

QUICKSTART

A series of helpful guides provided by the Information Technology Department

Scheduling Appointment View in PowerChart

PowerChart Scheduling Overview

Patient appointments scheduled electronically can be viewed from within PowerChart. You can view a schedule for a single resource (clinician) or for a specific patient.

A few quick set up steps are required in order to view appointments on the Scheduling screen.

Setting up the Scheduling Tab

- Click on the Scheduling icon in the top right of the PowerChart screen
- Task
 Edit
 View
 Patient
 ⊆

 Image: A structure
 Image: A structure
 Image: A structure
 Image: A structure
 Image: A structure
- The **Scheduling** screen will then display (when you first access Scheduling, the whole screen may be grey)

| Scheduling | | | | | 👘 Print 📌 O minutes ago |
|-----------------|----------|------------------|--------------------|-------------|-------------------------|
| Date: 15/01/2 | 013 | | Recent - Resource: | 1 | 两 |
| Time Name 30 | Duration | Appointment Type | | Description | 1 |

• From the Schedule menu, select Preferences.

| Attacl | Change | Contraction of the | Contact Modify Hold | a |
|-------------------|----------------|--------------------|---------------------------|-----|
| Tear Off Attack | Change | Contraction of the | Hold | |
| | | Contraction of the | | |
| BMJ Best Practice | CHW Laboratory | y Colle | 1973 N | 100 |
| | | 1 | Cancel | e |
| | | ALALALA . | No Show | |
| Oshoduling | | | | |
| Scheduling | | | Check In | |
| | | | Check Out | 1 |
| Date: 15/01/2013 | | | Patient Seen | Į |
| Time Name | Duration | Арр | Requests | 1 |
| 30 | | | Verify | T |
| 45 | | | Med Nec Check | |
| 1100 | | | Med Nec Checkin | Į. |
| 15 | | | Lock | L |
| 30 | | | Unlock | ŀ |
| 45 1200 | | | | ł |
| 15 | | | Appointment View | |
| 30 | | | Appointment History View | ŀ |
| 45 | | | Scheduling Reports | |
| 1300 | | | View | |
| 15 | | | TIGTY | |
| 30 | | | Preferences | |

| Schedule - Preferences | | × |
|---|--|---|
| Generic Day View Check In Check Out | | |
| Default resource: | Visible fields: Name Home Phone Work Phone MRN | |
| Show flexible person info Use best encounter filters Always display PM Organization dialog when addin | g encounter | |
| | OK Cancel | |

• To set up the schedule preferences, you will be changing information on the **Generic** tab and the **Day View** tab of the **Schedule – Preferences** dialogue box.

Generic tab of the Schedule - Preferences dialogue box

- Ensure you are viewing the **Generic** tab.
- If required, you can set the schedule to always show patients under a particular clinician. This is known as a default resource. To do this, click in the **Default resource** field enter the clinician's name in the format of *surname, first initial.*

Note: If you need to view schedules for multiple resources then leave the default resource blank.

• The **Person/encounter preferences** are displayed back in the schedule when you hover your mouse over a scheduled patient's name.

| Schedule - Preferences | × |
|---|----|
| Generic Day View Check In Check Out | |
| Default resource: | |
| 神 | |
| Person/encounter preferences Available fields: | |
| Social Security Number Language VIP Order(s) Diagnosis Under(s) Diagnosis | |
| ✓ Show flexible person info | |
| Use best encounter filters | |
| Always display PM Organization dialog when adding encounter | |
| | |
| OK Cance | el |

• Add the following fields:

MRN, Name, Birth Date, Gender, Home Phone, Work Phone

• Select the required field in the Available fields pane.

- Click on the button depicting a right-pointing arrow to move the field into the Visible fields pane.
- Repeat for all other required fields.

Note: Visible fields maybe removed by highlighting the field from the **Visible fields** pane and clicking on the left arrow.

Day View tab of the Schedule – Preferences dialogue box

- Click on the Day View tab.
- Select the following fields from the Available columns pane.

Status, Appointment Type, Name, Duration, Location

| Columns: Available columns: PT: Time Template | | Visible colum Status Appointmer | | | |
|--|---------|--|----------|---|--|
| Description PT: Location Order(s) Diagnosis Patient Seen Wait Time (min) | | Appointmer Name Duration Location | к туре | | |
| Expand to fill screen | | | | | |
| Time St Appointment Type 1200 15 | | Name | Duration | L | |
| ime interval: | | | | | |
| 15 | • | | | | |
| | | | | | |

- Click on the right arrow to move the item into the Visible columns pane.
- Ensure that the Expand to fill screen checkbox is ticked.

Expand to fill screen

• Click on OK.

Viewing a clinician's daily schedule in PowerChart

• In the **Date** field, type in the required date or select using the drop-down arrow.

| Date: | 15/01/2013 | |
|-------|------------|--|
| | | |

• In the **Resource** field, type in the surname of the clinician's schedule that you want to view, and click on the binoculars button. If there is only one matching resource, the schedule will load. If there are multiple matching resources, you will be prompted to select the resource:

| nnett, David | | |
|--------------|--------------|--------------|
| l | nnett, David | nnett, David |

| Date: | 08/01/2013 | Recent - Resource: Be | ennett, David | | | ĝ. |
|----------|-----------------------------|-----------------------|---------------|----------|----|----|
| | tatu Appointment Type | | Name | Duration | Lc | - |
| 45 | | | VELLEVER | | | |
| | onfi Adolescent Complex New | | KELLEHER, | Va01:00 | Ac | |
| 15 30 | | | | | | |
| 45 | | | | | | |
| 200 | | | | | | |
| 15 | | | | | | |
| 30 | | | | | | |
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| 15 | | | | | | |
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| 45 | | | | | | |
| | lo S Adolescent Complex F/U | | SOBHI, Eve | Sa 01:00 | Ac | |
| 15 | | | | | | |
| 30 | | | | | | |
| 45 | | | | | | |
| 15 | Che Adolescent Complex F/U | | MCLAUGH | LI 01:00 | A | |
| 30 | | | | | | - |
| 30 45 | | | | | | |
| 40 | | | | | | |
| 15 | | | | | | |
| 30 | | | | | | |
| 45 | | | | | | |
| 00 | | | | | | |

- *Note:* If you have selected a default resource, this will be displayed automatically. To change, just delete and enter new resource name.
- *Note:* By hovering the cursor over the top of a patient's name the information set up in the **Generic** tab of the preferences is displayed.

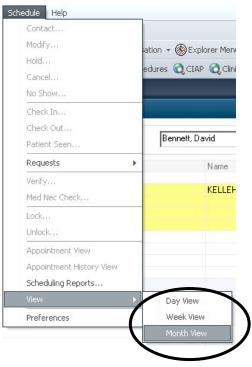
| 30 | | | | | |
|--|---------------|------------|-------|-----------------|--|
| 1000 MONSTER, Cookie | Endocrine New | Checked In | 01:00 | Endocrine Clin2 | |
| 30 MP: No Visitors: Name: MONSTER | | | | | |
| VIP: No Visitors; Name: MONSTER, 1100 Cookie; Home phone: N/A; Work | Endocrine New | Confirmed | 01:00 | Endocrine Clin2 | |
| 30 phone: N/A; MRN: 1014023 | | | | | |
| 1200 KIDMAN, Nicole | Endocrine New | Confirmed | 01:00 | Endocrine Clin2 | |

Note: Double clicking a patient opens the patient chart

Viewing a clinician's weekly or monthly schedule in PowerChart

The current view can be changed from a day view to either a Week View or Month View.

• From the Schedule menu, select either Week View or Month View.



Viewing a specific patient's schedule in PowerChart

PowerChart also provides the ability to display past and future appointments for an individual patient.

- Open the patient's chart. From the Scheduling screen you can do this by double-clicking on the patient's name.
- Select the Appointments item from the Menu.

| EST, Peter 🛛 🗶 | | | A | | | | | | cent 👻 MRN |
|--------------------------------------|----------------------|---------------|-------------------|-------------------|--|--------------------|---------------------|---|--|
| EST, Peter | | | Age:8 y DOB:01 | /ears /01/2005 | ľ | IRN:999999 | 97 Locati Wait L | | |
| * Allergies ** | Gender:Male | | No Non- | Clinical Ale | rts Recorded | | | | |
| Menu | 📍 < 🖂 - 👘 A | ppointmen | ts | | | | | | 🛑 Print 🍣 O minut |
| Allergies | | | | | | | | | |
| Appointments | Summary | | | | | | | | |
| Ilinical Notes | Cancellations by Pat | ient: 1 | | Resched | dules by Patient: no | ne | No Shows | 26 | |
| Prowier | Other Cancellati | ons: 150 | | Othe | er Reschedules: 13 | 3 | | | |
| Growth Charts | Future Appointm | ents | | | | | | | |
| | Begin Date/Time D | uration State | Appointr | ment Type Ap | pointment Reason | Primary Resource L | ocation | | |
| Orders 🕇 Ad | d | | | | | | | | |
| Problems/Alerts & Demographics | | | | | | | | | |
| | | | | | | | | | |
| Results last 7 days (no Blood Gases) | Past Appointmen | nts | | | | | | | |
| 5ummary - Clinical | Begin Date/Time | Duration Sta | ite | Appointment T | уре | | Appointment Reaso | on Primary Resource | Location |
| Johnmary - Cainicar | 28/11/2012 • 11:40 | | | SSR Bladder F | | | | Caldwell, Patrina | SSR Renal |
| | 27/09/2012 • 09:00 | | | Pre Admission | | | | Pre Admission Nurse | Preadmit Clin 1 |
| | 20/09/2012 • 10:30 | | | Pre Admission | | | | Pre Admission Nurse | Preadmit Clin 1 |
| | 05/08/2012 • 10:30 | | | | gy Daytime Video E nu Video Telemetru | Eli | | Neurophysiology Room 1 Video Telemetru Machine | Department of Neuro Department of Neuro |

• Information regarding future and past appointments will be displayed:

| BEG DATE: | Appointment date and time. |
|------------|---|
| DURATION: | Length of Appointment |
| STATE: | Current state of Appointment. i.e. Confirmed. |
| APPT TYPE: | Appointment Type |
| RESOURCE: | Name of Clinician |
| LOCATION: | Clinic location |
| | |