



# SCHEDULING AN APPOINTMENT

## HOSPITAL INFORMATION SYSTEM (HIS)

### STEPS TO SCHEDULE AN APPOINTMENT

---

There are **four steps** that must be completed to schedule an appointment.

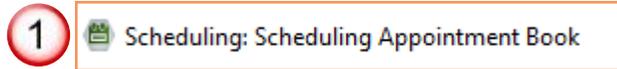
1. Select the correct patient and correct clinic information.
2. Schedule the appointment using one of the three methods:
  - a. **Suggest:** The system suggests based on the set date and time parameters, providing options without searching through the scheduling grid.
  - b. **Drag & Drop:** The drag and drop functionality is a quick and simple method for scheduling single appointments.
  - c. **Schedule:** The Schedule button allows the user to view and change the default selections such as duration and slot if needed.
3. Confirm the appointment.
4. Add or attach an encounter to the appointment.

# SCHEDULING AN APPOINTMENT

## HOSPITAL INFORMATION SYSTEM (HIS)

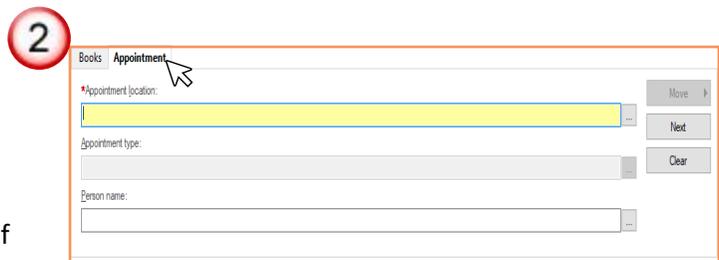
### SCHEDULING AN APPOINTMENT USING SUGGEST

1. Open the Scheduling Appointment Book.

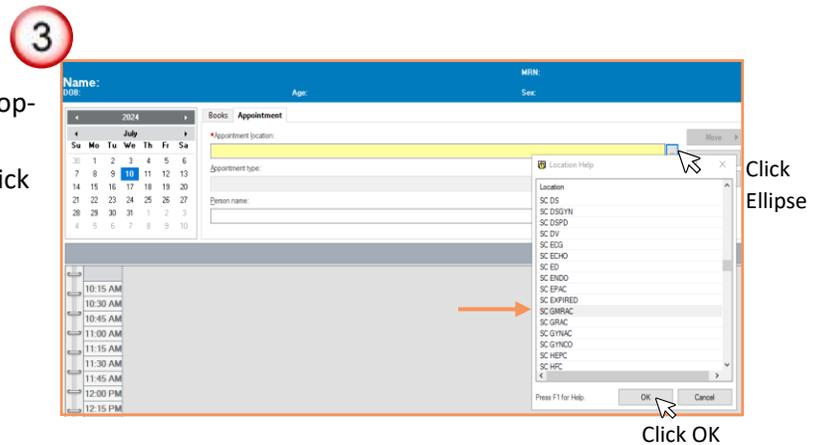


2. Click the "Appointment" tab.

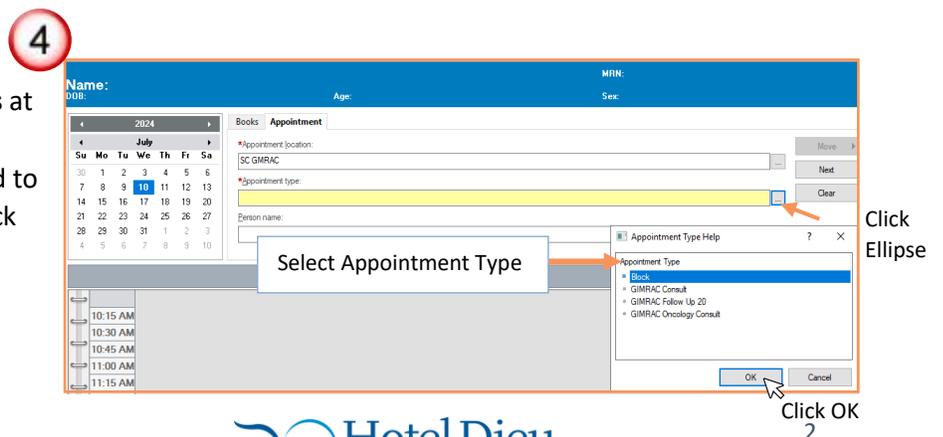
**Note:** Mandatory fields are marked with a red asterisk and highlighted in yellow. These fields must be completed to move to the next step of scheduling an appointment.



3. Click the ellipses (...) to open the drop-down list of available **Appointment Locations**. Select your choice and click "OK."



4. Next click on the ellipses at the end of the **Appointment Types** field to make your selection. Click "OK."



# SCHEDULING AN APPOINTMENT

## HOSPITAL INFORMATION SYSTEM (HIS)

- Click the ellipsis in the Person Name field.

Click Ellipse

- Enter either the “Patient Name” or “Health Card Number.” Click “Search.”

Click Search

- With the Patient Name selected in the top pane Click “OK.”

**Note:** Do not select an encounter.

Select patient

Click OK

Deceased?	Patient Name	Privacy	Health Card Number	VC	MRN	Sex
No	TEST PATIENT, CUPCAKE PINK		1234-555-555		11001746	Female
No	TEST PATIENT, HOWARD W		5555-555-555		11001836	Male
No	TEST PATIENT, ICONE		2222-222-224		11000791	Female
	ATIENT, IPACFIVE				11000850	Male
	ATIENT, IPACFOUR				11000849	Female
	ATIENT, IPACONE		2222-222-222		11000845	Male
	ATIENT, IPACSEVEN		4444-333-333		11000852	Male
	TEST PATIENT, IPACSIX		8888-666-666		11000851	Female
	TEST PATIENT, IPACTHREE				11000847	Male
	TEST PATIENT, IPACTHREE		5555-444-444		11000848	Female
No	TEST PATIENT, IPACTWO				11000846	Female
	TEST PATIENT, JOE		2222-333-344		11000783	Male
No	TEST PATIENT, LEADER AWAY DAY		2023-202-420		11000761	Female

MRN	Facility	Encounter	Patient Type	Reg Date (DD-MMM-YYYY)	Expected Date of Arrival	Medical Service
11001746	SCS	22-002944	PreReg		2024-Jun-25 09:50	Ambulatory
11001746	SCS	22-002309	PreReg		2024-Jun-06 09:00	Ambulatory
11001746	SCS	22-002067	Outpatient	2024-Jun-21 09:39	2024-Jun-03 08:30	Ambulatory
11001746	SCS	22-002134	Outpatient	2024-Jun-07 13:00	2024-May-31 09:00	Ambulatory
11001746	WS	22-002144	Emergency	2024-May-28 11:52		Emergency

- The Patient Name will now appear in the Person Name field.

# SCHEDULING AN APPOINTMENT

## HOSPITAL INFORMATION SYSTEM (HIS)

9. Enter in the **“Reason for Exam”** and any **“Scheduling comments”** and click **“Move.”**

9

\*Reason For Exam:  
Chest

Scheduling Comments:  
Follow up in 1 week

Move  
Next  
Clear

Click Move

10. The appointment information has now been moved to the **Work in progress** area. Click **“Suggest.”**

10

Name: TEST PATIENT, CUPCAKE PINK

Appointment Location: SC GMRAC

Appointment Type: GIMRAC Consult

Work in progress

Click Suggest

Time	Wed, 10/24/2024	Thu, 11/14/2024	Fri, 12/14/2024	Sat, 13/14/2024	Sun, 14/14/2024
10:45 AM	Follow-ups	Follow-ups	Follow-ups		
11:00 AM					
11:30 AM					
12:30 PM	Lunch	Lunch	Lunch		
12:45 PM					
1:00 PM					
1:30 PM					
1:45 PM					
2:00 PM					
2:30 PM					
3:00 PM					
3:15 PM	Obstetrics consult	Obstetrics consult	Obstetrics consult		
3:30 PM					

11. Fill out the information as required under the **“Suggest Criteria”** tab. Click **“Suggest.”**

11

Suggested Schedules

Patient: TEST PATIENT, CUPCAKE PINK  
Appointment Location: SC GMRAC  
Appointment Type: GIMRAC Consult

Select Suggest Criteria Tab

Suggest Criteria Preferences

Appointment Date  
 Date range: 10/24/2024 - 24/Aug/2024  
 Schedule in: 1 Days From: 10/24/2024  
 Date restrictions: Next 2 Days

Appointment Time  
 Time range: 0000 - 2355  
 Time restrictions: AM Only

Schedule as visit within 6 hours  
 Override suggested date and time  
 Schedule multiple persons to mixed Group Sessions

Clear Suggest

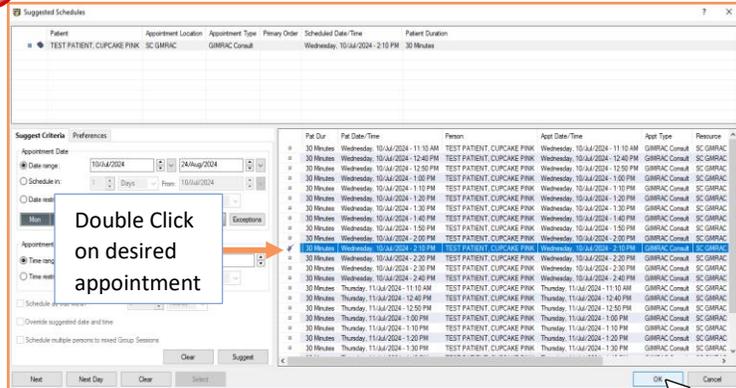
Next Next Day Clear Select

Click Suggest

# SCHEDULING AN APPOINTMENT HOSPITAL INFORMATION SYSTEM (HIS)

12

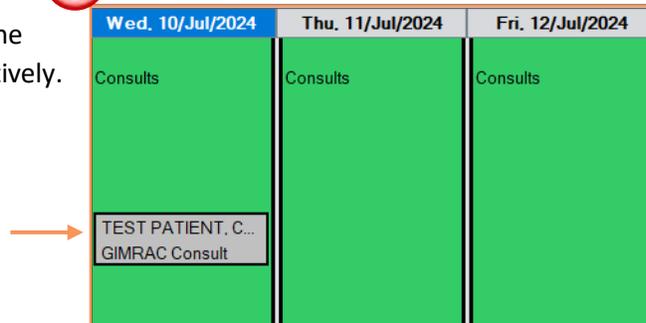
12. A list of suggestions will populate.  
"Double click" on your choice of appointment.  
Click "OK."



Click OK

13

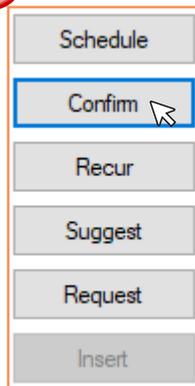
13. It will then be added to the appointment book tentatively.



14

14. Click "Confirm" to add an encounter to the selected appointment.

**Note:** If the Confirm button is unavailable, there is an issue with the booking. This could be due to selecting an unavailable time, date, or resource.





# SCHEDULING AN APPOINTMENT HOSPITAL INFORMATION SYSTEM (HIS)

15. The **Confirm** window opens.  
Click **“OK.”**

**Note:** Clicking Print in the confirm window will print the appointment information for the patient.

15

Click OK

16. The **Encounter Selection** Window opens. Click **“Add Enc.”**

16

Click Add Enc.

17. The **Available Conversations** window displays. Using the drop down Select the most appropriate conversation. Select **“Ok.”**

17

18. The Pre-Registration conversation opens. Click the **Encounter Information** tab and complete the required fields as appropriate. Click **“OK.”**

18

**Note:** All required fields will need to be completed before the system will allow you to submit the conversation.

Click OK

# SCHEDULING AN APPOINTMENT

## HOSPITAL INFORMATION SYSTEM (HIS)

19. The encounter confirmation window will open. Click **"OK"** to close.

19

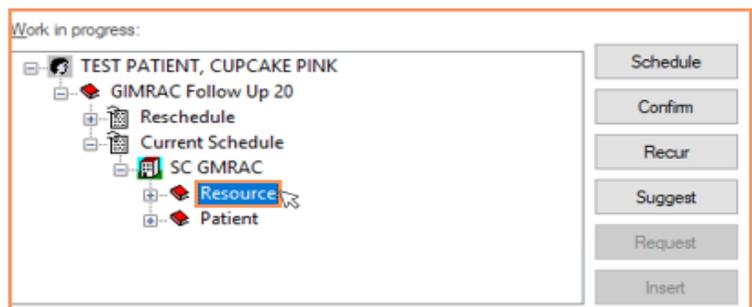


Click OK

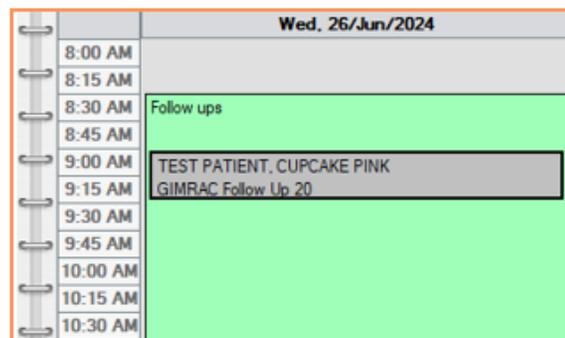
### SCHEDULING AN APPOINTMENT USING DRAG & DROP

1. Follow steps 1 through 10 as above.
2. **"Click"** and **"Hold"** on **"Resource"** book from the Work in progress Window. Drag the appointment to the desired date and time.

2



**Note:** the appointment will be added to the appointment Book tentatively.



Drag Appointment to desired time

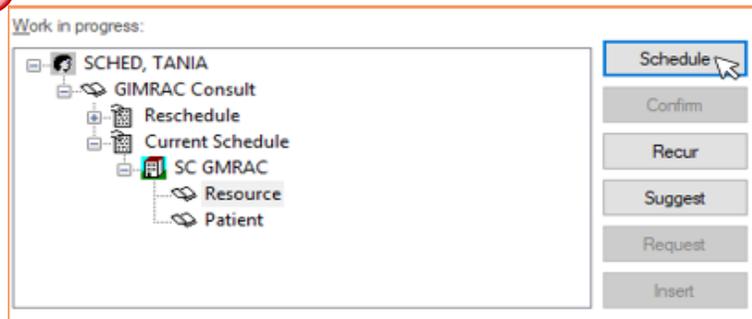
3. Follow steps 14 through 19 as above to complete and confirm the appointment.

### SCHEDULING AN APPOINTMENT USING THE SCHEDULE BUTTON

1. Follow steps 1 through 10 as above.

2

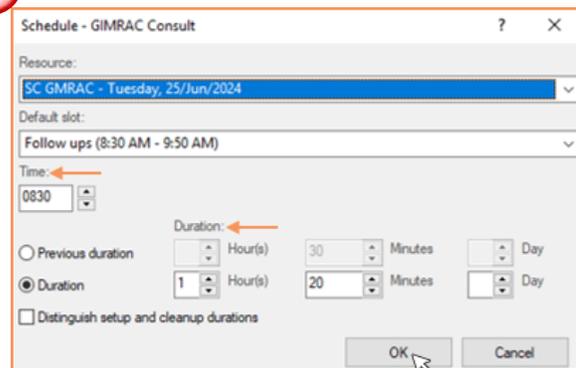
2. In the **Work in progress** area click the **"Schedule"** button from the side menu.



3. In the **Schedule window** select the date from the **"Resource"**

drop-down and the desired **"Default slot."** Select the **"Time"** and the **"Duration"** of the appointment and click **"OK."**

3



Select Resource menu  
Select Default slot menu

Click OK

4. Follow steps 14 through 19 as above to complete the appointment booking.