

Tip Sheet – Scheduling to Orders

The screenshot shows a software interface with a tab labeled "Appointment". Below the tab, there are three input fields:

- The first field is labeled "*Appointment location: (1)" and is highlighted in yellow.
- The second field is labeled "Appointment type (2)".
- The third field is labeled "Person name: (3)".

Each field has a small "..." button to its right, indicating a dropdown or search function.

Complete the accept formats under the Appointment Tab. Fill in the Appointment Location (1), Appointment Type (2), and Person Name (3) field. Additional accept formats may appear depending on the appointment type that is being scheduled. Complete any additional accept formats if necessary. Click **'Move'** to move appointment to the Work In Progress box.

The screenshot shows a dialog box titled "Appointment Attributes". The "Appointment" tab is selected. The dialog is divided into several sections:

- Left Panel:** A tree view showing a folder "SCHED, TANIA" containing a sub-item "CT Body Contrast".
- Top Tabs:** "Details", "Orders", "Move Criteria", "Resource List", "Guidelines", "Appointment", and "Eligibility".
- Main Area:** A large empty rectangular box for editing appointment details.
- Optional Section:** A section with tabs "Optional", "Search", "Existing Orders", "Privileges", "AOS", and "Re". Below these tabs is a list of appointment types, including:
 - CT Abdomen w
 - CT Abdomen w (Ped Sedate)
 - CT Abdomen w/wo
 - CT Abdomen w/wo/ Pelvis w
 - CT Abdomen/Pelvis w
 - CT Abdomen/Pelvis w/wo
 - CT Chest w
 - CT Chest w + High Resolution
 - CT Chest w Abdomen w/wo Pelvis w
 - CT Chest w PE Protocol
 - CT Chest w/wo
 - CT Chest/Abdomen/Pelvis + Head w
 - CT Chest/Abdomen/Pelvis Head w/wo
- Bottom:** "OK" and "Cancel" buttons.

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Appointment Attributes window will appear. In the box on the lower half of the window, find the order (1) that is tied to the appointment type that is being scheduled. Once the order has been located, double click to move Order (2) to the box on the upper half of the window. Once the order has been selected, required accept formats (3,4,5,6,7) may need to be filled out depending on the order that was selected. Fill in any accept formats if necessary. Click **'OK'** (8) when this is complete. Window will close.

Appointment Attributes

SCHED, TANIA
CT Body Contrast

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

SCHED, TANIA

CT Abdomen w (2)

Optional Search Existing Orders Privileges AOS Re

CT Abdomen w (1)
CT Abdomen w (Ped Sedate)
CT Abdomen w/wo
CT Abdomen w/wo/ Pelvis w
CT Abdomen/Pelvis w
CT Abdomen/Pelvis w/wo
CT Chest w
CT Chest w + High Resolution
CT Chest w Abdomen w/wo Pelvis w
CT Chest w PE Protocol
CT Chest w/wo
CT Chest/Abdomen/Pelvis + Head w
CT Chest/Abdomen/Pelvis Head w/wo

*Requested Start Date/Time:
26/Sep/2024 1056

*Priority:
Routine

*Reason for Exam:
test

Special Instructions:

CC Provider:

*WTIS Priority:(3)

*Clinical Indication for Scan(4)

*Received Requisition on Date/Time:
xxx jxxxx (5) (6)

*Combination Scan Indicator:(7)

Specified Date Procedure:

OK (8) Cancel

From the Scheduling Appointment Book, the Work in Progress box will be populated.

Books **Appointment**

*Appointment location:
SC CT

*Appointment type:
CT Body Contrast

*Person name:
SCHED, TANIA

Move
Next
Clear

Work in progress:

SCHED, TANIA
CT Body Contrast
Current Schedule
SC CT
SC CT (P3,P2,Any,Open)
Patient

Schedule
Confirm
Recur
Suggest
Request
Insert

Click the **'Suggest'** button to the right of the Work in Progress box to look for the first available appointment time. Suggested Schedules window will appear. Click Suggest (1) to

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view available appointment types. Highlight the appointment (2) that works for the patient. Click OK (3) to close the Suggested Schedules window.

Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order	Resource Duration	Slot Type
15 Minutes	27/Sep/2024 - 8:45 AM	SCHED, TANIA	27/Sep/2024 - 8:45 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 9:00 AM	SCHED, TANIA	27/Sep/2024 - 9:00 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 9:15 AM	SCHED, TANIA	27/Sep/2024 - 9:15 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 9:30 AM	SCHED, TANIA	27/Sep/2024 - 9:30 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 9:45 AM	SCHED, TANIA	27/Sep/2024 - 9:45 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 10:00 AM	SCHED, TANIA	27/Sep/2024 - 10:00 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 10:00 AM	SCHED, TANIA	27/Sep/2024 - 10:00 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 10:15 AM	SCHED, TANIA	27/Sep/2024 - 10:15 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 10:30 AM	SCHED, TANIA	27/Sep/2024 - 10:30 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 10:45 AM	SCHED, TANIA	27/Sep/2024 - 10:45 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 11:00 AM	SCHED, TANIA	27/Sep/2024 - 11:00 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 11:00 AM	SCHED, TANIA	27/Sep/2024 - 11:00 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 11:15 AM	SCHED, TANIA	27/Sep/2024 - 11:15 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 11:30 AM	SCHED, TANIA	27/Sep/2024 - 11:30 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 11:45 AM	SCHED, TANIA	27/Sep/2024 - 11:45 AM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 1:00 PM	SCHED, TANIA	27/Sep/2024 - 1:00 PM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 1:00 PM	SCHED, TANIA	27/Sep/2024 - 1:00 PM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 1:15 PM	SCHED, TANIA	27/Sep/2024 - 1:15 PM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 1:30 PM	SCHED, TANIA	27/Sep/2024 - 1:30 PM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve
15 Minutes	27/Sep/2024 - 1:45 PM	SCHED, TANIA	27/Sep/2024 - 1:45 PM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	Open CT
15 Minutes	27/Sep/2024 - 2:00 PM	SCHED, TANIA	27/Sep/2024 - 2:00 PM	CT Body Contrast	SC CT 1	SC CT	CT Abdomen w	15 Minutes	P3 CT Reserve

Books will be red in the Work In Progress window. Click the **‘Confirm’** button to confirm the appointment.

Work in progress:

The confirmation window will appear. Review appointment details to ensure they are correct. Click **‘OK’**, and an encounter selection window will appear.

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The screenshot shows a software window titled "Confirm" with a patient name "SCHEDE, TANIA" and MRN "11000764". The patient's DOB is "01/Aug/1995", Age is "29 Years", and Sex is "Female". The interface includes a navigation pane on the left with a tree view containing "SCHEDE, TANIA", "CT Body Contrast", "SC CT", "SC CT 1", and "SCHEDE, TANI". The main content area has tabs for "Summary", "General", "Resource View", "Guidelines", "Notification", "Conversation Summaries", "Itineraries", "Locks", "Eligibility", and "Booking Notes". The "Summary" tab is active, displaying the patient's name and MRN, followed by sections for "Allergies", "Orders" (CT Abdomen w), and "Preparations" (fasting instructions). At the bottom right, there are buttons for "Options", "Print...", "Print ABN...", "OK", and "Cancel".

Confirm

Name: SCHEDE, TANIA MRN: 11000764 DOB: 01/Aug/1995
Age: 29 Years Sex: Female

Summary General Resource View Guidelines Notification Conversation Summaries Itineraries Locks Eligibility Booking Notes

SCHEDE, TANIA Med Rec Nbr: 11000764

Allergies:
Allergies

30/Sep/2024 - 11:00 AM 15 Minutes CT Body Contrast SC CT SC CT 1

Orders:
CT Abdomen w

Preparations:
Patient is required to fast 2 hours prior to exam, unless diabetic. Please instruct patient to arrive 30 minutes early. To cancel or reschedule, please contact the booking office 905-378-4647 x 46391.

Options Print... Print ABN...

OK Cancel

Encounter Selection Window will appear. Click 'Add Enc' to add a new encounter. A PreReg window will appear. Fill out any required fields. (Note: all required fields will appear in yellow). Click 'OK' when finished.