

### Hemodialysis Scheduling

#### **HEMODIALYSIS SCHEDULING**

Step-by-Step Guide for End Users

1. Appointment detail information to be filled out

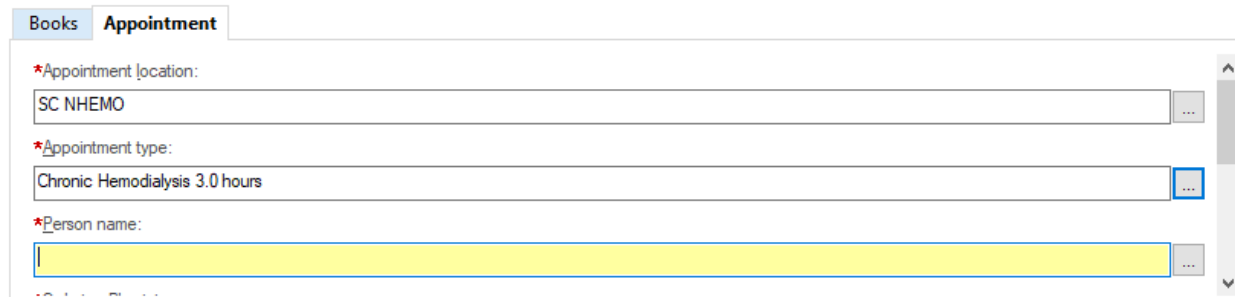
Appointment Location:

**SC NHEMO**

**NF NHEMO**

**WS NHEMO**

Once a location is selected, use the ellipses on the right hand side of the Appointment Type field to view the appointments available and make a selection.

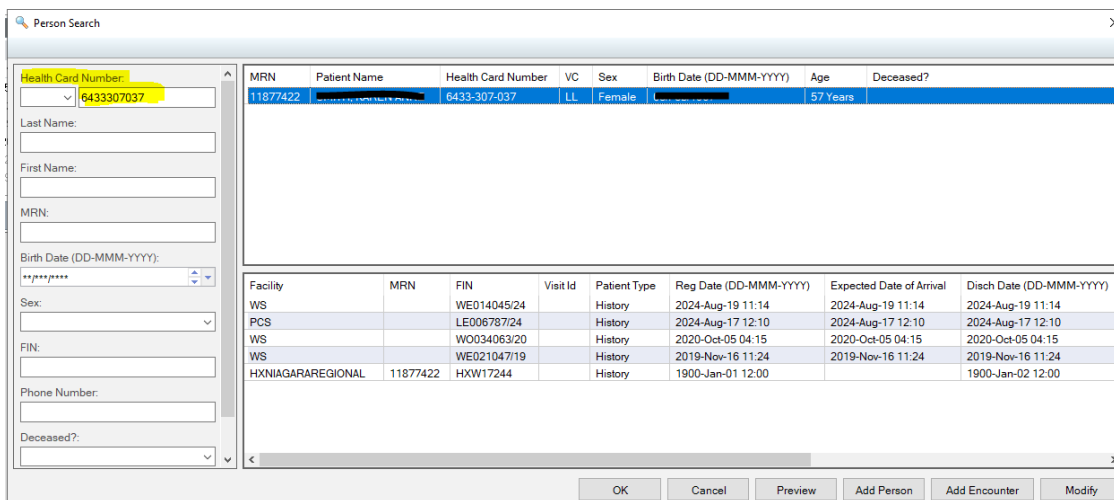


The screenshot shows a software interface with a tab labeled 'Appointment'. It contains three input fields, each with an asterisk indicating it is required:

- \*Appointment location:** A dropdown menu with 'SC NHEMO' selected and an ellipsis button on the right.
- \*Appointment type:** A dropdown menu with 'Chronic Hemodialysis 3.0 hours' selected and an ellipsis button on the right.
- \*Person name:** A text input field that is currently empty and highlighted in yellow, with an ellipsis button on the right.

To search for the patients name, select the ellipses to open up the patient search box. In the Person Search box, search for the patient using their health card number. Type in the number and press ENTER.

The patient information will appear on the right hand side in the top half of the screen. When you are confident you have the correct patient, click OK. (The bottom half of the screen is encounters already created for this patient)



MRN	Patient Name	Health Card Number	VC	Sex	Birth Date (DD-MMM-YYYY)	Age	Deceased?
11877422	[REDACTED]	6433-307-037	LL	Female	[REDACTED]	57 Years	

Facility	MRN	FIN	Visit Id	Patient Type	Reg Date (DD-MMM-YYYY)	Expected Date of Arrival	Disch Date (DD-MMM-YYYY)
WS		WE014045/24		History	2024-Aug-19 11:14	2024-Aug-19 11:14	2024-Aug-19 11:14
PCS		LE006787/24		History	2024-Aug-17 12:10	2024-Aug-17 12:10	2024-Aug-17 12:10
WS		WO034063/20		History	2020-Oct-05 04:15	2020-Oct-05 04:15	2020-Oct-05 04:15
WS		WE021047/19		History	2019-Nov-16 11:24	2019-Nov-16 11:24	2019-Nov-16 11:24
HXNIAGARAREGIONAL	11877422	HXW17244		History	1900-Jan-01 12:00		1900-Jan-02 12:00

You will also need to fill out the Ordering Physician. Type in the physician's name and press **ENTER**. If there is another physician with the same last name, a Provider Selection window will appear to guide you.

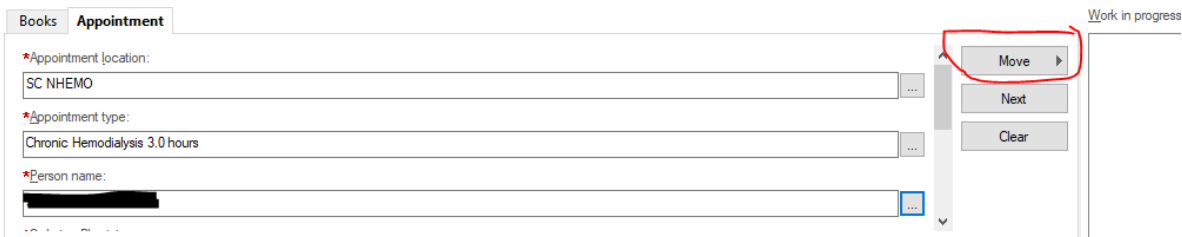
Reason for exam is free text but does need to be filled out.

\*Ordering Physician:

\*Reason For Exam:

Scheduling Comments:

2. Once all of the Appointment Details information has been populated, select **MOVE**.



Books Appointment Work in progress

\*Appointment location: SC NHEMO

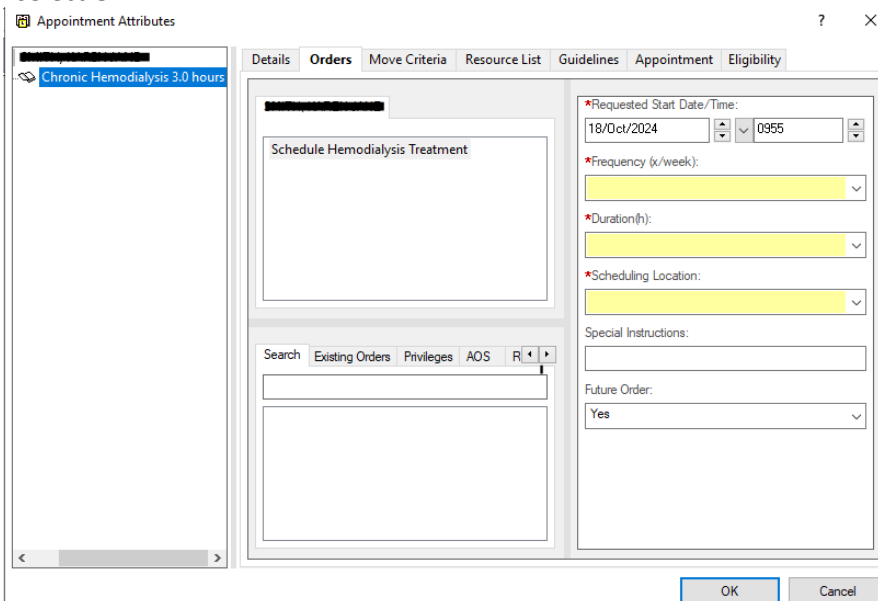
\*Appointment type: Chronic Hemodialysis 3.0 hours

\*Person name: [REDACTED]

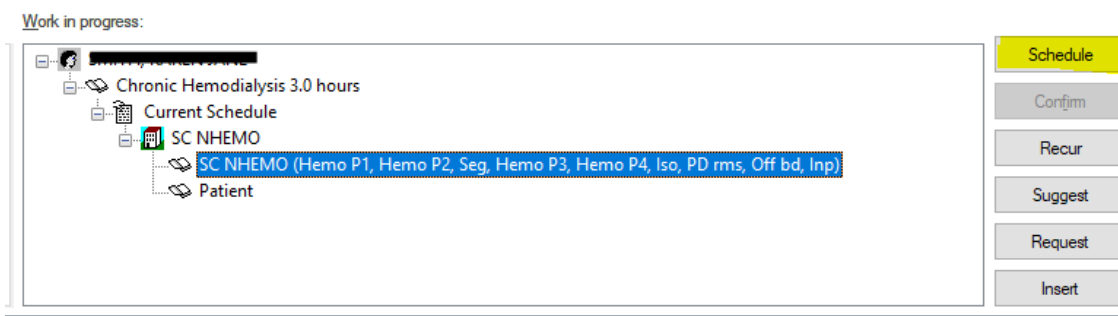
Move Next Clear

- The **Appointment Attributes** window will appear.

Fill in the required order details by clicking on the drop-down arrow to the right of the field and select **OK**.



- The appointment is now in the **Work in Progress** box and ready to be scheduled.
- At this point, we are going to schedule the patients **first appointment only**. Using the calendar on the left side of the screen, navigate to the first day of the patient's appointment series after the Go Live date of November 9<sup>th</sup>.
- In your **Work in Progress** box, ensure you are focused on the line as seen in the screenshot below and select the **Schedule** button on the right.





# TIP SHEET

## HOSPITAL INFORMATION SYSTEM (HIS)

- The following **Schedule** box will appear. On the first line that indicates **“Resource”** – it is a drop down menu to choose the chair to schedule the patient in. And the **“Time”** is the start time of the appointment. Once these two fields are populated, select **OK**.

- The patient should appear on the schedule below in GREY. Select **“Confirm”** on the right hand side of the **Work in Progress** window.

The Confirm window will appear. Take this time to verify the Appointment Date/Time, Appointment Type and Resource are all correct. When you are ready, select **OK**.

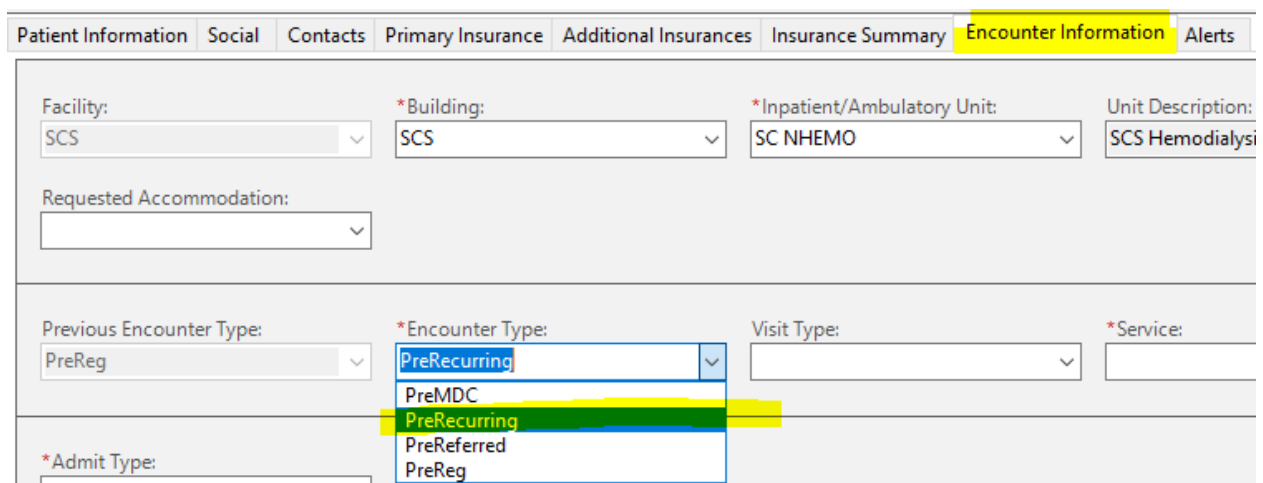
- The Encounter selection box will appear. Since this is the patients first visit – we are going to create their encounter. Select **“Add Enc”** on the bottom left of the window.

FIN	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prnt	Provider Name	Reg Date	Arrive Date
22-005536	Service Interaction	07/Oct/2024 - 10:11 AM	Elective	SCS	SC NHEMO	Attending Physician	Lagrotteia, Danny D.	07/Oct/2024 - 10:11 AM	
22-005536	Recurring		Elective	SCS	SC NHEMO	Attending Physician	Lagrotteia, Danny D.	07/Oct/2024 - 10:05 AM	
22-004436	Outpatient		Elective	SCS	SC ORTHO	Attending Physician	Sacevich, Nathan Lee	28/Sep/2024 - 2:59 PM	
22-005264	Outpatient		Elective	SCS	SC PACECL	Attending Physician	Test, Doctor One	27/Sep/2024 - 12:40 PM	
22-005040	Outpatient		Elective	SCS	SC PACECL	Attending Physician	Mackett, Robert L, MD, BSc, FRCPC	23/Sep/2024 - 11:48 AM	
22-003329	Outpatient		Elective	SCS	SC HIU	Attending Physician	Test, Cemer	12/Jul/2024 - 4:01 PM	
22-003099	Outpatient		Elective	SCS	SC GMRAC	Attending Physician	Jan, Ankur, MD	02/Jul/2024 - 10:41 AM	
22-000898	Telephone Visit	26/Apr/2024 - 12:15 AM	Elective	SCS	SC CLINU			24/Apr/2024 - 2:41 PM	
22-001629	Telephone Visit	26/Apr/2024 - 12:15 AM	Elective	SCS	SC CLINU			24/Apr/2024 - 2:33 PM	
22-001627	Telephone Visit	26/Apr/2024 - 12:15 AM	Elective	SCS	SC CLINU			24/Apr/2024 - 2:23 PM	
22-001626	Telephone Visit	26/Apr/2024 - 12:15 AM	Elective	SCS	SC CARD			24/Apr/2024 - 2:18 PM	
22-001625	Telephone Visit	26/Apr/2024 - 12:15 AM	Elective	SCS	SC CARD			24/Apr/2024 - 2:14 PM	
22-000867	Telephone Visit	26/Apr/2024 - 12:15 AM	Elective	SCS	SC 1AA			24/Apr/2024 - 1:57 PM	
22-000436	Inpatient		Elective	SCS	SC GMRAC	Attending Physician	Test, Doctor One	12/Mar/2024 - 9:30 AM	12/Mar/2024 - 9:30 AM
22-000237	Outpatient	08/Apr/2024 - 10:01 AM	Elective	SCS	SC LDAP	Attending Physician	Test, Doctor One	12/Feb/2024 - 10:47 AM	

10. Selecting the Add Encounter button will launch a Pre-Registration window. All required fields must be populated. If you select the OK on the bottom left of the window, this will focus you to the fields that need to be populated.

There is one field that must be changed to reflect the recurring encounter that these patients require.

On the Encounter Information tab, the **Encounter Type must be PreRecurring.**

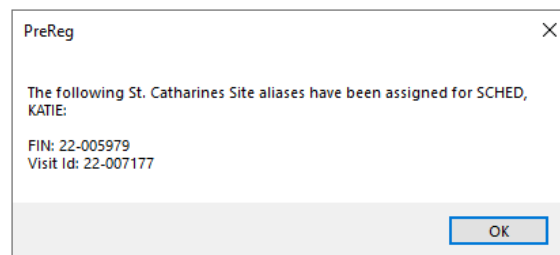


The screenshot shows the 'Encounter Information' tab in the HIS system. The 'Encounter Type' dropdown menu is open, showing options: PreRecurring (highlighted in green), PreMDC, PreReferred, and PreReg. Other fields include Facility: SCS, Building: SCS, Inpatient/Ambulatory Unit: SC NHEMO, Unit Description: SCS Hemodialysis, Previous Encounter Type: PreReg, Visit Type, and Service.

Once all fields are populated for the Pre-Recurring registration, select **OK**.

11. The following window will appear, select **OK**.

This window is displaying the encounter information created for this patient. Once you select OK, the patient is scheduled and will display on the schedule.



The screenshot shows a 'PreReg' window with the following text: 'The following St. Catharines Site aliases have been assigned for SCHED, KATIE: FIN: 22-005979 Visit Id: 22-007177'. There is an 'OK' button at the bottom right.

12. Now that that patient has their first visit, they have a pre-recurring encounter and we can schedule their recurring visits.

We are going to start again by filling out the Appointment Location and the Appointment Type. When you use the **Person Search** box to search for your patient, instead of selecting the Person from the top half of the screen, we are going to select their *Pre-Recurring Encounter* that we have just created.

Person Search

Health Card Number:

Last Name:

First Name:

MRN:

Birth Date (DD-MMM-YYYY):

Sex:

FIN:

Phone Number:

Deceased?:

MRN	Patient Name	Health Card Number	VC	Sex	Birth Date (DD-MMM-YYYY)	Age	Deceased?
88000052; 11000356		3333-123-456		Female		31 Years	

Facility	MRN	FIN	Visit Id	Patient Type	Reg Date (DD-MMM-YYYY)	Expected Date of Arrival	Disch Date (DD-MMM-YYYY)	Medical Service	Location	Room	Bed	Attending Physician
SCS	11000356	22-005976	22-007177	PreRecurring		2024-Nov-11 08:00		Nephrology/Dialysis	SC NHEMO			Broski, Anthony
SCS	11000356	22-005845	22-007040	PreReg		2024-Oct-28 13:35		Diagnostic Imaging	SC MG			Test, Cerner
SCS	11000356	22-005702	22-006885	PreReg		2024-Oct-14 14:15		Nephrology/Dialysis	SC NMCKC			Broski, Anthony
SCS	11000356	22-005468	22-006640	PreReg		2024-Oct-04 12:00		Diagnostic Imaging	SC US			Test, Cerner
WS	11000356	22-005435	22-006607	PreReg		2024-Oct-08 13:00		Diagnostic Imaging	WS NM			Test, Cerner

The FIN will look different than the rest of the historical encounters that were migrated from Meditech. The Patient Type will be *PreRecurring* and you will see your Location and Attending Physician. Ensure you are selecting the correct Encounter that you just created and select **OK**.

13. Fill out the Reason for Exam, and select **MOVE**.

14. The **Appointment Attributes** window will appear. Populate the required fields for the order. Then, on the **Resource List** tab right click on the line beneath where it says Default Resource List and select "**Uncheck All**". This will de-select all of the chairs. Now, select the chair that the patient will be scheduled into. Once you have the chair selected, click **OK**.

Appointment Attributes

Chronic Hemodialysis 3.0 hours

Details Orders Move Criteria **Resource List** Guidelines Appointment Eligibility

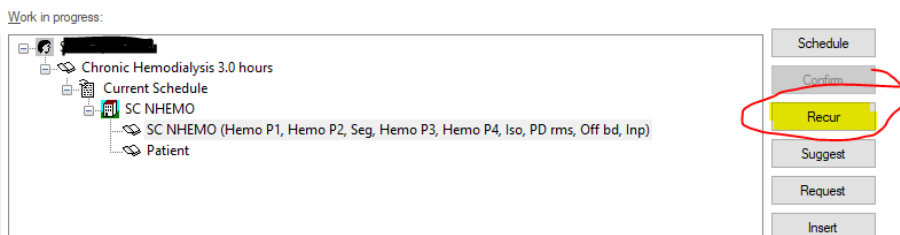
Chronic Hemodialysis 3.0 hours

Default Resource List (SC NHEMO)

- SC NHEMO (Hemo P1, Hemo P2, Seq, Hemo P3, Hemo P4, Iso, PD rms, Off bd, Inp)
- SC HEMO - 01
- SC HEMO - 02
- SC HEMO - 03
- SC HEMO - 04
- SC HEMO - 05
- SC HEMO - 06
- SC HEMO - 07
- SC HEMO - 08
- SC HEMO - 09
- SC HEMO - 10
- SC HEMO - 11
- SC HEMO - 12
- SC HEMO - 13
- SC HEMO - 14
- SC HEMO - 15
- SC HEMO - 16
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- SC HEMO - 20
- SC HEMO - 21
- SC HEMO - 22
- SC HEMO - 23

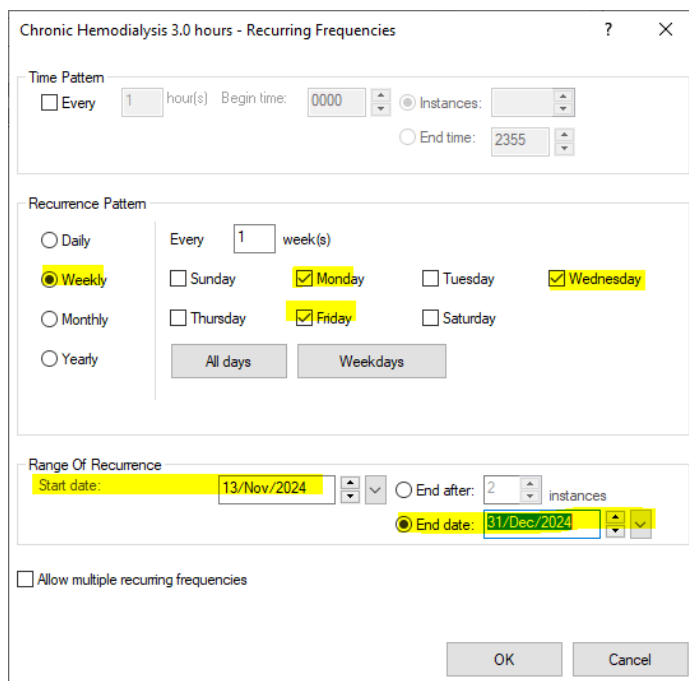
Make overflow resources available

15. Select the “**Recur**” button to the right of the **Work in Progress** window.



16. The **Recur** window will launch.

On this window, we will select the **days of the week** the patient is to be scheduled, the **start date** (keep in mind you have scheduled their first visit already), and the **end date**.  
When you are done, select **OK**.



Chronic Hemodialysis 3.0 hours - Recurring Frequencies

Time Pattern  
 Every 1 hour(s) Begin time: 0000 Instances: End time: 2355

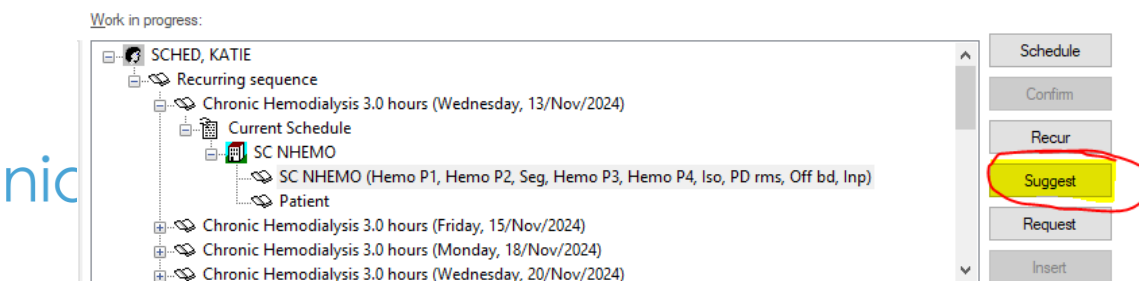
Recurrence Pattern  
 Daily Every 1 week(s)  
 **Weekly**  Sunday  **Monday**  Tuesday  **Wednesday**  
 Monthly  Thursday  **Friday**  Saturday  
 Yearly All days Weekdays

Range Of Recurrence  
 Start date: 13/Nov/2024 End after: 2 instances  
 **End date: 31/Dec/2024**

Allow multiple recurring frequencies

OK Cancel

17. The dates for the appointments will appear in the **Work in Progress** window.  
Select the “**Suggest**” button to the right of the **Work in Progress** window.



18. When the Suggest window appears, the appointments to be scheduled will appear on the top half of the screen.

In the **Appointment Time** selection, adjust the **Time Range** to be the start time of the patients Dialysis. Then select **“Suggest”**.

19. Once you click **“Suggest”**, on the right hand side the appointments will appear.

You will see the dates listed in the series but all should have the same time and the same resource.

Double click on the appointments to select, and click **OK**.





## TIP SHEET

### HOSPITAL INFORMATION SYSTEM (HIS)

20. Once you click **OK**, all the appointments will appear on the schedule.  
Select the "**Confirm**" button to the right of the Work in Progress window. At this point, verify that all the information is correct.  
Select **OK**. All of the patients appointments are scheduled and will be under the Pre-Recurring encounter that was selected in the Person Search box