

Community User - Appointments



Scheduling Appointments

Create real-time appointments separate from an order for patients using the Quick Appointment activity. After you create an appointment, it is reserved in the system for that patient, provider, date, and time.

When you schedule an appointment, you might see a series of questions. After you answer the questions and confirm the appointment, a report appears that you can print and give to the patient to take home.

When you search for an appointment, pre-configured search criteria are available for you to use.

Schedule an appointment

1. Select the **Patient** tab and click **Scheduling > Quick Appointment**.
2. In the Appointments column, click the type of appointment that you want to make.
3. Find a provider, date, and time combination for the appointment on the list of choices that appears. If you do not see an ideal option, click **+ More** to see additional open time slots.
4. Below the provider's name, click the time of the appointment that you want to schedule.
5. In the **Referring Provider** field, choose a referring provider from the available list.
6. If needed, fill in the **Appointment Notes** field.
7. Click  **Schedule**.
8. To print the appointment information for the patient, click .

Viewing Upcoming Appointments

The Upcoming Appointments reports sort appointments by patients in a particular patient group, if applicable, and then by date and time.


View upcoming appointments for your patients

1. Choose the upcoming appointments report you want:
 - a. To view a report for all of your patients, select the **Schedules** tab and click **Upcoming Appts - My Patients**.
 - b. To view a report for one patient, select the **Patient** tab and click **Upcoming Appts - Patient**.
2. Click the double arrow (⤴) icons to collapse or expand a section.

Documenting a Case for Scheduling

Use Case Entry to create surgical or invasive cases to document information in an organized and discrete way, and reduce the need to clarify details with <Organization Name> over the phone.


Create a case

1. Select the **Patient** tab and click **Case Entry** (found under the **Scheduling** section).
2. Select a patient from your list.
3. Enter a location and a provider.
4. Click **+ New Case**.
5. Complete the following fields. A  icon indicates a required field.
 - a. **Date**
 - b. **Patient Class** - Select the appropriate admission status.
 - Inpatient - Patient is currently admitted to hospital.
 - Emergency - Patient is currently in the Emergency Department.
 - Surgery Admit - Patient will be admitted after the surgery.
 - Outpatient Surgery - Patient will have surgery on an outpatient basis.
 - c. **Pre-op Diagnosis**
 - d. **Procedure/Code**
 - e. **Laterality** (if needed)


You can also use completion matching and synonyms to find procedures. For example, enter "lap app" to find laparoscopic appendectomy.



If there are multiple procedures within a panel, rearrange the order of the procedures by changing the numbers in the **Row** field.

6. Document other fields as needed.
7. To indicate the case is ready to schedule, go to the **Questions** form and complete the questionnaire.
8. If needed, document pre- and post-op appointment information on the **Appointments** form.
9. Click  **Accept**.


View or modify an existing case

1. Select the **Patient** tab and click **Case Entry** (found under the **Scheduling** section).
2. Select a patient from your list.
3. A list of the patient's cases appears. Use the **Location**, **Provider**, and **Date** fields to filter the list.
4. To open a case, select it from the list and click  **Open Case**.


Finding Open Times for Surgical Blocks





Easily manage blocks from the OR Marketplace. In the activity, you can see and take action on both time you own and time you're authorized for but don't own.

Send messages or request time


1. Go to the **OR Marketplace** tab.
2. Use the filters on the left to select the provider, locations, and blocks you are interested in. For example, select Orthopaedics in the **Blocks** field to search for available time for blocks authorized for the Orthopaedics service.
3. Click  **Apply**.
4. Click on a date.




The  icon indicates whether the room includes a surgical robot. Use the filters on the left if you want to include only or exclude these rooms from the results.

5. Find the time you are interested in. To open the Request Time activity, click  **Request Time**. If sending a message, click  **Send Message**.
6. Compose your message.
 - Click the time range in the header to quickly add it to your message text. Alternatively, use the **Start Time** and **End Time** fields to specify a time range.
 - Click  to add contacts.
7. Click  **Send** to send your request or message.

Request to release time or release time yourself

1. Go to the **OR Marketplace** tab.
2. Use the filters on the left to select the locations and blocks you are interested in. For example, select Orthopaedics in the **Blocks** field to search for available time for blocks authorized for the Orthopaedics service.
3. Click  **Apply**.
4. Click on a date.



The  icon indicates whether the room includes a surgical robot. Use the filters on the left if you want to include only or exclude these rooms from the results.

5. Find the time you are interested in. If it has the **Request Release** button you can request to release this time. For simple releases, you can also release the time yourself using the **Release Now** button.
6. To open the Request Release activity, click **Request Release**.
7. Select a **Release range** and a **Release reason** if needed.
8. Add a comment if needed.

9. Click **Request** to send a message to the scheduling pool. If you are releasing the time yourself, click **Release**.
10. If the block has an existing release request, that information appears in a banner.

Act on OR Time Available Messages in Your In Basket

You might receive OR Available Time messages in your In Basket. To act on available time messages in In Basket, review the available time listed in the message, click Request to send a request for that time, and decline any time you do not want to use.

Fri Sep 08 for Jamie Davidson, MD Received: Yesterday

System-Generated Message → Jamie Davidson, MD; Sally Silver

OR Time Available

New OR time is now available that might be a good fit for Jamie Davidson, MD, who currently has 8 unscheduled cases.

Epic Surgery Center

Time Available	Room	
8 hours (7:00 AM - 3:00 PM)	OR - 01	Request

[Decline All Time](#)

[See more available OR time](#)


Jamie Davidson, MD's Schedule on Fri Sep 08: 0 Cases, 2 Appointments (Clinic Day)

[View provider's day](#)

Time	Type	Location / Department	Visit Type / Procedure
2:00 PM - 2:30 PM	2 Appointments	MADISON CLINIC	FOLLOW UP

Want to change when messages for Jamie Davidson, MD are sent? [Update preferences](#)

This message was sent to 2 users and/or pools.

1. Open your **Block Messages** In Basket folder.
2. Review any messages about available OR time.
3. If you want to request any of the available time, click **Request** for that row.
 - a. In the window that appears, select a user or pool to send the request to by clicking , selecting **Add User** or **Add Pool**, and entering the name of the user or pool who should get your request.
 - b. Enter any details about the request, such as specifying which part of the available time you want. The request automatically includes details such as the location of the available time and the name of the surgeon you're requesting the time for.
 - c. Click **Send**.

Request Time

6/19/2023 06:00 - 18:00
 Epic Hospital Main OR
 Main OR 2





Recipients

+ ▾ SCHEDULING M ... ✕

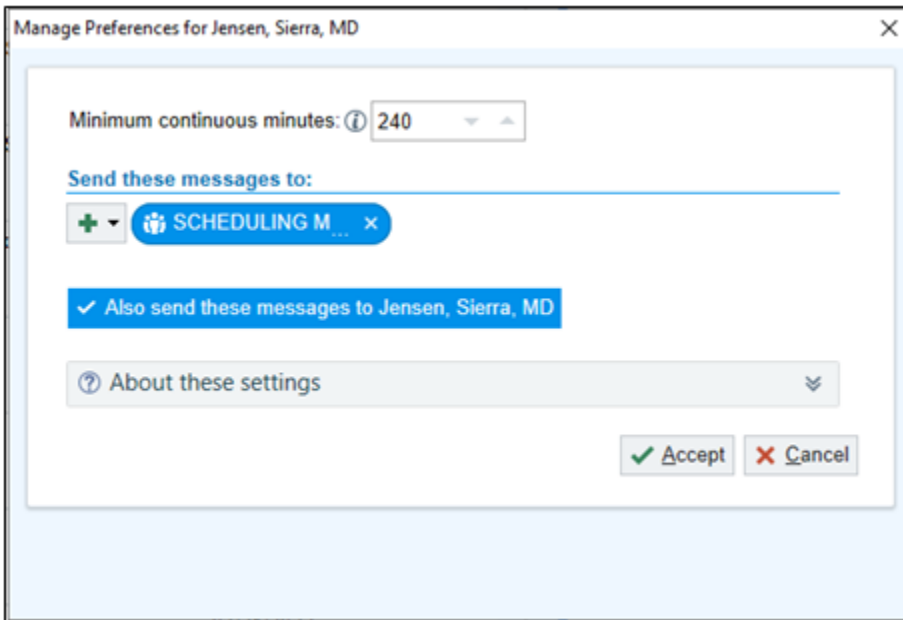
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6:00 to 10:00

✈️ Send ✕ Cancel

4. If you're finished requesting time, click  **Decline Unrequested Time** to mark the message as done.
 - Note that if you didn't request any of the available time in the message, the button is  **Decline All time** and does the same thing by marking the message as done.
5. If you want to see additional upcoming available time for the surgeon, click **See more available OR time** to open the OR Marketplace activity and search for additional time you might want to request.
6. If you want messages about newly available time for this surgeon to go to other recipients, click **Update preferences**.
 - a. In the window that appears, select a user or pool who should receive these messages for this surgeon by clicking + ▾, selecting  **Add User** or  **Add Pool**, and entering the name of the user or pool who should receive these messages.

b. Click  **Accept**.



The image shows a dialog box titled "Manage Preferences for Jensen, Sierra, MD" with a close button (X) in the top right corner. The dialog contains the following elements:

- A label "Minimum continuous minutes:" followed by an information icon (i) and a numeric input field containing "240".
- A section header "Send these messages to:" followed by a horizontal line.
- A list of recipients, starting with a plus icon (+) and a dropdown arrow, followed by a blue pill-shaped button containing a person icon, the text "SCHEDULING M...", and a close icon (X).
- A blue checkmark icon (✓) followed by the text "Also send these messages to Jensen, Sierra, MD".
- A grey button with a question mark icon (?) and the text "About these settings", followed by a downward arrow (v).
- At the bottom right, two buttons: "Accept" with a green checkmark icon (✓) and "Cancel" with a red X icon (✗).

Releasing Upcoming Underutilized Blocks

You might receive block notification messages in your In Basket when one of your surgical blocks is projected to be underutilized. Use these messages to release blocks to other surgeons or groups to increase your overall utilization.

From the message you can request release of the block, or, in some cases, release the block directly from the notification.

Release a block

1. Open your **Block Messages** In Basket folder.
2. Review any messages about upcoming unused OR time.
 - If you see the option, click **Release Now** to release a block directly from the notification.
 - Click **Request Release** to send a request to a pool of schedulers to release the block.

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