

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.

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Date: 15/01/2013			Patient Seen	Į
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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	-
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- *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.

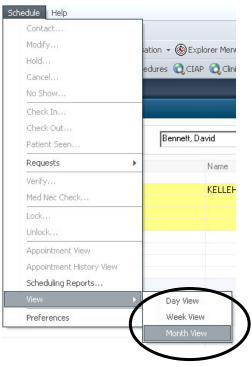
30					
1000 MONSTER, Cookie	Endocrine New	Checked In	01:00	Endocrine Clin2	
30 MP: No Visitors: Name: MONSTER					
VIP: No Visitors; Name: MONSTER, 1100 Cookie; Home phone: N/A; Work	Endocrine New	Confirmed	01:00	Endocrine Clin2	
30 phone: N/A; MRN: 1014023					
1200 KIDMAN, Nicole	Endocrine New	Confirmed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

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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				
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Allergies									
Appointments	Summary								
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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							
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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