User Guide

Configure Cerner Millennium Scheduling and Registration Default Preferences
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CONFIGURING YOUR CERNER MILLENNIUM SCHEDULING AND REGISTRATION SETTINGS

This guide shows you how to set the settings of your Scheduling Appointment Book so you can begin to Schedule and Register with Cerner Millennium.

You begin by signing into Cerner Millennium Application Bar (AppBar for short), setting your AppBar preferences and then configuring the Scheduling Appointment Book.

SIGNING INTO THE APPBARR

To sign in to AppBar:

1. Click the Windows Start button, in the lower left corner of your display.

2. Click All Programs when the Start Menu pops up.

3. Scroll to the Cerner folder and click it to open it up; and then click AppBar – PROD.

4. Type your User Name and Password at the Cerner Millennium sign in screen.
5. When you sign in to Cerner Millennium **AppBar** for the first time, it will only have one button on it, the **AppBar** button (big letter A), shown below.

6. Continue with the instructions, **AppBar settings**, below to configure your **AppBar**.

**AppBar settings**

To add or change the order of the buttons on your **AppBar**, click the **AppBar** icon and select **Customize**.

On the **Options** tab, confirm that **Allow Floating** and **Large Buttons** have a checkmark next to them and **Always on Top** is not checked.
1. Go to the **Buttons** tab and place a checkmark beside the required applications. See *Select these Required Applications* below.

2. Click on the grey application bar to sort the applications so they appear at the top. Use the up and down arrow buttons to rearrange their order.

3. Click **OK** when done. Your **AppBar** will now reappear on your desktop with the applications added to it.

### Select these Required Applications

- Conversation Launcher
- Documents
- Explorer Menu
- Lock Manager
- Patient Locator
- PowerChart
- Scheduling Appointment Book

### SETTING UP PREFERENCES FROM THE SCHEDULING APPOINTMENT BOOK

Once you’ve configured your **AppBar**:

1. Click the **Scheduling Appointment Book** button to open the **Scheduling Appointment Book**.
2. To make it easy for you to use the **Scheduling Appointment Book**, maximize the screen by clicking on the **Maximize** button in the top right corner. This is the middle button that looks like it has two boxes on it. If you click on the **Exit** button, the one with the X, you will be brought back to the AppBar and have to click the **Scheduling Appointment Book** button again.

The remainder of this guide includes configuration settings for your Scheduling Appointment Book.

**TURNING OFF THE SIZE OPTION**

Click on the **Scheduling Appointment Book** icon. The size option has to be disabled:

- Click **View > Toolbars** and uncheck **Size**
**SETTING UP OPTIONS DEFAULTS IN THE SCHEDULING APPOINTMENT BOOK**

Click the **View** menu, then **Options** to open the **Options** dialog box.

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**Moving from tab to tab in the Options dialog box**

When configuring Options settings, you have to move from tab to tab to make the changes. On some of the tabs, you will have to click the **Flex Form Defaults** button to access more settings for that tab.

You will work, left to right, beginning with the **User Defaults** tab.

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**User Defaults tab**

*Default Appointment Type*

Set a default location if you will only be using one location code or one code for 80% of the time. Otherwise leave blank.

*Appointment detail field*

Move **Person Name** to the top of the list by highlighting and using the arrows to move up.
Appointment tab

Select:

- Mark qualifying days on calendar
- Display future requests / appointments displayed.
- Display extended conflict details.
- Maintain focus on pending appointment during reschedule.

Leave Health Plan Check blank

Appointment tab Flex Form Defaults

1. Click the Appointments tab Flex Form Defaults button and select the following settings from the drop-down fields.

2. Click OK when done to close the Flex Form Defaults dialog box.
**Navigation tab**

Select your **Default bookshelf**: If you are in a particular book most often, then select a **Default book**: as well. This setting will vary depending on your department and personal preference.

![Navigation tab screenshot](image)

**You will skip the Details and the Allergies tabs.**

**Confirm tab**

Make sure that there is a checkmark in the “always display confirm dialog when confirming appointments” box.

*Following appointment confirmation*

Select your preference for what the system will do after confirming an appointment.

In most cases, you might want to leave it selected to **Maintain focus on last confirmed appointment.**

![Confirm tab screenshot](image)
Check In tab

Leave Always create new encounter when requested blank.

Check In tab Flex Form Defaults

1. Click the Flex Form Defaults button on the Check In tab and select the following settings from the drop-down fields.
2. Click OK when done to close the Flex Form Defaults dialog box.
Check Out tab

Check the settings as shown.

Check Out tab Flex Form Defaults

1. Click the Flex Form Defaults button on the Check Out tab and select the following settings from the drop-down fields.

2. Click OK when done to close the Flex Form Defaults dialog box.
PM Toolbar tab

To access the PM Toolbar tab, you may have to click on the right-facing arrow in the upper right corner of the Options window.

PM Toolbar tab Flex Form Defaults

1. Click the Flex Form Defaults button on the PM Toolbar tab and select the following settings from the drop-down fields.

2. Click OK when done to close the Flex Forms Defaults dialog box.
Request Criteria tab

Configure the following:

Request date range
Infinite days in date range

Default Time Range
Start 0000 End 0000

Default days of week:
Select Mon to Fri by clicking on the buttons until they look pushed down.

DEMOGRAPHICS BAR

To display important patient information on the Demographics Bar, you must set the Demographic Bar properties.

To view the properties of the Demographics Bar:

1. Ensure you are in the Scheduling Book, right-click on the Demographics Bar and then click the pop-up Properties button.

The Demographic Bar Properties dialog box is displayed.
STEP ONE: Adding columns to your Demographics Bar

Columns and rows are separated by a solid line when you view the Demographics Bar Properties dialog box.

The default Demographics Bar has 5 columns stretching from the first column with Name to the last column with DOB: and Sex: See ① above

The Demographics standard requires 13 columns

To add columns to your Demographics Bar to get a total of 13 columns:

2. Click the right-arrow button (see ② above) to add one column at a time.  
   *If you accidentally add extra columns, click the left-arrow button to remove columns one at a time.*

When the extra columns have been added, for a total of 13 columns, the Demographics Bar Properties dialog box looks like the graphic below:
**STEP TWO: Adding the Third Row to the Demographic Bar**

To add the third row to the Demographic Bar:

1. Click the up arrow to the right of the two columns.

   ![Image of Demographic Bar Properties](image)

   *The third row is added.*

**STEP THREE: Updating or Adding Demographic Bar fields**

To add or update a Demographic Bar field you perform these three steps for each field.

1. Selecting the field and click:
   a. **Update**... if the field is currently displayed
   b. **Add**... if the field is not displayed

   ![Image of Demographic Bar Properties](image)
2. Set the field’s **Location (Left, Top)** and **Size (Width, Height)**

![Diagram showing how to set location and size](image)

3. Format the field’s **Font style** and **Size**:

![Diagram showing font style and size settings](image)

**Note**

See Table 1: Demographic Bar Field Configuration following the instructions **Configuring fields; using Name: as an example** for each field’s settings.

**Configuring fields; using Name: as an example**

Below is the step-by-step process for configuring the **Name** field. You will follow the same process for all of the fields.

Refer to Table 1: Demographic Bar Field Configuration for each field’s settings.

1. Right-click the **Demographics Bar** and click **Properties**.
   *The Demographics Bar Properties window is displayed.*

2. Click **Name** in the **Field** column and click **Update**...
   *The Attribute Properties – name dialog box is displayed.*

3. From the drop down menus, select the **Location (Left, Top)** and **Size (Width, Height)** coordinates from the table below.
   *(1,1) and (3,1) respectively.*

4. Click **Font**.
   *The Font dialog box is displayed.*

5. Select the Size from the table below and ensure the font is **Bold**.
   *Font Size is 12.*

6. Click OK to close the **Font** dialog box, click OK to close the **Attribute Properties – Name** dialog box.
   *You are now back at the Demographics Bar Properties window.*

7. Follow the process above (Steps 1 to Steps 6) for the rest of the fields using configuration from the Table 1: Demographic Bar Field Configuration.
## Table 1: Demographic Bar Field Configuration

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Click on</th>
<th>Location (Left, Top)</th>
<th>Size (Width, Height)</th>
<th>Font Size</th>
<th>Font Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Update</td>
<td>(1,1)</td>
<td>(3,1)</td>
<td>12</td>
<td>Bold</td>
</tr>
<tr>
<td>MRN</td>
<td>Update</td>
<td>(6,1)</td>
<td>(4,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>DOB</td>
<td>Update</td>
<td>(4,1)</td>
<td>(2,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Age</td>
<td>Update</td>
<td>(4,2)</td>
<td>(1,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Sex</td>
<td>Update</td>
<td>(6,2)</td>
<td>(1,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Home Phone</td>
<td>Add</td>
<td>(1,2)</td>
<td>(2,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Family Physician</td>
<td>Add</td>
<td>(6,3)</td>
<td>(3,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>VIP</td>
<td>Add</td>
<td>(12,2)</td>
<td>(2,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Person Comments</td>
<td>Add</td>
<td>(10,3)</td>
<td>(2,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Allergies</td>
<td>Add</td>
<td>(10,1)</td>
<td>(2,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 01 (C. DIFF/MDO)</td>
<td>Add</td>
<td>(9,3)</td>
<td>(2,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 02 (LCP #)</td>
<td>Add</td>
<td>(9,2)</td>
<td>(1,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 03 (Language)</td>
<td>Add</td>
<td>(12,1)</td>
<td>(1,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 04 (Interpreter)</td>
<td>Add</td>
<td>(13,1)</td>
<td>(1,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 05 (Violent Patient)</td>
<td>Add</td>
<td>(10,2)</td>
<td>(2,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 06 (Alternative Phone)</td>
<td>Add</td>
<td>(1,3)</td>
<td>(3,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 07 (Call Instructions)</td>
<td>Add</td>
<td>(4,3)</td>
<td>(3,1)</td>
<td>8</td>
<td>Bold</td>
</tr>
</tbody>
</table>
When you are finished, the Demographics Bar Properties dialog box should look like this:

![Demographics Bar Properties Image]

Also, when you have patient information in your Demographics Bar it will look similar to this:

![Patient Information Image]
**Setting Book Properties**

To set up your **Appointment Book** to the default view you have to do select the default View and then set the Appointment Book Properties for each tab:

- Right-click anywhere on the book and Select View > Proportional Single-day

<table>
<thead>
<tr>
<th>Book Settings</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Date and Time...</td>
</tr>
<tr>
<td></td>
<td>Properties...</td>
</tr>
<tr>
<td></td>
<td>Non-proportional, Single-day</td>
</tr>
<tr>
<td></td>
<td>Proportional, Single-day</td>
</tr>
<tr>
<td></td>
<td>Proportional, Multiple-day</td>
</tr>
<tr>
<td></td>
<td>Week</td>
</tr>
<tr>
<td></td>
<td>Month</td>
</tr>
</tbody>
</table>

**Setting Appointment Book Properties**

To set the **Appointment Book Properties** for each tab:


*The Appointment Book Properties dialog box opens.*

**General tab**

**Column Headings**

Check the box for Display number of scheduled appointments.

**Visible day range**

You can change the start of your day that appears on the scheduling screen by setting the “Begin Time” on this tab.

**Tooltips**

Change to 20 seconds

**Display fields**

Under Display fields, leave the defaults and add:

- Encounter Type
- MRN
- Person age
- Person birth date
- Person home phone
- and add Surgeon 1 and Primary Order for all Surgical Secretaries
Icons tab

In the Appointment icons: window, check:

- Information
- Comments
- Group Sessions
- Recurring
- Protocol
- You may require the Allergies icon if the information is required at time of scheduling and if the Allergy information is being entered for the patients.

View –Proportional Single-Day tab

Display binder

Take check mark off.

Time interval

You might need 5 or 15 min depending on your shortest appointment time

Column width

It is suggested that you begin by selecting Size to fit all.

However, you should adjust this to get the right layout for you. Depending on how many resources are in the book you may want to try a Custom width or Size to fit all, with minimum width: 150 (or your choice of width).

Start display at:

You may want to start at the beginning of the clinic day and at the current date and time.
**CHECK IN SCREENS SETUP**

**WARNING**

You will be working with an actual scheduled patient appointment to perform the Check In screens setup.

It is important that you follow these instructions exactly, or you may accidentally create a Registration.

1. Right-click on an appointment in the Scheduling Appointment Book and select **Actions > Check In**

   The Check In window is displayed.

   During this process you will have to click the column headings and Set Enc button. They are highlighted red in this graphic.

2. Right-click on the column headings and select **Preferences**.

   The Column Preferences dialog box is displayed.

3. Configure your **Selected columns**: Column Preferences to match the Selected columns (the right column) in the graphic below.

   You move items between columns by clicking on them and then the **Move** button.
4. When your Selected columns: matches the graphic above, click OK. 
You are brought back to the Check In window.

5. Click the Set Enc button.  
The Encounter Selection window is displayed.

**WARNING** Do not click on any buttons in the lower right, such as Modify, Add Enc, or OK.

6. Right-click on the column headings and select Preferences.

The Column Preferences dialog box is displayed.

7. Configure your Selected columns: Column Preferences to match the Selected columns (the right column) in the graphic below.
Configure Cerner Millennium Scheduling and Registration Default Preferences

You move items between columns by clicking on them and then the Move button.

![Column Preferences](image)

8. When your Selected columns: matches the graphic above, click OK.

**WARNING** Carefully follow the next two steps so you do not create a Registration.

9. Click Cancel to return to the Check In window.

10. Click Cancel to return to the Scheduling Appointment Book.

**Appointment View Screen Setup**

1. Double-click on a scheduled appointment. The Appointment View window is displayed. The Appointment Information area and column headings you will have to click are highlighted red in this graphic.
2. Right-click in the **Appointment information** area and select **Preferences**. The **Appointment View Preferences** dialog box is displayed.

3. Configure your **Selected Tabs:** and **Available tabs:** Appointment View Preferences to match the **columns** in the graphic below. You move items between columns by clicking on them and then an arrow button.

4. When your columns: matches the graphic above, click **OK**.
5. Right-click the column headings and select Preferences. *The Column Preferences dialog box is displayed.*

6. Configure your Selected columns: column preferences to match the Selected columns (the right column) in the graphic above. Move items between columns by clicking on them and then the Move button.

7. When your Selected columns: matches the graphic above, click OK.

8. Click Close

**YOU HAVE FINISHED CONFIGURING YOUR DEFAULT SETTINGS**