

Cerner Scheduling (Level 3) **QUICK GUIDE**



Online Manual is located at:
www.c3project.ca/epr_priv/education/index.htm

Email training requests to:
[eHIM Education@lhsc.on.ca](mailto:eHIM_Education@lhsc.on.ca)

Advanced Methods Used to Schedule

To Reschedule a Future Appointment:

1. Conduct a proper patient search using Use Person Search or the Ellipsis.
2. Select the patient.
3. A Future Request Screen will appear.

Request Action	Appointment Type	Earliest Request Date	Latest Request Date	Created By	Date Created	
Confirmed	FUP	S-PPV	2006/09/13 - 09:00	2006/09/13 - 09:30	Singley, Jennifer	2006/09/12 - 12:19
Confirmed	FUP (Diabetic First	TG-DIABETIC	2006/09/18 - 10:00	2006/09/13 - 10:30	MedSec +S, Training05	2006/09/05 - 10:42
Confirmed	FUP (Diabetic First	TG-DIABETIC	2006/09/18 - 10:00	2006/09/18 - 10:30	MedSec +S, Training05	2006/09/05 - 10:42

Buttons: **Select**, Unselect, OK, Cancel

4. Choose the appropriate visit from the Future Patient Appointments screen and left-click **Select**.
A red checkmark will appear to the left of the appointment.
5. Left-click **OK**.
6. The appointment details will be sent to the Work In Progress area to be rescheduled.

Swap Resources



Swap Resources

Use only to swap all appointments on the same day with another resource in the same appointment book.

1. Left-click on the triangle on the resource bar ▲ to increase size of appointment resource template.
 2. Left-click on the resource and then left-click the **Swap Resource** button shown above.
- (or) Right-click under the resource.
Left-click **Actions, Swap Resources...**

The Swap Resources Dialogue Box will open.

Swap Resources

Swap Isaac, Dr. I. with:

- Naidu, Dr. K.
- Naidu, Dr. K.
- Sanjeev, Dr. D.
- Jain, Dr. S
- Burdan, Dr. L.
- Robinson, Dr. D.
- Chandarana, Dr. P.

3. Select the resource to swap with.
4. Left-click **OK**.

A Dialogue Box will appear to confirm swap.

5. Left-click **OK**.
6. Left-click **Yes** to confirm.

Scroll to the top of the clinic day to

Slot Properties

Mnemonic: Meeting - 2 hours

Description: Meeting - 2 hours

Display scheme: Pale mauve background

Flex String: <None>

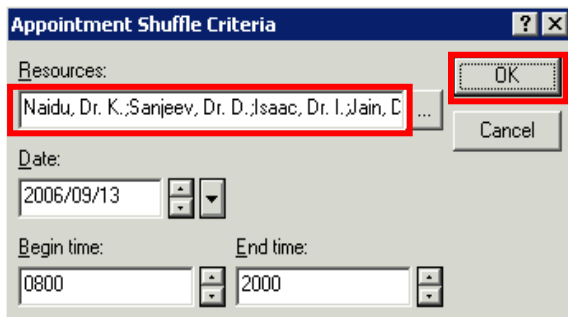
Duration: 120

Buttons: OK, Cancel, Defaults

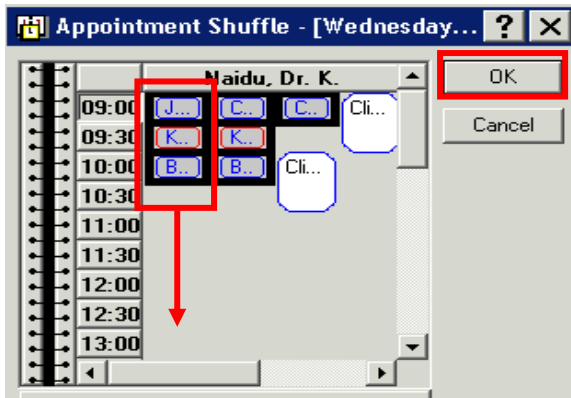
Shuffle Appointments

Used only to move appointments on the same day:

1. Left-click the **Shuffle Appointments** button on the tool bar.
(or) Right-click in the appointment book (grey space).
Left-click **Actions, Shuffle**.



2. Select the appropriate resource.
3. Left-click **OK**.



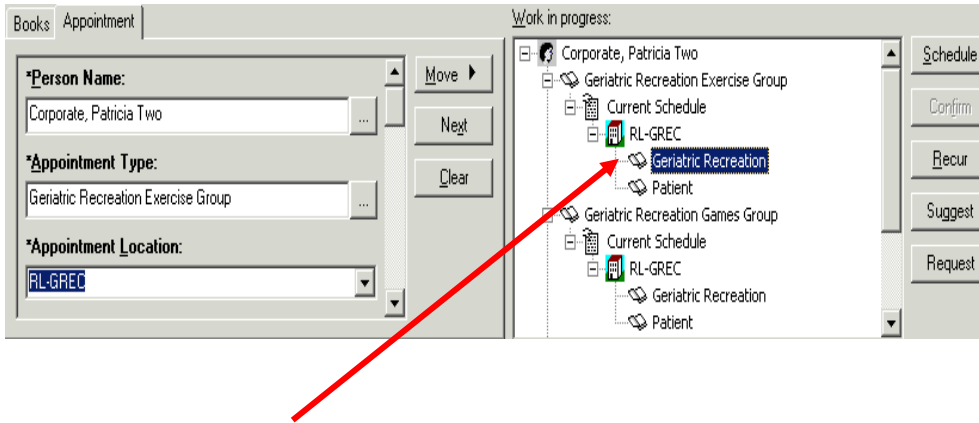
4. CTRL + left-click on the individual appointment(s) to move and drag to a new time slot.
5. Left-click **OK**.
6. Select an appropriate reason for Shuffle from the list provided.
7. Left-click **OK**.

To Schedule Multiple Appointments (Group)

1. Left-click on the **Appointment Tab**.
2. Enter patient name and clinic information.
3. Left-click the **Move** button to transfer appointment criteria to Work In Progress area.
4. Left-click the **Next** button.

Change appointment criteria, if necessary

5. Left-click on the **Move** button to transfer appointment criteria to Work In Progress area.
6. Click on the Next button and then repeat steps 3 - 5 to create as many appointments as needed.



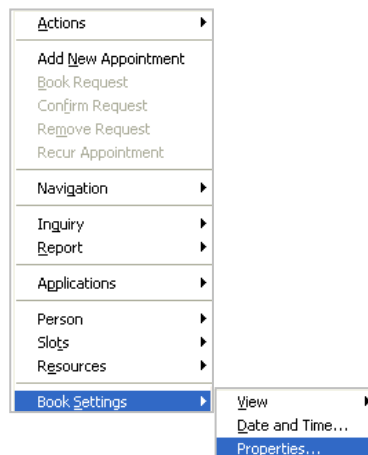
Each appointment will show in the Work In Progress screen.

7. Make sure that the resource name is highlighted.

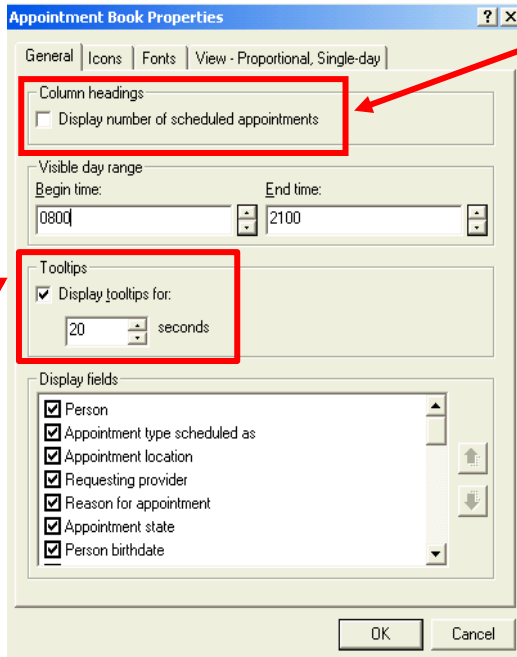
Book Settings

Open the Appointment Book Properties Conversation

Right-click in the bottom section of the scheduling book and select **Book Settings, Properties**.



Display Number of Scheduled Appointments



1. Left-click in the box beside Display number of scheduled appointments.

Note: If the resource name is too long, then the user may not be able to see the number of appointments associated with each resource. If this occurs, users can change the width of the resource column.

2007/04/18 - Ortho Clinic UC			
	Bourne, Dr. R. [20]	MacDonald, Dr. S. [17]	McCalden, Dr. P. [7]
08:25	NEW CLINI...		
08:30	[i] Hardy...	[i] Bleye...	
08:35	[i] Savag...		
08:40	[i] Andre...		
08:45	[i] Reith...	[i] Grigg...	
08:50	[i] Bortoli...		
08:55	[i] Cornel...		
09:00	[i] Deal, I...	[i] Shore...	[i] Borth...

Change Length of Time for Information to Display When Hovering Over an Appointment

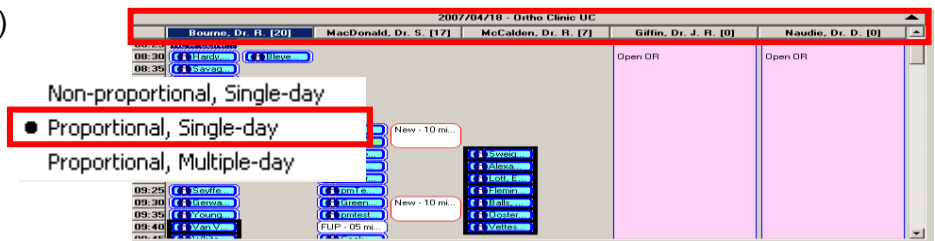
1. Ensure the checkbox is ticked beside Display tooltips for:
2. Enter the number of seconds the information will display for
3. Left-click **OK**.

Book Settings- Resource Views

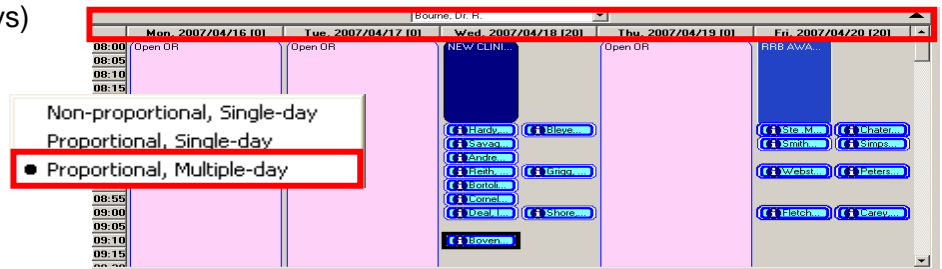


Change View

Multiple Resource View (Single Day)

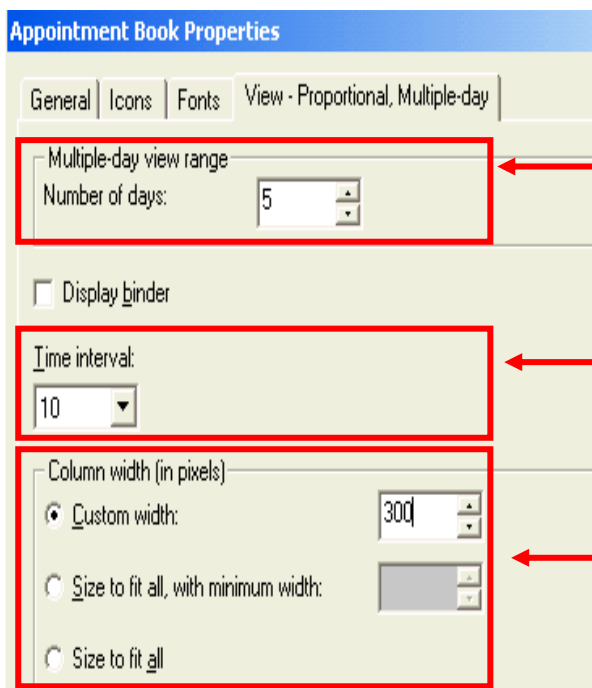


Single Resource View (Multiple Days)



Right-click in the bottom section of the scheduling book and select **Book Settings, Properties**.

Left-click on **View – Proportional Multi-Day View Tab**



Number of Days - select number of scheduling days to view on screen

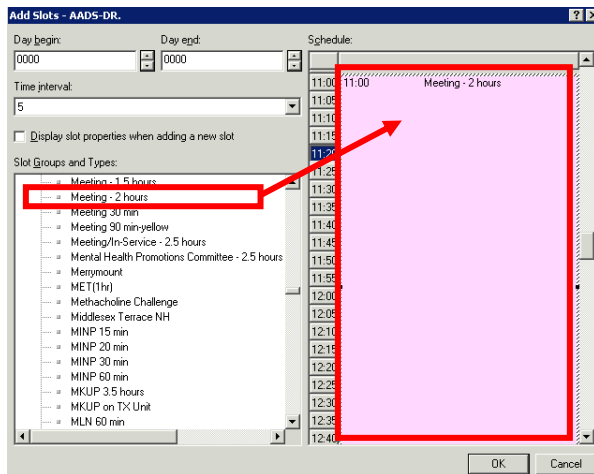
Note: To remove days with no scheduled appointments, select View Menu, Empty Schedules (to deselect).

Time Interval - changes the displayed time increments

Column Width – sets width of resource columns (set in increments of 100 or select Size to Fit All)

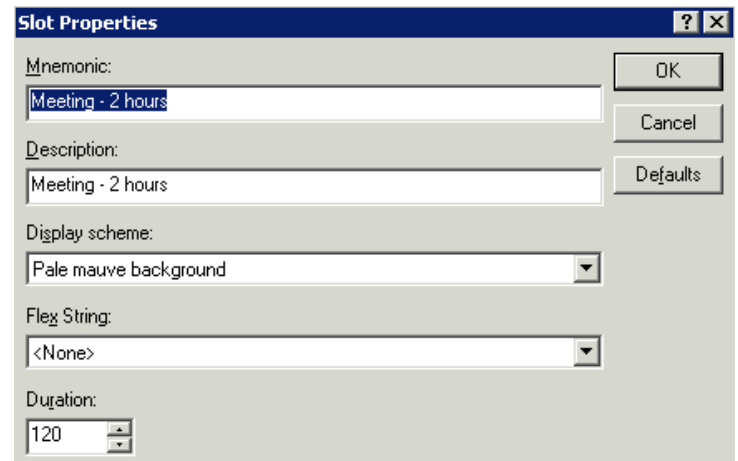
Add Multiple Slots

1. Right-click in the appointment book (grey space) under the resource name.
2. Select **Slots**.
3. Select **Add Slots**.
4. Double-click **All Slot Types** to open menu.
5. Choose appropriate slot name from the list.
6. Drag the slot into the appropriate time slot on the Schedule portion of the screen.



Use Slot Properties To Customize:

7. Right-click in the slot.
8. Left-click **Slot Properties**.
9. Customize the slot name by changing the information in the Mnemonic field.
10. Change the appointment duration if necessary.



11. Left-click **OK** to accept changes.
12. Repeat steps 5 through 11 until you have added all desired slots to the Schedule portion of the screen.
13. Left-click **OK**.

Shortcuts and Defaults

t = for today's date	n = for current time
pat = to fill in patient demographics in other tabs after it is initially entered in the patient tab	Autofill – enter initial keystrokes into a drop-down field and system will autofill
nok = next of kin	clr = clear all associated fields
unk = unknown address will fill in all necessary information	nfa = no fixed address will fill in all necessary information
▲▼ = Expand / Reduce appointment resource template	FUP = Follow up appointment with auto chart request
“ ” = enter double quotes in the preferred name field to delete a previous entry	Follow Up = Follow up appointment without chart request
Alt + Underlined letter (S <u>cheduling</u>)	Tab between fields to enter data

Types of PIN numbers

Prefix	# of Digits	Site
No PIN		DOB exists – Valid Patient Record – Must Use
900	6	Laboratory Referred Work
London Hospitals		
No Prefix 3000, 3100	8	London Health Sciences Centre <i>Downtime PIN</i>
LCP	6	London Regional Cancer Program
M	5	Mount Hope, London
P	5	Parkwood Hospital, London
RL	5	Regional Mental Health London
RS	5	Regional Mental Health St. Thomas
J <i>J3</i>	6 or 7	St. Joseph's Health Centre, London Downtime PIN
Historic PINS – no longer being issued		
U	6	University Hospital, London
V	6	Victoria Hospital, London
Regional Hospitals		
AH	6	Alexandra General Hospital, Ingersoll
FC	6	Four Counties Hospital, Newbury
LM	6	Listowel Memorial Hospital
SH	5	South Huron Hospital, Exeter
SE	6	St. Thomas Elgin General Hospital
SM	6	Strathroy Middlesex General Hospital
TG	6	Tillsonburg District Memorial Hospital
WD	6	Wingham & District Hospital
WH	6	Woodstock General Hospital