processor
PHYSICIAN-----X: FMC,SUR,32 ADAIR,FRANK K      Thu Mar 05, 2009 04:43 pm
  No.      Name      Sex  BD   Room  Physician  SVC ICD Status
01050-00002 JACKSON,LISA  F  02/19/10 4102-01 BELL,MARY A  MED 10 1E
19
  1 Appointment Series Start Date      2 Appointment Series End Date
    03/09/01                          03/16/09

  3 Appointment Days
->
Page:01                                     ##=Current Choices
( 1) Sunday
( 2) Monday
( 3) Tuesday
( 4) Wednesday
( 5) Thursday
( 6) Friday
( 7) Saturday

Enter choices (e.g. 1,7,5-9) or '-'choices to remove--
                                end select(NL)

```

Field Explanations

1. APPOINTMENT SERIES START DATE (DATE-R)

Enter the start date for the appointment series. You may enter the current date or a future date to begin the appointment series.

2. APPOINTMENT SERIES END DATE (DATE-R)

Enter the end date for the appointment series. You may enter the current date or a future date to end the appointment series, but the end date must be later than the start date.

3. APPOINTMENT DAYS (TABLE LOOKUP-R)

Enter the specific days of the week for this series of appointments. Multiple days may be chosen.

Impact

After you complete this screen, the following takes place:

- The appointment process is complete.
- The patient appointment information entered in the system can now be accessed through the patient, resource, department or nurse station functions available throughout the system.

Output

- If the New Visit field was completed with I, O, or U, this appointment information appears on the New Visit report.
- If the Referral Source field was completed, this patient appointment information appears on the Monthly Referral report.
- If the Transportation field was completed, this appointment information appears on the Transportation Schedule Census. If the appointment is being made for the same day, an online transportation notice prints on the department's designated printer as identified in the Resource Department table.
- If the Chart Request field is Yes, this appointment information appears on the Chart Pull List and Outguide List when they are prepared. If the appointment is being made on the same day, a Stat Chart Pull Notice prints in Medical Records online.
- An online appointment notice or audit copy print as determined by the parameters set up in the Resource Department table.

If you enter **Y** at the prompt that asks if you want to generate an order from the appointment, the following screen displays:

General Hospital Procedure Scheduling Processor						
CARDIOLOGY Order			Thu Mar 05, 2009 04:43 pm			
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
01050-00002	JACKSON, LISA	F	02/19/01	2102-01	ABEL, JODI A	MED 10 1E
19						
1 Item				2 Initials	3 Print Loc	1
1112 ELECTRODES				K B	Department	
4 Priority						
->						
5 Frequency	6 Schedule Days		7 Times			
8 Start Date	9 Start Time	10 Duration		11 Stop Date	12 Stop Time	
13 Ordering Physician				14 Interpreting Physician		
15 Prompt Response / Message				16 Medications		
17 Transportation	18 Blood Pressure			19 Ordering Diagnosis		
20 Modifier				21 Comment		
Enter table code or ('-' for table)--						

For detailed information about this screen, see field explanations in the section entitled "General Order Screen" in Chapter 1 in the *STAR Patient Care Order Management/ Charge Processing - Volume I* of the *STAR Patient Care Reference Guide*.

The appointment date, time, or both defaults from the appointment screen to the order screen if the Start Date/Time Entry field is set to Date Only, Time Only, or Both Date, and if the Order Category/Status field is set to Routine.

The following table describes examples using an Order Category/Status of Routine, non-panels, and items without predefined times:

Start Date/Time Entry	STAT Date/Time	Routine Date/Time
Both Date and Time	Now/Now	Appointment/Appointment
Date Only	Now/Now	Appointment/Now
Time Only	Now/Now	Now/Appointment
Neither Date or Time	Now/Now	Now/Now

The following are rules for system-defaulted Start Date and Times for the Procedure Scheduling function:

- The Priority table allows both Date and Time entries, and the Frequency has a predefined time(s) as per the Times field in the Frequencies table.
 - Result - The system generates the occurrences using a start time based on the next applicable predefined time.
- Frequency has an entry in the Allow Time Edits? field of the Frequencies table.
 - Result - The system does not take into consideration the Allow Time associated with the appointment.
- The SIM Departments table contains a number (for example, 7) in the Future Date Orders field. You place an appointment for a greater number of days in the future (for example, 10).
 - Result - When the system gets to the orders screen associated with the appointment, it attempts to default the appointment date but then displays the following error:

Date exceeds Departmental Limit!

You must enter a date that falls within the Future Date Orders window in order to complete the order.

- The SIM Item's Default Order Values page contains an entry in the Duration field.
 - Result - The system does not take into consideration the Duration field entry on the Default Order Values page when completing the orders screen associated with the appointment.

- You would like to generate an order for a panel item.
 - Result - The system always assumes a quick panel, therefore, it does not display all applicable order screens. If you use a multi-department panel when generating an order from an appointment, the system does not generate any occurrences.
- The Priority contains a STAT entry in the Order Category/Status field.
 - Result - The system defaults the current date and time when generating an order from an appointment.
- The Priority does not contain any entry in the Order Category/Status field.
 - Result - The system always assumes Routine when you generate an order from an appointment.

Upon acceptance of this screen, the following prompt appears:

Order # [xxx] assigned. Enter additional orders? (Y/N) [N] --

If you enter **Y**, you are taken back to the list of Departments. If you enter **N**, the following screen is displayed for the continuation of the scheduling process:

General Hospital Procedure Scheduling Processor							
Thu Mar 05, 2009 04:43 pm							
No.	Name	Sex	BD	Room	Physician	SVC	ICD Status
01050-00002	JACKSON, LISA	F	02/19/10	2102-01	ABEL, JODI A	MED 10	1E 19

More for same (R)es, (I)tem, (D)ept, (P)at, (C)opy multiple or (N)ew pat--

LETTERS

Patient letters that currently exist in the system continue to be generated by the same transactions that create letters currently. Once the transaction is completed, an additional Multiple Selection table display enables you to determine whether the appropriate letter type(s) should be printed immediately, depending on the patient type/letter type information built in the Hospital Facility Options, Resource Department Code, or Resource Master information.

If the letter type is appropriate and the online request is not processed, the system creates a log to permit the letters to be printed in a batch mode upon request. Each time the letter is requested, online or batch, a record is logged to the patient's appointment history. This three-line log indicates the person to whom the letter was addressed, the type of letter, how the letter was generated, by whom it was generated, and the date and time it was generated.

General Hospital Reprint Letters Processor								
Mon Apr 01, 1996 05:10 pm								
No.	Name	Sex	BD	List	Physician	Spc	Status	
000000631	CASEY,BRIAN EVER	M	10/04/92					
#	Day	Date	Time	Type	Dpt	Resource	Reason	Status
Page:01								
(1)	Fri	03/01	0300P	POST	FMC		POST-OP EVALUATIONX	Letter
	03/01/96	1542	Type	New Appointment-Patient				
	From Appointment-Online at PAS by #30597 VMN							
(2)	Tue	03/12	0100P	LNCH	FMC		LUNCH	Letter
	03/12/96	1420	Type	New Appointment-Patient				
	From Appointment-Online at PAS by #30597 VMN							
(3)	Wed	03/13	1130A	CON	FMC		7422 XR ABD SERIES W	Letter
	03/13/96	1945	Type	New Appointment-Patient				
	From Appointment-Online at PAS by #30597 VMN							
(4)	Wed	03/13	0100P	CLS	FMC		EDUCATION CLASS---X	Letter
	03/13/96	1901	Type	New Appointment-Patient				
	From Appointment-Online at PAS by #30597 VMN							
Enter choice--								

The log for letters consists of the associated appointment's information on the first line as it appears on all other appointment transactions. The second line consists of the date the letter was printed, the type of letter and *Patient* if it was a patient letter, and the physician receiving the letter if it was a physician letter. The third line displays the function being performed that generated the letter, whether the letter was printed online or batch, the generating individual's ID code and initials, as well as the CRT that was used.

Three new types of letters are available: Cancellation Letters, Attendance Letters, and Appointment Revision Letters.

- Cancellation letters are created through the Revise Patient Appointment function, once Deletion has been indicated and the Cancellation option is selected. Only true cancellations are eligible for these letters, not cancellations that have been rescheduled to a different resource, date or time.

- Cancellation can also be indicated through the Check In/Out processor and the End of Day processor, similar to the process described in the Revise Patient Appointment function.
- Attendance letters are generated as a by-product of Checking In/Out a patient appointment through either the Appointment Check In/Out processor or the End of Day processor.
- Appointment Revision letters are generated as a byproduct of moving an appointment or appointments through the Reschedule/Reserve/Move function. These letters can also be created as a byproduct of changing the resource, date or time of an appointment through the Revise Patient Appointment function, the Check In/Out function, or the End of Day function.
- Appointment Revision letters may not be printed in the domestic environment since the patient is usually at the hospital or clinic, or on the phone at the time of the change of appointment.

Whether the letter is printed immediately or in a batch mode, any Custom Documents associated with the letter prints immediately following the letter. If the letter is appropriate, you can *annotate* additional lines of information to the standard letter body. The default response to this prompt is **N** (No). If many appointments are being adjusted, such as with the Move capability, any annotation created applies to all appointments being rescheduled with that transaction.

If the letter is to be printed immediately, it is directed to the letter printer as specified in the CRT Names table. If no printer is specified, the local default printer is used.

The following tables demonstrate Letter Creation Summary by Function and Letter Creation Summary by Letter:

Letter Creation Summary by Letter	
Type	Use
Appointment	New Appointment Letter Wait List Letter (if added to Wait List)
Copy Appointment	New Appointment Letter Wait List Letter (if added to Wait List)
Procedure Scheduling	New Appointment Letter Wait List Letter (if added to Wait List)

Letter Creation Summary by Letter	
Type	Use
Revise Patient Appointment	<p>After answering the Delete? prompt affirmatively, you can:</p> <p>Change the Resource Appointment Revision Letter</p> <p>Change the Date/Time Appointment Revision Letter</p> <p>Cancel the Appointment Cancellation Letter</p>
Check In/Out	<p>After entering E (editing), then pressing ENTER, then entering Y to the Delete? prompt, you can:</p> <p>Change the Resource Appointment Revision Letter</p> <p>Change the Date/Time Appointment Revision Letter</p> <p>Cancel the Appointment Cancellation Letter</p> <p>Check In Attendance Letter</p> <p>Check Out Attendance Letter</p> <p>No Show No Show Letter (DNA)</p> <p>Cancel (from initial prompt) Cancellation Letter</p>

Letter Creation Summary by Letter	
Type	Use
End of Day	<p>After entering E (editing), then pressing ENTER, then entering Y to the Delete? prompt, you can:</p> <p>Change the Resource Appointment Revision Letter</p> <p>Change the Date/Time Appointment Revision Letter</p> <p>Cancel the Appointment Cancellation Letter</p> <p>Check In Attendance Letter</p> <p>Check Out Attendance Letter</p> <p>No Show (individual or batch) No Show Letter</p> <p>Cancel (from initial prompt) Cancellation Letter</p>
Resource Reschedule/ Reserve/Move	<p>After indicating the resource, time frames and appointment types you can:</p> <p>Reschedule Reschedule Letter</p> <p>Move Appointment Revision Letter</p>
Reschedule List	<p>No Appointment Cancellation Letter</p> <p>New Resource New Appointment Letter, No Letter or Appointment Revision Letter (parameterized)</p> <p>New Date New Appointment Letter, No Letter or Appointment Revision Letter (parameterized)</p>
Wait List	<p>No Appointment Cancellation Letter</p> <p>New Resource New Appointment Letter</p> <p>New Date New Appointment Letter</p>

Letter Creation Summary by Letter	
Type	Use
New Appointment Letter	Appointment Copy Appointment Procedural Scheduling Reschedule List (parameterized) Wait List
Appointment Reminder Letter	Patient Letters
Appointment Revision Letter	Revise Patient Appointment Check In/Out End of Day Resource Reschedule/Reserve/Move Reschedule List (parameterized)
Attendance Letter	Check In/Out End of Day
Reschedule Letter	Resource Reschedule/Reserve/Move
No Show Letter	Check In/Out End of Day
Wait List Letter	Appointment Copy Appointment Procedure Scheduling
Cancellation Letter	Revise Patient Appointment Check In/Out End of Day Reschedule List Wait List

Chapter 3 - SCHEDULE PROCESSING

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DISPLAY RESOURCE SCHEDULE

The Display Resource Schedule function is one of three methods used to view a resource's schedule. This function provides access to a resource's current working schedule for the date specified, including scheduled appointments and open time slots.

After you select Display Resource Schedule from the Resource Schedule Inquiry menu, a screen displays containing the following prompt prompting you to select a resource.

Enter first letter(s)`, number, dept or `=` for current resource--

At this prompt, select one of the following responses:

- Enter the first letters of the resource's name followed by a hyphen (-)
- Enter the number of the resource
- Enter the resource's department
- Enter an equal sign (=) to display the most recently accessed resource
- Press hyphen (-) and ENTER to display a list of the available resources

After you select the resource, a screen displays containing the following prompt prompting you to enter the date.

Enter date--

There are several formats you can use to enter the date. Refer to Chapter 4: Information Entry Techniques in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details.

The open appointment slots display on the next screen, as follows:

General Hospital Display Resource Schedule Processor							
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.				Fri Mar 20, 1994 02:52 pm			
Page:01				Appointments			
Time	Type	Stat	Unit#	Patient	Reason	Acct#	Prio
730A	GEN		A000100106	OHLMANN,RICHARD	GENERAL	990000707078	
730A	~WI	F	A000100102	HARPER,DAFNE	REGULAR PREGNANCY	990000667078	1
735A	GEN	N	A000100101	DEAN,THOMAS	GENERAL	990000659400	
740A	GEN	OPEN	(1)				
800A	NEW	OPEN	(1)				
820A	NEW	F	A000100099	FREEMAN,BETH	REGULAR CHECKUP	990000637078	3
900A	NEW	OPEN	(1)				
920A	NEW	FI		STEVENS,CARLA	NEW APPOINTMENT		
940A	NEW	OPEN	(1)		1000A NEW OPEN (1)		
1100A	FUP	F	A000100104	ANDREWS,COURTNE	8296 ENDOMETRIAL BIO	990000690078	2
1100A	FUP	FIO	A000100098	ANDERSON,LEAHAN	8200 AMNIOCENTESIS	990000627078	
1110A	FUP	OPEN	(2)				
1120A	FUP	F	A000100102	HARPER,DAFNE	FOLLOW UP APPT	990000667078	
Press NL--							
next page (/)							

The information on this screen is entered during the appointment making process. This information includes appointment times, appointment types and current status of each appointment slot. The following statuses display:

Appointment Slot	Status
Open (2)	This slot has no scheduled appointments, and normally accommodates two patients.
N	This appointment has been marked a no-show by the system.
F	This slot has been filled.
FI	This slot has been filled, and the patient has been checked in.
FIO	This slot has been filled, and the patient has been checked in and out.
P	This slot has an appointment pending.

This display also includes the patient's medical record number, patient name, reason for the appointment (freeform reason, SIM item, or appointment type) and patient account number. Any priority given to the appointment displays, such as:

- 1 - Medical
- 2 - Rescheduled
- 3 - Overbook

Walk-in appointments are designated by a tilde (~).

NOTE: Any appointment slot that has been reserved displays highlighted on the screen.

PRINT RESOURCE SCHEDULE

The Print Resource Schedule function is an option on a Scheduling Menu. Selecting this option results in the printing of a hard copy of the list of patient appointments for the department/resource/dates selected.

After selecting the Print Resource Schedule option from the Resource Schedule Inquiry menu, a screen displays containing the following prompt prompting you to select the resource for which you want a printout.

Enter first letter(s) '-' , number, dept or '=' for current resource--

At this prompt, enter one of the following responses:

- Enter the first letters of the resource's name followed by a hyphen (-)
- Enter the number of the resource
- Enter the resource's department
- Enter an equal sign (=) to display the most recently accessed resource
- Press hyphen (-) and ENTER to display a list of the available resources

After you select the resource, the screen prompts you to enter the date you want the printout for:

Enter date--

There are several formats you can use to enter the date. Refer to the Information Entry Techniques chapter in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details.

After you enter the date, the following prompt displays to identify whether one or multiple appointments should print per page:

Print One(O) or Multiple(M) appointments per page(O/M) [Multiple]--

If you enter **O**, the resource's schedule prints one appointment per page and does not print a page for an open slot. If you enter **M**, the resource's schedule prints multiple appointments per page and includes open slots if identified to do so in the Resource Master.

The default displayed in the prompt displays based on the contents of the Sched Print Format field in the Resource Department table. If the Sched Print Format field is blank, the default for this prompt is set to Multiple. If you press ENTER, the default is accepted.

After you enter the date, a message displays informing you that your selection is printing.

Output

Upon completion, the Resource Schedule prints on the default printer for the requesting CRT. For an example of a resource schedule, refer to Chapter 6: Online Reports/Forms, in this manual.

RESOURCE RESCHEDULE/RESERVE/MOVE

The Resource Reschedule/Reserve/Move functions are used to handle patient appointments for a resource that is not available for a particular time period. For example, if a doctor is unable to keep his/her office hours, or if a piece of equipment is being repaired and cannot be used.

The Reschedule function places any scheduled appointments on a list for further scheduling activity. The Move function enables you to place a set of scheduled appointments for one resource onto the schedule of another resource for the same day and time periods. This is useful when one physician is covering for another. The Reserve function provides a way to flag certain appointments for special attention by the department.

The Wait List and Reschedule List functions (described in this chapter) provide information about the patients in question (for example, home telephone numbers), document patient follow-up contacts, and assist with rescheduling the patient's appointment.

The Resource Reschedule/Reserve/Move selection enables you to make adjustments to a resource's schedule. After selecting this option from the menu, select the resource and enter the relevant appointment date (today or future dates only) according to the prompts you receive.

This screen prompts you to either view or process the schedule:

```

      General Hospital Resource Reschedule/Reserve/Move Processor
ROOM-----X: RAD,NM,9130 NUC MED ROOM 1 (STue Jan 16, 2001 11:24 am
Types:  NMBS 30,NME 30,NMN 30,NMR 30
Date:    Tue Jan 16, 2001
Comment:
Time  Type Pt/Fd Comment
0800A NMBS 1/ 0
0830A NMBS 1/ 0
0900A NME 1/ 0r
0930A NMN 1/ 0r
1000A NMR 1/ 0
1030A NME 1/ 0
1100A NME 1/ 0
1130A NME 1/ 0
1200N NME 1/ 0
1230P NME 1/ 0

Enter view(V) or process(P)--

```

If you enter **V** for view, the following screen is displayed, providing details of the schedule:

```

General Hospital Resource Reschedule/Reserve/Move Processor
PHYSICIAN:  ANS,ANS,1 ADAMS,HAROLD R                      Fri May 29, 1994 03:59 pm
Types:      CBC 10,FUP 20,CONS 60,GEN 30,LNCH 45
Date:       Fri May 29, 1994

Page:01
Appointments
Time  Type  Stat  Unit#      Patient      Reason      Acct#      Prio
730A  GEN   OPEN  (1)
800A  GEN   OPEN  (1)
830A  GEN          A00000156  SIMONS,GARY  GENERAL APPOINTMENT  200009-8      R
900A  GEN   OPEN  (1)
930A  GEN   OPEN  (1)
930A  FUP   OPEN  (4)
931A  CBC   OPEN  (1)
1000A  GEN          HILTY,HARRY S  7500 ACID FAST STAIN          M
1030A  GEN   OPEN  (1)
1030A  FUP   OPEN  (2)
1100A  GEN   OPEN  (1)
1130A  GEN          A00000158  MILLER,SUSAN  838 ABOIMMUNE TITER  300001-6      R
1200N  GEN   OPEN  (2)

Press NL--

next page(/)

```

The information on this screen includes the appointment time, type and status, the patient's medical record number and name, the reason for the appointment (free- form, SIM item, or appointment type), patient account number, and appointment priority.

If you enter **P** for process, the following prompts are displayed:

Enter start time for process--

Enter end time for process--

This enables you to process only a portion of a resource's schedule, leaving the rest unchanged (i.e., a therapist is not available until 11:00 pm).

After entering the start and end times for the process, the following prompt displays:

Enter reserve(H), unreserve(U), reschedule(R) or move(M)--

Select one of the following options:

- Enter **H** for Reserve to highlight a portion of a schedule in Dim Reverse video. This is used to remind the staff that an appointment slot may need to be reserved. The times reserved are available for scheduling patients, but the system warns you that a highlighted time has been selected. Also, when a slot is reserved, a lowercase "r" displays next to the slot.
- Enter **R** for Reschedule to place a group of patients with scheduled appointments during a specific time frame on a reschedule list. This is used

when a resource becomes unavailable during regular hours and appointments must be rescheduled.

- The system prompts you to select the reason for this rescheduling from a table display (for example, Emergency Call or Sick). The reason appears with the appointment on the Reschedule List, as well as in the Comment field of the resource's schedule for that day. After you enter the reason, the following prompt displays for verification:

Patients will be put on Reschedule List. Accept (Y/N)--

- Enter **N** for No to abort the rescheduling process.
- Enter **Y** for Yes and the message: Rescheduling complete displays.
- If the appointment you are rescheduling is a collapsed slot appointment (meaning that the appointment is using two or more schedule slots), the following prompt also displays:

Slot was collapsed, restore previously collapsed slots? (Y/N) --

- Enter **N** to restore only one appointment slot, or enter **Y** to restore the collapsed appointment slot to its original format determined in the Resource's Master.
- Whether or not you choose to restore the collapsed slot to its original format, the system displays the following verification message:

Old Appointment Cancelled!

- Next, the system displays the following prompt asking if the schedule slots should be removed from the resource's schedule as well:

Schedule Times from ##### to ##### will be DELETED (Y/N) [Y]--

- The pound signs (####) identify the start and stop times you selected at the beginning of the process. You are required to respond to this prompt.
- Enter **N** for No to NOT remove the schedule slots between the start and stop times. The following message displays prior to redisplaying the resource's schedule, including the schedule slots that have not been removed:

Process Complete

- The maximum number of appointments is increased by the number of patient appointments placed on the reschedule list. This is not the number of slots.

- Enter **Y** for Yes or press ENTER to remove the schedule slots between the start and stop times. The following message displays prior to redisplaying the resource's schedule, which no longer contains the slots that were removed:

Process Complete

- In this instance, the maximum number of appointments is not increased by the number of appointments placed on the reschedule list.
- Again, if the appointment you are rescheduling is a collapsed slot, the following example illustrates the impact to the schedule if you chose to restore the previously collapsed slots:
- For this example, the original schedule profile has the appointment type set to EXAM for 15 minute slots. You are scheduling two one-hour appointments; one for 10:00 am and the other for 10:30 am. When you begin to schedule the first appointment, the original schedule displays as follows:

1000 EXAM (2/0)

1015 EXAM (2/0)

1030 EXAM (2/0)

1045 EXAM (2/0)

1100 EXAM (2/0)

1115 EXAM (2/0)

1130 EXAM (2/0)

- After you schedule the 10:00 am appointment, the schedule displays as follows:

1000 EXAM (2/1)

1015 EXAM (1/0)

1030 EXAM (1/0)

1045 EXAM (1/0)

1100 EXAM (2/0)

1115 EXAM (2/0)

1130 EXAM (2/0)

- Notice that the 10:15, 10:30, and 10:45 am slots have been collapsed to accommodate the one-hour appointment.
- Next, you schedule the 10:30 am appointment. Notice that this schedule also reflects the 10:00 am appointment:

1000 EXAM (2/1)

1015 EXAM (1/0)

1030 EXAM (1/1)

1100 EXAM (1/0)

1115 EXAM (1/0)

1130 EXAM (2/0)

- The 10:45 am slot has been collapsed and no longer displays on the schedule.
- When you reschedule the 10:30 am appointment and you restore the previously collapsed slots, the schedule reflects the following:

1000 EXAM (2/1)

1015 EXAM (1/0)

1030 EXAM (1/0)

1045 EXAM (1/0)

1100 EXAM (2/0)

1115 EXAM (2/0)

1130 EXAM (2/0)

- For more information regarding the ability to collapse and uncollapse (or cancel) schedule slots, refer to the Insert Times field of the Resource Master Scheduling Parameters located in the Resource Maintenance chapter of this manual.
- Enter **U** for Unreserve to remove the Dim Reverse video and lowercase "r" on a schedule placed by the Reserve function, releasing these appointments from being reserved.
- Enter **M** for Move to place a resource's scheduled patients on another resource's schedule for the same date. The appointment types and times of

the resource accepting the moved patients must match those of the original resource.

The following prompt displays for verification:

Schedule Times from ##### to ##### will be Moved. Accept? (Y/N)--

- The pound signs (####) identify the start and stop times you selected in the beginning of the process.
- If you enter **N** for No, the move is aborted.
- If you enter **Y** for Yes, the following prompt displays enabling selection of the resource to which the appointments should be moved:

Enter first letter(s) '-', number, dept or '=' for current resource--

- The selected resource's schedule is checked to insure that open schedule slots with the same type and time exist for each of the appointments being moved. If this is not the case, the process is aborted and a message displays explaining the reason why the move cannot be performed. The prompt enabling selection of the resource to which you are moving the appointment redisplay.
- Once it is determined that matching slots are available on the receiving schedule, the following message displays in the center of the screen for verification:

The schedule between ##### and ##### for Resource XXX,XXX,##### will be moved to Resource XXX,XXX,#####

- The pound signs (####) identify the start and stop times you selected in the beginning of the process. The XXX,XXX,#####s identify the Resource ID Codes from which and to which the appointments are being moved. The following prompt displays for acceptance:

Proceed with move? (Y/N)

- If you enter **N** for No, the process is aborted. The prompt enabling selection of the resource to which you are moving the appointments redisplay.
- If you enter **Y** for Yes, the appointments are moved and the following message displays:

Move Complete

- The following prompt displays enabling you to delete or retain the schedule slots between the start and stop times:

Schedule Times from ##### to ##### will be Deleted (Y/N) [N]--

- The pound signs (####) identify the start and stop times you selected in the beginning of the process. This prompt requires a response.
- If you enter **N** for No, the schedule slots between the start and stop times are NOT removed. The following message displays prior to redisplaying the resource's schedule, including the schedule slots that were not removed:

Process Complete

- The number of booked appointments (not slots) is added back to the maximum number of patients/day for that date.
- If you enter **Y** for Yes, the schedule slots between the start and stop times are removed. The following message displays prior to redisplaying the resource's schedule which does NOT include the schedule slots that have been removed:

Process Complete

- This is followed by the message:

Move Complete

NOTE: If Scheduling Letter Options have been defined to print online for the resource and you select one of the options to generate, the system displays the following prompt:

Annotate New Appointment letter? (Y/N) [N] --

When you accept the default, a predefined letter prints. If you enter **Y** (Yes), you can enter additional text to the predefined letter. This text prints in addition to the predefined letter.

- To begin the process again, select another resource to view or process.

Impact

After you accept this screen, the following takes place:

- If a schedule or a portion of a schedule is highlighted using the Reserve or Release functions, the highlights appear on specific online inquiry functions throughout the system.
- If an appointment has been reserved, the slot is denoted with an "r" in the Pt/ Fd column.

- If a portion of a schedule is moved from one resource to another, the appointments appear on the new schedule and are removed from the original schedule. Appointment slots are removed and the maximum patients per day adjusted if indicated to do so.
- Appointments are placed on a Reschedule List or moved to another resource's schedule.
- Schedule slots remaining after appointments are rescheduled or moved are retained or deleted based on the user's direction.
- Appointments placed on a Reschedule List can be accessed and processed through the Reschedule List processor for assignment of a new appointment.
- Any display/printout of the resource's or patient's schedule reflects updates made through this process.

RESCHEDULE LIST

The Reschedule List function facilitates the rescheduling of patients removed from a schedule through the Resource Reschedule/Reserve/Move function (discussed previously). The difference between a Reschedule List and a Wait List is that the Reschedule List contains the specific dates and times of the original appointments, while the Wait List contains a requested date with a comment, but no specific appointment information.

After selecting the Reschedule List option from the menu, select the resource. A list of days with Reschedule Lists displays with the following prompt:

Select day to reschedule or hardcopy (H)--

NOTE: The system displays a list of all Reschedule dates available for a resource based on the purge parameter date.

Select a specific day, or enter **H** to print a hard copy (See Chapter 6: Online Reports/Forms). After selecting the desired day, the first patient on the list is displayed, as follows:

```

                                General Hospital Reschedule List Processor
THERAPIST-----X: RT,NUS,6500 RESPIRATORY THERAThu Jul 28, 2005 11:12 pm

                                Fri Aug 05, 2005 For EMERGENCY-----X

    Patient: A000002199 TATE,LARRY
    Appt Time: 0800A 08/05/05
    Appt Type: NEW-NEW APPOINTMENT---X
    Visit Reason: NEW APPOINTMENT---X
    Diagnosis: 001.0-CHOLERA D/T VIB CHOLERA E
    Priority: MEDICAL
    Birthdate: 01/01/22
    Phone:
    Message:
    Work Phone:
    Letter Sent:          Invalid Addr/Phone: BA
    Phone Attempts:

Contacted-process this appt(C), record phone attempt(P) or [next patient]-- |
  
```

This screen contains information about the original appointment, including the reason for the appointment being rescheduled. The patient's telephone numbers display to assist with making contact with the patient to confirm new appointment information. Some additional fields that display are:

DIAGNOSIS (DISPLAY ONLY)

The diagnosis entered for this appointment displays if entered in the appointment data.

BIRTHDATE (DISPLAY ONLY)

This is the patient's date of birth.

PHONE (DISPLAY ONLY)

This is the patient's home phone number.

NOTE: The system checks the Confidential field at the visit level if the appointment is linked to a visit, and if there is an entry, the alternate phone number prints on the Reschedule List.

MESSAGE (DISPLAY ONLY)

This field indicates if messages should be left on the primary home phone.

WORK PHONE (DISPLAY ONLY)

This phone number is entered on the Employer page of the Admission screen.

LETTER SENT (DISPLAY ONLY)

This field contains the date the reschedule letter was sent to the patient. This date is entered when the reschedule letter is printed by the system, not when the letter is mailed.

INVALID ADDR/PHONE (DISPLAY ONLY)

This field displays the code that indicates if the patient's address or phone number is invalid.

PHONE ATTEMPTS (DISPLAY ONLY)

This field contains the dates and times when telephone contacts were attempted. This information is the result of the Phone (T) transaction.

As this information displays for each patient appointment on the Reschedule List, the following prompt displays the available options:

Contacted-process this appt(C), record phone attempt(P) or [next patient]--

Enter **C** to indicate that you contacted the patient and you need to assign a new appointment time or cancel the original appointment time. The following prompt displays:

Enter no appt(N) new resource(R) or new date(D)--

- Enter **N** to indicate there is no new appointment
- Enter **R** to schedule an appointment with a new resource
- Enter **D** to schedule an appointment with the same resource on a different date.

Any of these options deletes the appointment from the Reschedule List.

If you select **R** or **D** from the previous prompt, the appointment scheduling process is repeated to file the new appointment. Information from the original appointment is retained to eliminate redundant data entry. When the new appointment is filed, the system returns to the next appointment on the reschedule list.

Enter **P** to indicate that an attempt was made to contact the patient by telephone, resulting in a record of the date and time of the call in the Phone Attempt field. You can document up to 22 calls. If this function is used, the patient remains on the Reschedule List. Press ENTER to view the next appointment on the list.

Press ENTER to display the data for the next appointment on the Reschedule List.

After all patients have been processed or viewed on the Reschedule List for that day, the system displays Day Completed and redisplay the list of remaining days to be rescheduled. You can select another day to process, or press ENTER to process another resource.

Impact

After you accept this screen, the following takes place:

- Any appointment that is rescheduled through this function appears in the system through the appropriate online functions.

Output

Upon completion, the following prints:

- If selected, a hard copy of the reschedule list prints on the default printer for the requesting CRT.
- If an appointment was assigned a new resource/date/time, the appropriate appointment, audit, and transportation notices print on the printer defined for the department in the Resource Department table.

WAIT LIST

The Wait List function of the *Patient Scheduling Module* enables patients that are placed on the list using the Appointment function to be processed the same way that patients on the Reschedule List are processed.

The Wait List function notifies an appointment clerk to contact patients and schedule them when a cancellation occurs or when a date becomes available for scheduling. A specific resource can be selected, or the system can be prompted to display all resources with Wait Lists. For each resource, the following information displays by patient.

General Hospital Wait List Processor	
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.	Fri Mar 20, 1994 02:50 pm
Mon Jun 29, 1994	
Patient: A000100106 OLIVER,ROBERT	
Comment: PLEASE CALL PATIENT	
Visit Reason: NEW APPOINTMENT	
Diagnosis: 918.0-SUPERFIC INJ PERIOcular	
Priority: MEDICAL	
Birthdate: 03/03/56	
Home Phone: (404)541-5909	
Work Phone: (404)395-4200	
Letter Sent: Mar 19, 1994	
Phone Attempts: Mar 20, 1994 1047	
Contacted-process this appt(C), record phone attempt(P) or [next patient]--	

The Comment field on this screen was entered when the patient was placed on the Wait List during the original appointment making process.

Some additional fields that display are:

DIAGNOSIS (DISPLAY ONLY)

The diagnosis entered in the appointment data displays.

BIRTHDATE (DISPLAY ONLY)

The patient's date of birth displays.

WORK PHONE (DISPLAY ONLY)

This phone number is entered on the Employer page of the Admission screen.

LETTER SENT (DISPLAY ONLY)

This field contains the date the reschedule letter was sent to the patient. This date is entered when the reschedule letter is printed by the system, not when the letter is mailed.

PHONE ATTEMPTS (DISPLAY ONLY)

This field contains the dates and times when telephone contacts were attempted. This information is the result of the Phone (T) transaction.

As this information is displayed for each patient appointment on the Wait List, the following prompt displays the available options:

Contacted-process this appt(C), record phone attempt(P) or [next patient]--

Enter **C** to indicate that you contacted the patient and that you want to schedule their appointment or cancel the original appointment. The following prompt displays:

Enter no appt(N) new resource(R) or new date(D)--

- Enter **N** to indicate there is no new appointment
- Enter **R** to schedule an appointment with a new resource
- Enter **D** to schedule an appointment with the same resource on a different date.

Any of these options deletes the appointment from the Wait List.

If you select **R** or **D** from the previous prompt, the appointment scheduling process is repeated to file the new appointment. Information from the original appointment is retained to eliminate redundant data entry. When the new appointment is filed, the system returns to the next appointment on the wait list.

Enter **P** to indicate that an attempt was made to contact the patient by telephone, resulting in a record of the date and time of the call in the Phone Attempt field. You can document up to 22 calls. If this function is used, the patient remains on the Wait List.

Press ENTER to display the data for the next appointment on the Wait List.

After all patients have been processed or viewed on the Wait List for that day, the system displays Day Completed and redisplay the list of remaining days to be wait listed. You can select another day to process, or press ENTER to process another resource.

The following are three ways to be notified of Wait List days becoming available:

- When an appointment is cancelled from a day that contains waiting patients, you receive an online message notifying you that someone is on the Wait List to be processed.
- If a day is opened through the Open/Edit function that contains patients on the Wait List, you are notified by an online message.

- If a resource with Auto Open = Yes has a day opened during Midnight Processing that includes patients on the Wait List, you can print the Wait List report to identify those patients.

Impact

After you accept this screen, the following takes place:

- Any appointment that is rescheduled through this function appears in the system through the appropriate online functions.

Output

After you accept this screen, the following prints:

- If a patient was scheduled an appointment and removed from the wait list, the appropriate appointment, audit, and transportation notices are generated on the printer defined for the department in the Resource Department table.

AUDIT SCHEDULE

The Audit Schedule function is used to view a resource's schedule, including the date and time the appointment was made, and the identity of the person that made the appointment.

The Audit Schedule function is one of three methods used to view a resource's schedule. This function displays all appointments for a particular resource on a specified day. Open appointment slots do not display, so the information is essentially an indicator of who is making appointments for the resource.

After selecting the Audit Schedule function from a Scheduling Menu, a screen displays containing the following prompt. You are prompted to select the resource you want to view.

Enter first letter(s) '-' , number, dept or '=' for current resource--

Upon selection of the resource, the following screen displays. This screen enables you to select the departments/specialties for the resource that you want to view.

General Hospital Audit Schedule Processor		
Tue Apr 05, 1994 11:05 am		
Resource Codes		
Page:01	Departments/Specialties For This Resource	
(1)	ANS,ANS,1-ADAMS,HAROLD R	Active
(2)	MED,CAR,1-ADAMS,HAROLD R	Active
Enter choice--		

After you select the resource and departments/specialties, the following screen is displayed:

General Hospital Audit Schedule Processor		
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.		Fri Mar 20, 1994 02:52 pm
1 Appointment Date	2 Start Time	3 End Time
03/20/94	1200M	1200M
Accept this screen? (Y/N) [Y]--		

Field Explanations

1. APPOINTMENT DATE (DATE)

Enter the new appointment date. The default is today's date. Pressing ENTER automatically enters today's date.

2. START TIME (TIME)

Enter the start time of the appointment if you want to view only segments of a schedule. The default is midnight. Pressing ENTER automatically enters 1200M in this field.

3. END TIME (TIME)

Enter the end time of the appointment if you want to view only segments of a schedule. The default is midnight. Pressing ENTER automatically enters 1200M in this field.

After you accept the previous screen, the following screen displays containing appointment information for the selected resource and day:

General Hospital Audit Schedule Processor						
PHYSICIAN: OBG, OBG, 45 BROWN, ROBERT D.					Thu Mar 19, 1995 02:52 pm	
Date : Fri Mar 20, 1994 (1200M - 1200M)						
Comment: NO LATE AFTERNOON APPOINTMENTS - DR. BROWN ON ROUNDS						
Time	Type	Unit#	Patient	Clerk/ID	Code	Date
730A	GEN	A000100106	OHLMANN, RICHARD	VMN	133	3/22/95 800A
730A	GEN	A000100102	HARPER, DAFNE	DDE	670	3/22/95 825A
735A	GEN	A000100101	DEAN, THOMAS	CHS	337	3/22/95 826A
820A	NEW	A000100099	FREEMAN, BETH	BRD	213	3/22/95 951A
920A	NEW		STEVENS, CARLA	BHJ	105	3/22/95 135P
1100A	FUP	A000100104	ANDREWS, COURTNEY	EDQ	288	3/22/95 153P
1100A	FUP	A000100098	ANDERSON, LEAHANNE	TPL	315	3/22/95 352P
1120A	FUP	A000100102	HARPER, DAFNE	PEW	098	3/22/95 425P
1130A	FUP	A000100103	HARRIS, SALLY	WWC	124	3/22/95 1204P N
1203P	~WI	A000100102	HARPER, DAFNE	PWS	203	3/22/95 1154A
1204P	~WI	A000100101	DEAN, THOMAS	MNC	197	3/22/95 125P
No more Appointments For Specified Day						
Enter date [next day]--						

The clerk name and ID Number, the date, and the time that display in the right column pertain to the appointment process. This date and time reflect the original appointment time or the last time the check-in or check-out date and time had been updated through end of day processing. If STAR Patient Care sign-on via security has not been implemented, all activity is under Clerk 0. An N on the right indicates that the appointment status is No Show. Press ENTER to view the appointments for subsequent days.

If the employee's ID code exceeds one character, the person's initials display followed by the code number.

If you enter a date, that date displays appointments based on the times previously entered. If you press ENTER, the next date after the displayed date displays. If you enter **T-1**, the previous date displays.

END OF DAY

The End of Day function scrolls through all the appointments that have not been processed and enables a status revision for each. At the end of a day of scheduling activity, this function is used to review those appointments that have not been processed.

For example, all leftover pending appointments can be changed to No Show status. Or, if check-in statuses have not been entered during the day, they can be done through the End Of Day function. During the course of a normal scheduling day, patients are checked-in and out of the system as they arrive for their appointments. At the end of a particular day of scheduling activity, the End of Day function is used to review the appointments that have not been processed.

When STAR Radiology is in the network, check-ins can be automatically updated in the *Patient Scheduling Module*. Any orders placed, either through STAR Patient Care or STAR Radiology, that are checked in on the Radiology system are automatically checked-in in the *Patient Scheduling Module* if the patient has a corresponding appointment.

The patient's appointment must have the same department and SIM code as the Radiology order. The system takes the check-in date sent by the Radiology system and searches for an available appointment for the same date, department, and SIM code. It checks in the first appointment it finds regardless of the time or resource.

If the appointment is already linked to an account number, the status is changed to Filled and Checked In (F/I). If no account number is associated with an appointment and "F"illed is selected, an error message displays, indicating that the appointment should be linked to an account, but the status is changed. This is allowed for times when End of Day is completed after the account that should have been associated with the appointment is no longer active.

If the Radiology system is checking in multiple SIM items under the same check-in, the Scheduling system searches through available appointments for each of the SIM items to see if the appointment exists for each. It checks in only one appointment for each SIM item. If a patient has multiple appointments with the same SIM item, it only checks in the first appointment it finds.

In order for this to occur, the department code used as the Scheduling department and Radiology SIM department must be the same. If the STAR Patient Care department is the same as well, the check-in is also updated under the Visit Check-In Processor. The STAR Patient Care function only shows one check-in per department per day regardless of the number of appointments/orders actually checked in.

After selecting the End of Day option from the Scheduling Menu, the following prompt displays prompting you to enter the desired resource:

Enter Resource--

Enter the resource's code whose appointments you want to check, or enter a hyphen (-), and press ENTER to view the available options.

The following screen displays prompting you to select the department/specialty you want to view:

```

                                General Hospital End Of Day Processor
                                Fri Apr 01, 1994 11:14 am

Page:01                      Departments/Specialties For This Resource ##=Current Choices
( 1) OBG, OBG, 45-BROWN, ROBERT D
( 2) MED, CAR, 45-BROWN, ROBERT D

Enter choices (e.g. 1,7,5-9) or '-'choices to remove--
                                end selection(NL)
```

Enter the number that corresponds to your choice and a screen displays containing the following prompt which prompts you to enter the date or to enter **L** to list the unprocessed days for that resource.

Enter date or list(L)--

NOTE: The system displays back to the first day of the previous month.

There are several formats you can use to enter the date. Refer to Chapter 4: Information Entry Techniques in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details.

After you enter the date, a screen displays containing a list of appointments, as shown on the following screen:

```

General Hospital End Of Day Processor
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.          Fri Mar 20, 1994 02:33 pm

                                Fri Mar 20,1994
                                Appointments
Page:01                                     ##=Current Choices
Time Type Unit#      Patient      Reason      Acct#      Status
( 1) 730A GEN A000100102 HARPER,DAFNE  REGULAR PREGNAN 990000667078 Pending
( 2) 735A GEN A000100101 DEAN,FRANK    GENERAL        990000659400 Pending
( 3) 820A NEW A000100099 FREEMAN,BETH  REGULAR CHECKUP 990000637078 No-Show
( 4) 920A NEW                STEVENS,CARLA  NEW APPOINTMENT          Pending
( 5)1100A FUP A000100104 ANDREWS,COURTNE 8296 ENDOMETRIA 990000690078 Pending
( 6)1100A FUP A000100098 ANDERSON,LEAHAN 8200 AMNIOCENTE 990000627078 F/I/O
( 7)1120A FUP A000100102 HARPER,DAFNE  FOLLOW UP APPT 990000667078 Pending
( 8)1130A FUP A000100103 HARRIS,SALLY  8254 CARDIAC MO 990000677078 Cancelled
( 9)1203P ~WI A000100102 HARPER,DAFNE  WALK-IN        990000667078 Walk-In
(10)1204P ~WI A000100101 DEAN,FRANK    WALK-IN        990000659400 Walk-In

Enter choices (e.g. 1,7,5-9) or ``choices to remove--
                                end selection(NL)

```

You can select to view and/or process up to 10 appointments at one time. The following screen displays to allow you to edit, cancel, or set the status to filled or No Show for each selected appointment, one after the other.

```

General Hospital End Of Day Processor
PHYSICIAN: OBG,OBG,45 BROWN,ROBERT D.          Fri Mar 20, 1994 02:33 pm

HARPER,DAFNE  Fri 03/20/94  Pending
Enter edit(E), cancel(C), fill(F), or No Show(N)--

```

The following options are available for each appointment:

- Enter **E** for Edit to provide access necessary to change the information on the appointment data screen or to enter Check-In/Out times. If a patient has not been registered or admitted, and there is no account number in Field 5, the patient's appointment prevents the End of Day from being completed for this resource and date. All appointments must either be linked to an account

number or set to No Show before End of Day processing can be marked Complete. For information on revising the appointment length, see “**REVISE PATIENT APPOINTMENT**” on page 2-68.

- If you press ENTER and enter **Y** for the Delete option, it enables you to reschedule this appointment for another resource (**R**) or to make another appointment for this patient with the same resource on a different date and time (**T**).
- Enter **F** for Filled to change the status of this appointment to Filled. If an account number has not been linked to this appointment, an error message displays. Use the Edit (**E**) option to change the New Visit field to No. Then choose the appropriate account number from the list that displays, and the appointment status is marked Filled.
- Enter **C** for Cancel to make the appointment status Cancelled.

For more information regarding the cancellation option, refer the discussion regarding cancellation in the Revise Patient Appointment section.

- Enter **N** for No show to make the appointment status No Show.
- Press ENTER if no change is to be made to the patient's appointment status.

Once all the desired appointment information has been reviewed or revised, the system asks if all the remaining pending appointments should be changed to No Show status with the following prompt:

*Complete end of day processing (Y/N) [N]--
Set pending appts to NO SHOW*

If the date that was entered has already been processed, the screen displays the date, time and name of the person who processed that day, and asks if it should be processed again.

It is necessary to complete End Of Day Processing for each day in order to keep accurate appointment information and statistics. The Delinquent End of Day Report is used as a tool to monitor the completion of this task for all resources. The Monthly Statistical report provides valuable information in terms of the data defined through End of Day. The Monthly Statistical report is not available if End of Day is not completed for all resources in the department.

Impact

After you accept this screen, the following takes place:

- Processing a resource's schedule for a given day removes that day from the Delinquent End of Day report.

- If appointments exist without a link to an account number and they are not marked as No Shows, End of Day processing for that resource's schedule does not complete and it remains on the Delinquent End of Day report.
- A hospital-defined parameter determines if check-ins performed in Scheduling should be automatically updated in the STAR Patient Care Visit Check-in Processor. If this parameter is set to Yes, the department associated with the appointment being checked in is logged as a check-in in STAR Patient Care. For this to occur, the Scheduling departments and STAR Patient Care departments must match.

Output

After you accept this screen, the following prints:

- Any no show appointment status assigned to this function appears on the No Show report.
- If all the schedules for a given month are processed through the End of Day process function, the system enables you to generate the Monthly Statistical report.
- If any appointment data was revised, the appropriate appointment, audit, and transportation notices print on the printer defined for the department in the Resource Department table.

SCHEDULING REPORTS

Outpatient Scheduling Reports is a function located on the Scheduling Menu. These functions provide the ability to produce reports that document how the *Patient Scheduling Module* is set up, or how it is being used. Each report has a heading that contains the report title, the date or period of time of the information on the report, and the date and time that the report was printed.

All reports, except the Resource Schedule Summary Report, can be printed on 8 1/2 by 11 inch paper. The page numbers are listed at the top. After selecting this option from the menu, the following screen displays listing the available reports.

```

                                General Hospital Scheduling Reports Processor
                                Thu Sep 02, 1994 09:25 am
Outpatient Scheduling Reports Input Options

      Option No.      Options
      -----
          1      Appointment Summary Report
          2      Department/Resource Schedule
          3      No Show Report
          4      Next Available Appointment Report
          5      Resource Schedule Summary Report
          6      Clerk Productivity Report
          7      Delinquent End of Day Report
          8      Appointment Reschedule Report
          9      Monthly Statistics
         10      Monthly Referral Report
         11      Referring Physician Report
         12      Wait List Report
         13      Print Patient Appointments
         14      Letters

Enter option number --

```

NOTE: For information on Option 14, Letters, see Chapter 6: Online Reports/Forms.

Appointment Summary Report

The Appointment Summary report is an accounting of the scheduling activity for resources within a department. It can be used to review past or future utilization of resources. This information is date and department specific, which are indicated at the top of the report. You can determine how many of the appointments scheduled were filled, and how many of them went unfilled. This data is totaled by resource as well as by department.

After selecting this option, the system displays a list of departments defined in the system and the following prompt:

```

Select department(s) or all (A)--
end selection (NL)

```

One or more departments can be selected or you can enter **A** for all departments. If ENTER is pressed, no selections are made and you are returned to the Reports Menu. Once departments are selected, and ENTER is pressed, the system displays the departments selected and prompts you to enter a starting date for the report. Dates can be entered in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details.

You cannot enter a date range for more than seven days. The system allows entry of any beginning and ending dates (past, present or future) as long as the date range does not exceed seven days.

The entered date displays on the screen and the system prompts you to enter an ending date for the report, defaulting to today's date. If the period of time between the starting and ending dates is greater than seven days, the system displays the following error message:

Error: Invalid Date Range

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Department/Resource Schedule

The Department/Resource Schedule report is a list in time sequence of the appointments scheduled for the departments and dates specified. It can be used as a working schedule for a resource, and contains more appointment detail than the print Resource/Department Schedule which is available through the Schedule Census function. Open appointment slots print based on the Print Open Times parameter set up via Resource Maintenance.

Upon selection of this option, the system displays a list of departments defined in the system, and the following prompt:

*Enter choices (eg 1,3,5-9), '-' choices to remove or all (A)--
end selection (NL)*

One or more departments can be selected or you can enter **A** for all departments. If ENTER is pressed, no selections are made and you are returned to the Reports Menu. Once departments are selected, and ENTER is pressed, the system displays the departments selected and prompts you to enter a starting date for the report. Dates can be entered in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details.

The entered date displays on the screen and the system prompts you to enter an ending date for the report. Both the starting and ending dates for this report must be in the future.

Once the dates are entered, you can specify the number of copies to receive. If more than 10 departments are selected, then you can specify only one copy. The maximum number of copies you can request is 10.

Upon acceptance of the screen, the system prints each resource's schedule in the format as indicated in the Sched Print Format field in the Resource Department Table for the selected departments.

If this field contains **O**, the report prints one appointment per page for all resources within that department. If it contains **M**, the report prints multiple appointments per page for all resources within that department. If this field is blank (null), the report is treated as if the field was set to **M** and prints multiple appointments per page.

You can request the number of copies when printing the Department/Resource Schedule report. This report can be printed for one or multiple departments and can also be printed for date ranges. In addition, when requested, it prints on the default printer associated with the requesting PC which is typically not a high speed printer. Restrictions have been put into place to prevent unnecessary overhead on the system, as well as unnecessary use of a printer. The restrictions are as follows:

- If you enter All departments or select more than 10 departments to print, the system does not allow access to the # Copies field and automatically fills in a quantity of one. The system displays an error message if you try to access the # Copies field in this situation.
- If you select less than 10 departments to print, the system allows access to the # Copies field but only allows entry of up to 10 copies. If more than 10 copies are desired, the request should be generated from data processing on the high speed printer (or a copy machine should be used).

If multiple departments were selected, it is possible for some resources to print one appointment per page while others print multiple appointments per page.

Output

- Upon completion, the report prints on the default printer associated with the requesting PC. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

No Show Report

The No Show report lists the patients who did not show for their appointment within a specified date range which is determined at the time the report is requested. The list identifies the patient and the appointment missed. Subtotals are given for the number

of no shows within each department. The No Show report lists the department, specialty, number of appointments that were made for the date range, and the number of no shows. The percentage of no shows is also listed. This summary is totaled by department.

Once this option is selected, the system displays the following prompts for the entry of beginning and ending dates for this report:

Enter date to begin check--

Enter date to end check [Today]--

Dates can be entered in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details. The default for the ending date is today's date. If a future date is entered, the system displays the following message:

Error: Invalid

Once valid dates have been entered and the screen has been accepted, the system redisplay the dates that have been entered along with a Printing message.

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Next Available Appointment Report

The Next Available Appointment report shows the next time slot available for each of the appointment types used by a resource if considered *searchable* in Resource Maintenance. This is the same information that can be obtained online by using the Search function. The data on the report is sorted by department, specialty, and then by resource. If there are no open *searchable* schedules with a particular appointment type, *None Available* is displayed.

After selecting this option, the following transaction prompts you to enter **Y** to print the report. All departments in the system are listed on the report.

Print report? (Y/N)--

If **N** is entered for No, the system returns to the Reports Menu.

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Resource Schedule Summary Report

The Resource Schedule Summary report is a hard copy of a specified week's schedule beginning with Sunday. This provides a quick look at the number of filled and open appointments for a given week. This report is printed by department, and is 130 characters in width.

After selecting this option, the list of departments defined in the system is displayed, followed by this prompt:

Enter choice--

Only one department can be selected at a time, and there is no default for this prompt. Once selected, the following prompt is displayed:

Enter date to begin (Must be a Sunday)--

Dates can be entered in a variety of formats, and this particular entry must be for a Sunday. If a valid date is entered, the beginning and ending dates for the report display, along with the Printing message. Dates entered for days other than a Sunday cause an Error: Invalid message. If no date is entered and you press ENTER, the system returns you to the Report Menu.

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Clerk Productivity Report

The Clerk Productivity report contains information about the volume of appointments that a particular clerk processed for a given day. The information is broken down into the number of appointments made, walk-ins processed and cancellations entered into the system for each of the days within the period specified. It is totaled by clerk. A grand total for all departments is printed at the end of the report.

After selecting this option, the following prompts prompt you to enter a beginning and ending date. The ending date defaults to today's date, with a maximum period of 30 days for the report period.

Enter date to begin check--

Enter date to end check, (30 day period maximum) [Today]--

Accept (Y/N)--

Dates can be entered in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details. If no begin date is entered and ENTER is pressed, the system returns to the Report Menu. If the dates

entered are more than 30 days apart, the system displays the Error: Invalid message. A Printing message displays if valid dates are entered.

If your hospital has purchased McKesson's WEM and your workstation and ID have been set up to enable its use, the following prompt displays:

(G)raph or (P)rint this data [P]--

If you enter **G** for Graph, a table of scheduling clerks displays for your selection. Enter the dates to be graphed (maximum of 15 days). A 3D stacked graph displays representing the number of appointments, cancellations, and walk- ins scheduled by this clerk.

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Delinquent End of Day Report

The Delinquent End Of Day report is used to audit the system for any outstanding appointment information that has not been processed via the Check In/Out or End of Day processing functions. It is suggested that this *To Do* list be run prior to using any of the statistical or summary reports available on the system. The information is sorted by department and resource, displaying any days for which activity has not been completed.

After selecting this option, the following prompts prompt you to enter the beginning and ending dates.

Enter date to begin check--

Enter date to end check [Today]--

Dates can be entered in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details. The ending date defaults to today's date. If a future date is entered in either field, the system displays the Error: Invalid message. If valid dates are entered, a Printing message displays.

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Appointment Reschedule Report

The Appointment Reschedule report is used to monitor the number of patients that have to be rescheduled through resource rescheduling for a new date. Rescheduling patient appointments is a resource intensive activity, and this report may point out the need to revise resource scheduling policies or procedures. The first page of the report shows the list of the reasons used to document rescheduled appointments. The report shows how many rescheduled appointments occurred for each reason for a particular resource on each given date. This information is summarized for each specialty, and then for the total facility at the end of the report.

After selecting this option, the following prompts prompt you to enter the beginning and ending dates.

Enter date to begin check--

Enter date to end check [Today]--

Dates can be entered in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details. The ending date defaults to today's date. If a future date is entered in either field, the system displays the Error: Invalid message. If valid dates are entered, a Printing message displays.

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Monthly Statistics

The Monthly Statistics report lists statistical totals for appointment types for a specified month. The Monthly Statistics report lists these totals for resources and/or for departments. Each report contains a daily average and a daily total for filled appointments, no show appointments, cancelled appointments, open appointments, booked time, and unbooked time.

When selected, the system requests the facility. After you select the facility, a listing of valid Resource Department codes display:

```
General Hospital Monthly Statistics Processor
                                Fri Nov 09, 1994 10:44 am

Page:01                                ##=Current Choices
( 1) 1E NURSING STATION
( 2) NINE EAST
( 3) ANESTHESIOLOGY
( 4) CANCER CLINIC
( 5) CARDIOLOGY LAB
( 6) CAT SCANNER
( 7) CHART DEPARTMENT
( 8) DENTAL CLINIC

Select department(s) or all(A)--
                                end selection(NL)
```

Department codes that are set to C for Chart Management only or P for Clinical Management only in the Module Usage field are not displayed. One or multiple departments can be selected once you select the desired department(s). The system displays the following :

Generating for XXXXX 1994

XXXXXX indicates the description of the month prior to the current month. The system checks to ensure that End of Day Processing has been done for all resources within the selected department(s). If a resource within the department has not completed End of Day Processing for all scheduled dates within the previous month, the following error message displays before returning to the reports menu:

Error: End of Day processing has not been completed!

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms for a more detailed explanation of this report.

Monthly Referral Report

The Monthly Referral report prints the referring source for patient appointments. This report is sorted by resource, department and date, listing the appointment type and time for each.

After selecting this option, the following prompts ask you to enter the beginning and ending dates:

Enter starting date of report--

Enter ending date of report--

Dates can be entered in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details. There are no defaults for these prompts, and if today's date or a future date is entered, the system displays Error: Invalid date! message. If historical dates are entered, and the screen is accepted, a Printing message displays.

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms for a more detailed explanation of this report.

Referring Physician Report

The Referring Physician report prints statistics on the referring physician(s). This report is actually two different reports. One report can be sorted by department while the other report can be sorted by resource with subtotals on physicians and grand totals on all physicians.

After selecting this option, the following screen asks you to enter the beginning and ending dates, and to decide whether you want to sort the report by resource or department:

```

General Hospital Referring Physician Report Processor
Thu Sep 02, 1994 09:26 am

1 Start Date      2 End Date      3 Res/Dept
->

Enter starting date of report --

```

You can enter dates in a variety of formats. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for further details. There are no defaults

for these prompts, and if today's date or a future date is entered, the message *Error: Invalid date!* is displayed. If historical dates are entered, and the screen is accepted, the message *Printing* is displayed.

Output

- Upon completion, the report(s) print on the printer associated with the report definition. See Chapter 6: Online Reports/Forms for a more detailed explanation of this report.

Wait List Report

The Wait List report is generated as part of Midnight Processing. As the system automatically opens up days on a resource's schedule, this report shows any resources that have patients on a wait list for these new days. This report is similar to the system notice that flashes when a new day is opened online informing you that a patient or patients are on a wait list for this new day.

This report does not contain patients added to the Wait List for a day that is currently open and full, nor for a closed day within the profile days already opened which would have to be opened manually through open/edit schedules.

After you select this option, the system displays the following prompt:

Print Wait List report? (Y/N) [N]--

Entering **Y** for Yes causes the system to display the Printing message. If the default of **N** for No is entered, the system returns to the Reports Menu. If no wait list appointments exist in the system, the report does not print and the following message displays before returning you to the Reports Menu.

Error: No Wait List appointments exist!

Output

- Upon completion, the report prints on the printer associated with the report definition. See Chapter 6: Online Reports/Forms, for a more detailed explanation of this report.

Print Patient Appointments

The Patient Appointments report is requested online via the Print Patient Appointment function. The output is a list of appointments for a patient which can be historical or pending.

After selecting this option, the following prompt asks you to select the patient for whom appointments are to be printed:

Enter Unit No, name, '=' for current--

'-' Social Security No, '#' Corporate No, '%' name for soundex

For information on selecting a patient from the MPI, refer to the *General Information Volume* of the *STAR Patient Care Reference Guide*. Once the patient has been selected, the following screen displays:

```

General Hospital Print Patient Appointments Processor
                                     Thu Mar 05, 2009 04:43 pm
No.      Name      Sex  BD   Room  Physician  SVC ICD Status
0000104804  SIMONS,GARY    M  10/16/50
1 Department Code      2 Resource                      3 Date
->

Page:01
( 1) 1E NURSING STATION      (13) PAIN CLINIC
( 2) 1 NORTH NURSING STATION (14) PSYCHOLOGY COUNSELING
( 3) ANESTHESIOLOGY         (15) PHYSICAL THERAPY DEPARTMENT IN
( 4) CANCER CLINIC          (16) REHAB CLINIC
( 5) CARDIOLOGY LAB
( 6) CAT SCANNER
( 7) CHART DEPARTMENT
( 8) DENTAL CLINIC
( 9) ENT CLINIC RESOURCE DEPARTMENT
(10) LABORATORY
(11) MEDICAL
(12) OBSTETRICS/GYNECOLOGY/INFERTIL

Select a department or all(A) --

```

Field Explanations

1. DEPARTMENT CODE (TABLE LOOKUP)

Enter the number of the department for which appointments are to be printed, or enter **A** for all departments.

2. RESOURCE (TABLE LOOKUP)

If a specific department is entered in Field 1, select the resource for which appointments are to be printed. If **A** for All is entered in Field 1, this field is left blank.

3. DATE (10-C-R)

Enter the starting date from which appointments are to be printed. If **H** is entered, all historical or past appointments print. The default is today's date, which causes all future scheduled appointments to print. Once this screen is accepted, the message *Printing* is displayed.

Output

Upon acceptance of this screen, a list of appointments for a patient, which may be historical or pending, prints at the default printer for the requesting CRT.

Chapter 4 - SCHEDULE CENSUS FUNCTIONS

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SCHEDULE CENSUS OVERVIEW

The Schedule Census functions provide schedule information in varying formats with different access methods to meet your specific needs throughout an organization. These schedules reflect online up-to-date information and are available on demand for display or print at any time.

To access a Schedule Census option, select Schedule Census from the following Scheduling menu:

```

                                General Hospital Schedule Census Processor
                                Mon Jun 01, 1994 03:17 pm
PAS Station ID Input Options

Option No.  Option
-----
      1      Appointments
      2      Procedure Scheduling
      3      Walk-In
      4      Copy Appointment
      5      Revise Patient Appointment
      6      Patient Appointment Inquiry
      7      Check In-Out
      8      End of Day
      9      Audit Schedule
     10      Resource Rescheduling
     11      Wait List
     12      Schedule Census
     13      Resource Schedule Inquiry
     14      Resource Maintenance
     15      Scheduling Reports
     16      RES-Q OR Functions

Enter option number--
```

After selecting the Schedule Census option from the menu, the following submenu might display:

```

                                General Hospital Schedule Census Processor
                                Mon Jun 01, 1994 03:17 pm
Schedule Census Input Options

Option No.  Option
-----
                                Display Options
      1      Resource/Department Schedule
      2      Station Schedule
      3      Resource Weekly Schedule
      4      Transportation Schedule

                                Print Options
      5      Resource/Department Schedule
      6      Station Schedule
      7      Resource Weekly Schedule
      8      Transportation Schedule

Enter option number--
```

RESOURCE/DEPARTMENT SCHEDULE

The Resource/Department Schedule lists, in time sequence, all appointments within the defined parameters for the specified department. All resources within the department are intermixed to provide a picture of the total department workload without separating the resources. The Resource/Department Schedule can be displayed on the screen or can be printed.

After selecting this option from the menu, the following screen is displayed:

General Hospital Resource/Department Schedule Processor			
Fri Mar 20, 1994 02:53 pm			
1 Date	2 Start Time	3 End Time	4 Department
03/20/94	06:00A	05:00P	OBG-OBSTETRICS/GYNEC
5 Resource			
All			
Accept this screen? (Y/N) [Y]--			

Field Explanations

1. DATE (DATE-R)

Enter the schedule date you want to display. The default is today's date.

2. START TIME (TIME-R)

Enter the start time for the time range of the schedule that you want to display. This field enables you to display only a portion of the schedule. For example, you could display only the patients going to Radiology this morning. There is no default for this field.

3. END TIME (TIME-R)

Enter the end time for the time range of the schedule that you want to display. The default value is equal to the Start Time.

4. DEPARTMENT (TABLE LOOKUP)

Enter the department you want to view. A single department must be selected. Select from the list, or enter the code if you know it. The code and description display.

5. RESOURCE (TABLE LOOKUP)

This field lists the resources within the department for selection. You can select a single resource, multiple resources, or all the resources within the department. The default value is ALL.

After you enter **Y** for Yes at the *Accept this screen?* prompt, the following screen displays or prints (depending on the function you selected from the submenu).

NOTE: If the patient is an inpatient and the I/P account is posted to the appointment, the patient's nursing station and bed number display in the Location field.

General Hospital Resource/Department Schedule Processor				
Fri Mar 20, 1994 02:53 pm				
Page:01	Appointments in OBSTETRICS/GYNECOLOGY Dept. on 03/20/94			
(1)	730A GEN	5 BROWN, ROBERT D.	OLSON, RALPH	No Location
		GENERAL		
(2)	730A GEN	5 BROWN, ROBERT D.	HARPER, DAFNE	26 1201-2
		REGULAR PREGNANCY		
(3)	735A GEN	5 BROWN, ROBERT D.	DAVIS, ROBERT	No Location
		GENERAL		
(4)	820A NEW	20 BROWN, ROBERT D.	FREEMAN, BETH	1N 1104-1
		REGULAR CHECKUP		
(5)	920A NEW	20 BROWN, ROBERT D.	STEVENS, CARLA	No Location
		NEW APPOINTMENT		
Enter choice--				
/ = next page				

The information on the previous screen includes the appointment time and type, resource code and description, and patient name and location (if available).

The prompt *Enter Choice --* enables the user to select an individual appointment in order to view the detail. This information is display only and cannot be edited.

The following is an example screen:

General Hospital Appointments Processor						
Scheduled Appointment Screen Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000001487	HARDERSEN, DARRON	M	02/03/04			
1 Resource			2 Visit Type	3 Appointment		
	RADIOLOGY RM 3 (DX) (SCH)		UGI	Fri 03/06/09 1030A		
4 New Visit	5 Account	6 Service Department		7 Visit Reason		
Yes		(A) Radiology		UPPER GI SERIES		
8 Ord #	9 Length	10 Comment				
	30					
11 Add'l Items	12 Referring Source		13 Referring Physician			
	11 REGIONAL HOSPITAL		32 ADAIR, FRANK C			
14 Ref Date	15 Transport	16 Priority	17 Display		18 Chart	
03/03/09	PORT	ASAP	VIEW REASON		Yes	
19 Additional Comment #1			20 Additional Comment #2			
21 Working Diagnosis						
011.60-TB PNEUMONIA-UNSPEC						
Enter field number or '/' starting field number--						

For more information about this screen and field descriptions, see the Scheduled Appointment screen under Super Search in Chapter 2: Appointment Processing.

Output

- If the print function was selected, a printout resembling the data that is displayed prints on the default printer for the requesting CRT. For more information, see Chapter 6: Online Reports/Forms in this manual.

STATION SCHEDULE

The Station Schedule function lists, in bed sequence order, the appointments for patients on the designated nursing unit or in the defined bed group. The Station Schedule enables the nursing department to view schedules for all their patients in one compiled list. This schedule is efficient because it is always as current as the department schedule. The Station Schedule can be viewed online, or can be printed.

After selecting this option from the menu, the following screen is displayed:

General Hospital Station Schedule Processor		
Fri Mar 20, 1994 02:54 pm		
1 Station	2 Bed Groups	3 Date
1 NORTH	ALL	03/20/94
4 Department	5 Resource	
->		
Enter department description `` or code [All]--		

Field Explanations

1. STATION (TABLE LOOKUP)

Enter the nursing station you want to access. The available nursing stations for a given nursing CRT are defined in the CRT table.

2. BED GROUP (TABLE LOOKUP)

The bed groups for this nursing station list on the bottom of the screen. Select a specific bed group, or press ENTER to display the default, which is all bed groups. If no bed groups are defined, this defaults to All.

3. DATE (10-C-R)

Enter the appointment date you want to view, or press ENTER to display the default which is today's date.

4. DEPARTMENT (TABLE LOOKUP)

Enter a specific department, or press ENTER to display the default which is all departments.

5. RESOURCE (TABLE LOOKUP)

If you specified a department in the Department field, a list of resources automatically displays on the bottom of the screen. Select resources from this list, or press ENTER to display the default which is all resources. If you entered **A** in the Department field, this field is bypassed.

After you complete and accept this screen, patients who have appointments within the defined criteria display, as follows:

General Hospital Station Schedule Processor					
Fri Mar 20, 1994 02:54 pm					
Page:01	Appointments in All. Dept. on 03/20/94				
(1)	1103-1	ANDERSON, LEAHANNE	FLOR, CARL	820A NEW	10
		NEW APPOINTMENT	CHAIR	SAMPSON, DIANE	
(2)	1103-1	ANDERSON, LEAHANNE	ADAMS, HAROLD R	900A FUP	20
		8074 ELECTRO-PHYSIO STUDY			
(3)	1103-1	ANDERSON, LEAHANNE	BROWN, ROBERT D	1100A FUP	10
		8200 AMNIOCENTESIS			
(4)	1104-1	FREEMAN, BETH	BROWN, ROBERT D	820N NEW	20
		REGULAR CHECKUP	STRETCH	ADAMS, HAROLD	
(5)	1104-1	FREEMAN, BETH	ADAMS, HAROLD R	940A NEW	10
		REGULAR EXAM			
Enter choice--					
/ = next page					

The information on this screen includes patient room/bed and name, resource name, appointment time, type and length of time, visit/appointment reason, type of transportation and attending physician.

The prompt *Enter Choice --* enables you to select an individual appointment in order to view the detail. This information is display only and cannot be edited.

The following is an example screen:

General Hospital Appointments Processor						
Scheduled Appointment Screen Thu Mar 05, 2009 04:43 pm						
No.	Name	Sex	BD	Room	Physician	SVC ICD Status
000001487	HARDERSEN, DARRON	M	02/03/04			
1 Resource			2 Visit Type	3 Appointment		
	RADIOLOGY RM 3 (DX) (SCH)		UGI	Fri 03/06/09 1030A		
4 New Visit	5 Account	6 Service Department		7 Visit Reason		
Yes		(A) Radiology		UPPER GI SERIES		
8 Ord #	9 Length	10 Comment				
	30					
11 Add'l Items	12 Referring Source		13 Referring Physician			
	11 REGIONAL HOSPITAL		32 ADAIR, FRANK C			
14 Ref Date	15 Transport	16 Priority	17 Display		18 Chart	
03/04/09	PORT	ASAP	VIEW REASON		Yes	
19 Additional Comment #1		20 Additional Comment #2				
21 Working Diagnosis						
011.60-TB PNEUMONIA-UNSPEC						
Enter field number or '/' starting field number--						

Refer to Chapter 2: Appointment Processing in this manual for detailed explanations of these fields.

Output

- If the print function was selected, a printout resembling the data that is displayed prints on the default printer for the requesting CRT. For more information, see Chapter 6: Online Reports/Forms in this manual.

RESOURCE WEEKLY SCHEDULE

The Resource Weekly Schedule provides an efficient way to view a resource's scheduled utilization for any specified seven day span. This function displays on one screen the number of filled and open slots scheduled for a resource. This function is particularly helpful for recurring appointments in areas such as rehabilitation.

After selecting this option from the menu, specify the resource and enter the starting date. The following screen displays:

General Hospital Resource Weekly Schedule Processor							
PHYSICIAN: PT,THP,45 JONES, MARY L.				Fri Mar 20, 1994 02:55 pm			
Time	03/20	03/21	03/22	03/23	*03/24	*03/25	*03/26
730A	(1/2)	(1/1)		(1)			
735A	(1/1)	(1)		(1)			
740A	(1)	(1/1)		(1)	(1/1)		
800A	(1)	(1)		(1)	(1/1)		
820A	(1/1)	(1/1)		(1)			
900A	(1)	(1/1)		(1)			(1/1)
920A	(1/1)	(1)		(1)			(1/1)
940A	(1)	(1)		(1)			
1000A	(1)	(1)		(1)			(1/1)
1100A	(2/2)	(2)		(2)			
1110A	(2)	(2)		(2)			
1120A	(2/1)	(2)		(2)			
1130A	(2/1)	(2)		(2)			
1140A	(2)	(2)		(2)			
1150A	(2)	(2)		(2)			
1200N	(2)	(2)		(2)			
1203P	(1)						
Press NL--							

All defined time slots for any of the seven days display in the far left column. The dates of the days of the week display across the top of the screen. Notepad days are indicated with an asterisk (*) beside the date. Single numbers within parenthesis indicate the number of allotted slots for that time with none of the slots filled, for example, (3).

When two numbers are in parenthesis, the number on the left of the slash (/) is the number allotted and the number on the right is the number filled. A slot is blank if no slots were defined for that time on that day. If the schedule cannot display on one screen, pressing ENTER brings up the next screen of time slots.

Output

- If the print function was selected, a printout resembling the data that is displayed prints on the default printer for the requesting CRT. For more information, see Chapter 6: Online Reports/Forms in this manual.

TRANSPORTATION SCHEDULE

The Transportation Schedule is used to facilitate communication from the scheduling department to the transportation or escort department in terms of patient appointment transportation requirements. When an appointment is scheduled, the scheduler confirms the need for transportation assistance and selects the method of transportation requested.

Appointments with transportation needs are placed on the Transportation Schedule. The department uses this list to determine which patients need assistance. The Transportation Schedule can be viewed online or can be printed as needed.

When selected, the following screen displays:

```

                                General Hospital Transportation Schedule Processor
                                Fri Nov 09, 1994 10:44 am

Page:01                                ##=Current Choices
( 1) 1E NURSING STATION
( 2) NINE EAST
( 3) ANESTHESIOLOGY
( 4) CANCER CLINIC
( 5) CARDIOLOGY LAB
( 6) CAT SCANNER
( 7) CHART DEPARTMENT
( 8) DENTAL CLINIC

Select department(s) or all(A)--
                                end selection(NL)
```

Department codes that are set to C for Chart Management only or M for Clinical Management only in the Module Usage field are not displayed. One or multiple departments can be selected for viewing/printing once you select the desired department(s). The system requests the date. You can enter the date to review, or press ENTER to display the default T, which is today's date.

The following screen displays or prints (depending on the function you selected from the submenu).

General Hospital Transportation Schedule Processor							
Fri Mar 20, 1994 02:55 pm							
Date: 03/20/94							
Time	Type	Dpt	Resource	Bed	Patient	Unit #	Method
1 730A	GEN	OBG	BROWN,ROBERT D.	1203-2	HARPER,DAFNE	10000100102	Walk
2 800A	NEW	ANS	ADAMS,HAROLD R	1206-1	JONES,BRENDA EL	10000100096	CART
3 820A	NEW	OBG	BROWN,ROBERT D.	1104-1	FREEMAN,BETH	10000100099	Wheelch
4 940A	NEW	ANS	ADAMS,HAROLD R	1104-1	FREEMAN,BETH	10000100099	Cart
5 1000A	NEW	ANS	ADAMS,HAROLD R	1311-2	SMITH,SAM	10000100100	Wheelch
6 1010A	NEW	ANS	ADAMS,HAROLD R	SER	DEAN,THOMAS	10000100101	Stretch
7 1100A	FUP	OBG	BROWN,ROBERT D.	1106-1	ANDREWS,COURTNE	10000100104	Wheelch
8 1100A	FUP	OBG	BROWN,ROBERT D.	1103-1	ANDERSON,LEAHAN	10000100098	Wheelch
9 1130A	FUP	OBG	BROWN,ROBERT D.	1402-1	HARRIS,SALLY	10000100103	Stretch
10 1203P	~WI	OBG	BROWN,ROBERT D.	1402-2	HARPER,DAFNE	10000100102	CART
11 1204P	~WI	OBG	BROWN,ROBERT D.	SER	DEAN,THOMAS	10000100101	CART
Press NL--							

The information on this screen includes the appointment time and type, resource department code, resource name, room/bed or outpatient type, patient name, and medical record and method of transportation.

Output

- If the print function was selected, a printout resembling the data that is displayed prints on the default printer for the requesting CRT. For more information, see Chapter 6: Online Reports/Forms in this manual.

Chapter 5 - CHART FUNCTIONS

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CHART FUNCTIONS

The Chart Functions are used to facilitate communication regarding patient charts between Scheduling Departments and Medical Records. Chart Functions pertain to pending request lists and outguides, as well as to other reports that provide information about patients that are scheduled for appointments within the organization. These lists and reports streamline the paper flow requesting charts for appointments and enables the Medical Record department to pull and deliver the charts more efficiently.

The reports available through the Chart Functions are the result of information that has been filed with each resource and with each filed appointment. As each appointment is filed, the Chart field has a Yes or No value. The initial value of this field is determined by the Resource designation of a chart requestor with Yes being the flag to write out a request for a chart. The following sections describe how each of the reports make use of this information.

In addition to the lists which you prepare and request on demand, Stat Chart Requests are generated for same day appointments that are filed with the Chart value equaling Yes. These requests are notices that print in Medical Records as soon as the appointment is filed. This notifies the department to deliver the chart as soon as possible.

After selecting Chart Functions from the Resource Maintenance menu, the following submenu displays listing the available options:

```

                                General Hospital Chart Functions Processor
                                Wed Apr 29, 1998 03:53 pm
Chart Functions Input Options

Option No.  Option
-----
      1      Print Chart Pending Request List & Outguides
      2      Print Exception List
      3      Print Unassigned Unit # List

Enter option number--
```

Print Chart Pending Request List & Outguides

The Pending Request List contains charts that have a request on file, either via the Chart Tracking Request option of the STAR Patient Care Chart Management Module, or as a result of an appointment made in the *STAR Patient Care Patient Scheduling Module* (if these modules are installed in your hospital). Once a request is filled or cancelled, the chart no longer displays on the list. The outguides that print with this option correspond to the charts that print on the Pending Request List.

NOTE: Printing the Pending Request List and/or outguides does not check out the chart.

If the chart is to be checked out, it must be done via the Chart Tracking Chart Check Out option of the STAR Patient Care Chart Management Module. (The chart can be checked out via the request that is on file.) You must also indicate that the chart has actually been pulled by marking it as such via the Update Pending RequestList option of the *STAR Patient Care Chart Management Module* (for additional information refer to the Update PendingRequest List section in the *STAR Patient Care Reference Guide Chart Management Module*).

To print the Pending Request List and/or Outguides, select this option from the Chart Tracking Print Functions menu. The following screen is displayed:

```
General Hospital Print Chart Pending Request List & Outguides Processor
                                Wed Apr 29, 1998 04:06 pm

Page:01                               Facilities
( 1) Model Hospital A
( 2) Model Hospital B

Enter choice--                          Search(TAB)
```

Make your selection, and the following processor screen displays:

```
General Hospital Print Chart Pending Request List & Outguides Processor
                                Wed Apr 29, 1998 04:02 pm

( 1)Starting date      :
( 2)Starting time     :
( 3)Ending date       :
( 4)Ending time       :
( 5)Print Outguides   :
( 6)Borrowers         :
( 7)Sort              :

Enter starting date [Today]--
```

Field Explanations

1. STARTING DATE (DATE-R)

This field enables you to indicate the starting date to be used for this report. The starting date corresponds to the Date Needed associated with the requests to be included on this list. For example, to include all charts with a date needed for tomorrow, enter that date here. If no entry is made press ENTER, and today's date is automatically entered.

2. STARTING TIME (TIME-R)

This field enables you to indicate the starting time to be used for this report. The starting time entered here corresponds to the time needed associated with the requests to be included on this list. For example, to include all charts with a time needed of 7:00am, enter that time here. If you press ENTER without making an entry, the current time is automatically entered.

3. ENDING DATE (DATE-R)

This field enables you to indicate the ending date to be used for this report. The ending date corresponds to the date needed associated with the requests to be included on the list. For example, to pull all charts that were requested for the next two days, enter two days from the value in the Starting Date here. If you press ENTER without making an entry, tomorrow's date is automatically entered.

4. ENDING TIME (TIME-R)

This field enables you to indicate the ending time to be used for this report. The ending time entered here corresponds to the time needed associated with the requests to be included on the list. For example, to pull all charts ending with a request time of 5:00pm, enter that time here. If you press ENTER without making an entry, the time of 7:00am is automatically entered.

5. PRINT OUTGUIDES (1-A-R)

This field enables you to indicate whether an outguide should print for each request on the Pending Request List. Even if this field is set to Yes, an outguide only prints for charts that have an account with the Print Outguide flag in the Chart Management Patient Type Parameters set to Yes. If you press ENTER without making an entry, No is automatically entered.

6. BORROWERS (TABLE LOOKUP)

This field enables you to identify specific borrowers to be included on the report.

To complete this field, execute one of these entry options:

- Enter the borrower code(s) separated by commas.
- Enter **A** to indicate the report should include all borrowers with pending requests.
- Enter a hyphen (-) to display all borrower with pending requests. You may select multiple entries from this listing.

If you press ENTER without making an entry, All is automatically selected, and the list includes all borrowers with pending requests.

7. SORT

This field enables you to indicate the sort option for the report. Enter the number of the desired sort option.

NOTE: When you select the sort option of Borrower, there is a page break after each listing for that borrower. If you press ENTER without making an entry, the list is automatically sorted by Unit Number.

Once all fields on this screen are completed and the screen is accepted, a message briefly displays stating the report is compiling. You are then returned to the first prompt. Press period (.) and ENTER to return to the original menu.

Output (1-N-R)

- The Chart Pending Request List prints on the printer associated with the report definition (refer to Chapter 6: Online Reports/Forms in this manual).
- If requested, the Outguides also print on the printer associated with the report definition (refer to Chapter 6: Online Reports/Forms in this manual).

Print Exception List

The Print Exception List function is an option on the Chart Functions submenu. This option enables you to print a list which includes all the patient appointments that did not request a chart (the value of the Chart field on the appointment screen equaled No). There are two ways this can happen:

1. The initial value of this field may have been No if the resource was defined in Resource Maintenance as not being a requestor.
2. The Chart field was edited during the appointment process to No.

After selecting this option, the following prompt displays:

Enter Exception List report date--

Enter the date to print and the list prints at the designated printer (refer to Chapter 6: Online Reports/Forms in this manual for details).

Output

After you accept this screen, the following prints:

- The Exception List prints at the printer associated with the report definition (Chart Pending Request List).

Print Unassigned Unit # List

The Print Unassigned Unit #List function is an option on the Chart Functions submenu. This option prints a list which includes all patients and their appointments that do not have unit numbers assigned. Without unit numbers, these patients are without charts. This report is a *catch all* audit of patients who need charts created, and can be used as a tool to avoid duplicate number assignments.

After selecting this option, the following prompt displays:

Enter report date--

Enter the date to print and the list prints at the designated printer.

The Medical Records department verifies that these patients are new to their organization and completes files on them as appropriate.

Output

After you accept this screen, the following prints:

- The Unassigned Unit # List prints at the printer associated with the Report Definition (Chart Pending Request List - refer to Chapter 6: Online Reports/Forms in this manual for details).

Clear MPI Of Unassigned Unit #s

The Clear MPI of Unassigned Unit #'s function is an option on the Chart Functions submenu. This function removes from the MPI people with no unit numbers who are not presently scheduled for appointments and who have no appointment history.

After selecting this option, the following prompts are displayed:

This function is very RESOURCE INTENSIVE! Continue (Y/N) [N]--

Entering **N** returns you to the Chart Functions submenu. Entering **Y** causes the following prompt to display:

This should be run at times of LOW system usage! Are you sure (Y/N) [N]--

Entering **N** returns you to the Chart Functions submenu. Entering **Y** begins the clearing process.

Impact

After you accept this screen, the following takes place:

- All patients in the MPI without a unit number are cleared from the database. Exceptions to this include patients with pending appointments, guarantors and patients with Pharmacy orders. This function should be used with caution since all references to the patients are deleted and can only be recreated manually.

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SCHEDULING REPORTS

The *Patient Scheduling Module* contains a variety of online reports, which are illustrated by the following menu. These reports provide the ability to document how the *Patient Scheduling Module* is set up, or how it is being used. Each report has a heading that contains the report title, the date or period of time of the information on the report, and the date and time that the report was printed.

All reports, except the Resource Schedule Summary Report, can be printed on 8 1/2 by 11 inch paper. The page numbers are listed at the top. After selecting Scheduling Reports option from the main Scheduling menu, the following menu displays listing the available reports.

General Hospital Scheduling Reports Processor	
Tue Jun 02, 1994 03:47 pm	
Scheduling Reports Input Options	
Option No.	Option
1	Appointment Summary Report
2	Department/Resource Schedule
3	No Show Report
4	Next Available Appointment Report
5	Resource Schedule Summary Report
6	Clerk Productivity Report
7	Delinquent End of Day Report
8	Appointment Reschedule Report
9	Monthly Statistics
10	Monthly Referral Report
11	Referring Physician Report
12	Wait List Report
13	Print Patient Appointments
14	Letters
15	SQL User Menu

Enter option number--

The options listed on the submenu above are described in this section.

RESOURCE MASTER DATA REPORT

The Resource Master Data report documents the resources entered into the system. This is essentially a hard copy of the information entered for a resource via the Resource Master Information function. It is useful for comparing resources and for determining what information may be missing from the Resource Masters as the system is being set up. This report is also helpful when using the CopyMaster function which provides a way to create new resources without rekeying the data.

The Resource Master Data reports can be printed individually by entering a specific resource/department ID, or the system defaults to all resources. One resource prints per page. The information on the upper right of the reports are the demographics of the resource. The upper left contains the Scheduling parameters as they are currently set up in the system. The Appointment Types listed are those available for patients being scheduled for this resource. For a more detailed explanation, see the Resource Maintenance chapter of this document.

The information on this report includes:

- Resource name, resource code, and date/time printed
- Resource department and resource department address one, address two, city, state, and ZIP code
- Resource name, resource code, and maximum patients per day
- Resource specialty and maximum overbook patients per appointment slot
- Resource department and maximum overbook patients per day
- Resource office telephone number and extend schedule parameter
- Resource type and insert time slots parameter
- Module usage and auto open schedules parameter
- SIM department and print open times on resource schedule parameter
- Valid shifts and scheduling creation deadline in days
- Station Group and chart requestor parameter
- End of day and request by resource parameters
- Display reason and require referring physician parameter
- Default attendance outcome and order generation parameter

- Order default parameter
- Appointment and profile types available

Figure 6.1 Resource Master Data Report

General Hospital A Scheduling System		Page 1
Resource Master Data Report		
		Printed: Wed Jul 12, 2000 0306P
ADAIR, FRANK C (FMC, SUR, 32)		
FAMILY MEDICINE CLINIC (ALL)-----X DEPARTMENT		1345 HOSPITAL DRIVE X
		ADDRESS TWO-----X
		ATLANTA-----X, GA 11111-1111
Resource:	ADAIR, FRANK C (FMC, SUR, 32)	Max Pts/Day: 999
Specialty:	SUR-	Max Overbook/Slot: 1
Department:	FMC-FAMILY MEDICINE CLINIC (ALL)-----X	Max Overbook/Day: 4
Office Phone:	(404) 324-4089	Extended Sched? Y
Resource Type:	4-THERAPIST-----X	Insert Times? Y
Module Usage:	Chart, Sched	Auto Open Schedules? Y
SIM Department:		Print Open Times On Sched? Y
Valid Shifts:		Sched Create Deadline: 365 Days
Station Group:		Requestor: Y
End of Day:	No	Request by Resource: N
Display:	View Reason	Require Ref Phys: N
Def. Att Outcome:	FOLLOW UP VISIT	Order Generation: Y
		Order Default: Y
Appointment Types		
ANGI	30 Minutes	Srch ANGIOGRAM-----X
ART	90 Minutes	Srch ARTERIOGRAM-----X
BE	30 Minutes	Srch BARIUM STUDY-----X
CN15	15 Minutes	Srch 15 MIN CONSULTATION
CN30	30 Minutes	Srch 30 MIN CONSULTATION
CN45	45 Minutes	Srch 45 MIN CONSULTATION
CSP	30 Minutes	Srch CERVICAL SPINE----X
CT30	30 Minutes	Srch CT HEAD-----X
CT60	60 Minutes	Srch CT ABD/PELVIS-----X
CTE	45 Minutes	Srch CT EXAM-----X
CKR	15 Minutes	Srch CHEST X-RAY-----X
LNCH	60 Minutes	Srch LUNCH
SUR	30 Minutes	NO Srch SURGERY
Profile Types		
Code	Description	
1	NEW PROFILE	
2	HOSPITAL SURGERY PROFILE	
End of Report		

DEPARTMENT DATA REPORT

The Department Data report is a list of the resources that exist for a particular department. This is essentially a hard copy of what displays when a hyphen (-) is entered to display the available resources in the system. The information available on this report includes whether or not the resource typically requests charts for their appointments. The information on this report can be modified through the Resource Maintenance functions.

The information on this report includes:

- Date report was printed
- Resource department name and address one
- Resource department telephone number, and address two
- Resource department city, state, and ZIP code
- Resource ID code, resource name, resource type, and chart requestor parameter.

Figure 6.2 Department Data Report

HOSPITAL Scheduling System			
Department Data			
		Printed: Wed Feb 05, 1994 9:00A	
OBSTETRICS		999 NINTH AVE	
(412)843-0293		SUITE 900	
		ATLANTA, GA 30346	
Resource List			
Resource I.D.	Name	Type	Requestor
OBS,300,999	STEVENS,CARLA A	PHYSICIAN	Yes
OBS,300,998	MILLARD,SAMUEL R	PHYSICIAN	Yes
OBS,500,1234	CAHILL,JAMES B	PHYSICIAN	Yes

APPOINTMENT TYPE SUMMARY REPORT

The Appointment Type Summary report is a list of the appointment types used by the various resources within the department. For example, this report can be used to verify which doctors are accepting new appointments. The Searchable Y/N field indicates whether searches for available appointments can be made when appointments are being scheduled.

The information on this report includes:

- Date and time report was printed
- Resource department name, and address one
- Resource department telephone number, and address two
- Resource department city, state, and ZIP code
- Appointment type code, length of time, description, and searchable parameter
- Resources using this appointment type

Figure 6.3 Appointment Type Summary Report

HOSPITAL Scheduling System			
Appointment Type Summary Report			
			Printed: Wed Feb 02, 1994 8:35A
OBSTETRICS DEPARTMENT		999 NINTH AVE	
(404) 342-8778		SUITE 900	
		ATLANTA, GA 30346	
Code	Time	Description	Searchable
*LUN	30 min	LUNCH HOUR	N
	Used by:	OBS, 300, 999 OBS, 500, 1234	
*MTG	60 min	MEETINGS	N
	Used by:	OBS, 300, 999 OBS, 500, 1234	
CONS	15 min	CONSULTATION	Y
	Used by:	OBS, 300, 999 OBS, 500, 1234	
CONS	30 min	CONSULTATION	Y
	Used by:	OBS, 300, 998	
FUP	10 min	FOLLOW UP	Y

APPOINTMENT SUMMARY REPORT (KASRX)

The Appointment Summary report is an historical accounting of the scheduling activity for resources within a department. This information is date and department specific, which are indicated at the top of the report. You can determine how many of the appointments scheduled were filled, and how many of them went unfilled. This data is totaled by resource as well as by department.

The information on this report includes:

- Schedule date
- Date/time printed
- Resource department name
- Resource name second code, appointment types defined, number of filled appointment slots, number of unfilled appointment slots by type
- Total filled and unfilled appointment slots by resource
- Total filled and unfilled appointment slots by department

Figure 6.4 Appointment Summary Report (KASRX)

HOSPITAL Scheduling System Appointment Summary Report Schedule Date: Feb 3, 1994 Printed: Wed Feb 02, 1994 8:54A			
OBSTETRICS DEPARTMENT			
Resource	Type	Filled	Unfilled

STEVENS, CARLA A (OBS,300,999)	CONS	0	1
	FUP	1	1
	NEW	1	0
	TOTAL	2	2
MILLARD, SAMUEL F (OBS,300,998)	TOTAL	0	0
CAHILL, JAMES B (OBS,500,1234)	CONS	0	1
	FUP	0	2
	NEW	0	1
	TOTAL	0	4
OBSTETRICS DEPARTMENT TOTALS		2	6

DEPARTMENT/RESOURCE SCHEDULE

The Department/Resource Schedule report enables you to print a hard copy of all resource schedules within one, multiple or all departments on the default printer associated with the requesting PC.

Each resource has the option of printing one or multiple appointments per page in the Resource Department table. If one resource is printing per page, then open appointment slots are not included on the report regardless of the setting in the Resource Schedule Parameters in the Resource Master.

The information on this report includes:

- Profile comment
- Patient type
- Unit number
- Transportation
- Birthdate
- Priority
- Referring source/referring physician
- Order number
- Frequency
- Working diagnosis
- Treatment diagnosis/reason
- Service Items
- Workload (by SIM item)
- Total resource workload
- Total scheduled SIM items
- Date/time printed
- Resource code and name
- Resource department and address one

- Resource department telephone number and address two
- Resource department city, state, and ZIP code
- Resource schedule day and date
- Appointment number, time and type, patient account number, name, location, sex, and home telephone number
- Appointment status and visit reason, patient medical record number, and transportation method (if any)
- Appointment comment, birthdate and priority
- Referring source and referring physician
- Additional appointment comments 1 and 2

NOTE: Any appointment slots that have been reserved print on the report with the word *Reserved* in the Patient Information field.

When the Department/Resource Schedule is accessed the following screen is displayed:

General Hospital Department/Resource Schedule Processor			
Wed Mar 07, 2001 01:33 pm			
1 Departments	2 Start Date	3 End Date	4 # Copies
FMC	03/07/01	03/07/01	1
Accept this screen? (Y/N) [Y]--			

Field Explanations

1. DEPARTMENTS (TABLE LOOKUP-R)

This field allows for the selection of the department from the Master Resource table or the selection of a specific department.

2. START DATE (DATE)

Enter the date from which you want the system to begin searching for resource schedule information.

3. END DATE (DATE)

Enter the date that you want the system to stop searching for resource schedule information.

4. COPIES (2-N-R)

This field is used to indicate the number of copies of the schedule to print. The default for this field is 1. No more than 10 copies may be requested at a time.

When this screen is accepted, the Department/Resource Schedule prints.

Figure 6.5 Department/Resource Schedule Report

Model Hospital A	Page 5
Dept/Resource Schedule Report	
FMC,SUR,32 (ADAIR,FRANK C)	Printed: Wed Mar 7, 2001 1127A
Wednesday March 7, 2001	
FAMILY MEDICINE CLINIC (ALL)-----X (404)552-9871	1345 HOSPITAL DRIVEX ADDRESS TWO-----X ATLANTA-----X, GA 11111-1111
DR ADAIR HAS SURGERY FIRST WEEK OF THE MONTH	
No Time Type Account # Patient Name	Location Sex Home Phone
Status Visit Reason Unit #	Patient Type Transport
Comment	Birthdate Priority
Referring Source/Referring Physician	Order # Frequency
Additional Comments	
Working Diagnosis	Treatment Diagnosis/Reason
Service Items	Workload
Additional Comments #3 (Maximum 3 lines)	
Additional Comments #4 (Maximum 3 lines)	
1 0900A NEW COMT-0900A	
2 0915A CN15	
3 0930A NEW	
4 0945A CN30	
5 1000A NEW	
6 1015A CN45	
7 1030A NEW	
8 1045A ANGI	
9 1100A CON	
10 1115A ART	
11 1130A CON	
12 1200N LNCH	
13 1230P CTE	
14 0100P CON	
15 0130P BE	
16 0130P BED	
17 0130P CON	
18 0200P CON	
19 0200P SUR	
End of Report	

NO SHOW REPORT (KNSR)

The No Show report lists the patients who did not show for their appointment within a specified date range which is determined at the time the report is requested. The list identifies the patient and the appointment missed. Subtotals are given for the number of no shows within each department. The No Show report lists the department, specialty, number of appointments that were made for the date range, and the number of no shows. The percentage of no shows is also listed. This summary is totaled by department.

Information on this report includes the following:

- Date range of report
- Date/time printed
- Department name
- Patient medical record number and name, resource code, appointment time, and appointment type
- Total no shows by resource department
- Resource department name, resource specialty, total number of appointments, total number of no shows, percentage of appointments that were no shows
- Resource department name, total number of appointments in department, total number of no shows in department, percentage of department appointments that were no shows
- Total number of appointments in the facility, total number of no shows in the facility, and percentage of facility appointments that were no shows

Figure 6.6 No Show Report (KNSR)

HOSPITAL Scheduling System					Page 1
No Show Report -- Department Summary					
Sat Feb 21, 1994 To Thu Feb 26, 1994					
Printed: Thu Feb 26, 1994 4:00P					
Department	Specialty	Appts	No Shows	Per Cent	
ANESTHESIOLOGY	GERONTOLOGY	7	4	70.00	
ANESTHESIOLOGY	Summary	7	4	70.00	
FAMILY PLANNING	OBSTETRICS	1	1	100.00	
FAMILY PLANNING	Summary	1	1	100.00	
INTERNAL MEDICINE	INTERNAL MEDICINE	10	0	0.00	
INTERNAL MEDICINE	Summary	10	0	0.00	
Total Summary		18	5	32.33	
End of Report					

HOSPITAL Scheduling System					Page 1
No Show Report -- Total Facility					
Sat Feb 21, 1994 To Thu Feb 26, 1994					
Printed: Thu Feb 26, 1994 4:00P					
Feb 25, 1994					
DEPARTMENT	Account #	Patient	Resource	Appointment	
ANESTHESIOLOGY					
	A000000156	SISNEY, GARY ANDREW	ANS,001,1	0845 (GEN)	
		WALSH, JAMES DALTON	ANS,004,1	1030 (NEW)	
	A000000157	SMITH, FREDERICK WILLIAM	ANS,004,1	1330 (CONS)	
	A000000162	REINER, MICHAEL JOSHUA	ANS,001,1	1400 (CONS)	
ANESTHESIOLOGY Summary: 4 No Shows Recorded					
Total Facility Summary: 4 No Shows Recorded					
End of Report					

NEXT AVAILABLE APPOINTMENT REPORT (KNAAF)

The Next Available Appointment report shows the next time slot available for each of the appointment types used by a resource if considered *searchable* in Resource Maintenance. This is the same information that can be obtained online by using the search function. The data on the report is sorted by department, specialty, and then by resource. If there are no open *searchable* schedules with a particular appointment type, *None Available* prints.

Information on this report includes the following:

- Date/time printed
- Resource department name
- Resource specialty code and name
- Resource name and code, appointment type and date of next available appointment

Figure 6.7 Next Available Appointment Report (KNAAF)

HOSPITAL Scheduling System		
Next Available Appointment Report		
		Printed: Wed Feb 05, 1994 8:56A
OBSTETRICS DEPARTMENT		
Resource	Type	Date

Specialty: 300 - WOMEN'S HEALTH		
STEVENS,CARLA A (OBS,300,999)	GEN	Feb 6, 1994
	CONS	None Available
	FUP	Feb 6, 1994
	NEW	Feb 27, 1994
MILLARD,SAMUEL F (OBS,300,998)	GEN	Feb 8, 1994
	CONS	Feb 8, 1994
	FUP	Feb 12, 1994
Specialty: 500 - OBSTETRICS		
CAHILL,JAMES B (OBS,500,1234)	GEN	Feb 5, 1994

RESOURCE SCHEDULE SUMMARY REPORT (KPSS)

The Resource Schedule Summary report is a hard copy of a specified week's schedule beginning with Sunday. This provides a quick look at the number of filled and open appointments for a given week. This report is printed by department, and is 130 characters in width.

The information that prints on this report includes the following:

- Date range for the report
- Date/time report was printed
- Resource name and code
- Resource department name and address one
- Resource department address 2
- Resource department city, state, and ZIP code
- Dates included on the report
- Days of the week included on the report
- Appointment time, type and length of time, and filled indicator (f) for each appointment of each day

Figure 6.8 Resource Schedule Summary Report (KPSS)

HOSPITAL Scheduling System Resource Schedule Summary Sun Jul 26, 1994 To Sat Aug 01, 1994						
Printed: Sun Jul 26, 1994 8:56A						
GYM THERAPIST (PMM,PMR,3)						
PHYSICAL MEDICINE & REHABILITATION DEPARTMENT						
175 MADISON AVENUE SUITE 100 MT JOY, NJ 08060						
Jul 26 Sunday	Jul 27 Monday	Jul 28 Tuesday	Jul 29 Wednesday	Jul 30 Thursday	Jul 31 Friday	Aug 01 Saturday
time type length	time type length	time type length	time type length	time type length	time type length	time type length
08:00 NEW 60	08:00 NEW 60	08:00 NEW 60	08:00 NEW 60	08:00 NEW 60	08:00 NEW 60	
08:00 TX 60	08:00 TX 60	08:00 TX 60	08:00 TX 60	08:00 TX 60	08:00 TX 60	
08:30 INPT 20	08:30 INPT 20	08:30 INPT 20	08:30 INPT 20 f	08:30 INPT 20 f	08:30 INPT 20 f	
08:30 TX 60	08:50 INPT 20	08:30 TX 60	08:30 TX 60	08:30 TX 60	08:30 TX 60	
08:50 INPT 20	09:00 NEW 60	08:50 INPT 20 f	08:50 INPT 20 f	08:50 INPT 20 f	08:50 INPT 20 f	
09:00 NEW 60	09:00 TX 60	09:00 NEW 60	09:00 NEW 60	09:00 NEW 60	09:00 NEW 60	
09:00 TX 60	09:10 INPT 20	09:00 TX 60	09:00 TX 60	09:00 TX 60	09:00 TX 60	
09:10 INPT 20	09:30 INPT 20	09:10 INPT 20 f	09:10 INPT 20 f	09:10 INPT 20 f	09:10 INPT 20 f	
09:30 INPT 20	09:50 INPT 20	09:30 INPT 20 f	09:30 INPT 20 f	09:30 INPT 20 f	09:30 INPT 20 f	
09:50 INPT 20	10:00 TX 60	09:50 INPT 20 f	09:50 INPT 20 f	09:50 INPT 20 f	09:50 INPT 20 f	
10:00 TX 60	10:10 INPT 20	10:00 TX 60	10:00 TX 60	10:00 TX 60	10:00 TX 60	
10:10 INPT 20	10:30 INPT 20	10:10 INPT 20 f	10:10 INPT 20 f	10:10 INPT 20 f	10:10 INPT 20 f	
10:30 INPT 20	10:50 INPT 20	10:30 INPT 20 f	10:30 INPT 20 f	10:30 INPT 20 f	10:30 INPT 20 f	
10:50 INPT 20	11:00 TX 60	10:50 INPT 20 f	10:50 INPT 20 f	10:50 INPT 20 f	10:50 INPT 20 f	
11:00 TX 60	11:10 INPT 20	11:00 TX 60	11:00 TX 60	11:00 TX 60	11:00 TX 60	
11:10 INPT 20	12:00 *LUN 60	11:10 INPT 20	11:10 INPT 20	11:10 INPT 20	11:10 INPT 20	
12:00 *LUN 60	13:00 *MTG 30	12:00 *LUN 60	12:00 *LUN 60	12:00 *LUN 60	12:00 *LUN 60	
13:00 NEW 60	14:00 INPT 20	13:00 NEW 60	13:00 NEW 60	13:00 NEW 60	13:00 NEW 60	
13:00 TX 60	14:00 NEW 60	13:00 TX 60	13:00 TX 60	13:00 TX 60	13:00 TX 60	
13:20 INPT 20	14:00 TX 60	13:20 INPT 20 f	13:20 INPT 20 f	13:20 INPT 20 f	13:20 INPT 20 f	
13:40 INPT 20	14:20 INPT 20	13:40 INPT 20 f	13:40 INPT 20 f	13:40 INPT 20 f	13:40 INPT 20 f	
14:00 INPT 20	14:40 INPT 20	14:00 INPT 20 f	14:00 INPT 20 f	14:00 INPT 20 f	14:00 INPT 20 f	
14:00 NEW 60	15:00 INPT 20	14:00 NEW 60	14:00 NEW 60	14:00 NEW 60	14:00 NEW 60	
14:00 TX 60	15:00 NEW 60	14:00 TX 60	14:00 TX 60	14:00 TX 60	14:00 TX 60	
14:20 INPT 20	15:00 TX 60	14:20 INPT 20 f	14:20 INPT 20 f	14:20 INPT 20 f	14:20 INPT 20 f	
14:40 INPT 20	15:20 INPT 20	14:40 INPT 20 f	14:40 INPT 20 f	14:40 INPT 20 f	14:40 INPT 20 f	
15:00 INPT 20	15:30 TX 60	15:00 INPT 20 f	15:00 INPT 20 f	15:00 INPT 20 f	15:00 INPT 20 f	
15:00 NEW 60	15:40 INPT 20	15:00 NEW 60	15:00 NEW 60	15:00 NEW 60	15:00 NEW 60	
15:00 TX 60		15:00 TX 60	15:00 TX 60	15:00 TX 60	15:00 TX 60	
15:20 INPT 20		15:20 INPT 20	15:20 INPT 20	15:20 INPT 20	15:20 INPT 20	
15:30 TX 60		15:30 TX 60	15:30 TX 60	15:30 TX 60	15:30 TX 60	
16:00 TX 60		16:00 TX 60	16:00 TX 60	16:00 TX 60	16:00 TX 60	

CLERK PRODUCTIVITY REPORT (KCPRF)

The Clerk Productivity report contains information about the volume of appointments that a particular clerk processed for a given day. The information is broken down into the number of appointments made, walk-ins processed and cancellations entered into the system for each of the days within the period specified. It is totaled by clerk.

The information that prints on this report includes the following:

- Date range for the report
- Date/time report was printed
- Appointment scheduling clerk's ID number and name
- Date and date, number of appointments, walk-ins, and cancellations made in the system
- Total appointments, walk-ins, and cancellations for each clerk

Figure 6.9 Clerk Productivity Report (KCPRF)

HOSPITAL Scheduling System Clerk Productivity Report Mon Feb 2, 1994 Thu Feb 5, 1994 Printed: Thu Feb 05, 1994 5:00P			
Clerk: 12312 Horn, Joan			
Date	Appointments	Walk-Ins	Cancellations
Mon Feb 2, 1994	120	0	25
Tue Feb 3, 1994	75	2	4
Wed Feb 4, 1994	26	12	0
Thu Feb 5, 1994	100	24	15
Total	321	38	44
Clerk: 23123 Cabe, James			
Date	Appointments	Walk-Ins	Cancellations
Mon Feb 2, 1994	50	100	2
Tue Feb 3, 1994	10	132	10
Total	60	232	12

DELINQUENT END OF DAY REPORT (KEODF)

The Delinquent End of Day report is used to audit the system for any outstanding appointment information that has not been processed via the Check In/Out or End of Day processing functions. It is suggested that this *To Do* list be run prior to using any of the statistical or summary reports available on the system. The information is sorted by department and resource, displaying any days for which activity has not been completed.

The information on this report includes the following:

- Date range for the report
- Date/time report was printed
- Resource department name and code
- Resource code and name
- Dates of schedules that have not been processed

Figure 6.10 Delinquent End of Day Report (KEODF)

HOSPITAL Scheduling System	
Delinquent End-Of-Day Processing Report	
Sun Feb 1, 1994 to Mon Feb 9, 1994	
Printed: Thu Feb 09, 1994 11:44A	
ANESTHESIOLOGY (ANS)	
ANS,001,185	ROBERTS,BEN
	Feb 5, 1994
	Feb 8, 1994
INTERNAL MEDICINE (INT)	
INT,500,111	KARLEN,RICHARD
	Feb 5, 1994
OBSTETRICS (OBS)	
OBS,300,999	STEVENS,CARLA A
	Feb 6, 1994
OBS,300,998	MILLARD,SAMUEL F
	Feb 7, 1994

APPOINTMENT RESCHEDULE REPORT (KARF)

The Appointment Reschedule report is used to monitor the number of patients that did not keep their original appointments and have to be rescheduled for a new date. Rescheduling patient appointments is a resource intensive activity, and this report may point out the need to revise scheduling policies or procedures.

The first page of the report shows the list of the reasons used to document rescheduled appointments. The report shows how many rescheduled appointments occurred for each reason for a particular resource on each given date. This information is summarized for each specialty, and then for the total facility at the end of the report.

The information on this report includes the following:

- Date range for the report
- Date/time report was printed
- Key to rescheduled reason codes and descriptions
- Resource code and name
- Day and date, number of appointments by reschedule reason code, and total number of appointments for that date
- Total number of appointments by reschedule reason code, and total appointments for the resource

Figure 6.11 Appointment Reschedule Report (KARF)

HOSPITAL Scheduling System Reschedule Report Thu Feb 5, 1994 To Thu Feb 5, 1994 Printed: Thu Feb 5, 1994 8:51A						
Reschedule Reasons Used by this Report:						
	1	EMERGENCY CALL				
	2	MEETINGS				
	3	PERSONAL				
	4	VACATION				
	5	SICK				

HOSPITAL Scheduling System Reschedule Report Thu Feb 5, 1994 To Thu Feb 5, 1994 Printed: Thu Feb 5, 1994 8:51A						
Resource:OBS,300,999 STEVENS,CARLA A						
	Reschedule Reason Code					
Date	1	2	3	4	5	Total Patients
Thu 02/05	5	0	2	0	0	7
Total	5	0	0	0	1	6

MONTHLY STATISTICS (KMSRF/KMSRD)

The Monthly Statistics report lists statistical totals for appointment types for a specified month. The Monthly Statistics report lists these totals for resources and/or for departments.

The information on this report includes the following:

- Date/time printed
- Month and year for which statistics are printed
- A code and name, and total number of appointments
- Daily average and monthly total number of filled appointments
- Daily average and monthly total number of no show appointments
- Daily average and monthly total number of cancelled appointments
- Daily average and monthly total number of open appointments
- Daily average and monthly total number of booked appointment time
- Daily average and monthly total number of unbooked appointment time
- Identical statistics by resource department

Figure 6.12 Monthly Statistics (KMSRF)

General Hospital A Monthly Statistical Report			Page 1
Resource Report			
Printed: Mon Mar 3, 1994 8:51A			
February 1994			
PT,PT,101 BONNER,LINDA		TOTAL APPTS	110
	Daily Average	Monthly Total	
FILLED APPOINTMENTS	4	80	
NO SHOW APPOINTMENTS	.5	10	
CANCELLED APPOINTMENTS	.5	10	
OPEN APPOINTMENTS	.5	10	
BOOKED TIME	300 MIN	100 HRS	
UNBOOKED TIME	30 MIN	10 HRS	
PT,PT,102 ROSSINS,TERRY		TOTAL APPTS	220
	Daily Average	Monthly Total	
FILLED APPOINTMENTS	8	160	
NO SHOW APPOINTMENTS	.1	20	
CANCELLED APPOINTMENTS	.1	20	
OPEN APPOINTMENTS	.1	20	
BOOKED TIME	600 MIN	200 HRS	
UNBOOKED TIME	60 MIN	20 HRS	

Figure 6.13 Monthly Statistics (KMSRD)

General Hospital A Monthly Statistical Report			Page 1
Department Report			
Printed: Mon Mar 3, 1994 8:51A			
February 1994			
Physical Therapy Department		TOTAL APPTS	220
	Daily Average	Monthly Total	
FILLED APPOINTMENTS	6	240	
NO SHOW APPOINTMENTS	.7	30	
CANCELLED APPOINTMENTS	.7	30	
OPEN APPOINTMENTS	.7	30	
BOOKED TIME	400 MIN	300 HRS	
UNBOOKED TIME	40 MIN	30 HRS	

MONTHLY REFERRAL SUMMARY REPORT (KMRF)

The Monthly Referral report prints the referring source for patient appointments. This report is sorted by resource, department and date, listing the appointment type and time for each.

The information on this report includes the following:

- Date/time printed
- Day and date reported
- Resource code, resource department, referring source, and appointment type
- Patient name, visit reason, and appointment time

NOTE: The data used to create this report is only stored as long as the McKesson Table Parameter Code is set to purge patient appointment information. This parameter is set by McKesson based on the individual hospital's request; therefore, when you enter the Begin Date field, remember that the report only provides data for as long as the parameter has been set.

For example, if you request a Begin Date of T-90 and the purge parameter code is set for 60 days, only the data available for the previous 60 days is provided. This can be confusing when specifying the Report Range for several months and all the requested data does not print. If you encounter this scenario, refer to the setting of the purge patient appointment parameter in the McKesson Table Parameter Code function.

Figure 6.14 Referring Physician Report by Department (KMRF)

General Hospital Scheduling System Physician Referral Report		
Printed: Wed Sep 8, 1994 3:34P		
Report Range - May 1, 1994 thru Sep 3, 1994		
Referring Physician	DEPARTMENT	APPOINTMENT

*ADAMS, JONES, SMITH ETAL - 700	RAD	1
	Physician Total	1
*BAAB, FREMSTAD ETAL - 703	RAD	1
	Physician Total	1
ADAIR, FRANK C - 32	RT	1
	Physician Total	1
ADAMS, HAROLD R - 1	LAB	1
	MRB	1
	RAD	1
	RT	2
	Physician Total	5
COLEMAN, MICHAEL G - 10	RT	3
	Physician Total	3
JAMES, STEVEN ONEXXXXX - 10	RAD	1
	Physician Total	1
ADAIR, FRANK TWOXXXXX - 20	RAD	1
	Physician Total	1
LEES, JACK R - 2	LAB	2
	PT	2
	RAD	3
	Physician Total	7
SCOTT, EDWARD D - 630	RAD	1
	Physician Total	1
TONGEN, LYLE A - 8	RT	3
	Physician Total	3
	Total For All Physicians	24
		=====

Figure 6.15 Monthly Referral Summary Report

HOSPITAL Scheduling System			
Monthly Referral Summary Report			
Printed: Thu Feb 26, 1994 8:51A			
Resource	Dept	Referring Source	Appt Type
Patient Name		Visit Reason	Appt Time

Thursday February 26, 1994			
10	ANS	SURGICENTER	NEW
HILTY, HARRY J		NEW APPOINTMENT	0930A
205	RAD	KAISER CLINIC	GEN
SISNEY, GARY A		GENERAL APPOINTMENT	1230P

PHYSICIAN REFERRAL REPORT (KRPR)

The Physician Referral Report prints the referring physician(s) for patient appointments. This report can be sorted by resource or department.

The information on this report includes the following:

- Referring physician, physician code
- Resource department, specialty, and code
- Subtotals for resources or departments by physician
- Total appointments for all physicians
- Report date range
- Date/time printed

The first report example shows the report sorted by department. The second report example shows the report sorted by resource.

NOTE: The data used to create this report is only stored as long as the McKesson Table, Parameter Code is set to purge patient appointment information. This parameter is set by McKesson based on the individual hospital's request; therefore, when you enter the Begin Date field, remember that the report only provides data for as long as the parameter has been set.

For example, if you request a Begin Date of T-90 and the purge parameter code is set for 60 days, only the data available for the previous 60 days is provided. This can be confusing when specifying the Report Range for several months and all the requested data does not print. If you encounter this scenario, refer to the setting of the purge patient appointment parameter in the McKesson Table, Parameter Code function.

Figure 6.16 Physician Referral Report by Department (KRPR)

Model Hospital A Physician Referral Report (KRPR) Printed: Wed Nov 30, 1994 0306P		
Report Range - Mar 6, 1992 through Nov 29, 1994		
Referring Physician - Code	Department	Appointments

*ADAMS, JONES, SMITH ETAL - 700	N/A	1
	RT	2
	Physician Total	3
*BAAB, FREMSTAD ETAL - 703	NSH	1
	Physician Total	1
*CONROY, PULLON, ETAL - 800	CAR	1
	EEG	2
	Physician Total	3
ADAMS, HAROLD R - 1	CAR	2
	PT	5
	RT	2
	Physician Total	9
BABB, GARY H - 432	RT	1
	Physician Total	1
DODGE, DEAN - 960	PT	3
	Physician Total	3
DONOVAN, STEVEN - 30	N/A	1
	Physician Total	1
LABONE, DANIEL - 95	N/A	2
	Physician Total	2
ZELLER, HECTOR C - 99	PT	1
	Physician Total	1
Total For All Physicians		24
- - End of Report - -		

Figure 6.17 Physician Referral Report by Resource (KRPR)

Model Hospital A Physician Referral Report (KRPR) Printed: Wed Nov 30, 1994 0306P Report Range - Mar 6, 1992 through Nov 29, 1994		
Referring Physician - Code	Resource	Appointments

*ADAMS, JONES, SMITH ETAL - 700	FMC, ORT, 1	1
	RT, PUL, 32	2
	Physician Total	----- 3
*BAAB, FREMSTAD ETAL - 703	PT, PT, 9152	1
	Physician Total	----- 1
*CONROY, PULLON, ETAL - 800	FMC, SUR, 32	1
	PT, CAR, 432	2
	Physician Total	----- 3
ADAMS, HAROLD R - 1	CT, CT, 9110	1
	PT, ORT, 123	1
	PT, PT, 9150	2
	PT, PT, 9152	2
	RT, PUL, 32	2
	US, US, 9140	1
	Physician Total	----- 9
BABB, GARY H - 432	RT, PUL, 32	1
	Physician Total	----- 1
DODGE, DEAN - 960	PT, ORT, 123	1
	PT, PT, 9152	2
	Physician Total	----- 3
DONOVAN, STEVEN - 30	FMC, SUR, 32	1
	Physician Total	----- 1
LABONE, DANIEL - 95	FMC, ORT, 1	2
	Physician Total	----- 2
ZELLER, HECTOR C - 99	PT, PT, 9150	1
	Physician Total	----- 1
Total For All Physicians		24
- - End of Report - -		

WAIT LIST REPORT (KWLRF)

The Wait List report is generated as part of Midnight Processing. As the system automatically opens up days on a resource's schedule, this report shows any resources that have patients on a wait list for these new days. This report is similar to the system notice that flashes when a new day is opened online informing you that a patient or patients are on a wait list for this new day.

The information on this report includes the following:

- Date/time printed
- Resource department name
- Resource code, name, and day and date of existing wait list

Figure 6.18 Wait List Report (KWLRF)

HOSPITAL Scheduling System Appointment Wait List Report Printed: Thu Feb 05, 1994 11:36A		
Department	OBSTETRICS	
	Resource	Date
	OBS,300,999 STEVENS,CARLA A	Thu Feb 5,1994
	INTERNAL MEDICINE	
	INT,002,997 JONES,MICHAEL R	Sat May 2, 1994

PRINT PATIENT APPOINTMENTS

The Patient Appointments report is requested online via the Print Patient Appointment function. The output is a list of appointments for a patient which may be historical or pending.

The information on this report includes the following:

- ID number of person requesting the report, and the date/time it was printed
- Patient name and medical record unit number
- Appointment number, day, date, time, type, resource department, resource name, appointment reason, and status

Figure 6.19 Print Patient Appointments

HOSPITAL A								
Patient Appointments								
Requested by: 12312					Printed: Thu Mar 12, 1994 03:48A			
Patient: JOHNSON, LARRY					Unit #: 000-10-00-53			
#	Day	Date	Time	Type	Dept	Resource	Reason	Status
1	Thu	03/12	1000A	CONS	ANS	ADAMS, HAROLD R	CONSULTATION	Pending
2	Fri	04/03	1130A	GEN	FMP	AGNESI, NICK	GENERAL CHECKUP	Pending
3	Tue	05/12	0300P	GEN	DER	MADDUX, ANDY	RASH ON FACE	Pending

LETTERS

You can print patient letters in a batch mode and reprint previously printed letters from the Scheduling Reports option on the Patient Care Scheduling menu. Select Letters from the following menu:

```
General Hospital Scheduling Reports Processor
Thu Apr 04, 1996 02:34 pm
Scheduling Reports Input Options

Option No.  Option
-----
1      Appointment Summary Report
2      Department/Resource Schedule
3      No Show Report
4      Next Available Appointment Report
5      Resource Schedule Summary Report
6      Clerk Productivity Report
7      Delinquent End of Day Report
8      Appointment Reschedule Report
9      Monthly Statistics
10     Monthly Referral Report
11     Referring Physician Report
12     Wait List Report
13     Print Patient Appointments
14     Letters
15     SQL User Menu

Enter option number--
```

The following screen is displayed:

```
General Hospital Letters Processor
Thu Apr 04, 1996 02:35 pm
Letters Input Options

Option No.  Option
-----
1      Batch Letters
2      Reprint Letters

Enter option number--
```

Batch Letters

When you select Batch Letters from the previous screen, the following screen is displayed:

```

                                General Hospital Batch Letters Processor
                                Thu Apr 04, 1996 02:36 pm

( 1)Facility                :
( 2)Reprint?                : No
( 3)Date Range              :
( 4)Letter Types            :
( 5)Addressee Types         :
( 6)Departments             :
( 7)Resources               :
( 8)Postage                 :
( 9)Printer                 :
Page:01                     Facilities
( 1) Model Hospital A
( 2) Model Hospital B

Enter choice--

```

Field Explanations

1. FACILITY (TABLE LOOKUP-R)

This field enables you to indicate which facility's letters you want to print if you are in a multifacility area. If it is not multifacility, the facility is defaulted.

2. REPRINT (1-A-R)

The field is automatically filled in with the default response of *No* as soon as the screen appears. In order to reprint a batch of letters, this field must be slashed into directly using the /2 convention. When you access this field, you can reprint previously printed letter batches. Valid entries are Y for Yes and N No.

3. LETTER TYPES (TABLE LOOKUP)

This field enables you to indicate the type(s) of letters you would like to print. The multiple response table driver is used to select the appropriate letters. The following prompt displays:

Enter `` to select letter types [ALL]--

4. DATE RANGE (SPECIAL FORMAT)

This field determines the date range for each of the letters. The following prompt displays:

Enter beginning date [04/07/96]--

The beginning date is a required field and any of the typical date entry routines are valid. The default response to the date depends on the letters being printed. Reminder, Revision, Attendance, Wait List, New Appointment, Reschedule, and Cancellation letters all default to the system date. No Show letters default to 3 weeks prior to the system date.

If multiple letters are selected, and any of them are No Show, the default is 3 weeks prior to the system date. Once the beginning date range has been entered, the ending date range must be entered. The following prompt displays:

Enter ending date --

The default for the ending date depends on the letter as well. All letters are one week from the date entered with the exception of No Show letters which is a default of 1 week previous. The ending date is required, and any of the typical date entry routines are valid.

5. ADDRESSEE TYPE (1-A-R)

This field enables you to request patient letters, doctor letters, or both. The following prompt displays:

Print doctor letters(D), patient letters(P), or both(B)? [B]--

6. DEPARTMENT (TABLE LOOKUP)

This field enables you to select the department(s) whose letters you would like to print. You can select or view only those departments for which you have access. Multiple departments can be selected. The following prompt displays:

Enter resource department code or first letter(s) '-' to list [ALL]--

7. RESOURCES (TABLE LOOKUP)

This field enables you to define the resources you would like to print letters for in this printing session.

8. POSTAGE (1-A-R)

This field enables you to indicate the postal grouping(s) of letters you would like in this printing session. The following prompt displays:

Print for first(F) class, second(S) class, or both(B) class postage? [B]--

If the physician has indicated that a fax is possible and faxing software is in use at the customer site, the letters are faxed rather than printed.

9. PRINTER (1-A-R)

This field enables you to indicate the printer to which the letters should be directed. The following prompt displays:

Use local(L) or central(C) printer? [L]--

Once the letters have been requested, they print in accordance with all the letter parameters previously described. If any attachments exist for any of the letters, they are printed directly following the letters.

In addition to logging the patient's appointment history that a scheduling letter has been created, this information can be accessed through the Reprint Scheduling Letters function. This function displays all letters that have been printed for the patient or letter type within the defined time frame (as long as that is within the letter retention parameter on the Facility Option screen).

Reprint Letters

When you select Reprint Letters from the Letters Input Options screen, the following prompt displays:

*Enter Unit No, name, '=' for current--
 '-' Social Security No, '#' Corporate No, '%' name for soundex, '*' Account No*

Once you select the patient, the following screen displays:

General Hospital Reprint Letters Processor							
Thu Apr 04, 1996 02:38 pm							
No.	Name	Sex	BD	List	Physician	Spc	Status
000000631	NAGLER, BRIAN EVER	M	10/04/92				
#	Day	Date	Time	Type	Dpt	Resource	Status
Page:01							
(1)	Fri	03/01	0300P	POST	FMC		Letter
	03/01/96 1542 Type New Appointment-Patient						
	From Appointment-Online at PAS by #30597 VMN						
(2)	Tue	03/12	0100P	LNCH	FMC		Letter
	03/12/96 1420 Type New Appointment-Patient						
	From Appointment-Online at PAS by #30597 VMN						
(3)	Wed	03/13	1130A	CON	FMC	7422 XR ABD SERIES W	Letter
	03/13/96 1945 Type New Appointment-Patient						
	From Appointment-Online at PAS by #30597 VMN						
(4)	Wed	03/13	0100P	CLS	FMC	EDUCATION CLASS---X	Letter
	03/13/96 1901 Type New Appointment-Patient						
	From Appointment-Online at PAS by #30597 VMN						
(5)	Tue	04/02	0900A	SUR	FMC	SURGERY	Letter
	04/02/96 0700 Type New Appointment-Patient						
	From Appointment-Online at PAS by #30597 VMN						
Enter choice--							

The screen lists all previously printed letters. Select the letter you want to reprint and the following prompt displays:

Use local(L) or central(C) printer? [L]--

Indicate which printer to use for the letter.

Letter Types

The following screens contain examples of the types of Patient Letters (Appointment Reminder, Appointment Revision, Attendance, Cancellation, New Appointment, No Show, Reschedule, and Appointment Wait List). Each letter type has three versions:

- A facility reminder letter for parent/child
- A facility version reminder letter
- A resource appointment reminder to accompany letter

APPOINTMENT REMINDER LETTER

1. Parent/Child

```
To the Parent/Guardian of {PATIENT NAME.....},

    {PATIENT NAME.....} has been scheduled for an
Appointment on {APPOINTMENT DATE}.

All results will be sent to:

    {PATIENT ADDRESS 1    ...}
    {PATIENT ADDRESS 2    ...}
    {PATIENT CITY (TO), {PATIENT STATE.....}, {PATIENT }

APPT REMINDER FOR PARENTS
```

2. Facility Version

```
{date}

{patient Name}
{Patient street address}
{Patient city},{State}.{zip code}

Dear {PATIENT NAME.....}

    This is to remind you that you have an appointment with
Resource: {Resource Name.....} at {APPOIN} on
{APPOINTMENT DATE} .

If you cannot keep this appointment for any reason, please call to
cancel the appointment and reschedule your visit.

Thank You.
```


3. Resource Appointment Reminder

Dear {Resource Name.....},

The following patients have been sent Attendance reminder letters:

{{Begin List}}

{PATIENT NAME.....}

{PATIENT ACCOU}

{{End List}}

APPT REMINDER FOR PHYSICIAN WITH LIST

APPOINTMENT REVISION LETTER

1. Parent/Child

To the Parents/Guardian of {PATIENT NAME.....},

Your Child's appointment has been revised, and you will now be seeing {Resource Name.....}.

Sincerely,

{HOSPITAL NAME.....}

2. Facility Version

Dear {PATIENT NAME.....},

Your appointment has been revised, and you will now be seeing {Resource Name.....}. You should review the following instructions prior to your appointment:

{DEPARTMENT INSTRUCTIONS
(SCHED).....}

3. Resource Appointment Reminder

Dear {Resource Name.....},

The following patients have been sent appointment reminder letters:

 {{Begin List}}
 {PATIENT NAME.....} {PATIENT MED}
 {{End List}}

Sincerely,
{Description Genera}

ATTENDANCE LETTER

1. Parent/Child

To the Parents of {PATIENT NAME.....},

This is to inform you that your child's attendance at his/her appointment with {Resource Name.....} went very well. You will be informed shortly of the results.

Sincerely,
{Description Genera}

2. Facility Version

Dear {P} {PATIENT NAME.....},

You recently attended an appointment with {RESOURCE NAME (SCHEDULE)}. We are writing to let you know that all of your results were normal. Should you wish to get more details, please call our Medical Records department at {HOSPITAL PH}, and give them your {PATIENT MED} to retrieve more detailed results or a copy.

The Medical Records department address is:

{HOSPITAL NAME.....}
Medical Records Department
{HOSPITAL ADDRESS LINE 1}
{HOSPITAL ADDRESS LINE 2}
{HOSPITAL CITY}, {} {HOSPITA}

Sincerely, {HOSPITAL NAME.....}

3. Resource Appointment Reminder

Dear {Resource Name.....},

The following patients have been sent attendance letters for the month:

	{{Begin List}}	
	{PATIENT NAME.....}	{APPOINTMENT
DATE}		
	{{End List}}	

CANCELLATION LETTER

1. Parent/Child

To the parents of {PATIENT NAME.....},

This is to confirm the cancellation of your child's appointment on {APPOINTMENT DATE} at {APPOIN} with {Resource Name.....}. Please call us to reschedule ASAP.

Sincerely,
{HOSPITAL NAME.....}

2. Facility Version

Dear {PATIENT NAME.....},

Your appointment with {Resource Name.....} has been cancelled because of {Rescheduled r}. Please call us if you want to reschedule.

Sincerely,
{HOSPITAL NAME.....}

3. Resource Appointment Reminder

Dear {Resource Name.....},

The following patients have been sent cancellation letters for the past month:

{Begin List}	
{PATIENT NAME.....}	{APPOINTMENT REASON}
{End List}	

NEW APPOINTMENT LETTER

1. Parent/Child

To the parents of {PATIENT NAME.....},

Your child has been scheduled for an appointment with
{Resource Name.....} on {APPOINTMENT DATE} at {APPOIN}.

Please call us if you have any questions or concerns.

Sincerely,
{Description Genera}

2. Facility Version

Department of {DEPARTMENT DESCRIP}

Telephone {HOSPITAL PH} {HOSPITAL NAME.....}

{HOSPITAL ADDRESS LINE 1}

{HOSPITAL CITY}

{HOS}

{HOSPITA}

{PATIENT NAME.....}{DATE - T}

{PATIENT ADDRESS 1}If inquiring

{PATIENT ADDRESS 2}please quote

{PATIENT CITY (TOWN).....}Hospital No:

{PATIENT COUNTY CODE.....}{MEDICAL R}

{PATIENT }

Dear {P} {PATIENT NAME.....}:

An appointment has been made for you with {Resource Name.....}

at the Clinic on {DATE - T}, the {DATE - T} at

3. Resource Appointment Reminder

{DATE - T}

Dear {PRIMARY PHYSICIAN (CODE)}:

The following patients are scheduled to see you on
{APPOINTMENT DATE}

{{begin list}}
{PATIENT NAME.....} {PATIENT ACCOU}
{{end list}}

Sincerely,

The {Description Genera}

No SHOW LETTER

1. Parent/Child

To the parents of {PATIENT NAME.....},

This is to confirm that your child did not show up for his/her

scheduled appointment with {Resource Name.....} on
{APPOINTMENT DATE}. Please call us to reschedule.

Sincerely,
{Description Genera}

2. Facility Version

```
{DATE - T}

{PATIENT NAME.....}
{PATIENT ADDRESS 1 ...}
{PATIENT CITY (TO), {PATIENT STATE.....}. {Patient Zip}

Dear {P} {PATIENT NAME.....},

    According to our records, you did not keep your appointment with
Resource: {Resource Name.....} on {DATE - T} {DATE - T}.

Please call us to reschedule another appointment.

Thank you.
```

3. Resource Appointment Reminder

```
Dear {Resource Name.....},

    The following patients were sent No Show letters in follow-up
to missed appointments during the past month:

    {{Begin List}}
    {PATIENT NAME.....}          {PATIENT ACCOU}
    {{End List}}

Sincerely,
{HOSPITAL NAME.....}
```


RESCHEDULE LETTER

1. Parent/Child

To the parents of {PATIENT NAME.....},

Your child's appointment with {Resource Name.....} has been rescheduled for {APPOINTMENT DATE} at {APPOIN}.

Sincerely,
{HOSPITAL NAME.....}

2. Facility Version

{DATE - T}

{PATIENT NAME.....}
{PATIENT ADDRESS 1 ...}
{PATIENT CITY (TO)},{PATIENT STATE.....},{Patient Zip}

Dear {P} {PATIENT NAME.....},

It has been necessary to reschedule your appointment with {Resource Name.....} on {DATE - T} {DATE - T}.

Please call our office to schedule another appointment.

Thank You,

Sincerely,

3. Resource Appointment Reminder

Dear {Original resource numbe},

The following patients have had their appointments
rescheduled to {Resource Name.....}:

{{Begin List}}

PATIENT NAME

REASON

{PATIENT NAME.....} {Rescheduled r}

{{End List}}

WAIT LIST LETTER

1. Parent/Child

To the Parents of {PATIENT NAME.....}

This is to inform you that your child's appointment with
{Resource Name.....} has been noted on our wait list, and you
will be informed as soon as room opens up. Your appointment has
been noted to be scheduled in the {Description Genera}, and they
can be reached at {HOSPITAL PH} if needed for any questions or
concerns you may have about your child's appointment.

2. Facility Version

{DATE - T}

{PATIENT NAME.....}

{PATIENT ADDRESS 1 ...}

{PATIENT CITY (TO)}, {PATIENT STATE.....}. {Patient Zip}

Dear {P}{PATIENT NAME.....}

According to our records you are awaiting an appointment with
Resource: {Resource Name.....} on {DATE - T} {DATE - T}.

Please call our office to schedule your appointment.

Thank you.

3. Resource Appointment Reminder

Dear {Resource Name.....},

The following patients have been placed on the Wait List for an appointment with you during the past week:

{{Begin List}}
{PATIENT NAME.....}
{{End List}}

Sincerely,
{Description Genera}

APPOINTMENT NOTICE

Under the Scheduling Department Code table, there is a field that controls the printing of an appointment notice as appointments are being made in the system. These can be set up to print for new appointments, for revisions to appointments, and/or for cancellations of appointments within the same day. The Appointment Notice contains only essential appointment information (The Audit Notice contains a complete set of appointment information).

The information on this notice includes the following:

- Date and time printed, initials and header (additions, revisions, or cancellations)
- Patient name and medical record number
- Patient nursing station and room/bed code (if an inpatient)
- Resource code and name
- Appointment time, type, and reason
- Diagnosis code and description

Figure 6.20 Appointment Notice

```
03/19/94 10:33A  DAL  ***ADD***  
For    SMITH, SAM          000-10-01-00  
      1N 1105-1  
CAR, CAR, 3          STEWART, ARTHUR R  
Time:08:10A  GEN   1001 EKG EXAM  
DIAG:414.10-ANEURYSM, HEART (WALL)
```

AUDIT COPIES FOR APPOINTMENT FILES

Under the Scheduling Department Code table, there is a field that controls the printing of appointment information as appointments are being made in the system. These can be set up to print for new appointments, for revisions to appointments, and/or for cancellation of appointments within the same day. The Audit Copy contains all the information collected on the Appointment screen. (The Appointment Notice has a more abbreviated set of appointment information.)

The information that prints on this notice includes the following:

- Date and time, notice header, and initials (addition, revision, or cancellation)
- Patient name, medical record number, resource name, appointment type and time
- Order number (when scheduling an ordered item)
- New visit indicator, patient account number, appointment length, and service department (SIM or Resource)
- Appointment reason and comment
- Referring source and physician
- Transportation indicator and method, appointment priority and display reason and chart request parameters
- Additional appointment comments one and two
- Working diagnosis code and description

Figure 6.21 Audit Copies for Appointment Files

```

10/18/95 02:50pm VMN ***ADDITION***
Name                Unit #      Resource          Type Appointment
ANDERSON, LEAHANNE  000100098  ADAIR, FRANK C    GEN 10/18/95 08:00am
New Visit          Account      Order #      Length      Service Department
No                990000627078  73           30          CAR
Visit Reason
1068 ANGIOPLASTY    Comment
This is patient's first visit to facility.
Referring Source    Referring Physician
FAMILY GROUP        SMITH, JANE R
Transport           Priority          Display          Chart
CART                OVERBOOK        VIEW REASON      YES
Additional Comment #1  Additional Comment #2

Diagnosis
ANEURYSM, HEART (WALL)    Checked-In      Checked-Out
0845A                0920A
  
```

REVISION AUDIT REPORT

The Revision Audit Report contains detailed audit information for an appointment, including fields with previous and revised scheduling information for the appointment. This report can be demand printed from the Patient Appointment Inquiry/Audit function.

The information on this report includes the following:

- Revisions made to the appointment
- Who made the revisions to the appointment
- When the revisions were made

Figure 6.22 Revision Audit Report

Model Hospital A		Page:1
Scheduling REVISION Audit		03/10/99 16:20
9715000002	OPO 001-20-09-05CHOVEY, ANN	Sex:F Svc:MED
Appt: Sat 03/13 1100A TRMT PT WHIRLPOOL (ALL)--- 1011 BODY WHIRLPOOL Pending		
Edit by: #12345 MLO Edit Date: 03/10/99 16:13 Revised		
Previous		Revised
Referring Doctor: JEKYL, JONAS J		*WOODSTOCK GROUP
Method of Tran:		WHLCHR
Priority:		ASAP
Additional Comment #1:		Previous
		Revised
S/W PT. EXPRESSED CONCERN RE. WATER		
Diagnosis/Complaint:		Previous
BACKACHE NOS		
Revised		
OTHER BACK SYMPTOMS		
Comment #3:		Previous
CONTACT DR.'S NORTHSIDE OFFICE FOR SPECIFIC INSTRUCTIONS		
		Revised
CONTACT DR.'S FRANKLIN OFFICE FOR SPECIFIC INSTRUCTIONS		

CHART PENDING REQUEST LIST (KBRF)

The Chart Pending Request List contains patient charts that have a request on file, either via the Chart Tracking Request option, or as a result of an appointment with the Chart Request field set to Yes.

The information on this report includes the following:

- Sort definition of the report (date and time, borrower or PC digit)
- Patient medical record number, name and birthdate
- Chart volumes needed, patient account number, borrower or resource department name, comment or resource code and date/time needed

NOTE: The patient must have a valid unit number to be included on this report.

Figure 6.23 Chart Pending Request List (KBRF)

Thu Jul 17, 1997 09:47 am						Page 1
Pending Request List for Model Hospital A						
Sort: Borrower						
Unit Number	Patient Name		Birthdate			
Vol	Acct Number	D/C Date	Borrower/Resource		Date/Time Needed	
Location	Person Responsible		Request Date	Reason	Prtly	
Comments						
Loc Info--Vol	Acct Number	Borrower	Location		Due Date	

000002218	KINGSTON,PAMELA SUE		06/24/92			
1	9633000001	04/13/96	FAMILY PRACTICE CLIN		07/19/97 0700	
1	9632000002	03/15/96	FAMILY PRACTICE CLIN		07/19/97 0700	
DR. DAVIS	Deborah Samperson		07/15/97	Patient Followup	High	
Call from Deborah on 07/17 - Sally will pick up chart do not deliver.						
1	9633000001	SPEECH THERAPY (ALL) THERAPY UNIT			08/14/97	
1	9632000002	SPEECH THERAPY (ALL) THERAPY UNIT			08/14/97	
000000567	TUTTLESTON,ERNESTINE		02/01/59			
1	All	OB CLINIC		07/20/97 0700		
2	All	OB CLINIC		07/20/97 0700		
OB POST DEL	Matthew Perry		07/18/97	Patient Followup	High	
1	9327900006	SPEECH THERAPY		THERAPY UNIT	08/07/97	
1	9621300004	SPEECH THERAPY		MED RECORD	08/07/97	
2	9711100003	CODING ABST		MED RECORD	07/15/97	
000000502	SILVERSTEIN,NICOLE		01/01/65			
All All	PHYSICAL THERAPY		07/17/97 0800			
AL-PT,PT,9150	Gertrude Gunderson		07/14/97	Patient Visit	High	
000002412	SAPERSTEIN,WYNONA ANN		05/24/54			
All All	PHYSICAL THERAPY		07/17/97 0900			
AL-PT,PT,9150	Gertrude Gunderson		07/14/97	Patient Visit	High	
000000522	HUTCHKINS,BELINDA GARDNER		05/23/77			
All All	PHYSICAL THERAPY		07/17/97 1500			
AL-PT,PT,9150	Gertrude Gunderson		07/14/97	Patient Visit	High	
000001122	SNARLEY,ELLIE		01/10/31			
All All	PHYSICAL THERAPY		07/17/97 1600			
AL-PT,PT,9150	Gertrude Gunderson		07/14/97	Patient Visit	High	
000000844	TEST,ALICE		07/22/56			
All All	RADIOLOGY DEPARTMENT		07/17/97 1400			
RAD,NM,8721	Vivian Haverstraw		07/14/97	Patient Visit	High	
Patient has multiple volumes, only need the last one.						
2	All	QUAL ASSUR		QA DEPT	02/24/97	
000001047	TAYLOR,OPPIE		01/01/72			
All All	RADIOLOGY DEPARTMENT		06/25/97 0830			
RAD,RAD,9100	Vivian Haverstraw		07/14/97	Patient Visit	High	
Vivian asked this be delivered to Marilyn Rosen instead of to her.						

EXCEPTION LIST (KBRF)

The Exception List is a list which includes all the patient appointments that did not request a chart (the value of the Chart field on the appointment screen equalled No). There are two ways this can happen:

1. The initial value of this field may have been No if the resource was defined in Resource Maintenance as not being a requestor.
2. The Chart field was edited during the appointment process to No.

The information on this report includes the following:

- Date the Exception List was printed
- Resource department name and telephone number
- Patient medical record number, name and birthdate, and Resource code and appointment time

Figure 6.24 Exception List (KBRF)

Wed Feb 21, 1994 12:19 pm PROVIDENCE MEDICAL CENTER				
Chart Exception List for 02/22/94				
Page 1				
Department : RAD		Phone # : (503)555-1212		
Unit #	Patient Name	Birthdate	Resource #	Appt
0000-0062-0	SIMONS, GEORGE DREW	10/06/58	RAD, GP, 72262	10:00am
0000-0064-6	MORGAN, PAULETTE	12/16/23	RAD, GP, 72262	01:00pm
0000-0062-0	SIMONS, GEORGE DREW	10/06/58	RAD, RPH, 7878	09:00am
End of Report				

OUTGUIDES (KGBF)

Outguides are notices or forms that can be placed in the file when a chart is removed and delivered to a department for an appointment. Two part paper can be used when these outguides are printed. The second copy can be used as a routing slip that accompanies the chart.

Outguides are helpful when someone is trying to locate a chart that is out of the file. Outguides are generated at the same time the Pending Request Lists are generated. If an updated Pending Request List is prepared, the available outguides correspond with that Pending Request List.

Information on these printouts includes the following:

- Date and time pulled and the initials of the user printing the outguides
- Patient unit number, volume number to be pulled and patient account number
- Patient name and birthdate
- Scheduling department resource, or borrower name
- Department phone number
- Appointment day, date, time
- Resource name or borrower comment
- Date due back (if using Chart Tracking)
- Location associated with the borrower receiving the chart

Figure 6.25 Outguides (KGBF)

Pulled: 10/24/94	Init: KGC
Unit #: 0010-4301-7	Vol: All Acct#: All
Patient: PULLON, MICHAEL	Birthdate: 11/14/18 70Y
Borrower/Resource: MEDICAL	
Phone: (404) 393-6000	Date & Time Needed: 10/11/94 02:00P
Comment: MED, CAR, 10	
Due Date: 10/30/94	Location: CARDIOLOGY CLINIC

RESCHEDULE LIST

The Reschedule List function facilitates the rescheduling of patients removed from a schedule through the Resource Reschedule/Reserve/Move function (discussed in Chapter 3: Schedule Processing). This report contains information about the original appointment. The difference between a Reschedule List and a Wait List is that the Reschedule List contains the specific dates and times of the original appointments, while the Wait List contains a requested date with a comment, but no specific appointment information.

The information on this report includes the following:

- Date/time printed
- Resource name and code
- Day and date of appointment
- Patient unit number, name, appointment time and type, and patient address or alternate address (the alternate address is printed if it is indicated as the *mail to* address for the visit)
- Patient's work telephone number
- Patient's home or alternate telephone number (the alternate phone number is printed if the Alt Phone field is set to Yes for the visit)
- Reason for the visit
- Dates letters were printed
- Dates calls were made to the patient
- Reason the appointment was rescheduled
- Message indicator (Indicates whether or not the patient wants to have messages left at the phone number)
- Invalid address/phone code (if entered for the address or phone number used on the list)

NOTE: The system checks the Alt Mail To field at the visit level if the appointment is linked to a visit, and if it is set to Yes, the alternate address prints on the Reschedule List. The system also checks the Alt Phone field at the visit level if the appointment is linked to a visit, and if it is set to Yes, the alternate phone number prints on the Reschedule List.

Figure 6.26 Reschedule List

Model Hospital A Scheduling System				Page 1		
Reschedule List				Printed: Fri Jul 29, 2005 1221A		
RESPIRATORY THERAPIST (RT,NUS,6500)						
Pat. #	Name	Time	Type	Address	Msg	Inv Addr/Phone
		Work	Phone	Phone		
Fri Aug 5, 2005						
000002199	TATE,MARY	0800A	NEW	1 AUBURN AVE		
	Visit Reason: NEW APPOINTMENT---X					
	Letter Prt'd: None Printed			ATLANTA		
	Last Call: No Calls Made			GA 30022		
	Reason: EMERGENCY-----X			(898)777-1111	Yes	BA
Fri Aug 12, 2005						
000002115	DUNN,LAURA	0900A	NEW	123 MAIN		
	Visit Reason: NEW APPOINTMENT---X					
	Letter Prt'd: None Printed			LAURELWOOD		
	Last Call: No Calls Made			NJ 30346		
	Reason: VACATION-----X	(937)555-7777				BA

RESOURCE/DEPARTMENTAL SCHEDULE

The Resource/Department Schedule lists, in time sequence, all appointments within the defined parameters for the specified department. All resources within the department are intermixed to provide a picture of the total department workload without separating the resources. The Resource/Department Schedule can be displayed on the screen or can be printed.

The information that prints on this report includes the following:

- ID of the person requesting this report and the date and time it was printed
- Date of the schedule
- Appointment time, type and length, resource name, patient name and location (if an inpatient)
- Appointment reason and referring physician

Figure 6.27 Resource/Departmental Schedule

HOSPITAL A					
Resource/Department Schedule					
Requested by: 29384			Printed: Thu Mar 19, 1994 10:34am		
Schedule Date: 03/19/94					
Time	Type	Length	Resource	Patient	Location
Reason			Referring Physician		
735A	NEW	10	ADAMS, HAROLD	DEAN, THOMAS	No Location
GENERAL WORKUP			ACHTERMAN, CHRISTOPHER		
745A	NEW	10	SIMMONS, JACK	JONES, BRENDA E	1N 1101-1
1000 ABDOMEN - 1 VIEW					
820A	GEN	30	ADAMS, HAROLD	HARRIS, DONALD	1N 1102-1
SORE THROAT					
1130A	GEN	30	QUIGGLY, JACK	HARRIS, SALLY	No Location
GENERAL					

RESOURCE WEEKLY SCHEDULE

The Resource Weekly Schedule provides an efficient way to print a resource's scheduled utilization for any specified seven day span. This function displays on one screen the number of filled and open slots scheduled for a resource.

All defined time slots for any of the seven days display in the far left column. The dates of the weeks display across the top of the screen. Notepad days are indicated with an asterisk (*) beside the date.

Single numbers within parentheses indicate the number of allotted slots for that time with none of the slots filled, for example, (3). When two numbers are in parentheses, the number on the left of the slash (/) is the number allotted and the number on the right is the number filled. A slot is blank if no slots were defined for that time on that day. If the schedule cannot display on one screen, pressing ENTER displays the next screen of time slots.

The information on this report includes the following:

- Resource type and name and date/time printed
- Appointment dates on the report (asterisk (*) indicates a Notepad schedule.
- Appointment time, the number of patients usually booked in that time slot and the number of booked appointments, if applicable

Figure 6.28 Resource Weekly Schedule

PHYSICIAN: OBG, OBG, 45 BROWN, ROBERT D.					Fri Mar 20, 1994 02:55 pm		
Time	03/20	03/21	03/22	03/23	*03/24	*03/25	*03/26
730A	(1/2)	(1/1)		(1)			
735A	(1/1)	(1)		(1)			
740A	(1)	(1/1)		(1)	(1/1)		
800A	(1)	(1)		(1)	(1/1)		
820A	(1/1)	(1/1)		(1)			
900A	(1)	(1/1)		(1)			(1/1)
920A	(1/1)	(1)		(1)			(1/1)
940A	(1)	(1)		(1)			
1000A	(1)	(1)		(1)			(1/1)
1100A	(2/2)	(2)		(2)			
1110A	(2)	(2)		(2)			
1120A	(2/1)	(2)		(2)			
1130A	(2/1)	(2)		(2)			
1140A	(2)	(2)		(2)			
1150A	(2)	(2)		(2)			
1200N	(2)	(2)		(2)			
1203P	(1)						

RESOURCE MONTHLY PLAN (KSMK2)

The Resource Monthly Plan report is requested via the Print Monthly Plan function found on the Resource Maintenance Menu. It resembles the data displayed on the screen.

The information on this report includes the following:

- Resource name and code and date/time printed
- Day of the week
- Week number and associated schedule profile number and description

Figure 6.29 Resource Monthly Plan (KSMK2)

HOSPITAL A Scheduling System	
Resource Monthly Plan Report	
Resource: CAHILL, JAMES B (SUR,005,1234)	Printed: Mon Apr 3, 1994 10:46A
Sunday	
Week #1:	
Week #2:	
Week #3:	
Week #4:	
Week #5:	
Monday	
Week #1:	1 - GENERAL SCHEDULE
Week #2:	1 - GENERAL SCHEDULE
Week #3:	1 - GENERAL SCHEDULE
Week #4:	3 - NOTEPAD SCHEDULE
Week #5:	3 - NOTEPAD SCHEDULE
Tuesday	
Week #1:	1 - GENERAL SCHEDULE
Week #2:	1 - GENERAL SCHEDULE

RESOURCE PROFILES

The Print Schedule Profiles function is an option on the Resource Maintenance Input Options screen. This function prints a hard copy of the Resource Schedule Profiles report for a desired resource. The report displays each of the profiles linked to the resource, including the description and comment.

The information on this report includes the following:

- Resource name and code and date/time printed
- Profile number and description
- Profile comment
- Appointment time, type, number of patients, appointment length, reserved indicator and comments

Figure 6.30 Resource Profiles

GENERAL HOSPITAL A Scheduling System					Page 1
Resource Schedule Profiles Report					
Resource:		ADAMS,HAROLD R (ANS,ANS,1)		Printed: Mon Jun 13, 1994 11:50A	
Profile:		1 - GENERAL PROFILE			
Comment:		FOR ROUTINE DEPT OPERATIONS			
Time	Type	Patients	Length	Reserved	Comment
730A	GEN	1	30	No	
800A	GEN	1	30	No	
830A	GEN	1	30	No	
900A	GEN	1	30	No	
930A	GEN	1	30	No	
1000A	GEN	1	30	No	
1030A	GEN	1	30	No	
1100A	GEN	1	30	No	
1130A	GEN	1	30	No	
1200N	GEN	1	30	No	AVOID, IF POSSIBLE
100P	CONS	3	60	No	
100P	FUP	2	20	No	
120P	FUP	2	20	No	
140P	FUP	2	20	No	
200P	CONS	3	60	No	
200P	FUP	2	20	No	
220P	FUP	2	20	No	
240P	FUP	2	20	No	
300P	CONS	3	60	No	
300P	FUP	2	20	No	
320P	FUP	2	20	No	
340P	FUP	2	20	No	
400P	CONS	3	60	No	
400P	FUP	2	20	No	
500P	CONS	3	60	No	

RESOURCE SCHEDULE

Program KGPSHK uses the default printer for the CRT as a report name for Department Resource Schedule, and is generated from menu option Print Resource Schedule. The Resource Schedule printout is requested via the Print Resource Schedule function. This is a hard copy of a resource's current schedule for the date specified. You can print either one or multiple appointments per page.

The information printed contains some additional data elements not available via the Display Resource function. Open time slots print on this report based on parameters set for this resource via the Resource Maintenance function.

When this function is selected, a series of prompts display requesting the resource's schedule, and the date to print. The system then displays the following prompt:

Print One(O) or Multiple(M) appointments per page (O/M) [XXXXXXXX]--

You can enter **O** to print one appointment per page, or **M** to print multiple appointments per page.

The information that prints contains some additional data elements not available via the Display Resource function (such as appointment comments and home telephone number). Open time slots print on this report based on parameters set for this resource via the Resource Maintenance function. The information printed includes:

The profiles defined in the Resource Master enable you to enter a ten-character comment next to a specific time slot and appointment type. If added to the resource's profile, the comment displays during appointment processing for each day that is opened using that profile.

In addition, the Open/Edit Schedule processor provides the same capabilities for entering comments for specific dates without adjusting the resource's profile. Any comment information prints on the schedule if a patient has not been scheduled (open) and the resource indicates that open times should print. The field prints in the space normally used to print the patient's account number.

If you enter No in the PRINT OPEN TIMES field in the Resource Master Scheduling Parameters, any comments associated with an open appointment slot do not print.

- Profile comment
- Patient type
- Unit number
- Transportation
- Birthdate

- Priority
- Referring source/referring physician
- Order number
- Frequency
- Working diagnosis
- Treatment diagnosis/reason
- Service Items
- Workload (by SIM item)
- Total resource workload
- Total scheduled SIM items
- Appointment number, time and type, patient account number, name, location (if an inpatient), sex and home telephone number
- Appointment status (pending, F(Filled), N(No Show), F/I(Checked In), F/I/O(Checked In and Out), visit reason, medical record number and transportation needs
- Appointment comment, patient birthdate, and appointment priority
- Referring source and referring physician
- Additional comments one and two

When the Resource Schedule is accessed the following screen is displayed:

General Hospital Print Resource Schedule Processor		
Wed Mar 07, 2001 10:56 am		
1 Date	2 Resource/Department	3 Resources
03/07/01	ADAIR,FRANK C	FMC,SUR,32
4 Sched Format	5 # Copies	
Multiple	1	
Accept this screen? (Y/N) [Y]--		

Field Explanations

1. DATE (DATE-R)

Enter the date of the Resource Schedule to be printed.

2. RESOURCE/DEPARTMENT (TABLE LOOKUP-R)

This field allows for the selection of the resource from the Master Resource table or the selection of a specific resource department. When a response is entered into this field, the Resources field is cleared for reselection. If this field is left blank, the Resources field is also blank.

3. RESOURCES (TABLE LOOKUP-R)

This field displays a list of resources for the selected Resource Master or Department from the Resource/Department field. Multiple selections can be made. When a response is entered into the Resource/Department field, this field is cleared for reselection. If the Resource/Department field is left blank, this field is also blank.

4. SCHED FORMAT (1-A-C)

This field determines the printing format for this report. If all of the selected departments are defined as O in the Scheduling Format field in the Resource Department Code table, then O is the default. If the selected departments have both O and M as the responses, there is no default. If this field is blank, the report is treated as if the field was set to M and prints multiple appointments per page.

5. COPIES (2-N-R)

This field is used to indicate the number of copies of the schedule to print. The default for this field is 1. No more than 10 copies may be requested at a time.

When this screen is accepted, the Resource Schedule prints.

Figure 6.31 Resource Schedule (KSMK3)

General Hospital										Page 1
Appointment Schedule										
FMC,SUR,32 (ADAIR,FRANK C)					Printed: Wed Mar 7,2001 1127A					
Wednesday March 7, 2001										
DR ADAIR HAS SURGERY FIRST WEEK OF THE MONTH										
No	Time	Type	Account #	Patient Name	Location	Sex	Home	Phone		
Status		Visit	Reason	Unit #	Patient Type		Transport			
Comment					Birthdate		Priority			
Referring Source/Referring Physician					Order #		Frequency			
Additional Comments										
Working Diagnosis					Treatment		Diagnosis/Reason			
Service Items					Workload					
Additional Comments #3 (Maximum 3 lines)										
Additional Comments #4 (Maximum 3 lines)										
1	0900A	NEW	COMT-0900A							
2	0915A	CN15								
3	0930A	NEW								
4	0945A	CN30								
5	1000A	NEW								
6	1015A	CN45								
7	1030A	NEW								

SIM ITEM SCHEDULING INSTRUCTIONS

The SIM Item Scheduling Instructions printout is requested via the Print SIM Scheduling Instructions function. This printout contains the instructions that were set up in the SIM Item Scheduling Instructions function.

The information on this report includes the following:

- Date/time printed
- Resource department name
- Service item master code and description
- Department headers (1-5)
- SIM item headers (two each, 1-5)

Figure 6.32 SIM Item Scheduling Instructions

SIM Scheduling Instructions		
Mon Jul 25, 1994 03:39 pm		Page: 1
Department: RADIOLOGY		
Service Item: 1000 Chest Exam - Two Views		
1. DEPARTMENT INFORMATION		
ASK THE PATIENT IF THEY HAVE HAD A CHEST XRAY IN THE LAST TWO YEARS		
2. PATIENT INFORMATION		
TELL THE PATIENT TO WEAR LOOSE CLOTHING AND NO JEWELRY		
3. ITEM INFORMATION		
CHECK THE FILM SUPPLY		
4. APPOINTMENT INSTRUCTIONS		
DO NOT BOOK TOO MANY CHEST XRAYS ON TUESDAYS		
5. MISCELLANEOUS COMMENTS		
HAVE PATIENT BRING IN ANY OLD FILMS, IF AVAILABLE		

STAT CHART PULL NOTICES (KSCF)

If an appointment is processed for a time slot later on the current day, a Stat Chart Pull Notice prints online in Medical Records if the Chart Request field contains **Y** (Yes) on the Appointment screen. The information on this notice includes the following:

- Print date and initials
- Patient's unit number
- Volume requested
- Account number requested (if the request was not for the entire chart or an entire volume)

NOTE: Requests generated from Scheduling are for the entire chart; you cannot request only a volume or an account.

- Patient's name
- Patient's birthdate and age
- Borrower/resource name and telephone number
- Date and time the chart is needed (patient's appointment time for automatic requests generated when an appointment is scheduled)
- Comments (if entered when the request was entered)

NOTE: Comments cannot be entered from the Scheduling module.

- Date chart is due back

Figure 6.33 STAT Chart Pull Notice (KSCF)

```

Pulled: 07/01/02          Inits: LTK

Unit #: 000-00-2308      Vol: 1 Acct#:
Patient: TANNER,CHARLES   Birthdate: 12/17/87 14Y

Borrower/Resource: PHYSICAL THERAPY (ALL)---
Phone: (404)123-4222      Date & Time Needed: 07/01/02 03:30P

Comment:
Due Date:

**** STAT REQUEST ****
  
```

STATION SCHEDULE

The Station Schedule function lists, in bed sequence order, the appointments for patients on the designated nursing unit or in the defined bed group. The Station Schedule enables the nursing department to view schedules for all their patients in one compiled list. This schedule is efficient because it is always as current as the department schedule. The Station Schedule can be viewed online, or can be printed.

The information on this report includes the following:

- ID and name of individual requesting report and date/time printed
- Schedule date
- Patient room/bed code and name, resource name and appointment time, type and length
- Appointment reason

Figure 6.34 Station Schedule

HOSPITAL A Station Schedule					
Requested by:43212			Printed: Thu Mar 19, 1994 10:43 am		
Schedule Date: 03/19/94					
Location	Patient	Resource	Time	Type	Length
Reason					
1101-1	JONES, BRENDA ELAINE	ADAMS, HAROLD	745A	NEW	10
1000	ABDOMEN - 1 VIEW				
1103-1	ANDERSON, LEAHANNE	ADAMS, HAROLD	830A	GEN	30
8071	BYPASS GRAFT ANGIO				
1105-1	SMITH, SAM	ADAMS, HAROLD	810A	GEN	30
1101	GENERAL ABDOMEN VIEW				
1102-1	HARRIS, DONALD GEORGE	ADAMS, HAROLD	820A	GEN	30
	SORE THROAT				
1104-1	FELDMAN, ANNE	ADAMS, HAROLD	900A	GEN	30
8064	CARDIAC LAB 1/2 HOUR				

TRANSPORTATION CENSUS

The Transportation Census prints a listing of appointments with the Transportation field completed for the selected date. In order to allow printing of departmental specific transportation needs, the function enables you select one, multiple, or all departments from the Resource Department Table.

This report includes the following:

- ID number of the person requesting the report
- Date/time the report is printed
- The date of the schedule being printed
- The appointment time
- The appointment type
- The department associated with the appointment
- The resource with which the appointment is scheduled
- If in a bed, the patient's room/bed
- The patient's name
- The unit number of the patient
- The method of transportation

Figure 6.35 Transportation Census

PROVIDENCE MEDICAL CENTER								Page 1
Transportation Schedule								
Requested by: 19535								Printed: Mon Nov 12, 1994 09:41 am
Schedule Date: 11/12/94								
	Time	Type	Dpt	Resource	Bed	Patient	Unit#	Method
1	1000	CONS	PT	SMITH, JOHN R	2G25-1	DANE, SAM	000011767	WC
2	1100	NEW	PT	JONES, SALLY	2G11-1	DAVIS, JOSEPH	000026171	STRETCH

TRANSPORTATION NOTICES

Transport Notices generate when an appointment is cancelled, or if modifications are made to the date, time, or resource for an appointment within the same day, and that has a mode of transportation defined. Transport Notices also generate when the Transport field has been changed.

The information on this notice includes the following:

- Date, time, initials, and notice header (transport addition, transport revision, or transport cancellation)
- Date/time printed
- Patient name and medical record number
- Patient nursing station code room/bed number
- Resource code and name
- Appointment time, type and reason
- Transportation method

A Transport Cancel Notice generates when one of the following criteria is met:

- if a scheduled appointment is cancelled and there is a method of transportation defined for the same day
- if a schedule appointment's date changes from the present day (today) to a future date, and there was a method of transportation defined for the same day

A Transport Revision Notice generates when the following occurs:

- if a scheduled appointment's resource or time is changed or altered for the same day

A Transport Addition Notice generates when one of the following criteria is met:

- if a scheduled appointment's date changes from a future date to the present day (today), and there was a method of transportation defined for the same day
- if the method of transportation was originally left blank for a scheduled appointment, and a method of transportation is entered for the first time

If this is a revision, the old and new type of transportation displays under the appointment time and type.

Figure 6.36 Transportation Notices

03/07/01 11:31 K B *** TRANSPORT ADDITION ***
For JACKSON,GEORGE 000-00-1829

FMC,SUR,32 ADAIR,FRANK C
Time: 0100P CON CONSULTATION
Transportation: CAR

03/07/01 11:57 K B *** TRANSPORT CANCEL ***
For JACKSON,GEORGE 000-00-1829

FMC,SUR,32 ADAIR,FRANK C
Time: 0100P CON CONSULTATION
Old Transportation: CAR
New Transportation: CAR

03/07/01 12:04 K B *** TRANSPORT REVISION ***
For JACKSON,GEORGE 000-00-1829

FMC,SUR,32 ADAIR,FRANK C
Time: 1000A NEW CONSULTATION
Old Transportation: CAR
New Transportation: BED

UNASSIGNED UNIT # LIST (KUUNF)

The Unassigned Unit Number List includes all patients and their appointments that do not have unit numbers assigned. Without unit numbers these patients are without charts. This report is a *catch all* audit of patients who need charts created, and can be used as a tool to avoid duplicate number assignments.

The information on this report includes the following:

- Date report was generated
- Resource department code and telephone number
- Patient name and birthdate, resource code, and appointment time

Figure 6.37 Unassigned Unit # List (KUUNF)

Wed Feb 21, 1994 12:19 pm		GENERAL MEDICAL CENTER		Page 1
Unassigned Unit Number List for 02/22/94				
Department : RAD		Phone # : (503)555-1212		
Patient Name	Birthdate	Resource	Appt	

JONES, FRED	12/25/58	RAD, GP, 72262	11:00am	
SMITH, ALAN	10/24/56	RAD, GP, 72262	02:00pm	
End of Report				

UNOPENED SCHEDULE LIST

The Unopened Schedule List contains listings of the days of a particular resource that have not yet been opened, and assists in auditing a resource's schedule.

The information on this report includes the following:

- Resource name and code and date/time printed
- Day and date of unopened schedule and indicator for missing schedule masters

Figure 6.38 Unopened Schedule List

```
HOSPITAL Scheduling System
Resource Unopened Schedule List
Resource: CAHILL,JAMES B (ORT,005,1234)    Printed: Mon May 4, 1994 11:45A

Schedules for the following days should be created:

1  Mon May 4, 1994
2  Mon May 25, 1994 No Master
```

PATIENTS PER DAY ADJUSTMENT REPORT

The Patients Per Day Adjustment report shows the changes made to an opened schedule when you adjust the Max Pts/Day setting through the Open/Edit Schedules function.

The following fields are included in the report:

- System date/time of generation
- Hospital name
- Page #
- New # Max Pts/Day
- Starting and ending date range
- Days of the week requested
- Employee code
- Name of the employee updating the files

For each open date that matches the criteria requested, the date is listed followed by the number of appointments currently scheduled on that date, the old number of previous appointments available, and the new number of available appointments.

NOTE: If the resetting of the Max Pts/Day causes the new maximum to be negative, it is automatically set to zero. If another user is already editing a schedule, no change is made to the Max Pts/Day. The audit report shows ****Schedule Locked - No Update**** next to that date. The date must be reset when it becomes available (unlocked).

Figure 6.39 Patients Per Day Adjustment Report

```
Tue May 26, 1994 10:36 am                                Page 1
                                General Hospital A
                                Reset Maximum Patient Per Day to 100
                                From 5/26/94 thru 06/07/94 on "SMTWRFA"
                                Requested by Employee #19535 Davis, Julie L

Resource:  RAD,RAD,111111 Resource Description

  Date      # Appts    Previous Avail    New # of Available
05/26/94    75         5                  25
05/27/94    80         0                  20
05/28/94    60        20                  40
05/29/94    50        30                  50
05/30/94    **Schedule Locked - No Update**
05/31/94    10        70                  90
06/01/94    1         79                  99
06/02/94    0         80                 100
06/03/94    0         80                 100
06/04/94    0         80                 100
06/05/94    0         80                 100
06/06/94    0         80                 100
06/07/94    0         80                 100

                                End of Report
```

PROCEDURE SCHEDULING PARAMETERS

This report provides a hard copy of the information contained in the Procedure Scheduling Parameters processor. This report documents the procedure's priority length and valid resource groups used during procedure protocoling and resource selection in the Procedure Scheduling function and in Appointment processing.

If you selected only one SIM item to print, then the report only contains the Procedure Scheduling Parameters for that one item. If you selected all SIM items to print, then all items with Procedure Scheduling Parameters entered for the selected department print. The system does not print SIM items that do not have parameters defined.

The following information is included on this report:

- The description of the selected department.
- The SIM item code and description.
- The Procedure Scheduling Priority code as defined for the SIM item. Null is a valid entry. Used only in Procedure Scheduling.
- The Appointment length associated with the entire procedure, not the specific resource group. Used by both Procedure Scheduling and Appointments.
- The resource group code and description. Used only in Procedure Scheduling.
- The type for this resource group. It prints as Primary, Secondary or Additional. Used only in Procedure Scheduling.
- The length of time required by a resource in this group. Used only in Procedure Scheduling.
- The starting time specified when a resource is needed within this group. Used only in Procedure Scheduling.

Figure 6.40 Procedure Scheduling Parameters

General Hospital Procedure Scheduling Parameters				
			Thu May 7, 1994 04:26 pm	
Department : Radiology			Page 01	
Service Item Code & Description		Priority	Appt Length	
Resource Group Code/Description	Type	Res Length	Starting	
2000 CHEST	1.0	30		
Room Diagnostic Rooms	Primary	30		0 min
Eqpt Equipment	Additional	30		0 min
Techs Technicians	Additional	15		+15 min
2001 CHEST AP & LAT	1.0	30		
Room Diagnostic Rooms	Primary	30		0 min
Eqpt Equipment	Additional	30		0 min
Techs Technicians	Additional	15		+15 min
End of Report				

Chapter 7 - MIDNIGHT PROCESSING

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MIDNIGHT PROCESSING INTRODUCTION

The *Patient Scheduling Module* contains a variety of features and reports that require nightly processing. These processes are completed during the Midnight Processing routine run each night. The following sections define the steps and explain their importance in the overall operation of the *Patient Scheduling Module*.

The following steps run during Midnight Processing to properly process Scheduling information.

- Daily schedules and patient appointment information are processed and set up in a format which facilitates future archiving and purging of historical information. This has no user impact.
- For resources with the Auto Open parameter set to Yes, that have been previously manually opened, schedules are extended another day. An additional day can be scheduled.
- Wait List report is created which includes any patients that are wait listed for days that were opened during the Auto Open extension of resource schedules. This report must be monitored on a regular basis to process these patients.
- Resource calendars are updated from the previous day's activities. Days that were filled, made available, or deleted during the course of the day are updated. Any resources added to the system during the day have calendars generated.
- Appointments for the current day whose pending status has not been updated are converted to a status of Auto. This is not a user-defined status and is useful to indicate incomplete End of Day processing.

This does not set the End of Day processing for that day to a completed status; thus, the Monthly Statistical report is still not available prior to all days for all resources having End of Day complete.

- The following nightly reports are generated:
 - New Visit Report
 - Scheduled Patient Discharge Report
 - Facility Schedule Report

These reports are set up in a Scheduling Report Group for printing after nightly processing is complete. The three reports listed above generated for the *Patient Scheduling Module* during Midnight Processing are designed to facilitate communication between scheduling areas and admitting and registration areas. These reports print on the printer associated with the report definition. The distribution and use of these reports varies based on the procedural guidelines of the organization.

NEW VISIT REPORT

The New Visit report includes all patients scheduled for an appointment on a user defined date in the future that is flagged as a new visit. Each facility defines the number of days in the future that they want appointments flagged new visits to be included on this Midnight Processing report. If this user defined parameter is set to five, then appointments scheduled five days from the midnight processing date are included on today's report.

New visits are identified using the New Visit field in the detail data entered at the time the appointment is created. This field not only enables you to identify new visits, but also enables you to group them by Inpatient, Outpatient or Unknown. This report is intended to be used as a tool to identify the incoming patients for a given date to help in planning and preadmission processing.

This report is sorted first by appointment time, then by the new visit indicator (Inpatient/Outpatient/Unknown) and then alphabetically by patient name. If *Unknown* is selected, a Y appears in the Type field on the report, indicating that this is a new visit. Patients with multiple appointments on the same date only appear once on the report.

The information on this report includes the following:

- Appointment schedule date
- Appointment time and patient name, medical record unit number, sex, and home telephone number and Social Security number
- Resource name, appointment type, resource department code, and appointment/visit reason
- Inpatient/outpatient indicator and appointment comment and priority
- Referring source and physician
- Additional comments one and two
- Page numbers

Figure 7.1 New Visit Report

HOSPITAL A Scheduling System New Visit Report					
Date: Wednesday February 11, 1994					
Time	Patient Name	Unit #	Sex	SS#	Home Phone
TYPE	Resource Name	TYPE	Dept	Visit Reason	Priority
	Comment				
	Referring Source			Referring Physician	
	Additional Comments 1			Working Diagnosis	
	Additional Comments 2				
800A	BENTON, JIM	A000000128			M (404) 123-1233
	EMERGENCY ROOM	NEW RAD		PRE-OP CHECKUP	
I	PATIENT HAS PRE-OP BLOOD TESTS			Medical	
	CLINIC - LOCAL		DR. SMITH		
	NEW PATIENT				
0900A	LANIER, JACK		M	123-54-6547	(404) 444-2221
	ROBERTS, BEN	NEW		SURGERY	
I				959.1-TRUNK INJURY NOS	
1000A	LANIER, JACK		M	123-54-6547	(404) 444-2221
	ROBERTS, BEN	NEW		NEW APPOINTMENT	
Y	PATIENT HAS PRE-OP BLOOD WORK				
	CLINIC ONE		DR. SMITH		
	Additional Comments 1			959.1-TRUNK INJURY NOS	
	Additional Comments 2				

SCHEDULED PATIENT DISCHARGE REPORT

The Scheduled Patient Discharge report is a subset of the Discharge report and only includes discharged patients who had outstanding scheduled appointments. Appointments are not automatically cancelled when a patient is discharged. The Scheduled Patient Discharge report is used to access appointments that are to be cancelled, rescheduled, or kept on schedule as they are. The Revise Patient Appointment function is used in conjunction with this report to process the scheduled appointments correctly.

Information on this report includes the following:

- Patient account number, name, medical record number, room/bed, condition code, and attending physician
- Total discharged patients with appointments
- Total expired patients with appointments
- Grand total discharged patients with appointments

Figure 7.2 Scheduled Patient Discharge Report

Mon Mar 16, 1994 12:04 am		HOSPITAL A			
Daily Appointment Discharge Report for 03/15/94					
Patient #	Name	Unit #	Rm/Bed	Cnd	Doctor
A000928371	STEWART,ALIN R	000-00-01-12	1101-2	G	SMITH
A000910001	TICHARDSON,EMILY	000-00-01-21	1201-1	G	JARVIS
A000920012	WATSON,EDISON	000-00-01-48	1203-2	G	SMITH
Total Discharges			-	3	
Total Expirations			-	0	
Total			-	3	

FACILITY SCHEDULE REPORT

The Facility Schedule report is a time sequenced schedule for all appointments in the facility. This report contains all information printed on the individual resource schedules and is sorted by time, then alphabetically by patient within time.

Information on this report includes the following:

- Appointment time and patient name, medical record number, room/bed or outpatient patient type, sex, and home telephone number
- Resource name, appointment type code, resource department code and appointment/visit reason
- Appointment status, comment, and priority
- Referring source and physician
- Additional comments one and two

Figure 7.3 Facility Schedule Report

HOSPITAL A Scheduling System HOSPITAL A Facility Report						
Date: Wednesday February 11, 1994						
Time	Patient Name	Unit #	Location	Sex	Home Phone	
	Resource Name	TYP Dept	Visit Reason			Priority
	Status	Comment				
	Referring Source/Referring Physician					
	Additional Comments					

800A	BENTON, JIM	A000000128	SER	M	(404) 123-1233	
	EMERGENCY ROOM	NEW RAD			PRE-OP CHECKUP	
	Pending					
	CLINIC - LOCAL					
	NEW PATIENT					
		PATIENT HAS PRE-OP BLOOD TESTS				Medical
		DR. SMITH				
900A	LANIER, JACK	A000000127	O/P	M	(404) 444-2221	
	ROBERTS, BEN	NEW RAD			NEW APPOINTMENT	
	PENDING					
		PATIENT HAS PRE-OP BLOOD TESTS				MEDICAL
		PATIENT NEVER TO CLINIC BEFORE/WILL REQUIRE TAXI				

Appendix A - TABLES

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CRT Names Table.....	A-28
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TABLES

Many of the tables defined in the STAR Patient Care Maintenance function are used within the Patient Scheduling Module. Rather than review the specifics of each of these individual tables, we have provided a list of all the tables used within the *STAR Patient Care Reference Guide Tables Volume* that have been referenced in this volume of documentation.

For specific table information on all tables, please refer to the corresponding entry in the *STAR Patient Care Reference Guide Tables Volume*. Letter Maintenance is also addressed in this appendix.

Patient Scheduling Tables (Chapter 6):

1. Appointment Priority
2. Appointment Types
3. Borrower File
4. Department Headers
5. Department Scheduling Priority
6. Holidays
7. Letter Maintenance
8. Methods of Transportation
9. Procedure Scheduling Priority
10. Physician/Resource Specialties
11. Reschedule Reason
12. Resource Department Code
13. Resource Groups
14. Resource Master
15. Resource Types
16. Type of Clinic
17. User-Defined Holidays

General Tables (Chapter 3):

- 12. Counties
- 13. Marital Status
- 14. Physicians
- 15. Race Codes
- 16. Referring Institution/Facility
- 17. SIM Department
- 18. ZIP Code

LETTER MAINTENANCE

This utility provides functionality for creating and printing letters that merge information from the STAR data base into pre-formatted letters. The utility is designed to be used by all applications in the STAR product line.

```

                                General Hospital Scheduling Table Maintenance Processor
                                Mon Jun 12, 1995 03:34 pm

Page:01                                Maintain Tables
( 1) Appointment Priority
( 2) Appointment Types
( 3) Borrower File
( 4) Department Headers
( 5) Department Scheduling Priority
( 6) Holidays
( 7) Letter Maintenance
( 8) Methods of Transportation
( 9) Physician/Resource Specialties
(10) Procedure Scheduling Priority
(11) Reschedule Reason
(12) Resource Department Code
(13) Resource Group
(14) Resource Master
(15) Resource Types
(16) Type of Clinic
(17) User Defined Holidays

Enter choice--
```

If multiple facilities exist, select the appropriate facility and proceed to the following screen.

```

                                General Hospital - Letter Maintenance Processor
                                Mon Jun 12, 1995 08:54 am

Page:01                                Product Modules with Letters
( 1) Patient Care - Psychiatry
( 2) Patient Care - Scheduling

Enter choice--
```

Scheduling is one of the functions in STAR Patient Care using this utility. Base letters for the facility are defined for this module. Select the Scheduling option.

The next screen displays the letter types that are currently defined. The product module and letter types are controlled by McKesson. These entries are not user-definable.

```
General Hospital - Letter Maintenance Processor
Mon Jun 12, 1995 08:57 am

Page:01          Letter Types for Patient Care - Scheduling
( 1) Appointment Reminder
( 2) Appointment Revision
( 3) Attendance
( 4) Cancellation
( 5) New Appointment
( 6) No Show
( 7) Reschedule
( 8) Wait List

Enter choice--
```

The next screen enables you to define different versions of the letters. If no letters are currently defined, the system displays the following message:

Enter letter version code to add--

If letters have been previously defined, the system displays a list of the letter versions for the selected facility.

```
General Hospital - Letter Maintenance Processor
Mon Jun 12, 1995 08:57 am

Page:01          Letter Versions for Appointment Reminder
( 1) FRMPCH-Facility reminder letter parent/c
( 2) FACIL-facility version reminder letter
( 3) RAPRWL-Resource Appointment Reminder w/1

Enter option or add(A) new letter version--
```

Add Letter Version

Enter **A** to add a new letter version. The system prompts you to enter a letter version code with the following prompt:

Enter letter version code to add--

A recommended naming convention for letters follows:

Patient Form Letters

APRLT1 - Patient form letter for appointment reminder letter

APRLT2 - Patient form letter for appointment revision letter

APRLT3- Patient form letter for cancellation letter

If you decide to have different letter formats for the different resources, the naming convention could be APRADA for the mammography resource for a detail appointment reminder letter. The cancellation letter for the mammography resource could be ACAADA. The first letter of the code could represent the facility, the next two characters represent the letter type, and the next three characters represent the resource.

The version code can contain up to six (6) alphanumeric characters. Once the version code is entered the following screen is displayed:

General Hospital - Letter Maintenance Processor	
Mon Jun 12, 1995 09:02 am	
Letter Type - Appointment Reminder	
(1)Version Code :	APRADA
(2)Description :	Appointment Reminder for Facility
(3)Edit by :	Brown, Barbara
(4)Edit date :	01/05/95 1805
Enter field number or '/' starting field number --	

Field Explanations**1. VERSION CODE (DISPLAY ONLY)**

This field is automatically filled in based on the entry in the previous prompt prior to display of this screen.

2. DESCRIPTION (36-C-R)

This field enables you to enter a 36-alphanumeric description of the version letter you are building.

3. EDIT BY (DISPLAY ONLY)

This field displays the name of the person who last edited the description field.

4. EDIT DATE (DISPLAY ONLY)

The field display the date and time the last edit was made to this screen.

Once the description is entered, the system prompts you to accept the screen information with the following prompt:

Accept this screen? (Y/N/^D'etele) [Y]--

If you enter **N**, you can make edits to the description.

If you enter **Y**, the system prompts you to continue the letter version process and either copy the text of an existing letter or enter new text:

Copy an existing letter to create this one? (Y/N) [N]--

If you enter **Y** to copy an existing letter, the system displays the list of existing versions for your selection.

If you enter **N**, the system takes you directly to the text edit screen. The text editors that are supported through this utility include Softkey Editor.

Using Softkey edit, the following screen is displayed to enter text:

General Hospital - Letter Maintenance Processor														
Mon Jun 12, 1995 10:49 am														
<div style="border: 1px dashed black; height: 150px; width: 100%;"></div>														
1Ins	2Ln	3	4Scn	5Scn	6Ins	7Ins	8Ctr	9Del	1Del	1Mrk	1Mrk	1Fmt	1	1End
ert	Fct		Fwd	Bck	Txt	Ln	Ln	Ln	0Wrđ	1Ln	2Pge	3Scn	4	5Edt

The following conventions need to be used when building the forms for the Appointment Reminder Letters.

Letter text can be created using the softkey editor. STAR letter elements can be imbedded in the letter body using the following guidelines:

Single curly braces - e.g. {patient name}

For any data element you want inserted in the letter at print time, reserve space in the letter text with a single left curly brace, followed by text, followed by a single right curly brace.

Single left curly brace with single right square bracket - e.g. [Patient name]

This works the same as the left and right curly braces except the right margin is fixed. This is useful when defining columns that should not shift based on text length.

Double curly braces - e.g. {{begin list}}

For summary letters for physicians that reference multiple patients, a format is provided for imbedding lists of repeating data elements within the body of the letter.

To identify a list, you must use two (2) left curly braces followed by the key words *Begin List* (upper, lower, or mixed case is acceptable), followed by two (2) right curly braces. Next, define the letter elements to include in the list. These letter elements would be defined with single curly braces. At the point the text would end, place two (2) left curly braces followed by the key words *End List* followed by two (2) right curly braces.

The following restrictions apply when mapping database elements to the form letter:

The database element mapper is a line editor for the letter text you have already saved. It can only manipulate a single line at a time.

Wrapping of embedded data elements is not allowed. Any embedded string that wraps to the next line are not recognized.

You need to arrange your letter to allow for the maximum possible size of the data you want to embed. If less than the maximum size is used, the line is compressed to the left to squeeze out extra spaces (except when the column convention "]" is used). Compression can only be performed on a single line rather than across an entire sentence.

Adding additional lines to the text or moving embedded data elements requires remapping of all embedded data elements that have been affected.

The following is an example of a summary formatted letter to be sent to the ordering physician.

```
{DATE - T}

| Dear {PATIENT NAME.....},
|
| You have an appointment scheduled with {Resource} for {APPOINTMENT DATE}
| at {APPOIN}.
|
| Please call Dr. Adair's office at {RESOURCE PH} for questions.
|
|
| Sincerely, Office Manager
|
| ADAIR APPT REMINDER
```

Once you have completed editing the letter, the system prompts you to accept the letter text:

Accept these changes? (Y/N) [Y]--

Enter **N** for not accepting the changes. The changes made during the edit session are not kept on the system. Enter **Y** to accept the text.

The following prompt is displayed:

Edit data field mapping? (Y/N) [Y]--

When you define database elements to be included in the letter, the text defined in curly braces needs to be mapped to a STAR database element. The actual text inside the curly braces does not have to be exact text. The text entered should be descriptive and have field length representative of the data element to be mapped. Once the element is mapped, the system automatically fills in the necessary text.

The previous screen is an example of a letter that has had the data elements mapped. Refer to the list of database elements available with the Letter Management feature. For the current example, the first embedded data element is the ordering doctor.

Enter **Y** to map the data elements defined in the letter. At this point, the letter utility scans the text for embedded data elements.

As each string is found, you can skip the string (for text where you want the braces to print) or map the string to a database element.

```

General Hospital - Letter Maintenance Processor
Mon Jun 12, 1995 07:26 am
Patient Care - Scheduling - Appointment Reminder - Appointment Reminder for ADAIR

Line 0 |
Line 1 | {DATE - T}
Line 2 |

Data Base Element: DATE - TODAY
Maximum Length   : 10
Example Output   : 56250

Enter data base description or '-' for table [skip]--

```

Enter a partial look-up for data elements related to the date and the following table is displayed:

```

General Hospital - Letter Maintenance Processor
Mon Jun 12, 1995 07:29 am
Patient Care - Scheduling - Appointment Reminder - Appointment Reminder for ADAIR

Line 0 |
Line 1 | {DATE - T}
Line 2 |

Page:10                                Data Base Elements
( 1) MENTAL HEALTH COMM AGENCY 5 ADDR 2
( 2) MENTAL HEALTH COMM AGENCY 5 CITY
( 3) MENTAL HEALTH COMM AGENCY 5 CONTACT
( 4) MENTAL HEALTH COMM AGENCY 5 PHONE
( 5) MENTAL HEALTH COMM AGENCY 5 POST CD
( 6) MENTAL HEALTH COMM AGENCY 5 STATE
( 7) OFFICE HOURS
( 8) ORIGINAL APPOINTMENT DATE
( 9) ORIGINAL APPOINTMENT TIME
(10) ORIGINAL RESOURCE NUMBER

Enter choice--
      next page(/) previous page(/P)

```

NOTE: The list of STAR data elements available for the letters are listed at the end of this section.

Selecting the ordering physician name results in the following screen:

```

General Hospital - Letter Maintenance Processor
                                Mon Jun 12, 1995 07:29 am
Patient Care - Scheduling - Appointment Reminder - Appointment Reminder for ADAIR

Line 0 |
Line 1 | {DATE - T}
Line 2 |

Data Base Element: Original appointment date
Maximum Length   : 10
Example Output   : 02/19/94
Page:01
Alternate Print Routines
( 1) DATE $H (MM/DD/YY)      ( 7) DATE $H (YYMMDD)
( 2) DATE $H (HOSPITAL FORMAT) ( 8) DATE $H (MM DD YY)
( 3) DATE $H (MM/YY)        ( 9) DATE $H (MMDD)
( 4) DATE $H (MM/DD)        (10) DATE $H (MM-DD)
( 5) DATE $H (FEB DD YYYY)  (11) DATE $H ( DD MM YY)
( 6) DATE $H (MMDDYY)      (12) DATE $H (DD MM YY)

Enter choice--
                                next page(/)

```

A table display of alternate print routines gives you a choice of the format to print the date. The default print routine is automatically entered as the selection. You can change to an alternate. Many of the data base elements have alternate print routines allowing for different formats of the data when printing on the reports.

Once you make your selection of format, the following screen is displayed.

```

General Hospital - Letter Maintenance Processor
                                Mon Jun 12, 1995 07:29 am
Patient Care - Scheduling - Appointment Reminder - Appointment Reminder for ADAIR

Line 0 |
Line 1 | {DATE - T}
Line 2 |

Data Base Element: Original appointment date
Maximum Length   : 10
Example Output   : 19 02 94

Accept? (Y/N) [Y] --

```

The system continues to prompt you each time it sees the curly braces. Once all the data elements have been mapped, the system displays the following message:

Accept these changes? (Y/N) [Y] --

Enter **N** to not accept the changes. All mapping done during the editing session are not retained. Enter **Y** to accept the mapping and the system displays the following message:

Data field mapping filed!

Once all the mapping is filed, the system prompts you to print a testletter and continue to another letter to add or edit.

Print(P) test letter or NL to continue? [NL]--

Enter **P** to print a test letter. The system generates the form letter with sample data in the data elements fields. If you have multiple departments, select the department for the report to print. The test letters are defined to go to the general reports printers.

The following is an example of the letter just added to the utility.

```
{DATE - T}

Dear LORNE,GAIL,

You have an appointment scheduled with Dr. Adair for June 6, 1996
at 10:00 AM.

Please call Dr. Adair's office at 770-123-4567 for questions.

Sincerely, Office Manager

ADAIR APPT REMINDER
```

Once a letter with embedded data elements has been filed, additional steps need to be taken when editing the text.

Once the letter is selected, the system displays a screen with the description of the letter with an option to edit the information.

```

                                General Hospital - Letter Maintenance Processor
                                Mon Jun 12, 1995 09:02 am
Letter Type - Appointment Reminder
( 1)Version Code : APRADA
( 2)Description  : Appointment Reminder for Facility

( 3)Edit by      :Brown,Barbara
( 4)Edit date    :01/05/95 1805

Enter field number or '/' starting field number --

```

If you enter **NL** at this prompt, the system displays the following prompt:

Edit letter text? (Y/N) [Y]--

If you enter **Y**, the system displays the selected letter text either in WordPerfect or Softkey editor format.

```

{DATE - T}

| Dear {PATIENT NAME.....},
|
| You have an appointment scheduled with {Resource} for {APPOINTMENT DATE}
| at {APPOIN}.
|
| Please call Dr. Adair's office at {RESOURCE PH} for questions.
|
|
| Sincerely, Office Manager
|
| ADAIR APPT REMINDER
|

```

Making an edit of inserting an extra line at the top of the file moves the position of all mapped data elements.

Once your edits are made, you end the edit screen and the system displays the following prompt:

Accept these changes? (Y/N) [Y]--

The system then prompts you to edit the data element mapping:

Edit data field mapping? (Y/N) [Y]--

Enter **Y** to edit the mapping. Since the letter utility is a line editor, looking at the position of each element, you must re-map all data elements in this example. The system displays the following message:

Mapping on Line 2 has been modified and must be remapped.

The following edit screen displays:

General Hospital - Letter Maintenance Processor	
Mon Jun 12, 1995 07:26 am	
Patient Care - Scheduling - Appointment Reminder - Appointment Reminder for ADAIR	
Line 0	
Line 1	{DATE - T}
Line 2	
Data Base Element: DATE - TODAY	
Maximum Length	: 10
Example Output	: 56250
Enter data base description or `` for table [skip]--	

You must select the ordering physician data element again. The system displays the following prompt:

Accept? (Y/N) [Y] --

Enter **Y** to re-map the data element in its new position (new line). Repeat the process for each element in the letter. Once all changes are made, the system prompts the following:

Accept these changes (Y/N) [Y]--

Entering **Y** accepts the changes and the system displays the following message:

Data field mapping filed!

You then have the option to print a test letter or continue to move through the Letter Maintenance process.

The following is a list of default format letter elements that are available for the letters to be sent to the patient and the physicians associated with a patient.

Letter Element	Sample Output
ADDRESS 2	123 Cherry Lane
ADDRESS 2	Suite 100
ADDRESS	123 Cherry Lane
ADDRESS	123 Cherry Lane
ADMITTING PHYSICIAN (CODE)	2334
ADMITTING PHYSICIAN (NAME)	Connors,Donald
ADMITTING PHYSICIAN ADDRESS LINE 1	123 Cherry Lane
ADMITTING PHYSICIAN ADDRESS LINE 2	Suite 100
ADMITTING PHYSICIAN CITY (TOWN)	Atlanta
ADMITTING PHYSICIAN FAX	770-123-4567
ADMITTING PHYSICIAN PHONE	770-123-4567
ADMITTING PHYSICIAN STATE	Georgia
ADMITTING PHYSICIAN ZIP(POSTAL) CD	30346-4046
APPOINTMENT DATE/DAY	Wednesday March 13,1996
APPOINTMENT LENGTH	45 min
APPOINTMENT REASON	Follow up appointment
APPOINTMENT TIME	10:00am
ATTENDING PHYSICIAN (CODE)	
ATTENDING PHYSICIAN (NAME)	
ATTENDING PHYSICIAN ADDRESS LINE 1	
ATTENDING PHYSICIAN ADDRESS LINE 2	
ATTENDING PHYSICIAN CITY (TOWN)	
ATTENDING PHYSICIAN FAX NUMBER	
ATTENDING PHYSICIAN PHONE NUMBER	
ATTENDING PHYSICIAN STATE	
ATTENDING PHYSICIAN ZIP (POSTAL) CD	
CITY	Atlanta
CITY	Atlanta
CITY	Atlanta

Letter Element	Sample Output
ADMITTING PHYSICIAN (CODE)	2334
ADMITTING PHYSICIAN (NAME)	Connors,Donald
ADMITTING PHYSICIAN ADDRESS LINE 1	123 Cherry Lane
ADMITTING PHYSICIAN ADDRESS LINE 2	Suite 100
ADMITTING PHYSICIAN CITY (TOWN)	Atlanta
ADMITTING PHYSICIAN FAX	770-123-4567
ADMITTING PHYSICIAN PHONE	770-123-4567
ADMITTING PHYSICIAN STATE	Georgia
ADMITTING PHYSICIAN ZIP(POSTAL) CD	30346-4046
APPOINTMENT DATE/DAY	Wednesday March 13,1996
APPOINTMENT LENGTH	45 min
APPOINTMENT REASON	Follow up appointment
APPOINTMENT TIME	10:00am
ATTENDING PHYSICIAN (CODE)	
ATTENDING PHYSICIAN (NAME)	
ATTENDING PHYSICIAN ADDRESS LINE 1	
ATTENDING PHYSICIAN ADDRESS LINE 2	
ATTENDING PHYSICIAN CITY (TOWN)	
ATTENDING PHYSICIAN FAX NUMBER	
ATTENDING PHYSICIAN PHONE NUMBER	
ATTENDING PHYSICIAN STATE	
ATTENDING PHYSICIAN ZIP (POSTAL) CD	
CITY	Atlanta
CITY	Atlanta
CITY	Atlanta
COMMUNITY AGENCY 2	Community Service Bldg.
COMMUNITY AGENCY 3	Children's Advocacy Center
COMMUNITY AGENCY 4	Mental Health Clinic
COMMUNITY AGENCY 5	Women's Shelter
COMMUNITY AGENCY	Meals on Wheels
CONSULTING PHYSICIAN 1 (CODE)	
CONSULTING PHYSICIAN 1 (NAME)	
CONSULTING PHYSICIAN 1 ADDR LINE 1	
CONSULTING PHYSICIAN 1 ADDR LINE 2	

Letter Element	Sample Output
CONSULTING PHYSICIAN 1 CITY (TOWN)	
CONSULTING PHYSICIAN 1 FAX #	
CONSULTING PHYSICIAN 1 PHONE	
CONSULTING PHYSICIAN 1 STATE	
CONSULTING PHYSICIAN 1 ZIP(POSTAL) CD	
CONSULTING PHYSICIAN 2 (CODE)	
CONSULTING PHYSICIAN 2 (NAME)	
CONSULTING PHYSICIAN 2 ADDR LINE 1	
CONSULTING PHYSICIAN 2 ADDR LINE 2	
CONSULTING PHYSICIAN 2 CITY	
CONSULTING PHYSICIAN 2 FAX	
CONSULTING PHYSICIAN 2 PHONE	
CONSULTING PHYSICIAN 2 STATE	
CONSULTING PHYSICIAN 2 ZIP	
CONSULTING PHYSICIAN 3 (CODE)	
CONSULTING PHYSICIAN 3 (NAME)	
CONSULTING PHYSICIAN 3 ADDR LINE 1	
CONSULTING PHYSICIAN 3 ADDR LINE 2	
CONSULTING PHYSICIAN 3 CITY	
CONSULTING PHYSICIAN 3 FAX	
CONSULTING PHYSICIAN 3 PHONE	
CONSULTING PHYSICIAN 3 STATE	
CONSULTING PHYSICIAN 3 ZIP	
CONSULTING PHYSICIAN 4 (CODE)	
CONSULTING PHYSICIAN 4 (NAME)	
CONSULTING PHYSICIAN 4 ADDR LINE 1	
CONSULTING PHYSICIAN 4 ADDR LINE 2	
CONSULTING PHYSICIAN 4 CITY	
CONSULTING PHYSICIAN 4 FAX	
CONSULTING PHYSICIAN 4 PHONE	
CONSULTING PHYSICIAN 4 STATE	
CONSULTING PHYSICIAN 4 ZIP	
CONTACT PERSON OR OTHER INFO	James Gunther
COUNTY CODE	54

Letter Element	Sample Output
COUNTY CODE	55
DATE - TODAY	03/14/96
DESCRIPTION GENERAL	Clinic
DISCHARGE CONDITION	Good
DISCHARGE DATE/TIME - \$H FORMAT	54367
EMPLOYMENT STATUS (CN)	Full time
EXPECTED LOS - WAIT LIST	3 days
GUARANTOR ADDRESS 2	Apt. 4C
GUARANTOR ADDRESS	123 Cherry Street
GUARANTOR CITY (TOWN)	Atlanta
GUARANTOR NAME	Eastern, Gary
GUARANTOR STATE	Georgia
GUARANTOR ZIP (POST) CODE	30346-5687
GUARANTOR'S RELATION CODE	Aunt
HOSPITAL ADDRESS LINE 1	
HOSPITAL ADDRESS LINE 2	
HOSPITAL AREA CODE	
HOSPITAL CITY (TOWN)	
HOSPITAL COUNTRY	
HOSPITAL COUNTY	
HOSPITAL NAME	
HOSPITAL PHONE NUMBER	
HOSPITAL PROVINCE NUMBER (CANADA)	
HOSPITAL STATE	
HOSPITAL ZIP (POSTAL) CODE	
INSTRUCTION	Education given
LINE 1 OF ADDRESS	123 Cherry Street
MENTAL HEALTH AGENCY 2 CITY	Atlanta
MENTAL HEALTH COMM AGENCY 1 POST CD	30346-4569
MENTAL HEALTH COMM AGENCY 2 ADDR 1	123 Cherry Street
MENTAL HEALTH COMM AGENCY 2 ADDR 2	Suite 200
MENTAL HEALTH COMM AGENCY 2 CONTACT	Therapist

Letter Element	Sample Output
MENTAL HEALTH COMM AGENCY 2 PHONE	770-123-4567
MENTAL HEALTH COMM AGENCY 2 POST CD	33346-4569
MENTAL HEALTH COMM AGENCY 2 ST	Georgia
MENTAL HEALTH COMM AGENCY 3 ADDR 1	123 Cherry Street
MENTAL HEALTH COMM AGENCY 3 ADDR 2	Suite 100
MENTAL HEALTH COMM AGENCY 3 CITY	Atlanta
MENTAL HEALTH COMM AGENCY 3 CONTACT	Therapist
MENTAL HEALTH COMM AGENCY 3 PHONE	770-123-4567
MENTAL HEALTH COMM AGENCY 3 POST CD	30346-6987
MENTAL HEALTH COMM AGENCY 3 ST	Georgia
MENTAL HEALTH COMM AGENCY 4 ADDR 1	123 Cherry Street
MENTAL HEALTH COMM AGENCY 4 ADDR 2	Suite 400
MENTAL HEALTH COMM AGENCY 4 CITY	Atlanta
MENTAL HEALTH COMM AGENCY 4 CONTACT	Therapist
MENTAL HEALTH COMM AGENCY 4 PHONE	770-123-4567
MENTAL HEALTH COMM AGENCY 4 POST CD	30346-9876
MENTAL HEALTH COMM AGENCY 4 ST	Georgia
MENTAL HEALTH COMM AGENCY 5 ADDR 1	123 Cherry Street
MENTAL HEALTH COMM AGENCY 5 ADDR 2	Suite 300
MENTAL HEALTH COMM AGENCY 5 CITY	Atlanta
MENTAL HEALTH COMM AGENCY 5 CONTACT	Therapist
MENTAL HEALTH COMM AGENCY 5 PHONE	770-123-1234
MENTAL HEALTH COMM AGENCY 5 POST CD	30346-5432
MENTAL HEALTH COMM AGENCY 5 ST	Georgia
OFFICE HOURS	9-5
ORDERING PHYSICIAN - LAB (CODE)	
ORDERING PHYSICIAN - LAB (NAME)	
ORDERING PHYSICIAN ADDRESS LINE 1	
ORDERING PHYSICIAN ADDRESS LINE 2	

Letter Element	Sample Output
ORDERING PHYSICIAN CITY	
ORDERING PHYSICIAN FAX #	
ORDERING PHYSICIAN PHONE	
ORDERING PHYSICIAN STATE	
ORDERING PHYSICIAN ZIP CODE	
ORIGINAL APPOINTMENT DATE	Wed. Mar 13,1996
ORIGINAL APPOINTMENT TIME	10:00A
ORIGINAL RESOURCE NUMBER	32
OUTPATIENT LOCATION	MH
PATIENT ACCOUNT NUMBER	A123456789
PATIENT ADDRESS 1	
PATIENT ADDRESS 2	
PATIENT ADMIT/REG DATE & TIME	
PATIENT AGE	
PATIENT BIRTHDATE	
PATIENT CITY (TOWN)	
PATIENT CLASS CODE	
PATIENT DIAGNOSIS - ADMITTING	
PATIENT DIAGNOSIS - WORKING	
PATIENT LOCATION	1E
PATIENT MEDICAL RECORD NUMBER	
PATIENT MEDICAL SERVICE	
PATIENT NAME ENTITLE/SUFFIX	
PATIENT NAME TITLE (MR/MS)	
PATIENT NAME	
PATIENT SOCIAL SECURITY NUMBER	
PATIENT STATE	
PATIENT TYPE	
PATIENT ZIP (POSTAL) CODE	
PATIENT'S COUNTRY OF RESIDENCE	Canada
PATIENT'S COUNTY CODE	54
PATIENT'S SEX	Male
PRIMARY PHYSICIAN (CODE)	
PRIMARY PHYSICIAN (NAME)	

Letter Element	Sample Output
PRIMARY PHYSICIAN ADDRESS LINE 1	
PRIMARY PHYSICIAN ADDRESS LINE 2	
PRIMARY PHYSICIAN CITY	
PRIMARY PHYSICIAN FAX #	
PRIMARY PHYSICIAN PHONE	
PRIMARY PHYSICIAN STATE	
PRIMARY PHYSICIAN ZIP CODE	
RECALL DATE	
RECALL TYPE (CODE OR DESC)	
REFERRING PHYSICIAN (CODE)	
REFERRING PHYSICIAN (NAME)	
REFERRING PHYSICIAN ADDRESS LINE 1	
REFERRING PHYSICIAN ADDRESS LINE 2	
REFERRING PHYSICIAN CITY	
REFERRING PHYSICIAN FAX	
REFERRING PHYSICIAN PHONE	
REFERRING PHYSICIAN STATE	
REFERRING PHYSICIAN ZIP CODE	
RELATIVE (1) ZIP CODE	30346
RELATIVE (2) ADDRESS LINE 1	123 Cherry Street
RELATIVE (2) ADDRESS LINE 2	Apt. 4C
RELATIVE (2) CITY (TOWN)	Atlanta
RELATIVE (2) COUNTY	Fulton
RELATIVE (2) NAME	Brown, John
RELATIVE (2) STATE	Georgia
RELATIVE (2) ZIP (POST) CODE	30346-3456
RELATIVE 1 ADDRESS 2	Apt. 4C
RELATIVE'S NAME (NON-DISPLAY)	Relative
RELATIVE'S STATE	Georgia
REMINDER DATE 1ST	
REMINDER DATE 2ND	
REMINDER DATE 3RD	
REMINDER LETTER PRINT D/T (1ST	
REMINDER LETTER PRINT D/T (2ND	

Letter Element	Sample Output
REMINDER LETTER PRINT D/T (3RD	
REMINDER LETTER SENT TO (1ST)	
REMINDER LETTER SENT TO (2ND)	
REMINDER LETTER SENT TO (3RD)	
RESCHEDULED REASON	Emergency
RESOURCE NAME	Therapist,A
SOCIAL SECURITY NUMBER	123-45-6789
STAFF ALERT (PSYCH MODULE)	Combative
STATE	Georgia
STATE	Ga
TELEPHONE NUMBER (DISPLAY)	770-123-4567
TELEPHONE NUMBER (DISPLAY)	770-123-4567
TELEPHONE NUMBER (DISPLAY)	770-123-4567
TEST COLLECTION DATE/TIME	
TEST COMPLETION DATE/TIME	
TEST ORDER DATE/TIME	
TEST ORDERED (CODE OR DESC)	
TEST SPECIMEN TYPE	
UK MENTAL CATEGORY	Stable
VERSION # - CANADA	123-45-6789
ZIP CODE	30346

Hospital Facility Options

To access the Hospital Facility Options function, select Tables from the initial Patient Care Input Options menu. The following screen is displayed:

```

                                General Hospital Tables Processor
                                Wed Jun 14, 2006 05:51 pm
Tables Input Options

Option No.  Option
-----
    1      Table Maintenance
    2      Medical Records & UM Table Maintenance
    3      Nursing Table Maintenance
    4      Scheduling Table Maintenance
    5      Clinical Management Table Maintenance
    6      Physician/NSCG Table Maintenance
    7      ROI Table Maintenance
    8      Wait List Tables
    9      Purge Inactive Contract Accounts
   10      Patient Type
   11      Facility Options & Parameters
   12      ADT Maintenance
   13      Demographic Print Interface Maintenance
   14      System Wide Parameters
   15      STAR Patient Location Tracker Maintenance
   16      Tables View Functions
Enter option number--

```

Select Facility Options & Parameters, then Hospital Facility Options. The following screen is displayed:

```

                                General Hospital Hospital Facility Options Processor
                                Tue Sept 4, 2007 04:15 pm
Hospital Facility Options Input Options

Option No.  Option
-----
    1      Admission and General Parameters
    2      Bed Parameters
    3      MPI Parameters
    4      Insurance and Employer Parameters
    5      Order Management and Charging Parameters
    6      Clinical Parameters
    7      Scheduling Facility Parameters
    8      Wait List Parameters
    9      UB Code Parameters
   10      Active Order Transfer Parameters
   11      Statistical Reports Parameters
   12      Period Definition Parameters
   13      Series Auto Discharge by Date Parameter
   14      GUI Parameters
   15      Bed Display Parameters
Enter option number--

```


Select Scheduling Facility Parameters. If you are in a multifacility environment, the system prompts you to select a facility. The following screen is displayed:

General Hospital Scheduling Facility Parameters Processor		
Fri Mar 09, 2001 10:04 am		
1 Letter Log Retention 365 days	2 First Class Postage 5 or more days	3 Second Class Postage 7 or more days
4 Reschedule List Letters Appointment Revision	5 Order Gen./Pat. Reg. Yes	6 Suppress No
7 Scheduling Series Summary Yes		
8 Letters	(1) Appointment Reminder	Entries Defined
	(2) Appointment Revision	Entries Defined
	(3) Attendance	
	(4) Cancellation	
	(5) New Appointment	Entries Defined
	(6) No Show	
	(7) Reschedule	
	(8) Wait List	Entries Defined
9 Edit Date 02/16/01	10 Edit By Johnson, Steve	
Enter field number or '/' starting field number--		

Field Explanations

1. LETTER LOG RETENTION (3-N-R)

This field indicates the retention time for the log records of Scheduling letters that are sent to patients, therefore allowing you to reprint any letter that has previously been sent to a patient. This log can be viewed through Appointment History for the patient. The default for this field is 365.

2. FIRST CLASS POSTAGE (2-N-R)

This field indicates the amount of time required to send mail with first class postage. When printing letters in batch mode, any letters that do not have first class postage are logged to a report so that the patients these letters are being sent to can be notified of their scheduled appointment. If the letters that are printed in batch mode have either first or second class postage, they are printed together with a banner page indicating that these letters are first class postage letters.

3. SECOND CLASS POSTAGE (2-N-R)

This field indicates the amount of time required to send mail with second class postage. When printing letters in batch mode, any letters that do not have first class postage are logged to a report so that the patients these letters are being sent to can be notified of their scheduled appointment.

If the letters that are printed in batch mode have either first or second class postage, they are printed together with a banner page indicating that these letters are first class postage letters. If the amount of time between the printing of the letter and the Appointment Date is equal to or greater than the entry in the Second Class Postage

field, these letters are printed after the letters with first class postage, and contain a banner indicating that these letters can be sent with second class postage.

4. RESCHEDULE LIST LETTERS (1-A-R)

This field determines which letter type should be used during the Reschedule List process. The system retains the previous appointment date, time, and resource, as well as the newly rescheduled one. You can skip the Reschedule letter and generate an Appointment Revision letter that includes both the old appointment and new appointment information by entering **A**. Enter **N** (New Appt letter during the Reschedule List process) to continue. If this field is left blank, no letter is generated. A reminder letter is generated within the appropriate time frame based on the new appointment information.

5. ORDER GEN./PAT. REG. (1-A-R)

This field determines if the facility allows orders to be generated from STAR Scheduling. Enter **Y** for Yes to allow the generation of orders. The default for this field is N. When this field is accessed the following prompt displays:

Allow Orders to be generated for the facility through STAR Scheduling (Y?N) [N]--

This is a McKesson parameter and must be set by McKesson personnel.

6. SUPPRESS (1-A-O)

This field is used to allow the header to print on the first page and to suppress the header on the following pages of the Department/Resource Schedule and Resource Schedule Reports. Enter **Y** for Yes to allow the header to print on the first page and be suppressed on the following pages. Enter **N** for No to allow the header to print on all pages of both reports. If this field is left blank and nothing is defined in the Resource Department Code Suppress Header field, the header is not suppressed in either report. When this field is accessed the following prompt displays:

Suppress header for multiple page report (Y/N) [N]--

7. SCHEDULING SERIES SUMMARY (1-A-O)

This field controls whether an appointment summary screen automatically displays for the user after completing the process of scheduling multiple appointments for series patients. If you enter **Y** for Yes, a summary screen displays for the user once the last appointment is accepted. If you enter **N** for No, the display of the summary screen is suppressed. When this field is accessed the following prompt displays:

Display Appointment Summary Screen after multiple appointments? (Y/N) [N] --

8. LETTERS (SPECIAL FORMAT)

For information regarding letters, see “**RESOURCE MAINTENANCE**” in Chapter 1: Resource Maintenance, “**LETTERS**” in Chapter 2: Appointment Processing, and “**LETTER MAINTENANCE**” in Appendix A: Tables of this volume.

9. EDIT DATE (DISPLAY ONLY)

This field contains the date and time this entry was edited.

10. EDIT BY (DISPLAY ONLY)

This field contains the name of the individual who last edited this screen if that person signed on with security.

The following screen is page two of the Scheduling Facility Parameters Processor. It allows you to activate Pathways Healthcare Scheduling.

General Hospital Scheduling Facility Parameters Processor	
Tue Jun 15, 1999 08:10 am	
1 PHS Active	2 Next Available Code
No	900030
3 Default Resource Type	4 Default Speciality Type
3 - TECHNICIAN-	NA - Not Applic
5 Default Appointment Type	6 Default Display Security
TRMT - TREATMEN	1 - VIEW REASON
Enter field number or '/' starting field number--	

Field Explanations

NOTE: The fields on this screen are obsolete and are in the system only for custom interface considerations.

1. PHS ACTIVE (1-A-R)

This field is used to activate Pathways Healthcare Scheduling. When this field is set to Yes, STAR Scheduling is deactivated for all functions except viewing and printing scheduling reports, and also for adding comments and method of transportation to existing appointments.

2. NEXT AVAILABLE CODE (6-N-O)

This field is used to create a new resource if a new resource is sent in the interface from Pathways Healthcare Scheduling. It defines the next available resource number. A resource number is defined as a six-digit numeric field. You should initially set this field to a value of 900000, since this reduces the chance of conflict with existing resource numbers and allows the addition of 100,000 new resources.

3. DEFAULT RESOURCE TYPE (TABLE LOOKUP-R)

This field defines the resource type of the new resource being created from the Pathways Healthcare Scheduling interface.

4. DEFAULT SPECIALTY TYPE (TABLE LOOKUP-R)

This field defines the specialty type of the new resource being created from the Pathways Healthcare Scheduling interface.

5. DEFAULT APPOINTMENT TYPE (TABLE LOOKUP-R)

This field defines the type of appointment to create for the new resource being created from the Pathways Healthcare Scheduling interface.

6. DEFAULT DISPLAY SECURITY (TABLE LOOKUP-R)

This field defines the default security used to view the appointment being created from the Pathways Healthcare Scheduling interface.

CRT Names Table

The CRT Names table establishes each CRT in the system. This table also contains information relevant to overall system use and is created as part of the installation process. However, it is intended that the hospital staff maintain this table to facilitate changes that they wish to make to the system. Such changes might include the movement of CRTs, the addition of CRTs, changing of initial menus, and addition or deletion of charging capability.

The CRT Names table controls many functions throughout STAR Patient Care such as patient access, charging and ordering parameters, routing of form printing and results, and security sign-on capabilities.

You can access the CRT Names table by selecting the following menu options:

1. Tables from the Data Processing main menu
2. Table Maintenance
3. CRT Names

The system prompts you to enter the CRT name code. After you select this code the following screen is displayed:

```

                                General Hospital Table Maintenance Processor
                                Thu Jul 01, 2004 10:41 am
CRT Names
 1 Code  2 CRT Name                3 Facility                4 Port # or PC Name
 1E      1 EAST CRT                A,B,C                    50
 5 Initial Menu                    6 Message Group          7 All Message
    TEMPORATY TEST                MODEL HOSPITAL A ME      No
 8 Station 9 Secondary Station(s) 10 Name Inquiry          11 Display O/P
 1E      OSG,2N,BAO,CCU,ICU        Standard                  Yes
12 Default Printer                13 Letter Printer        14 Result Printer
 1E-1 East Census and Me          1E-1 East Census and Me
15 Help Text 16 Auto Lab Results Here 17 Form Eject Printer(s)
    No          Yes                1E
18 Sign-on 19 Freq Chg/Ord 20 Dup/Conf 21 Contract
    Yes          Yes                Yes
22 Default I/P Chg Loc 23 Default O/P Chg Loc 24 Eligibility Printer
    Nurse Station                1 EAST
25 Comment
    1 EAST NURSING STATION

Enter field number or '/' starting field number--
                                next(/) or previous screen(/P) [/]

```

This table contains five screens. The first screen allows entry of the basic CRT information, the second screen allows entry of basic ordering parameters, the third screen allows entry of form printing information, the fourth screen allows entry of access parameters for the CRT, and the fifth screen allows entry of pharmacy-related information if STAR Pharmacy is in the network.

Field Explanations

NOTE: The Result Printer field is the only field that specifically pertains to setup for Scheduling. For information regarding the remaining fields, refer to Chapter 2: High Level Tables of the *STAR Patient Reference Guide, Tables Volume* and Appendix A: Tables of the *STAR Patient Reference Guide, Order Management/Charge Processing Volume II*.

14. RESULT PRINTER (TABLE LOOKUP-O)

Enter the printer that prints results from the clinical systems automatically or upon demand. This field is only functional if the hospital has STAR Radiology or STAR Laboratory. The Printer table must be established first. If this field is blank, results print at the patient location.

RESOURCE DEPARTMENT CODE

The letter information entered at the Resource Master level overrides letter information at the Resource Department Code level and at the Facility level. If any letter information is entered at the Resource Master level, all letter information must be entered at the Resource Master level.

If no letter information is entered at the Resource Master Level, the system uses the associated Resource Department Code letter information. If any information is entered at the Department level, all letter information must be entered at the Department level.

If no information is entered at the Resource Master level or the Department level, then the letter information at the Facility level is used. Letter information must be filled out at the Facility level, at a minimum. This information should include text and other associated parameters regarding the letters, prior to printing.

The Resource Department Code table is accessed through the Scheduling Tables Maintenance processor. This table is displayed below:

```

General Hospital Scheduling Table Maintenance Processor
                                Mon Mar 30, 1998 08:35 am

Resource Department Code
1 Department Code          2 Department Description
CAR                        CARDIOLOGY (CHART/SCHED)-----X
3 Address 1                4 Address 2
130 HEART DRIVE----X      ADDRESS TWO-----X

5 City                      6 State  7 ZIP Code  8 Office Phone  9 Office Hours
ATLANA-----X            GA        11122-2333   (404)877-6755   8884449999
10 Module Usage            11 Sched. Deadline  12 SIM Department
Chart,Sched                365                      CARDIOLOGY
13 Schedule Edit Access?   14 PHS Department
No

15 Appt Notice              16 Report Name
Add,Cancel,Revise          PAS-PAS PRINTER
17 Audit Notice             18 Report Name
Add,Cancel,Revise          PAS-PAS PRINTER
19 Trans Notice             20 RES-Q OR Conflict Notice  21 Suppress
PAS-PAS PRINTER

22 Sched Print Format        23 Edit Date          24 Edit By
One Appt/Page              01/14/98 1521         King,Candie

Enter field number or '/' starting field number--
                                next(/) or previous screen(/P) [/]

```

For a description of the fields on this screen, see Chapter 6: Patient Scheduling Tables of the *STAR Patient Care Reference Guide, Tables Volume*.

When you press ENTER on this screen, the second screen of the table appears. This screen displays the letter information for the Resource Department, if any is defined for this department. Defining letter information at this level allows for more flexibility than defining the information at the facility level, but does not require the build effort that defining letters at all of the Resources would be. Due to the defaulting logic of the

letters as described above, combinations of all three levels are probably not uncommon.

General Hospital Scheduling Table Maintenance Processor	
Mon Apr 01, 1996 02:54 pm	
Resource Department Code	
1 Department Code	2 Department Description
RAD	RADIOLOGY
3 Letters	
(1) Appointment Reminder	
(2) Appointment Revision	
(3) Attendance	
(4) Cancellation	
(5) New Appointment	
(6) No Show	
(7) Reschedule	
(8) Wait List	
Enter field number or '/' starting field number--	
next(/) or previous screen(/P) [/]	

Field Explanations

1. DEPARTMENT CODE (DISPLAY ONLY)

The Department Code for the selected department is displayed for informational purposes. This field cannot be edited or adjusted from this screen.

2. DEPARTMENT DESCRIPTION (DISPLAY ONLY)

The Department Description for the selected department displays for informational purposes. This field cannot be edited or adjusted from this screen.

NOTE: The department description is always displayed, printed, and stored in uppercase.

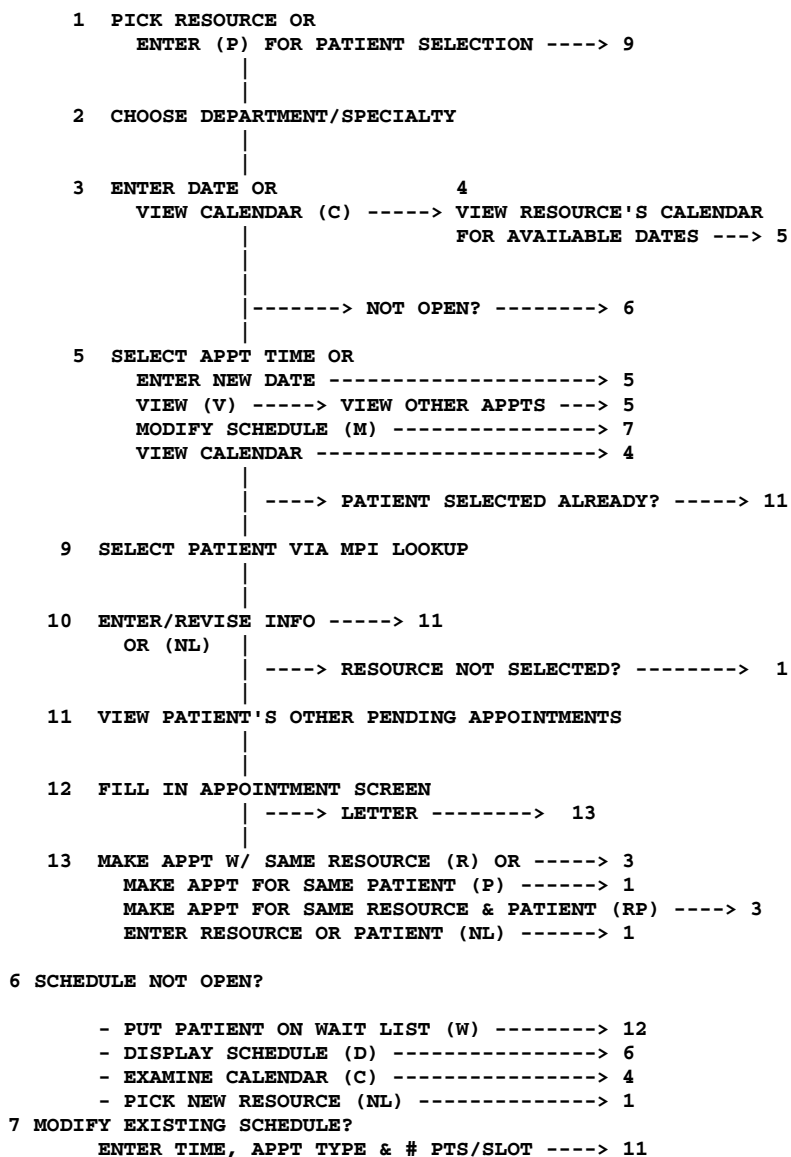
3. LETTERS (SPECIAL FORMAT)

For specific information regarding the letter information, see “**RESOURCE MAINTENANCE**” in Chapter 1: Resource Maintenance of this volume.

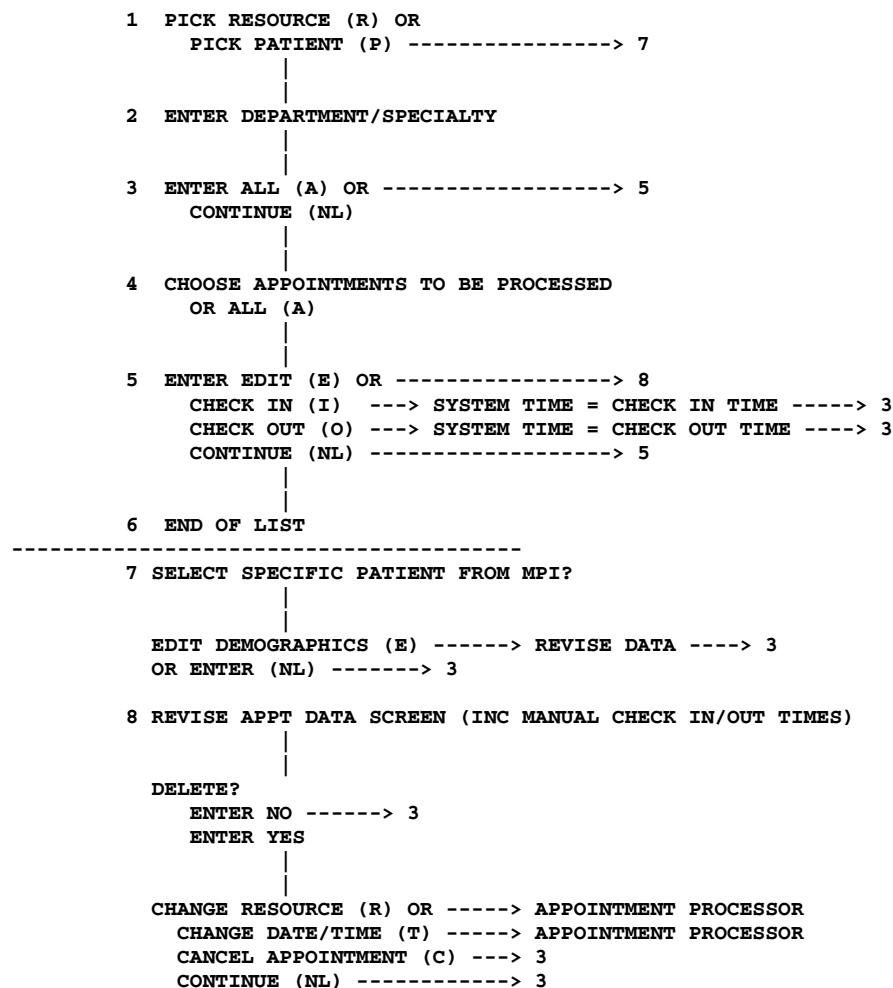
Appendix B - SCHEDULING FLOW

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CHECK IN-OUT PROCESSOR	B-4
END OF DAY PROCESSOR	B-5
RESOURCE MASTER PROCESSOR	B-6

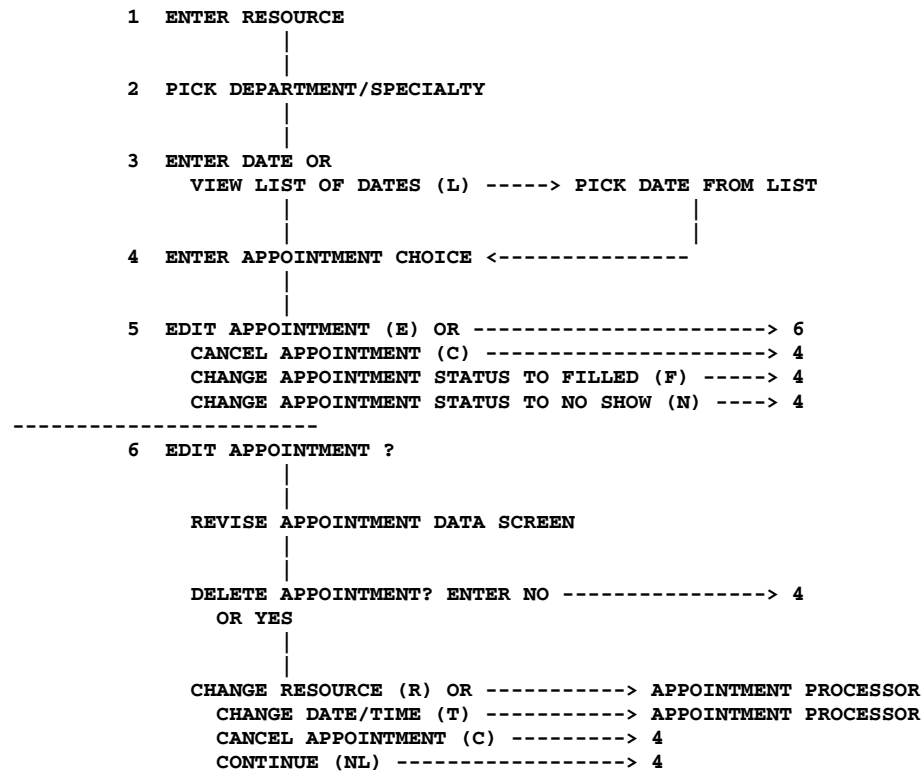
APPOINTMENT PROCESSOR



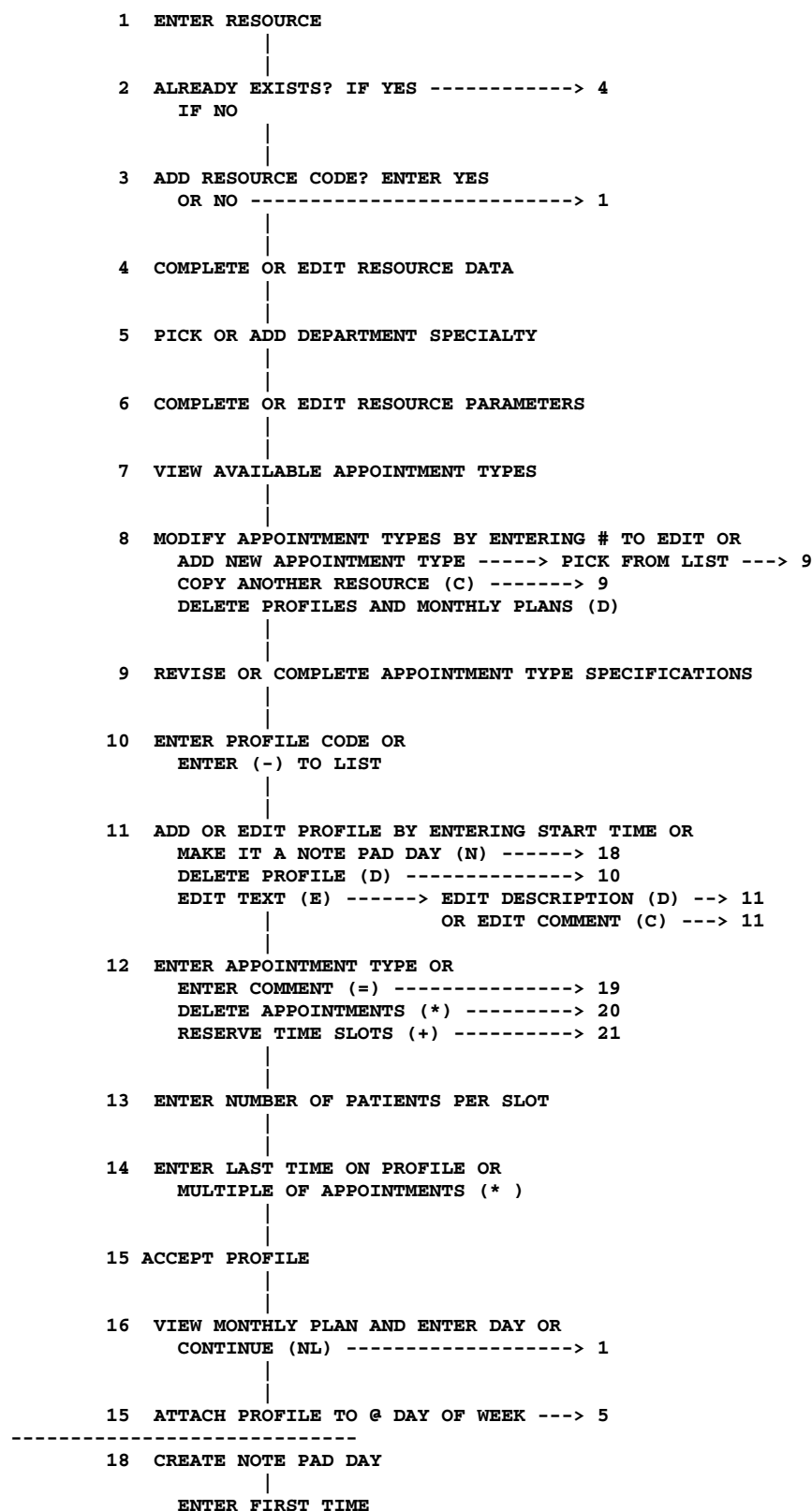
CHECK IN-OUT PROCESSOR



END OF DAY PROCESSOR



RESOURCE MASTER PROCESSOR



```
      |
      ENTER LAST TIME -----> 11
19  ENTER APPOINTMENT TYPE TO BE COMMENTED
      |
      ENTER COMMENT OR -----> 11
      DELETE COMMENT (*) -----> 11
20  DELETE APPOINTMENTS
      |
      ENTER LAST TIME TO DELETE -----> 11
21  RESERVE (OR UNRESERVE) TIME SLOTS
      |
      ENTER RESERVE STOP TIME -----> 11
```

Appendix C - INFORMATION WINDOWS

INFORMATION WINDOWS	C-3
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Physician Information	C-5
Pharmacy Profile	C-6
Patient Preparation Instructions	C-7

INFORMATION WINDOWS

You can display the Patient Information, Physician Information, and Pharmacy Profile Information Windows if you meet the following criteria:

- You must be using McKesson's WEM product on an IBM-compatible personal computer
- Your PC and host ID computer must be set up to enable the use of Information Windows

For more information on using Information Windows, see the *WEM User's Guide*.

Information Windows displaying patients' medical information, physicians of record, and pharmacy information are available through Order Management and Nursing functions. Information is downloaded into the windows upon selection of a patient in these functions. During the download process, the system displays the following message:

Downloading Information Windows...Please Wait!

NOTE: Pharmacy information is only available when STAR Pharmacy is in the system network.

The information is cleared when you select a different patient in one of the functions where Information Windows are available or when you access a different function from the Nursing menu.

In WEM, Information Windows are accessed by clicking on the Tools selection on the menu line and then selecting Information Windows.

Patient Information

Select **Tools, Information Windows** from the menu bar, or click your mouse on the [VIEW] function box to display the following Patient Information Window:

STAR Development System (ID 201) Department Orders Processor

Thu Jul 30, 2009 02:45 pm

EEG Order

No	Name	Sex	BD	Room	Physician	SVC	ICD	Status
0907800001	RDTWO, TENIPHE	F	02/02/24	2121-01	AIR, FRANK	CCAR	10	I/P 134

1 Item
3100 EEG
4 Priority
STAT
5 Frequency 6 Schedule
->
8 Start Date 9 Start Time
13 Ordering Physician
15 Prompt Response / Message
17 Transportation
19 Modifier
Enter description "-" or code --

Patient Information

Admitting Dx	A18.89-Tuberculosis of other sites
Working Dx	FREEFORM
Allergies	ICD10
Precautions	STA: IVL
Condition	FAIR
Height	6'0.0" / 182.9cm
Weight	200lbs / 90.720kg
Smoker	No
Isolation	NORMAL ISOLATION
Admit Date	03/19/09

F1 Pat Info F2 Phy Info F3 Rx Profile

18 Ordering Diagnosis
20 Comment

The Patient Information window is displayed on the right side of the screen. The patient's medical data is displayed, which includes the following:

- Admitting diagnosis
- Working diagnosis
- Logged allergies
- Precautions
- Condition
- Height
- Weight
- Smoking status
- Isolation
- Admit date

To scroll through the available information, press the Up Arrow, or Down Arrow key. Press the ESC key to exit Information Windows, F2 to view the Physician Information Window, or F3 to view the Pharmacy Profile Information Window.

For more information regarding Information Windows, refer to the *WEM User's Guide*.

Physician Information

The Physician Information Window is displayed as follows:

```

General Hospital (ID 9) Department Orders Processor
CARDIOLOGY Order Wed Sep 02, 1992 11:02 am
No Name Sex BD Room Physician SUC Status
92241-00001 SMITH, JOHN ADAM M 01/01/01 2107-2 JONES, ARNOLD MED I/P 6

1 Item 1000 ELECTROCARDIOGRAM
4 Priority 5 Request Referring Phys 224 PARKER, SAMUEL
8 Recurring 9 Stop Dat Family 321 BARNETT, PATRICK T
12 Ordering Physician Consults 10 COLEMAN, MICHAEL G
14 Medications 34 DUNNIGAN, ANN C
17 Prompt Response / Message 30 WOODBURN, ROBERT L
18 Order Diagnosis 20 HENKE, WILBERT J

Print on profile? (Y/N) [Y]--
1Pat Info Phy Info 3RX Profile

```

Notice that the Phys Info option in the lower left corner is highlighted. The Physician Information Window displays on the right side of the screen under the patient demographic information. The following physicians are displayed (if they are logged):

- Admitting Physician
- Attending Physician
- Referring Physician
- Family Physician
- Consulting Physicians

When applicable, you can press the Up Arrow or Down Arrow key to scroll through the physicians of record. Press the ESC key to exit Information Windows, F1 to view the Patient Information Window, or F3 to view the Pharmacy Profile Information Window.

If the patient has more consulting physicians than can display in the Information Window, the system notifies you on the last line with the following message:

More Consultants...see Revise Patient - Physician

For more information regarding Information Windows, refer to the *WEM User's Guide*.

Pharmacy Profile

The Pharmacy Profile Information Window is displayed as follows:

```

General Hospital (ID 9) Department Orders Processor
CARDIOLOGY Order Wed Sep 02, 1992 11:02 am
No Name Sex BD Room Physician SUC Status
92241-00001 SMITH, JOHN ADAM M 01/01/01 2107-2 JONES, ARNOLD MED I/P 6

[ ] Pharmacy Active Orders [ ]
1 Item Ord# Drug Route Freq Sch
1000 ELECTR
4 Priority 10 ASPIRIN 325 MG TABLET EC ORAL QD QD
5 DIGOXIN 0.25 MG TABLET ORAL QD QD
8 Recurring 9 ATENOLOL 100 MG TABLET ORAL QAM QD
6 ASPIRIN/OXYCODONE 1-2 TABLET ORAL Q4-6H PRN
12 Ordering Ph 7 PROMETHAZINE HCL 25 MG SUPPOSITORY RTL Q4-6H PRN
8 LIDOCAINE HCL 50-100 MG/2.5-5 ML IV PRN PRN
14 Medications
17 Prompt Response / Message
18 Order Diagnosis

Print on profile? (Y/N) [Y]--
1Pat Info 2Phy Info RX Profile
  
```

Notice that the Rx Profile option in the lower left corner is highlighted. The Pharmacy Profile Information Window displays on the right side of the screen under the patient demographic information. The Pharmacy Profile Information Window information includes the following:

- Medication order number
- Drug information
- Drug administration route
- Drug administration frequency
- Drug schedule

The drug information includes the formulary name, the strength of the drug, and the dosage form.

NOTE: The Rx Profile Information Window does not display when STAR Pharmacy is not in the system network.

If a patient has more active orders than can display in the Information Window, the system displays the following message:

**** INCOMPLETE LIST **** *Use Profile Inquiry for a complete display.*

When you access a patient who does not have any active pharmacy orders, the following message displays:

No active orders for selected account.

When applicable, you can press the Up Arrow or Down Arrow key to scroll through the active medication orders. Press the ESC key to exit Information Windows, F1 to view the Patient Information Window, or F2 to view the Physician Information Window.

For more information regarding Information Windows, refer to the *WEM User's Guide*.

Patient Preparation Instructions

The new Preps information window contains patient preparation instructions from up to three sources:

- The STAR Radiology Patient Preparation Instructions function, usually found on the Radiology system's Order Management menu. Information entered here appears in the window under the heading <Dept>-Defined Preps, where <Dept> is actually a STAR Radiology department code, like RAD.
- The STAR Scheduling SIM Item Scheduling Instructions function, usually found on Scheduling's Resource Maintenance menu. Information entered here appears in the window under the heading Scheduling Instructions.
- The STAR Nursing Preps and Special Instructions function, usually found on STAR Nursing's Standard File Maintenance menu. Information entered here appears in the window under the heading Nursing Preps.

Throughout the Scheduling application, the information window indicator appears in one of three situations:

- When a screen displays a SIM item with a defined prep in the Visit Reason field
- When the Visit Reason field is revised to include a SIM item with a defined prep
- When a single SIM item with a defined prep is selected from a table

The Preps information window can be accessed in the following STAR Scheduling processors:

- Appointments

- Walk-in
- Copy Appointment
- Revise Patient Appointment
- Patient Appointment Inquiry/Audit
- Check In/Out
- Resource/Department Schedule (on the Schedule Census menu)

For more information regarding Information Windows, refer to the *WEM User's Guide*.

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■ R e a d e r C o m m e n t F o r m ■

We value your suggestions for improving our documentation. Please use this form to evaluate the *Patient Scheduling Module* of the *STAR Patient Care Reference Guide* for Release 17.0.

Topic	Poor	Fair	Good	Excellent
Organization of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accuracy of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completeness of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clarity of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of overview information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explanation of processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are there parts of this manual that could be made more helpful to you? Please explain.

Other Comments:

Thanks for your help in improving the documentation.

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Hospital/Organization
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Telephone Number

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Yes or No (circle one)

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