Registration & Scheduling

USER SETUP & PREFERENCES GUIDE
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Arranging buttons on the AppBar

To change the order of the buttons on your Appbar, left-click on the Cerner button and select customize.

To move a button, left-click on the button that you would like to move and use the arrows to move it up or down the list.

Spaces can also be added to separate groups of applications as shown to the left. To do this, left-click on the ‘Insert Space’ button shown in the diagram on the previous page.

How to Set up User Preferences in Cerner Patient Scheduling

Users will have to set preferences prior to using the Scheduling Appointment Book for the first time. If these preferences are not set, the user will not be able to complete their work properly.

Options

Follow the steps below to set your preferences. The steps with an asterisk (*) beside them are mandatory.

* Open the Scheduling Appointment Book. Left-click View, then Options to open the Setup window.
**User Defaults Tab**

To set your default location (clinic/area for scheduling), left-click the down arrow to select the appropriate location from the list.

If you have more than one location code, then leave this blank to avoid any chance of using the incorrect code.

If a clinic has a default synonym for their appointment types, then you can click on the check box, then select the synonym from the system table.

**Appointment Tab**

Users can place a checkmark in the box beside **Display future requests/appointments** in order to view a list of appointments that the patient already has booked and avoid any conflicts within your clinic.

*Users are encouraged to check the box to **Display extended conflict details**. This will prompt the user when the patient already has another appointment that is in conflict with the appointment they are trying to schedule.

The **Flex Form defaults need to be set according to the individual user’s security position, if these fields are blank, please contact the eHIM Education team.**
Navigation Tab

For any staff who will use one particular book most often, you can set the default book that you would like the system to open every time you enter the Scheduling Appointment Book.

* Left-click the Navigation tab in order to set your default Bookshelf and default Book.

* Left-click the drop-down arrow to select the Bookshelf that you would like to automatically open when you launch the scheduling application.

Confirm Tab

* Next left-click the Confirm tab to select the option of displaying the confirmation dialog box when confirming all appointments.

Users have the option to have the screen return to the previous display prior to booking the appointment, return to the current date and default appointment book or to maintain focus on the last confirmed appointment.

For users who schedule as well as check in patients, you may want to select the option to return to the current date after each new appointment has been confirmed.

* The Confirmation dialog box is used to add booking notes, to modify patient demographic information while booking the appointment or to print a list of appointment dates / times when booking multiple appointments for one patient. It is recommended that you place the checkmark in this box.
The Confirm dialog box is also the last opportunity to verify the appointment information with the patient prior to confirming the appointment in the system. If a date or time needs to be changed after the appointment is confirmed, then the appointment will have to be rescheduled.

Check In Tab

Users who will always create a new encounter for every scheduled appointment and will never check in more than one appointment into a single encounter can select the ‘always create a new encounter when required’ box.

Please check with the eHIM Education or IM Scheduling team to ensure that this selection is correct for your area.

The Flex Form defaults need to be set according to the individual user’s security position, if these fields are blank, please contact the eHIM Education team.
Check out Tab

*ALL users in ALL departments must have the following settings on their **Check out tab**
Place checks as indicated below

The **Flex Form defaults** need to be set according to the individual user’s security position, if these fields are blank, please contact the eHIM Education team.

Viewing Cancelled and/or Rescheduled Appointments

To view cancelled and rescheduled appointments in your Appointment Book, left-click **View** and add a checkmark beside **Cancels** and **Reschedules** by selecting them one at a time. To change back to the original view, left-click them again and this removes the checkmark.

**Note:** Cancelled and rescheduled appointments should only be turned on when trouble shooting an appointment.
Demographic Bar

*Unless otherwise instructed, users should have the demographic bar appearing on their scheduling screens. To do this, left-click View then Demographic Bar to add a checkmark and display the patient demographics.

To Change or Add Information to the Demographic Bar

Right-click on the Demographic bar and select Properties.

In order to make room for other fields to appear on the Demographics bar, add 4 more columns (total 9 columns).
Search for the demographic attribute on the list, and make the changes as indicated on the table (sample shown below):

<table>
<thead>
<tr>
<th>Name of Field</th>
<th>Field Label</th>
<th>Location (Left, Top)</th>
<th>Size (Width, Height)</th>
<th>Font Size</th>
<th>Colour</th>
<th>Bold?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Update</td>
<td>(1,1)</td>
<td>(3,1)</td>
<td>12*</td>
<td>Black</td>
<td>Bold</td>
</tr>
<tr>
<td>MRN</td>
<td>Update</td>
<td>(5,1)</td>
<td>(3,1)</td>
<td>8*</td>
<td>Black</td>
<td>Bold</td>
</tr>
<tr>
<td>DOB</td>
<td>Update</td>
<td>(4,1)</td>
<td>(1,1)</td>
<td>8*</td>
<td>Black</td>
<td>Bold</td>
</tr>
<tr>
<td>Age</td>
<td>Update</td>
<td>(4,2)</td>
<td>(1,1)</td>
<td>8*</td>
<td>Black</td>
<td>Bold</td>
</tr>
<tr>
<td>Gender</td>
<td>Update</td>
<td>(3,2)</td>
<td>(1,1)</td>
<td>8*</td>
<td>Black</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>Black</td>
<td>Bold</td>
</tr>
<tr>
<td>Family Physician</td>
<td>*Add</td>
<td>(7,2)</td>
<td>(2,1)</td>
<td>8*</td>
<td>Black</td>
<td>Bold</td>
</tr>
<tr>
<td>VIP</td>
<td>*Add</td>
<td>(8,1)</td>
<td>(1,1)</td>
<td>8*</td>
<td>Red</td>
<td>Bold</td>
</tr>
<tr>
<td>Person Comments</td>
<td>*Add</td>
<td>(5,2)</td>
<td>(2,1)</td>
<td>8*</td>
<td>Black</td>
<td>Bold</td>
</tr>
<tr>
<td>Allergies</td>
<td>*Add</td>
<td>(9,1)</td>
<td>(2,1)</td>
<td>8*</td>
<td>Green</td>
<td>Bold</td>
</tr>
<tr>
<td>Custom Field 01</td>
<td>*Add</td>
<td>(9,2)</td>
<td>(2,1)</td>
<td>8*</td>
<td>Red</td>
<td>Bold</td>
</tr>
</tbody>
</table>

The following is a demonstration of changing the attributes:

1. Search for the attribute from the list by typing in the first letter.
2. Choose Update or Add (as indicated on the above table).

   The Attribute Properties window opens.

3. Select the appropriate Location and Size form the drop down lists.

4. Select Font to change font attributes or colour.

5. Repeat until all attributes have been completed.
Book Settings - View

Proportional vs. Non Proportional options:
The system will default to a non-proportional day, which means that the appointment times for each resource will be listed according to the start of the template for each resource. If one resource starts at 0800 and another at 0900 then both of these appointment times will appear next to each other on the screen. Also if there are multiple appointment slots in the template for the same time, then they will be listed underneath each other.

There are two ways that a user can change their view:

1) Left-click on the Change View icon at the top of the screen and select Proportional, Multiple-day.

2) Right-click in the bottom portion of the scheduling book and select Book Settings> View > Proportional, Multiple-day.

Proportional, Multiple-day
Users can now see a week view in the scheduling book for a single resource. The resource can be changed using the drop down arrow at the top of the schedule to switch from one resource in a book to another.

Users can also determine the number of days to view in the range. The default is 5 days, Monday to Friday but it can be changed to any number between 2 & 7 depending on the clinic needs.
To change the default view:
1) Right-click in the bottom portion of the scheduling book and select Book Settings > Properties.
2) Left-click on the last tab, View-Proportional, Multiple-day.
3) Change the number of days in the top box and left-click on OK.

Book Settings - Properties

Right-click in the appointment area and select **Book Settings** then **Properties**. The Appointment book properties window will appear.

### General Tab

**Column headings**
Place a check mark in front of Display number of scheduled appointments

**Visible day range**
Users can change the start of day that appears on the scheduling screen by setting the “Begin Time” on this tab.

**Tooltips**
Users can change the duration for the tooltips to display on the screen. If the tips disappear sooner than you would like, then increase the duration.

**Display fields**
Users can change or add to the information that is available when hovering your cursor over an appointment. Place a check mark in the box next to the desired field to add it to the list. To change the order of the information, left-click on the name of the field and then use the up and down arrows to place it in the desired spot on the list.

Example:
The patient’s age, phone number and start/end time of appointment has been added to the display fields to the left.
Fonts Tab (for visually impaired users only)

If a user needs to increase the size of the font that appears on the scheduling screen, this can be changed on the Fonts tab.

Left-click on the Font button to select the size.
Left-click on OK.

View –Proportional Single-Day

Display binder
Users can choose to remove the graphic of the binder coils from the scheduling screen by removing the checkmark from the Display binder field.

Time interval
For any staff that will be booking appointments longer than 15 minutes, you may want to increase the time interval. This will shorten the length of the appointment view on the screen.

Note: if you book 10 or 20 minute appointments, do not select 15 or 30 minutes for a time interval.

Column width
Custom width defaults to 150. If this width does not allow the user to see all of the appointment information, then you can increase this width.

Size to fit all will allow the user to view all resources available on the screen without scrolling. This option may make the column width smaller than desired if there are more than 5-6 resources available to schedule.

Start display at
Staff can choose the time of day that the scheduling book will begin displaying or check off the option to start the display for the current time. Either of these options are very helpful if a clinic does not have appointments in the morning and staff has to scroll down to the bottom of the screen to book all appointments.
**Adding Fields to the Check In Screens**

1. Right-click on an appointment in the scheduling book and select Actions, Check In.

The Check In window will open.

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

3. Locate VIP in the Available Columns list and select Move to move it to the Selected Columns list. Use the arrows to move it to the top of the list.

Now repeat this step to move all of the fields shown in the selected columns to appear as shown to the right.

4. Click on OK

The Check In window will be displayed again.
5. Select Set Enc.

The Encounter Selection window will open.

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

7. Locate VIP in the Available Columns list and select Move to move it to the Selected Columns list. Use the arrows to move it to the top of the list. Ensure that all of the selected columns appear as shown below before left clicking on OK.
The Check In window will be displayed again.

8. **Select Cancel to exit this window without checking in the appointment.**

*Adding the Health Card Validation Tab to the Inquiry Screens*

* To add the HCV Tab to the Appointment View Screen:

1. Right click on an appointment
2. Select ‘Inquiry’ > ‘Appointment View’
3. The Appointment View window will appear
4. Right click in the grey area shown below and select ‘Preferences’
5. The appointment View preferences window will appear. Left click on HCV on the left side of the screen under available tabs.

6. This will activate the arrow in the centre of the screen. Click on the arrow to move HCV to the right column.

7. Once HCV is placed under the selected tabs side of the screen, the up and down arrows will become active. Use the up arrow to place the HCV tab after the Event Details tab.

* Users should also move the Action History, Action Details, Orders and Warnings tabs to appear after the HCV tab since these are the most commonly used information tabs in this inquiry.

Staff who are using the request list, protocol appointments or recurring series appointments will want to have these tabs appear as shown.

It is not necessary to repeat these steps for the Appointment History View screen under ‘Inquiry’. This is linked to the Appointment View screen and will be automatically changed.