

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.

Books	Appointment	
*Appoir	Itment location:	^
SC NH	EMO	
* <u>A</u> ppoir	itment type:	
Chronic	: Hemodialysis 3.0 hours	
*Persor	name:	
I		
		× .

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.





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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)

✓ €433307037 LL Female 57 Years IName: 57 Years 57 Years IName: 57 Years 57 Years N: n Date (DD-MMM-YYYY): **/*** **/*** **/*** **/***		^	MRN Pa	atient Name	Health Card Num	ber VC	Sex B	lirth Date (DD-MMM-YYYY)	Age	Deceased?		
IName: In Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YYYY): In Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YYYY): Im Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YYYY): Im Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YYYY): Im Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YYYY): Im Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YYY): Im Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YYY): Im Date (DD-MMM-YYYY): Expected Date of Arrival Disch Date (DD-MMM-YY): Im Date (DD-MMM-YYY): Expected Date of Arrival Disch Date (DD-MMM-YY): Im Date (DD-MMM-YY): Im Date (DD-MMM-YY): Expected Date of Arrival Disch Date (DD-MMM-YY): Im Date (DD-MMM-YY): Im Date (DD-MMM-YY): Expected Date of Arrival Disch Date (DD-MMM-YY): Im Date (DD-MMM-YY): Im Date (DD-MMM-YY): Expected Date of Arrival Disch Date (DD-MMM-YY): Im Date (DD-MMM-YY): Im Date (DD-MMM-YY): Expected Date of Arrival Disch Date (DD-MMM-YY): Im Date (DD-MMM-Y): Im Date Y 2004-Aug-17 12:10<	~ <mark>6433307037</mark>		11877422		6433-307-037	LL	Female U		57 Years			
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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 2024-Aug-17 12:10 20	N:											
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 2024-Aug-17 12:10 20												
Pacing MRN FIN Variant Pacing Discr Late (Up-Mini-F111) Expected Date of Armai Discr Late (Up-Mini-F111) VS WS Heb104/512 History 2024-Aug-19 11:14 2024-Aug-19 11:14 2024-Aug-19 11:14 2024-Aug-19 11:14 2024-Aug-19 11:14 2024-Aug-17 12:10												
PCS LE00678724 History 2024-Aug-17 12:10 2024-Aug-17 12:10 WS W0034063/20 History 2024-Aug-17 12:10 2024-Aug-17 12:10 2024-Aug-17 12:10 WS W0034063/20 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	Date (DD-MMM-YYYY):											
WS W0034063/20 History 2020-Oct-05 04:15		•	Facility	MRN	FIN	Visit Id	Patient Type	Reg Date (DD-MMM-YYY)) Expec	ted Date of Arrival	Disch Date (DD-MM	M-YY)
WS WE021047/19 History 2019-Nov-16 11:24 2019-Nov-16 11:24 2019-Nov-16 11:24	**/****	•		MRN		Visit Id						M-YY
WS WE021047/19 History 2019-Nov-16 11:24 2019-Nov-16 11:24 2019-Nov-16 11:24	**/****		ws	MRN	WE014045/24	Visit Id	History	2024-Aug-19 11:14	2024-/	Aug-19 11:14	2024-Aug-19 11:14	Μ-ΥΥ
HXNIAGARAREGIONAL 11877422 HXW17244 History 1900-Jan-01 12:00 1900-Jan-02 12:00	**/****		WS PCS	MRN	WE014045/24 LE006787/24	Visit Id	History	2024-Aug-19 11:14 2024-Aug-17 12:10	2024-/	Aug-19 11:14 Aug-17 12:10	2024-Aug-19 11:14 2024-Aug-17 12:10	Μ-ΥΥΥ
	/**		WS PCS WS	MRN	WE014045/24 LE006787/24 W0034063/20	Visit Id	History History History	2024-Aug-19 11:14 2024-Aug-17 12:10 2020-Oct-05 04:15	2024- 2024- 2020-	Aug-19 11:14 Aug-17 12:10 Dct-05 04:15	2024-Aug-19 11:14 2024-Aug-17 12:10 2020-Oct-05 04:15	M-YYY
	*****		WS PCS WS WS		WE014045/24 LE006787/24 WO034063/20 WE021047/19	Visit Id	History History History History	2024-Aug-19 11:14 2024-Aug-17 12:10 2020-Oct-05 04:15 2019-Nov-16 11:24	2024- 2024- 2020-	Aug-19 11:14 Aug-17 12:10 Dct-05 04:15	2024-Aug-19 11:14 2024-Aug-17 12:10 2020-Oct-05 04:15 2019-Nov-16 11:24	M-YY
	p** 🛓		WS PCS WS WS		WE014045/24 LE006787/24 WO034063/20 WE021047/19	Visit Id	History History History History	2024-Aug-19 11:14 2024-Aug-17 12:10 2020-Oct-05 04:15 2019-Nov-16 11:24	2024- 2024- 2020-	Aug-19 11:14 Aug-17 12:10 Dct-05 04:15	2024-Aug-19 11:14 2024-Aug-17 12:10 2020-Oct-05 04:15 2019-Nov-16 11:24	IM-YYY

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:		
	Q	
*Reason For Exam:		
Scheduling Comments:		
A		¥

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

Books Appointment	Work in pro	ogress
*Appointment location:	Move 🕨	
SC NHEMO	Next	
*Appointment type:		
Chronic Hemodialysis 3.0 hours	Clear	
*Person name:		
	,	2
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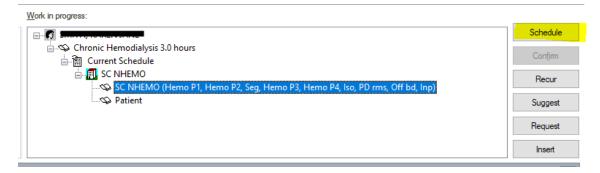


3. The Appointment Attributes window will appear.

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

hronic Hemodialysis 3.0 hours	Details 0	Orders	Move Criteria	Resource List	Guidelines	Appointment	Eligibility			
inome memodialysis 5.0 nodis			***		*Reque	sted Start Date/Ti	me:			
					18/0ct	/2024	• 0955	▲ ▼		
	Schedu	le Hemo	dialysis Treatme	nt	*Freque	ncy (x/week):				
			~							
					*Duratio	n(h):				
								~		
					*Schedu	uling Location:				
								~		
					Special Instructions:					
	Search	Existing C	orders Privileges	AOS R · ·						
					Future Order:					
					Yes			~		

- 4. 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 9th.
- 6. 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.



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7. 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.

72	024 - SC NHEMO (Hemo P1, Hemo P2, Seg, Hemo P3, Hemo P4, Iso, PD rms, Of	i bd,	. 1
SC	Schedule - Chronic Hemodialysis 3.0 hours ?	×	S
ler	Resource:		He
	SC HEMO - 01	\sim	
	Default slot:		
	Hemodialysis Pod 1 (6:00 AM - 11:00 PM)	~	
	Time:		
	Duration:		
	3 Hour(s) Minutes Day		
	Distinguish setup and cleanup durations		
	Apply Duration Change to Order		
	OK Cancel		

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

Confirm			? >
ame:	MRN: 88047623;11734373	DOB: 1211-11000	
	Age: 62 Years	Sex: Female	
Summary General Resource View Guidelines Notification Conversation Summaries Itineraries	Locks Eligibility Booking Notes		
Chronic Hemodalys Sc NHEMO Gree Nbr: 88047623;11734373 Allergies: Allergies Not Recorded			
11/Nov/2024 - 6:00 AM 3 Hour(s) Chronic Hemodialysis 3.0 hours SC NHEMO	SC HEMO - 01		
Orders: Schedule Hernodialysis Treatment			
		Options Print	Print ABN
		OK	Cana

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**.

9. 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 Prsnl	Provider Name	Reg Date	Arrive Date	^
22-005536	Service Interaction	07/Oct/2024 - 10:11 AM	Elective	SCS	SC NHEMO	Attending Physician	Lagrotteria, Danny D.	07/Oct/2024 - 10:11 AM		
22-005536	Recurring		Bective	SCS	SC NHEMO	Attending Physician	Lagrotteria, 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	Jain, Ankur, MD	02/Jul/2024 - 10:41 AM		
22-000868	Telephone Visit	26/Apr/2024 - 12:15 AM		SCS	SC CLINU			24/Apr/2024 - 2:41 PM		
22-001628	Telephone Visit	26/Apr/2024 - 12:15 AM		SCS	SC CLINU			24/Apr/2024 - 2:33 PM	24/Apr/2024 - 2:33 PM	
22-001627	7 Telephone Visit	26/Apr/2024 - 12:15 AM		SCS	SC CLINU			24/Apr/2024 - 2:23 PM	24/Apr/2024 - 2:23 PM	
22-001626	Telephone Visit	26/Apr/2024 - 12:15 AM		SCS	SC CARD			24/Apr/2024 - 2:18 PM	24/Apr/2024 - 2:18 PM	
22-001625	Telephone Visit	26/Apr/2024 - 12:15 AM		SCS	SC CARD			24/Apr/2024 - 2:14 PM	24/Apr/2024 - 2:14 PM	
22-000867	7 Telephone Visit	26/Apr/2024 - 12:15 AM		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		~

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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.

Patient Information	Social	Contacts	Primary Insurance	Additional Insurances	Insurance Summary	Encounter Info	rmation	Alerts
Facility: SCS Requested Accomm	nodatio	n: V	*Building: SCS		Inpatient/Ambulatory SC NHEMO	Unit: V		scription: modialysi
Previous Encounte PreReg *Admit Type:	r Type:	~	*Encounter Type: PreRecurring PreMDC PreRecurring PreReferred PreReg		/isit Type:	~	*Service	8

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.

PreReg	×
The following St. Catharines Site aliases have been assigned for KATIE: FIN: 22-005979 Visit Id: 22-007177	SCHED,
	ОК

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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:	MRN		Patient Name	Health C	ard Number	VC	Sex	Birth Date (DD-MM	M-YYYY) Ag	je I	Deceased?					
~	880000	52; 11000356		3333-12	3-456		Female	4	31	l Years						
Last Name:																
sched	111															
First Name:	1															
inite	111															
MRN:	11															
	111															
Birth Date (DD-MMM-YYYY):	11															
/*/****	11															
Sex:																
~																
FIN:																
	111															
Phone Number:						_									_	
	Facility	MRN	FIN	Visit Id	Patient Type		Reg Da	te (DD-MMM-YYYY)	Expected Da	ate of Arriva	I Disch Date (DD-MMM-YYYY)	Medical Service	Location	Room	Bed	Attending Physicia
Deceased?:	SCS	11000356	22-005979	22-007177	PreRecurring	9			2024-Nov-11	1 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
Search Reset	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**.

Chronic Hemodialysis 3.0	Details Orders Move Criteri	a Resource List Guidelines	Appointment Eligibility	
chronic richouldysis sid	Chronic Hemodialysis 3.0 hd			^
	🖃 🛅 Default Resource List (S			
		P1. Hemo P2. Sea. Hemo P3. Hem	o P4, Iso, PD ms, Off bd, Inp)	
		Expand Branch		
	■ W SC HEMO - 0	Check All		
	IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Uncheck All		
	SC HEMO - 08			
	i			
	🔬 🐨 🐼 SC HEMO - 19			
	Image: Image			
	Image: Image			
$\mathbf{\Omega}$	Image: Image			~
gc				
	Make overflow resources available			

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15. Select the "Recur" button to the right of the Work in Progress window.

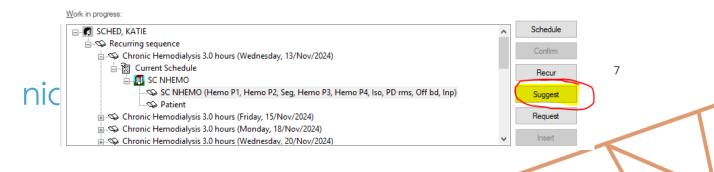


16. The **Recur** window will launch.

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 Hemodialysi	is 3.0 hours - Recurring Frequencies ? X
Time Pattern	hour(s) Begin time: 0000 Image: Instances: Image:
Recurrence Pattern	
◯ Daily	Every 1 week(s)
🖲 Weekly	🗌 Sunday 🔄 Tuesday 🗹 Wednesday
O Monthly	🗌 Thursday 🛛 Friday 🗌 Saturday
◯ Yearly	All days Weekdays
Range Of Recurrence	
Start date:	13/Nov/2024 ○ ▼ ○ End after: 2
	● End date: 31/Dec/2024
Allow multiple recurri	na 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**".

		1											
	Patient	Appointment Loc			Primary Ord		Scheduled Da	te/Time Patie	nt Duration				
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE SCHED, KATIE		Chronic Hemodialy Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodialy										
	SCHED, KATIE		Chronic Hemodial										
	SCHED, KATIE		Chronic Hemodialy										
-	SCHED, KATIE	SC NHEMO	Chronic Hemodial										
Weekly		13/Nov 31/D	ec Every week on M										
Appointm		0800			`								
	inge:		- pood										
Time ra	estrictions:	AM Only		×									
) Time re Schedu	le as visit within	1	▲ day(s) ↓	~	_								
) Time re Schedu		1	▲ day(s) ∨	~									
) Time re Schedu Override	le as visit within	1 and time	ssions	C									
) Time re Schedu Override	le as visit within e suggested date a	1 and time		Sugg	jest								

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**.

uggest Criteria Prefe	rences					Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order	Resource
Appointment Date				🛛 🗉 🏹	3 Hour(s)	13/Nov/2024 - 8:00	AM SCHED, KATIE	13/Nov/2024 - 8:00 AM	Chronic Hemodialysis 3.0 hours	SC HEMO - 03	SC NHEMO	Schedule Hemodialysis Treatment	3 Hour(s	
						3 Hour(s)	15/Nov/2024 - 8:00	AM SCHED, KATIE	15/Nov/2024 - 8:00 AM	Chronic Hemodialysis 3.0 hours	SC HEMO - 03	SC NHEMO	Schedule Hemodialysis Treatment	3 Hour(
Recurrence frequency	Start date	End date	Recurrence Pattern	Number of inst		3 Hour(s)	18/Nov/2024 - 8:00	AM SCHED, KATIE	18/Nov/2024 - 8:00 AM	Chronic Hemodialysis 3.0 hours	SC HEMO - 03	SC NHEMO	Schedule Hemodialysis Treatment	3 Hour
Weekly	13/Nov	31/Dec	Every week on M			3 Hour(s)	20/Nov/2024 - 8:00	AM SCHED, KATIE	20/Nov/2024 - 8:00 AM	Chronic Hemodialysis 3.0 hours	SC HEMO - 03	SC NHEMO	Schedule Hemodialysis Treatment	3 Hour
						3 Hour(s)	22/Nov/2024 - 8:00	AM SCHED, KATIE	22/Nov/2024 - 8:00 AM	Chronic Hemodialysis 3.0 hours	SC HEMO - 03	SC NHEMO	Schedule Hemodialysis Treatment	3 Hour
						3 Hour(s)	25/Nov/2024 - 8:00			Chronic Hemodialysis 3.0 hours			Schedule Hemodialysis Treatment	3 Hour
< >>						3 Hour(s)	27/Nov/2024 - 8:00			Chronic Hemodialysis 3.0 hours				3 Hour
						3 Hour(s)	29/Nov/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
						3 Hour(s)	02/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
Appointment Time						3 Hour(s)	04/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
						3 Hour(s)	06/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
Time range:	0800		0800	÷		3 Hour(s)	09/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
						3 Hour(s)	11/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
Time restrictions:	AM Only			\sim		3 Hour(s)	13/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
						3 Hour(s)	16/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
Schedule as visit within						3 Hour(s)	18/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
						3 Hour(s)	20/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours				
Override suggested date and time					3 Hour(s)	23/Dec/2024 - 8:00			Chronic Hemodialysis 3.0 hours					
						3 Hour(s)	25/Dec/2024 - 8:00							
Schedule multiple persor	ns to mixed Gr	oup Session	s				27/Dec/2024 - 8:00						Schedule Hemodialysis Treatment	
			Clear	Suggest	<	3 Hour(s)	30/Dec/2024 - 8:00	AM SCHED, KATIE	30/Dec/2024 - 8:00 AM	Chronic Hemodialysis 3.0 hours	SC HEMO - 03	SC NHEMO	Schedule Hemodialysis Treatment	3 Hour
Next Nex	d Dav	Clear	Select										ок с	ancel

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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



