Note this document was generated from an archived project with the trial version of MadCap Flare, so text is scrambled.

OR Manager Scheduler User Guide

Picis Perioperative and Critical Care 10.0

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Contents

1

Introduction

Welcome

Welcome to the OR Manager Scheduler User Guide for Picis Perioperative and Critical Care [illegible]

OR Manager Scheduler (henceforth referred to as OR Scheduler) allows scheduling staff to identify available time slots for patients while taking room, resources, and equipment into consideration.

Note:

For the following activities, you must use OR Manager:

- Creating and maintaining [illegible] entries (for drop-down list items and other settings for both OR Manager and OR Scheduler)
- Creating Pre-admit Test (PAT) bookings (you can use OR Scheduler for viewing and cancelling them)
- Viewing and printing schedule reports
- Printing picklists and soapsheets
- Creating [illegible] billing [illegible]
- Creating preference cards for surgeons and procedures (for generated picklists and soapsheets)
- [illegible] case record [illegible] (including [illegible] for billing and supply management)

- Accessing SmartTrack
- Running reports

For more information, see the following guides:
- DR Manager User Guide
- DR Manager Configuration Guide
- SmartTrack User and Configuration Guide

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Basic Concepts and Skills

This chapter covers the basics about how to log on to OR Scheduler and how to navigate through the system's screens.

Topics in this chapter include the following:

- Logging On below
- OR Schedule Screen on the next page
- Physician Office Link on page [illegible]
- Block Times on page [illegible]
- Booking Modes on page [illegible]

Logging On

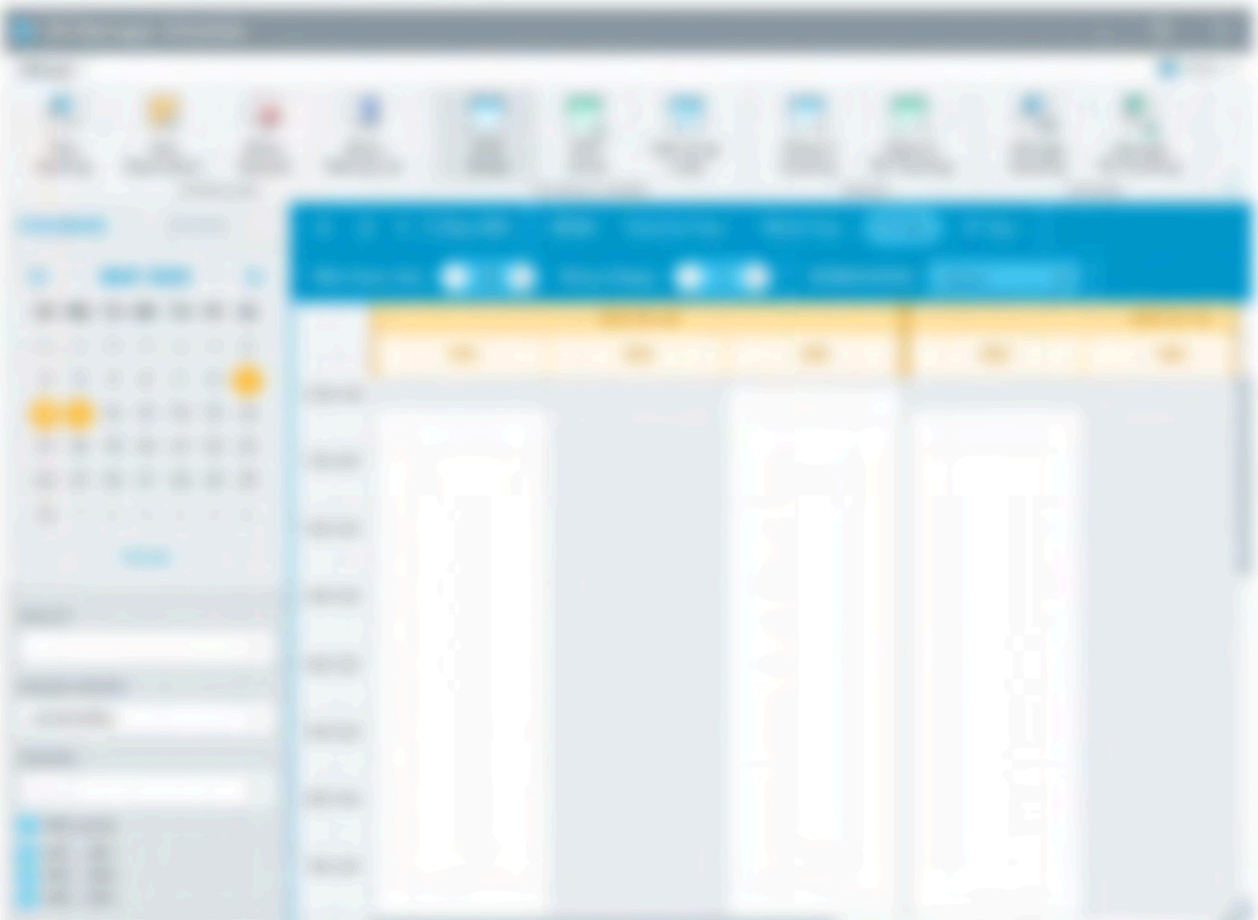
Note: The OR Scheduler icon is generally available on the Windows Start menu:
Start > Picis Desktop > OR Scheduler
It may also be present on the desktop.

1. Double-click the OR Scheduler icon.
   The Picis log-on screen appears.

2. Enter a valid user name and password (case-sensitive) to log on and then click **OK**.

> **Note:** Whether or not the **Change Password** button is present in login window depends on your system configuration (if Directory Services Authentication is used it will never be present). If configured by your site, there is also a control for choosing the **Domain** to log on as.

OR Scheduler Screen



When you open OR Scheduler it shows the OR Mode Schedule Viewer screen by default. This is considered as the "Home" screen in OR Scheduler. A ribbon at the top on the main window provides access to the following program functions.

RIBBON SECTION	BUTTON	ALLOWS YOU TO...
SCHEDULING	New Booking New Reservation New Request New Waiting List	• Start a new booking, reservation, request or waiting list entry. **Note:** For brevity, in some parts of this guide, bookings, reservations, requests and/or list entries are collectively referred to as appointments.
SCHEDULE VIEWER	OR Mode	• View the OR schedule • Break an OR booking or reservation • Convert an OR booking or reservation to a request or wait list entry • View, edit or book an OR booking • Cancel an OR booking • Release a block (See the note following this table) • Add a comment to a time slot
	PAT Mode	• View the PAT room schedule • Cancel a PAT booking • Release a block (See the note following this table) • Add a comment to a time slot
	Rearrange a Day	Rearrange the bookings in a day. **This button opens OR Manager.**

RIBBON SECTION	BUTTON	ALLOWS YOU TO...
SEARCH	Search Bookings Search PAT Bookings	Search for OR or PAT bookings to perform the following: • View or edit a booking • Show a booking in the schedule viewer • Copy a booking to create a new one • Cancel a booking • Rebook a canceled booking • Convert an OR appointment to a wait list entry
MANAGE	Manage Bookings Manage PAT Bookings	These buttons open OR Manager, so you are able to perform the following for existing bookings: • View and print surgeon reports • Print picklists and worksheets • View booking audit trails For more information, see the OR Manager User Guide.

Note: "OR block times are time segments reserved for specific surgeons, specialties, procedure categories, groups, patient bed types, or any combination of these things. A PAT block time is a time segment reserved for a specific PAT booking status. For more information, see the OR Manager Configuration Guide.

When you open the program the ribbon is open by default. You can minimize the ribbon so that it only appears after you click the Home tab (as soon as you click elsewhere it will hide again).

Hide (minimize) the ribbon

» In the bottom right corner of the ribbon, click the up arrow.

Temporarily show the ribbon (when minimized)

Home

- At the top left of the screen, click the **Home** tab.

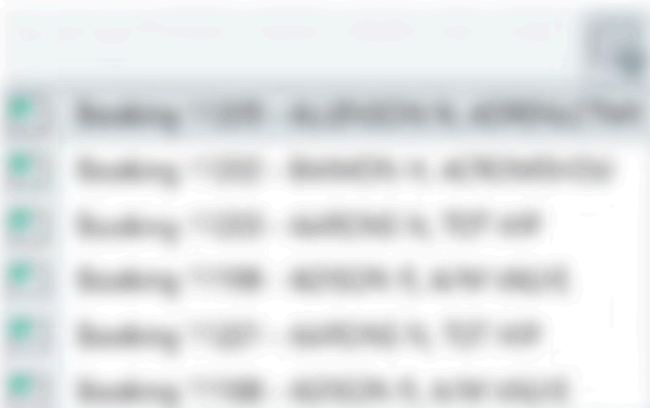
Permanently show the ribbon (when minimized)

1. At the top left of the screen, click the **Home** tab.
2. In the bottom right corner of the ribbon, click the pin icon.

Recent Bookings

The following button appears on the far right of the ribbon as soon as you have created, viewed or edited an appointment:

Clicking the button shows a list of the last 10 appointments that you have worked with at this workstation:



You can quickly access any appointment on the list by clicking it. The appointment opens for editing unless you do not have editing permissions or it is locked by another user, in which case it opens read only.

Booking Modes

Type	Description
Booking	A booking has a date/time and a room and appears on the scheduling grid. When a booking is created it is checked for conflicts of all types. A booking is considered to be "Active". this means it can be used to initiate a case record in OR Manager.
Reservation	A reservation has a date/time and a room and appears on the scheduling grid. However, unlike a booking, when a reservation is created it is only checked for a reduced list of conflict types. A reservation must be converted to an active booking before it can be used to initiate a case record. A scheduler typically creates a reservation while waiting for resource conflicts to be resolved.
Request	A request has a date/time, but does not have a room, does not appear on the scheduling grid, and is not checked for conflicts. Requests can be accessed via the Search Bookings window. A request must be converted to a reservation or active booking for it to appear on the scheduling grid (an active booking is needed to initiate a case record). A scheduler typically creates a request when he/she is not authorized to override a conflict.
Wait List	A wait list entry does not have a date/time or room, does not appear on the scheduling grid, and is not checked for conflicts. Wait List entries can be accessed via the Search Bookings window. When creating a wait list entry, the user is prompted to enter a priority that can be used for sorting data. A wait list entry must be converted to a reservation or active booking for it to appear on the scheduling grid (an active booking is needed to initiate a case record). A scheduler typically creates a wait list entry when first receiving a petition for surgery (from a Physician Office or specific unit) when the target is, especially if a preferred time has not be selected.

Note:

- You can use OR Scheduler to edit all appointment types and, if necessary, change the booking mode. (For example, to change a booking to a wait list entry.)
- Reservations and requests appear in the "Request Inbox" in OR Manager. You can also see them in search results from the Seeing Bookings window.

The following table shows a summary of the differences:

	Has Date/time?	Has Room & Appears in grid?	Shown in OR Manager "Request Inbox"?
Booking	Y	Y	NO
Reservation	Y	Y	Y
Request	Y	NO	Y
Wait List	NO	NO	NO

Block Times

Block Times are time segments reserved for a specific purpose in a particular room. They are created in the Rooms dictionary using OR Manager. (For information on creating block times, see the OR Manager Configuration Guide.)

For OR rooms, block times can be reserved for surgeons, procedures, procedure categories, groups, patient hold types, or any combination.

Example: Dr. Miller might reserve RM01 every Monday and Wednesday from 1300 to 1500, or RM04 might be reserved every Friday morning for cosmetic surgeries.

Block times are either primary or secondary rank blocks:

- Primary Rank blocks are the first-level room reservations.
- A Primary Rank block may have an associated Secondary Rank block. These blocks automatically reserve unused block time if the associated Primary Rank Block is released.

Example: You might have a surgeon block time which would be released to the surgeon's group if not booked within 48 hours of the surgery, then released to general booking if unused within 24 hours of the surgery.

For PAT rooms, block times can be reserved for specific PAT working statuses.

Example: Nursing staff reserve Friday afternoons for telephone surgery PAT tasks (with a status of "By Phone").

Physician Office Link

OR Manager and OR Scheduler may be installed in physicians' offices outside of a hospital to enable doctors to schedule surgeries. Such a setup is referred to as a Physician Office Link.

Users receive a surgical appointment directly in OR Scheduler. The reservation process is most often used by facilities that utilize assigned block times. The requested time is added on the schedule by the physician's office as a 'reservation' until the scheduler at your facility either confirms or rejects the requested appointment. Surgeon's offices can 'reserve' in their block of time, as well as 'request' out of block time.

Using a Physician Office Link requires high-speed access to the hospital server, which can be achieved in the following ways:

- Remote office has direct access to the network.
- Remote office has access to the network through a Virtual Private Network.
- Remote office can use OR Scheduler via a Citrix connection, which requires an additional dedicated server.

Security Manager restricts access to OR Scheduler functionality in the same way as workstations and users are restricted within the hospital. However, the **Physician Office Link** tab in Security Manager provides further restrictions. For more information, see the Security Manager User Guide.

Drop-down List Filtering

All drop-down lists in the product have a "code" column and may have additional columns. For example, the following screenshot shows a list with three columns. The "code" column is labeled "Surgeon Code".

[illegible]

Star search

[illegible]

Note: Star searches are not case sensitive.

[illegible]

[illegible]

Multi-string Search

[illegible]

Example: To find the dictionary entry for the procedure description "excision ganglion", enter the following text:
"excis, g n"

Example: To find all procedures whose descriptions contains the text "amputation" and whose CPT code contains the text "180", enter the following text:
"amputation, 180"

Note: The order of the strings does not matter.

3

Scheduling

General Scheduling Workflow

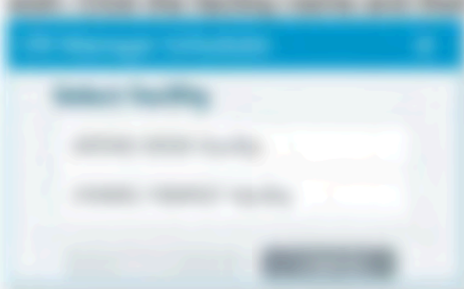
The high-level workflow for creating a new booking, reservation, request, or wait list entry is as follows:

1. Click the appropriate ribbon button to start the process: **New Booking**, **New Reservation**, **New Request**, **New Wait List**.

   For bookings and reservations you can also start by right-clicking a time slot for a room in the Schedule Viewer. In this situation, the room and date/time in the Booking Options default to the room and date/time that you right-clicked.

   (You can also start a new booking with the CTRL + B key combination.)

   Note: If your hospital is a multi-facility installation, and this is the first time that you are using OR Scheduler, you will be shown a window for you to select the facility that you want to work with. Click the facility name and then click **SELECT**.

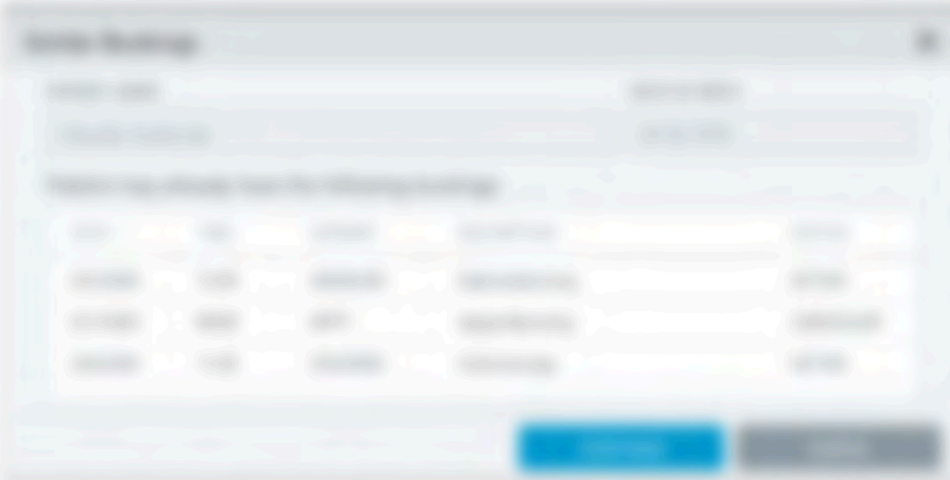
The scheduling screen appears.

2. The currently selected facility will be shown at the top of the scheduling screen. If your hospital is a multi-facility installation and you want to work with a different facility, click **CHANGE** next to the facility name.
3. Click the Booking Options button in the top left of the scheduling screen and set the options that you want:
   - **Wait List** entries: Set the Wait List Priority.
   - **Requests**: Set the date/time.
   - **Bookings** and **Reservations**: If you already know the exact date/time or room you can select them here. Otherwise, you can set them later in the Booking Grid tab.
4. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
5. In the **Patient** tab, enter a patient and the bed type.
6. In the **Forms** tab, enter required data plus any optional data as needed. (Note that the forms and their contents depend on the selected procedure.)
7. For Wait List entries and Requests, and for Bookings and Reservations that already have a date/time and room set in the **Booking Options**:
   - Click **SAVE** to complete the process. If there are any conflicts, cancel or override them (if they are overridable). A message will be shown to indicate that the save action was successful.
8. For Bookings and Reservations that do not already have a date/time and room set in the **Booking Options**:
   - In the **Booking Grid** tab, right-click the time slot you want and click **Book here**. Then click **SAVE** to complete the process. If there are any conflicts, cancel or override them (if they are overridable). A message will be shown to indicate that the save action was successful.

Note: The scheduler screen also includes a read-only "Booking Notes" tab. This tab shows notes from the Booking Notes dictionary (in OR Manager). The notes shown depend on the selected surgeon, procedure and date.

Similar Booking Check

When creating an appointment, a "Similar Bookings" window may be appear if there are any patients with similar names or birth dates who have been booked for procedures within a certain number of days before or after the booking you are making. The criteria for displaying the window are configured by your hospital and may depend on the appointment type and status.



Based on the information shown in the window the user can click **CONTINUE** to proceed with saving the appointment or can click **CANCEL** to cancel it.

The Similar Bookings window helps avoid situations such as the following:

- Booking the patient for the same surgery in different rooms on the same day
- Booking the patient for the same surgery on different days
- Booking the patient for a different surgery without providing enough recovery time after the first
- Booking the patient for different surgeries when the procedures could have been combined in the same surgery

Note: The Similar Bookings window may also be shown if the criteria are met when moving or editing an appointment.

Specific Scheduling Workflows by Appointment Type

Note: The following workflows assume you have already selected a facility to work with.

Create a New Booking

Create a new booking via the New Booking button

1. Click **New Booking** (or use the CTRL + N key combination).
   The scheduling screen appears.
2. If you already know the exact date/time or room you can select them using the **Booking Options** button in the top left of the scheduling screen. Otherwise, you can set them later in the Booking Grid tab.
3. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
4. In the **Patient** tab, enter a patient and the bed type.
5. In the **Forms** tab, enter required data plus any optional data as needed. (Note that the forms and their contents depend on the selected procedure.)
6. If you have already selected the room and date/time in the Booking Options window, you can go ahead and click **Send** to complete the process.
7. On the **Booking Grid** tab, right-click the time slot you want and click **Book here**. Then click **Send** to complete the process.

Note: If there are any conflicts, cancel or override them (if they're overridable). A message will be shown to indicate that the save action was successful. For more information on conflicts, see Validation Errors and Conflicts on page 00.

Create a new booking directly in the OR Mode Schedule Viewer

1. Right-click a time slot for a room in the Schedule Viewer and click **New Booking**. (The room and date/time in the Booking Options default to the slot and date/time that you right-clicked.)
2. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
3. In the **Patient** tab, enter a patient and the bed type.
4. In the **Forms** tab, enter required data plus any optional data as needed. (Note that the forms and their contents depend on the selected procedure.)
5. Click **Send** to complete the process.

Note: If there are any conflicts, cancel or override them (if they are overridable). A message will be shown to indicate that the save action was successful. For more information on conflicts, see Validation Errors and Conflicts on page 00.

Create a New Reservation

Create a new reservation via the New Reservation button

1. Click **New Reservation**.
   The scheduling screen appears.
2. If you already know the exact date/time or room you can select them using the **Booking Options** button in the top left of the scheduling screen. Otherwise, you can set them later in the Booking Grid tab.
3. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
4. In the **Patient** tab, enter a patient and the bed type.
5. In the **Forms** tab, enter required data plus any optional data as needed. (Note that the forms and their contents depend on the selected procedures.)
6. If you have already selected the room and date/time in the Booking Options window, you can go ahead and click **SAVE** to complete the process.
7. In the **Booking Grid** tab, right-click the time slot you want and click **Book here**. Then click **SAVE** to complete the process.

Note: If there are any conflicts, resolve or override them (if they are overridable). A message will be shown to indicate that the save action was successful. For more information on conflicts, see Validation Errors and Conflicts on page 25.

Create a new reservation directly in the OR Mode Schedule Viewer

1. Right-click a time slot for a room in the Schedule Viewer and click **New Reservation**. (The room and date/time in the Booking Options default to the room and date/time that you right-clicked.)
2. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
3. In the **Patient** tab, enter a patient and the bed type.
4. In the **Forms** tab, enter required data plus any optional data as needed. (Note that the forms and their contents depend on the selected procedures.)
5. Click **SAVE** to complete the process.

Note: If there are any conflicts, resolve or override them (if they are overridable). A message will be shown to indicate that the save action was successful. For more information on conflicts, see Validation Errors and Conflicts on page 25.

Create a New Request

Create a new request via the New Request button

1. Click **New Request**.
   The scheduling screen appears.

   > **Note:** Requests do not have a room, so are not checked for conflicts. Also, the date/time defaults to 'today'.

2. If you already know the exact date and time you can enter this information using the **Booking Options** button in the top left of the scheduling screen.
3. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
4. On the **Patient** tab, enter a patient and the bed type.
5. In the **Forms** tab, enter required data plus any optional data as needed. (Note that the forms and their contents depend on the selected procedure.)
6. Click **SAVE** to complete the process.

Create a New WaitList Entry

Create a new waitlist entry via the New WaitList button

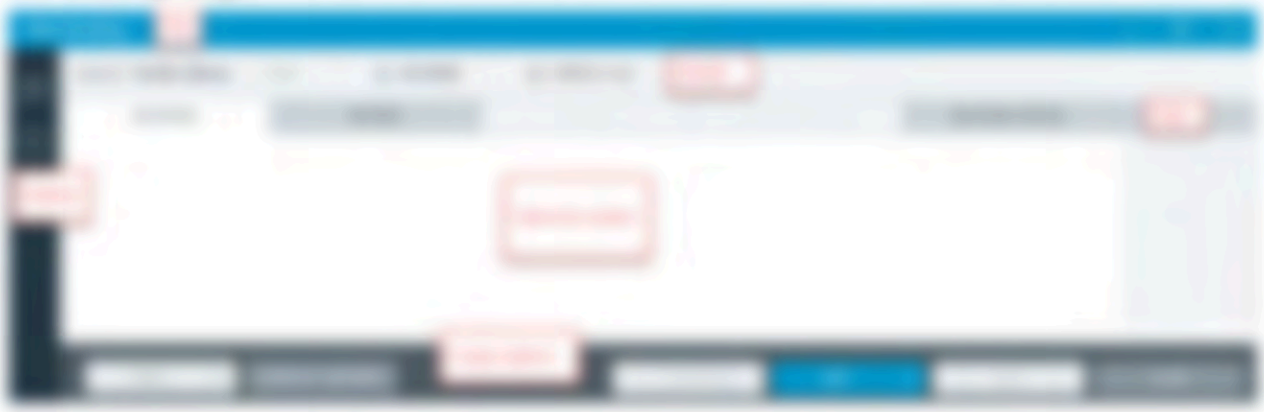
1. Click **New WaitList**.
   The scheduling screen appears.

   > **Note:** Waitlist entries do not fit in a room or date/time and are not checked for conflicts.

2. In the **Booking Options** window, enter a **Waitlist priority**.
3. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
4. In the **Patient** tab, enter a patient and the bed type.
5. In the **Forms** tab, enter required data plus any optional data as needed. (Note that the forms and their contents depend on the selected procedure.)
6. Click **SAVE** to complete the process.

Booking Window

Regardless of the Booking Mode, the booking window has the same general structure, as shown in the following image.



Title
Shows the following information:

- New appointment type or booking ID (for existing bookings)
- Patient Name (when set in the Patient tab)
- Primary Surgeon
- Primary Procedure

Header
Allows you to select a facility and shows the following information:

- Surgery date and time (except for wait list entries)
- OR room (when set in the Booking Options or Booking Grid tab)
- Patient ID no (when set in the Patient tab)

Sidebar
Contains a Booking Options button and an Issues button.

- The Booking Options button allows you to select the booking mode, and where relevant, the surgery date and time, OR room and Wait List priority.
- The Issues button allows you to see conflicts for the booking.

Tabs
The following tabs are available:

- Booking
- Patient
- Forms (this tab becomes available after you have selected a patient)
- Booking Grid (if the booking mode is booking by reservation). (This tab becomes available after you have selected a surgeon, procedure and patient.)
- Booking Notes

Footer buttons
The footer buttons help you check for issues and move through the workflow for creating a booking.

> **Note:** For existing bookings, the footer also includes a **Cancel** button with which a user can cancel the booking. (Users can also cancel a booking from the right-click menu in the OR Book Schedule Viewer.)

Print booking notes and/or patient instructions

- Click **Paper**.

For more information, see Booking Notes Tab on page [illegible].

> **Note:** This button is disabled if there are no notes on the **Booking Notes** tab.

Check for validation issues and conflicts

- Click **Conflict Checking**.

For more information, see Validation Errors and Conflicts on page [illegible].

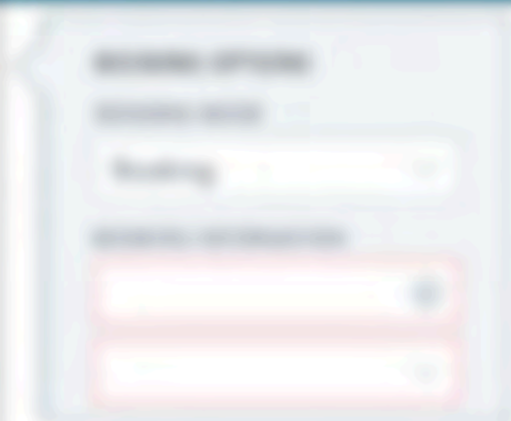
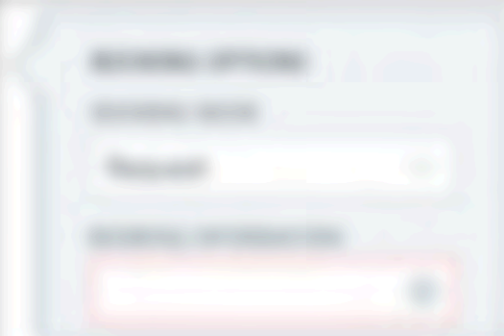
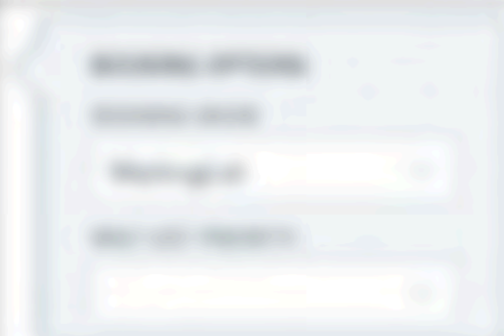
Open a tab

- Directly click the tab or use the **PREVIOUS** and **NEXT** buttons to navigate to the tab that you want.

Booking Options

The Booking Options window is accessed from the Booking Options button at the top of the scheduling window sidebar.

The window contents depend on the booking mode you are working with, as shown in the following table.

Booking Mode	Booking Options Window	Values
Bookings [illegible] reservations		• [illegible] • [illegible]
Requests		• Date/time
Wait List		• (Optional) Wait List Priority

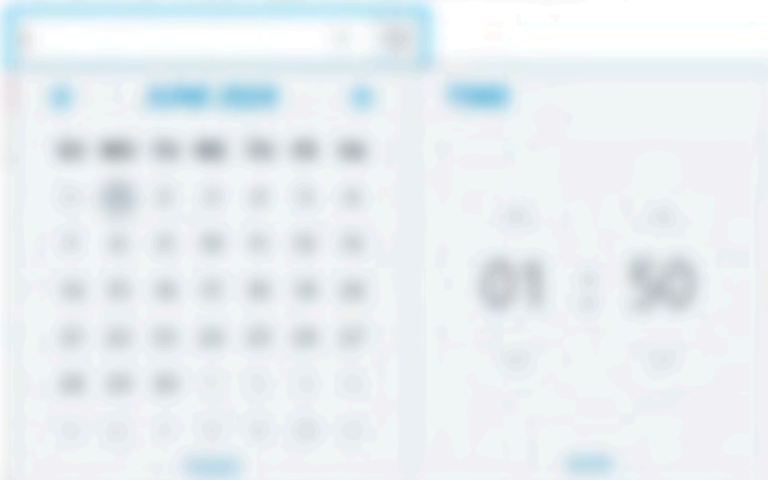
Change the booking mode

- Click the field labelled **Booking Mode** and select the required scheduling type.

Select a date/time for the booking

(This procedure applies to all booking modes except Wait List entries)

1. Under **Booking Information**, click the calendar symbol.
   The calendar picker appears beneath the field.



2. Select the date and time for the start of surgery and then click anywhere outside the picker to close it.
   (You can quickly select the current date and time (rounded up to the next grid interval) with the **TODAY** and **NOW** buttons, respectively.)

Note: A configuration parameter limits the number of days in advance that a procedure can be booked.

Note: If the [illegible] is implemented, the date and time will be selected automatically and cannot be edited.

Select a room

(This procedure applies to bookings and reservations only.)

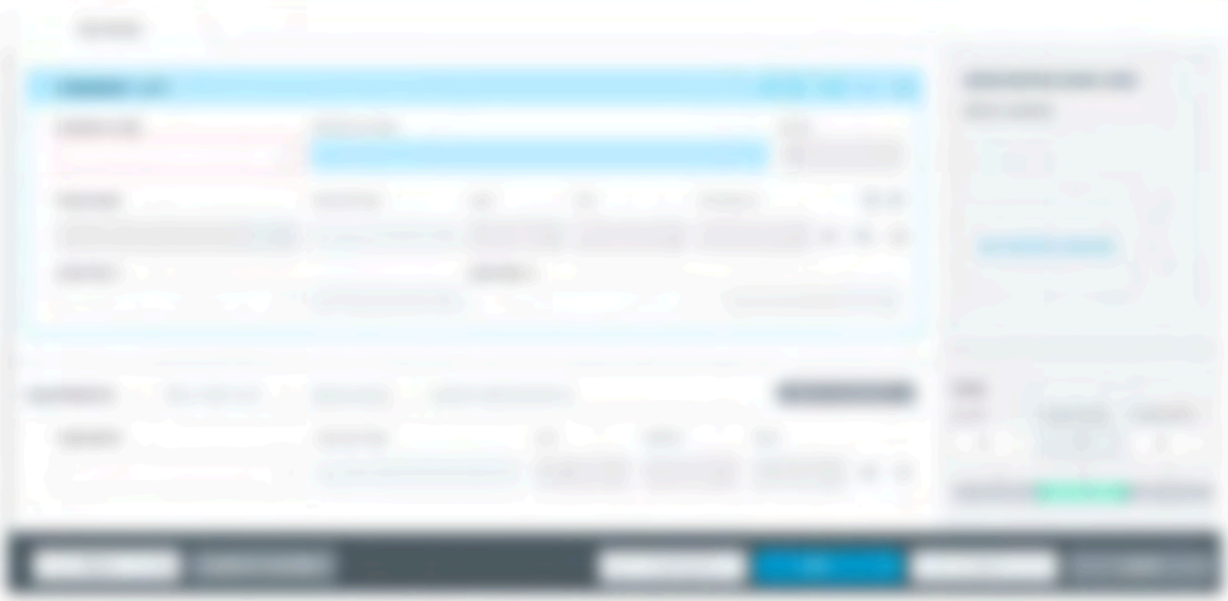
- In the field at the bottom of the window, click the drop-down arrow and then select a room.

Select a Wait List priority

(This procedure applies to wait list entries only.)

- Click the **Wait List Priority** field and select a priority for this entry.

Booking Tab



The **Booking** tab is available for all booking modes. It allows you to schedule the necessary surgeon, procedure, anesthesiologists, resources, equipment, and equipment/TPR. You are automatically notified about any conflicts with scheduling or authorization, allowing you to make adjustments and re-book the operation.

The **Booking** tab has three basic regions:

- Surgeon: This section includes an information panel for every surgeon involved in the operation.
- Surgeon/Procedure Stats: Provides the option of calculating averages for Complex or Simple cases, and provides an estimate of the total time the surgery should take based on the history of the selected surgeon/procedure combination(s).
- Equipment, TPR, Resources, and Anesthesiologists: Lists the default equipment, [illegible], resources, and anesthesiologists for the operation.

Note: When accessing OR Scheduler via a Physician Office link, restrictions may prevent you from editing certain bookings. For more information, see the Security Manager User Guide.

Surgeon Region

Fields

The following table shows the fields in the Surgeon region of the booking.

Note: Mandatory fields are outlined in red. Surgeon, Procedure and Duration are always mandatory. Whether or not Site and Laterality is also mandatory depends on the system configuration.

	Surgeon Code. The short identifier of the selected surgeon. **Example:** [illegible]
	Surgeon Name. The surgeon's full name. This field populates automatically based on the Surgeon Code selection and cannot be edited. **Example:** Dr. [illegible]
	Offset. This field is only enabled for additional surgeons. It allows you to set the number of minutes into the operation that the additional surgeon starts.
	Procedure. This field becomes available after you have selected a surgeon. Depending on your system configuration, the field will either show all procedures or only those that the selected surgeon is authorized to perform.
	Description. The full procedure name. This field populates automatically based on the procedure selection and it cannot be edited.
	Dur (min). The duration of the procedure. By default, this shows the average time (in minutes) it takes the surgeon to perform this procedure. If the surgeon has not performed enough operations to provide a reliable average, the default value set from the Procedure dictionary is applied.
	Site. The area on the patient's body the procedure is related to, such as leg, abdomen, etc.

	Laterality. The position on the patient for this operation, such as left, right, both, etc.
	Assistant. Up to two assistants per surgeon. **Note**: If two surgeons are working on the same procedure, add one of the surgeons as an assistant; do not add an additional surgeon.

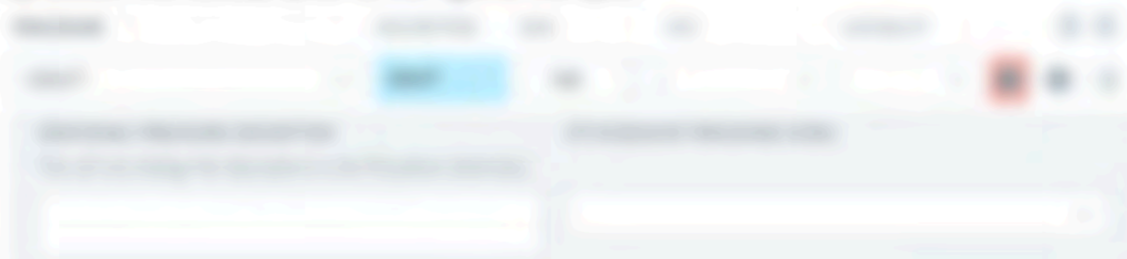
Note: A booking's schedule cannot cross midnight.

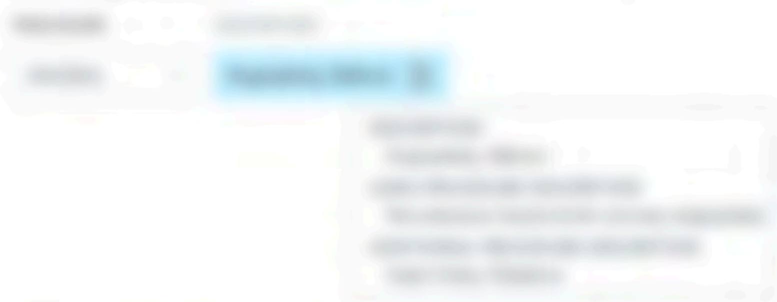
Procedure Related Buttons

The following buttons are available to the right of the procedure information, as described in more detail in the following sections.

Procedure Information

Depending on the system configuration, an "Additional Procedure Description" section may be shown for the Scheduling window by default. If it is not shown, you can show and hide the section by clicking the vertical arrow to the right of the area.





Codes

Additional Procedure for the same surgeon

Additional Surgeon

[illegible]

Note: [illegible]

Add an additional surgeon

1. [illegible]

[illegible]

2. [illegible]

Notes regarding the Offset field

- [illegible]
- [illegible]
- [illegible]
- [illegible]

[illegible]

[illegible]

> **Note:** When you reorder surgeons they remain linked to their procedures. You cannot move a surgeon to a different procedure.

Collapse/Expand surgeon panels

To help you focus on the information you need, you can toggle the visibility of surgeon panels.

- To collapse a panel, click the up arrow to the right in the surgeon heading.
- To expand a panel, click the down arrow to the right in the surgeon heading.

Delete a surgeon

1. To the right of the surgeon, click the "remove" button.
   This button is disabled when there is only one surgeon.

   > **Note:** When you delete a surgeon it also deletes the related procedures. Deleting a procedure does not remove any equipment or resources that were automatically added with the procedure.

2. Edit and/or delete any equipment, trays/sets, or resources that may have been added in association with the surgeon you deleted, regardless of whether they were added manually or automatically.

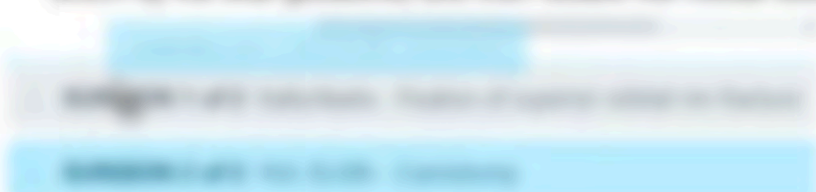
Reorder surgeons – method 1

- Select a surgeon and click the up or down arrows in the surgeon panel heading to move the surgeon to the required position.

> **Note:** These buttons are disabled when there is only one surgeon.

Reorder surgeons – method 2

1. Move the cursor over the pick-up patch to the left of the surgeon.
   The cursor changes and a floating drag box shows the surgeon you have selected.
2. Keeping the mouse button pressed, "drag" the surgeon up or down to the position you want (as shown by the blue guideline) and then release the mouse button to "drop" it.



Staff Filtering by Facility

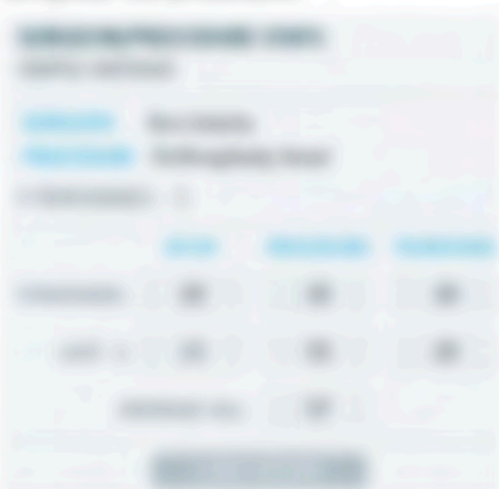
[illegible]

[illegible]

Surgeon/Procedure Stats

Note: [illegible]

[illegible]



[illegible]

[illegible]

[illegible]

Times section

The Times section shows the setup, procedure and teardown times used for the booking.

The **Procedure** value is editable in the **Duration** field. The **Setup** and **Teardown** values are directly editable in the Times section.

Complex Cases

A case with one or more procedures is called a complex case.

As with the simple cases, for each combination of multiple surgeons and procedures, after a pre-configured number of identical cases have been performed the system can calculate surgeon-specific average times which can default into new bookings.

Statistics NOT available

If statistics are not available for a complex case combination, the average times for each procedure/surgeon individually are returned and these average times are combined in the "Times" section on the booking. The **Procedure** value shows the total aggregated time for all procedures in the surgery, the **Setup** and **Teardown** values are the longest times of any of the procedures in the surgery.

For example

	Setup	Procedure	Teardown
Procedure A	[illegible]	[illegible]	[illegible]
Procedure B	[illegible]	[illegible]	[illegible]
Values shown in Times section (used for placing the booking on the grid)	[illegible]	[illegible]	[illegible]

Statistics available

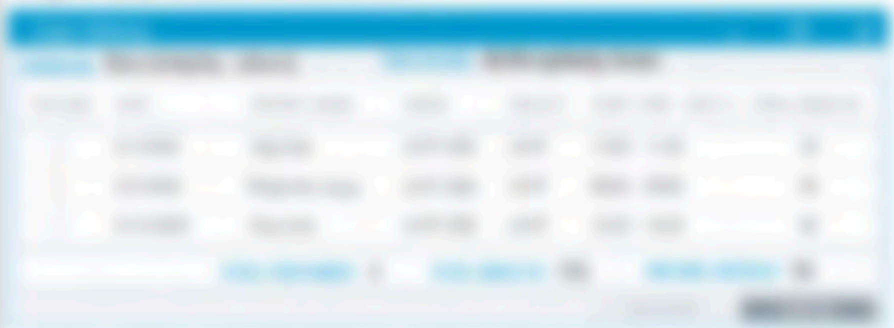
If statistics are available for a complex case combination, new tabs appear in the Surgeon/Procedure Stats section.

The SIMPLE AVERAGE tab shows statistics related to each of the individual surgeon/procedure combinations. (Click a procedure row to see the statistics related to it.)

The COMPLEX AVERAGE tab shows statistics related to the whole combined complex case.

By default, the "Times" section shows the complex average times. You can accept the default times or edit them. If you edit any times, the values shown in the Times section are updated based on the edits that you make and using simple addition of the individual times. (As if statistics for the complex (...) combination were not available.) You can revert back to the complex average statistics (so that they appear again in the "Times" section) by clicking the **APPLY** button.

Fields and Buttons in the Surgeon/Procedure Stats Region

Field/Button	Description
CASE HISTORY	Shows a list from each previous case used to generate the statistics for the surgeon/procedure combination.  The data includes the date, patient, start and finish time, and total minutes. With the proper security access, you can designate some cases as Outliers, which are cases that do not counted in computing **Surgeon/Procedure Stats**. Outliers are typically procedures that [illegible] exceptional circumstances and should not be counted in the averages. **Manually designate a previous case as an outlier** • To the left of the case that you want to designate as an outlier, select **Outlier** and then click **Confirm**. The case is permanently removed from the list and its underlying times are removed from the average calculation.
STANDARD	Only shown for simple cases or on the **Simple Average** tab for a complex case. Shows the standard Setup, Teardown and Procedure times, as declared in the Procedure dictionary.

Field/Button	Description
# PERFORMED	Shows the total number of times the surgeon/procedure combination has been performed.
LAST X (X is a number configured by your hospital)	Shows the average Setup, Teardown and Procedure times for the 1 to X documented cases for the surgeon/procedure. **Note:** Deleted cases, complex cases (more than one procedure), and incomplete cases are not included in these averages.
APPLY	(Button only available in the Complex Average Tab) With complex cases, if you edit the field for a procedure, setup or teardown, the values shown in the Times section are updated based on the edits and using simple addition of the individual times. You can revert back to the complex average statistics by clicking this button. **Note:** If you have not made any edits to these times, clicking this button has no effect.

Equipment, Tray/Pack/Kit (TPK), Resources, and Anesthesiologists

Equipment, **Trays Packs Kits (TPK)**, **Resources** and **Anesthesiologists** default in from the Procedure dictionary. They can be edited for a particular procedure without affecting the defaults in the Procedure dictionary.

Note: Resources relate to additional people, such as Laser Technicians and Circulating Nurses, who assist in surgeries and need to be assigned to a booking for the purpose of conflict checking, not billing.

View Equipment, Trays/packs/kits, Resources, or Anesthesiologist entries; click the corresponding tab.

- To view the Equipment, Trays/packs/kits, Resources, or Anesthesiologist entries applied to the booking, click the corresponding tab.

Add or edit an entity

1. To add an entity, click the corresponding tab and select the entity from the drop-down list on the left.

   This example shows the Equipment drop-down list.
2. For equipment, TPK and resources you must select the quantity.

3. Optionally, for equipment, TPK and resources, you can also set the **Offset** and **Duration** values to specify the number of minutes into the surgery that the entity is needed (Offset) and the length of time for which it is needed (Dur).

   > **Note:** The offset is counted from the setup start tile. If left empty the application assumes a value of 0.

   > **Note:** If the **Duration** field is left empty, the application assumes the duration runs till the end of the appointment.

   > **Note:** The sum of **Offset + Duration** cannot be greater than the whole appointment time including setup, procedure and teardown duration.

> **Note:** For TPK items, the Type field indicates whether the selected item is a tray, pack or kit.

> **Note:** To add another entity, click the plus sign to the right of the previous entity in the same category.

Delete an entity

- To the right of the entity, click the "remove" button.

Restore defaults

- To reset the equipment, SPR and resource fields to their original default values, click **Revert to Defaults**.

Note: This does not affect the Anesthesiologist tab.

Patient Tab

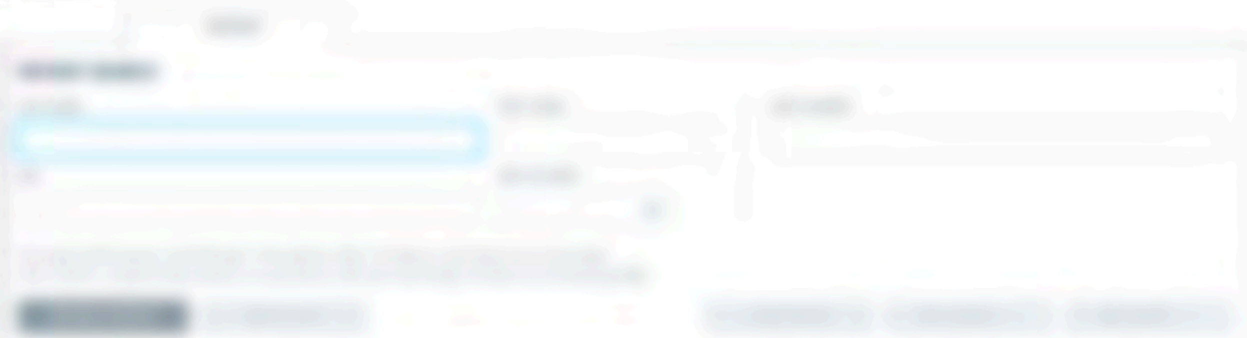
Before a patient is chosen, the **Patient** tab opens with the "Patient Search" view. After a patient has been selected the view changes to the "Standard Patient Details" view.

Note:

In this guide the following expressions are used synonymously:

- Medical Record Index system (MRI)
- Hospital Information System (HIS)
- Health Care Information System (HCIS)
- Clinical Information System (CIS)

Patient Search



The Patient Search view provides demographics fields for you to search for a patient in the system or MRI system. You can also use this tab to create a new patient in the system.

It quickly shows you a list of records that match your search criteria.

After selecting a matching patient record (or creating a new one) you can edit basic demographic data for the patient and then save the patient to the booking.

After you save a patient for the booking, you can no longer edit the basic patient information but you can still access it in a view-only mode. (The exception is the Patient/Bed type, which you can still edit after you have selected the patient.)

Note: You can change the patient before or after it has been saved to the booking.

Best Practice Workflow for Searching

Picis recommends that you search for a patient using different methods in the following order until you find a match:

1. Search the Picis database. Patients in the Picis database have previously had surgery at your facility.

   If the patient is not found, a prompt asks if you want to do an MRN search.

2. Search the MRN system for patients who have been previously admitted to your facility but have not had surgery in the Picis system.

   If the patient is not found, a prompt asks if you want to do a Soundex search (against the MRN system).

3. Perform a Soundex Search. This looks for character combinations that may not exactly match what you put in the **First Name** and **Last Name** boxes but are close.

   Example: Keying in "bask" could bring up patients Bassey, Bell, and Bailey.

Note: Only if you cannot find a match with the previous methods, should you create a new patient record (which gets added in the Picis database).

Search Options

[illegible]	[illegible] • [illegible] • [illegible] • [illegible] **Note:** [illegible] **Note:** [illegible] **Best Practice:** [illegible]
[illegible]	[illegible]
[illegible]	
[illegible]	[illegible] **New Patient** [illegible]
[illegible]	

Search for a patient

1. Enter data in the fields you want to search on and then click the appropriate search button. A list of matching patient records is shown.

(Example results from a Pixis search)

2. Click the patient that you want to use and then click **Select Patient**.

Facility filtering

For searches in the Pixis database, your system will be configured in one of two ways:

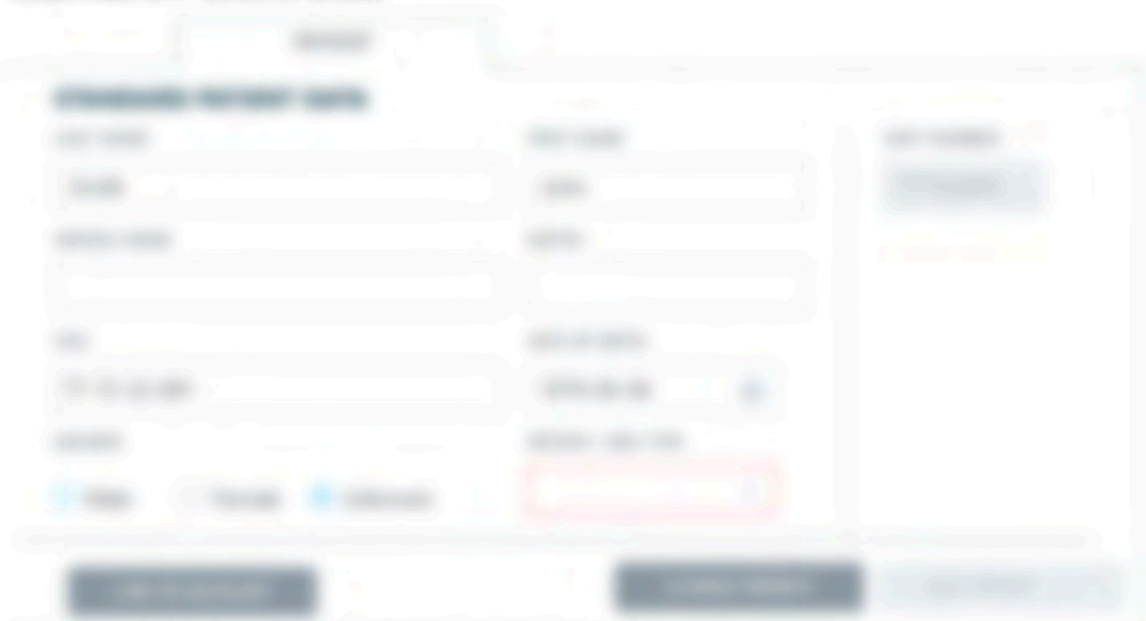
- You can search for patients from any facilities for which you are authorized.

or

- You can only search for patients from the facility that has been selected for the booking.

For searches in the MR system, the search is always restricted to patients from the same facility that has been selected for the booking.

Standard Patient Data



The Patient tab changes to the Standard Patient Data view when you have selected a patient or chosen to create a new patient record.

A configuration setting determines whether SSN, Birth Date and Bed Type is required before the patient can be saved to the booking. (Required fields are outlined in red and the SAVE PATIENT button will only become available when all required fields are entered.)

Note: After you save the patient to the booking only the Bed Type field remains editable.

Enter patient data

1. Enter or edit data in the fields, making sure to fill in any fields outlined in red.
2. Click **Save Patient**.

Changing the Patient in a Booking

You can change the patient while creating a new booking or when editing an existing saved booking.

If you change the patient when creating a new booking (before it is saved) the current patient selection clears and you select another patient in the same way as you selected the original patient.

Note: If you change the patient when creating a new booking after entering data in forms but before saving the booking then any forms data that you have entered will be lost. (You will need to enter the data in the forms again for the new patient as needed.)

If you change the patient for an existing booking, the workflow is different: after selecting the new patient, you must specify whether the new patient is the same as the old one or different. The choice that you make determines whether allergies and precautions for the original patient are combined with the new patient.

In the following procedure, the initial patient on the booking is referred to as the old patient; the replacement patient is referred to as the new patient.

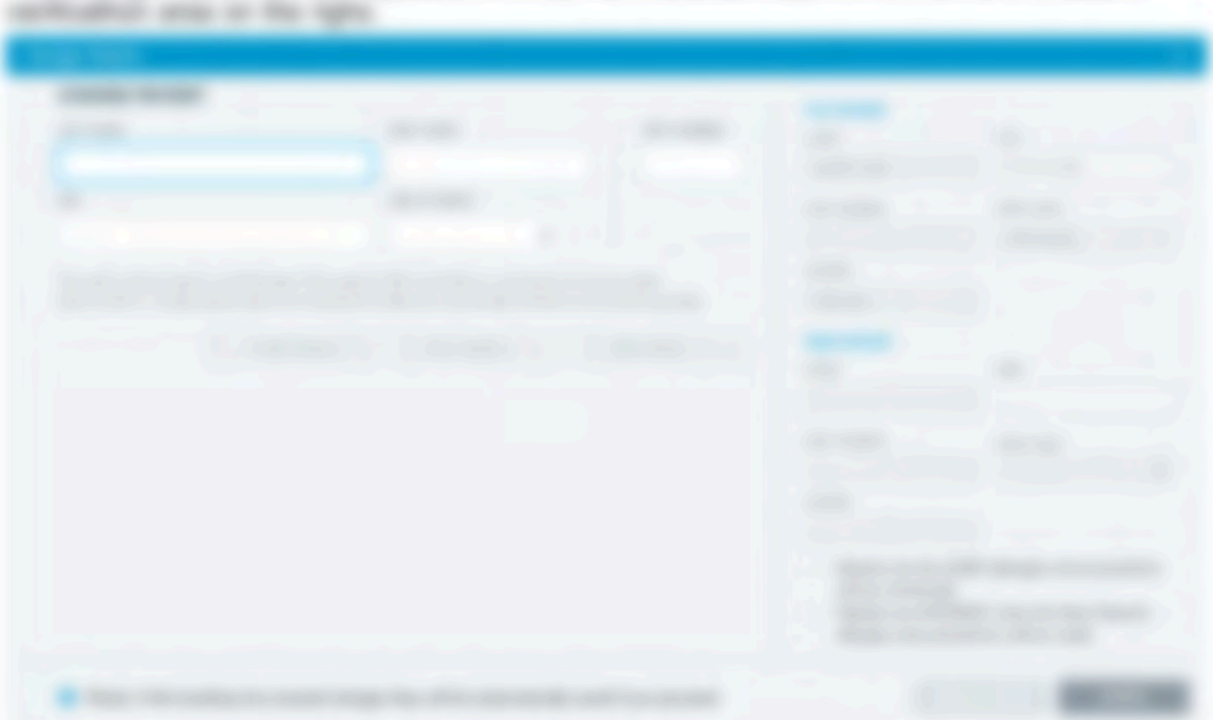
Change the patient while creating a booking

1. In the **Patient** tab, click **Change Patient**.
2. Search for and select the new patient.

Change the patient for an existing booking

1. Open the booking for the old patient.
2. In the **Patient** tab, click **Change Patient**.

   The Change Patient window appears, with a patient selection area on the left and a patient verification area on the right.



3. Search for and select the new patient.
4. Select one of the two options in the lower part of the screen. The text in the screen describes the consequences of each option.
    - **Patients are the SAME**: Old and new patient allergies and precautions are combined.
    - **Patients are DIFFERENT**: Only the new patient's allergies and precautions are used.
5. Click **Change Patient**.

Note: Any unsaved changes in other tabs will be automatically saved when you click this button.

Note: Any account number linked to the original patient is lost during the patient change; you will need to relink it to the updated patient.

Patient Identification Numbers in OR Scheduler

Most [illegible] locations identify patients and patient information by Medical Record Number (MRN).

Note: OR Scheduler and OR Manager use the term Unit Number rather than Medical Record Number.

An organization assigns an MRN (Unit Number) to each patient [illegible], and that number identifies the patient in all future transactions with the organization. Within the issuing organization the MRN is unique. [illegible]

The MRN is most often generated by the hospital admission system [illegible] the MRN and the system "owns" the number, although some [illegible] locations have enterprise master patient index processes for this purpose.

Unlike a patient's MRN (unit number), a patient may have multiple account numbers within the same organization. Account numbers are assigned by the hospital per medical visit, as needed. They are used for billing and other purposes the hospital may have. Depending on the circumstances, when a booking is created the hospital may link to a new account number or choose to relate an account number that was used for a previous booking for that patient.

Example: If a patient undergoes a series of skin graft surgeries, which for billing purposes need to be associated with a single account number. When creating a new booking the user links it to a previously used account number.

If the **Link to Account** button is available you can use this to assign an account number to a booking.

Note: Account numbers are only used for patients in the MRN system. You cannot specify an account number for a patient in the [illegible] database that does not have a [illegible] record in the MRN system.

> **Note:** The ability to add an account number to a booking depends on a system configuration setting as well as your user rights.

Associate an account number with a booking

1. In the **Patient Tab** (Standard Patient Data view), click **Link to Account**.
   The following window appears:

   If the patient already has an account number it will be shown in the top left field.
2. Manually enter an account number. Type the number in the **Enter account Number on Booking Form** field and then click **OK**.

   > ⚠ **CAUTION:** Porto applications do not support the use of recycled account numbers for different patients. If account numbers are recycled, patient information is lost and overwritten by another patient's data.

   OR
3. Automatically associate the booking with an account number that was previously used for this patient. Select a record from the results list and then click **OK**.
4. Click **Save Patient**.

Remove an account number from a booking

1. In the **Patient Tab** (Standard Patient Data view), click **Link to Account**.
2. Click **UNLINK**.

3. Click **OK**.
4. Click **Save Patient**.

Note: This clears the account number from the booking regardless of how it was originally entered.

Forms Tab

Example of the Forms tab

The **Forms** tab is displayed automatically after saving the patient for the booking. (Prior to this the tab is unavailable.)

The tab includes forms for collecting and showing patient-related information and medical information related to the booking.

The forms are configured by your hospital and depend on both the facility and procedure that you have selected for the booking.

Best Practice: Select the procedure in the Booking tab before working with forms. (If you have not yet selected a procedure, you will just see forms that are available for all procedures. After you have selected a particular procedure, more forms may appear.)

Forms are listed on the left of the screen and consist of two types:

- **Patient forms**: Patient forms contain patient data that is not specific to the current visit, such as the patient address.

  Data entered into patient forms stays with the patient from booking to booking. If you are booking a patient who already has a record in the [illegible] system, his/her patient forms fill in automatically and can be updated to reflect changes.

- **Booking forms**: Booking forms contain booking-specific data that is different from visit to visit, such as procedure, surgeon, anesthesia type, etc. Booking forms must be filled in for each new case.

Viewing and Entering Data

Required Fields

The fields that appear on forms can be mandatory, recommended, or have no restrictions.

- **Recommended**: A recommended field has a yellow outline until you enter data for it. Your hospital recommends that you enter data for such a field; however, you can still create a booking without doing so. When saving a booking, you will be warned about missing data for recommended fields, but all users have the ability to override the warnings and proceed with the save.
- **Mandatory**: A mandatory field has a red outline until you enter data in it. When saving a booking, you will be warned about missing data for mandatory fields, but only supervisory users with the necessary system rights will be able to override the warnings and proceed with the save.
- **No restrictions**: You can leave the field blank.

Note: Some hospitals may configure the system such that it does not use colored outlines (or any other formatting) for required fields.

Note: Whether or not a field is mandatory or recommended may depend on certain conditions being met regarding other fields.
For example, if Age is less than 18 then the Next of Kin field becomes mandatory.

Saving Forms

When you have finished entering data in forms, click **SAVE FORMS**.

If any recommended or mandatory data is missing, the Issues window will appear.

The ENTER key

Ability to Edit a Field

> **Example:** When the user specifies that the patient's sex is Female, the field "Is the patient pregnant?" becomes available for editing.

Default values

Some fields may be pre-populated with default values when you first open the form.

Drop-down List Filtering

You can filter any drop-down list by typing in the filter field at the top of the list. As soon as you start typing, the list filters to show only the entries whose mnemonics begin with the text that you have typed.

Multi-line Fields

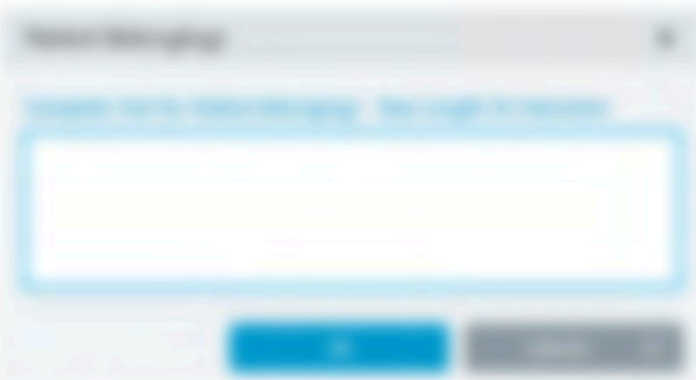
Multi-line fields have one row to start with, but allow you to add new rows as needed. The following buttons can be seen beneath such fields:

- To add a row, click the Add button.
- To delete a row that you have added, click the Remove button.

Text Fields

Free-text fields may allow you to enter more characters than can be displayed in the field. In such cases, the field will have an ellipsis button next to it.

Click the button to open a window where you can enter the full text.



Example text window for a skill named "Pattern Belonging"

Entering Dates

There are two ways to enter dates:

- Using the date picker
- By directly typing in the field

Enter a date using the calendar

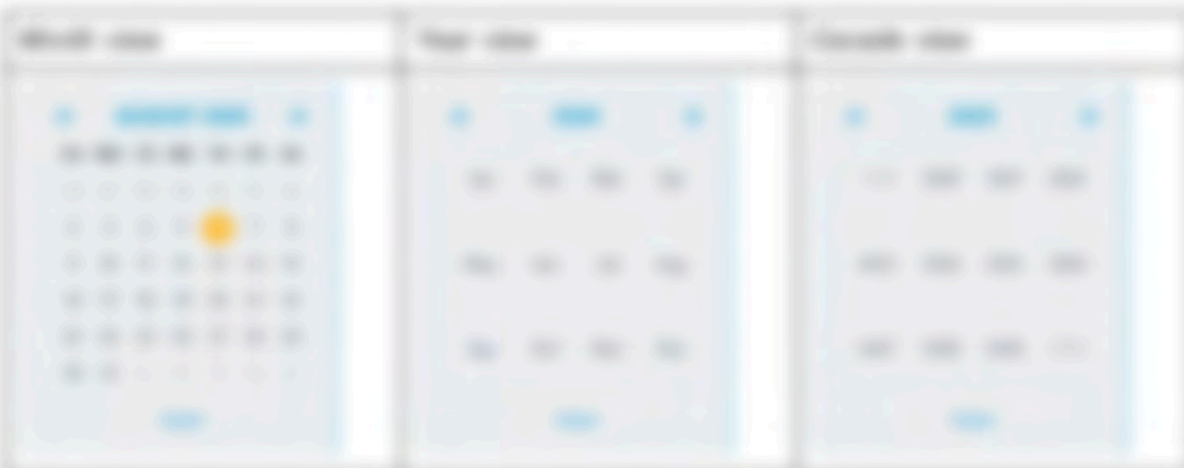
1. Click the calendar icon to the right of the field.
   The calendar appears.

   When you first open the calendar it shows a monthly view. Click the calendar header to zoom the view out from months to years. Click it again to zoom out from years to decades.

   To return (zoom in) to the calendar view you were using before you clicked you must select an item beneath the calendar header.

   Use the left and right arrows to move between months, years or decades, depending on the current view.



The selected date is shown in an orange circle.

The current day is shown in a gray circle (unless selected, in which case it is in orange).

2. To quickly select the current day, click TODAY.
3. Change the month and year as previously described.
4. To change the day, make sure the appropriate year and month are selected and then click the day that you want.

Entering a date by directly typing

- [illegible]
- [illegible]

Example: T: Today. T-7: The date seven days ago. T+365: The date a year from now.

Entering Times

There are two ways to enter times:

- Using the time picker
- By directly typing in the field

Enter a time using the time picker

1. Click the clock icon to the right of the field.
   The time picker appears.
   
2. To select the current time, click **NOW**.
3. To change the hours or minutes, click in the corresponding box and either directly type a value or use the up/down arrows to select it.

Enter a time by directly typing

- You can enter the time in 24-hour notation by directly typing the values. You do not have to enter a leading zero (0) for times before noon.

  Example: Enter 945 and the system displays 0945; for 1:30 PM, enter 1330.

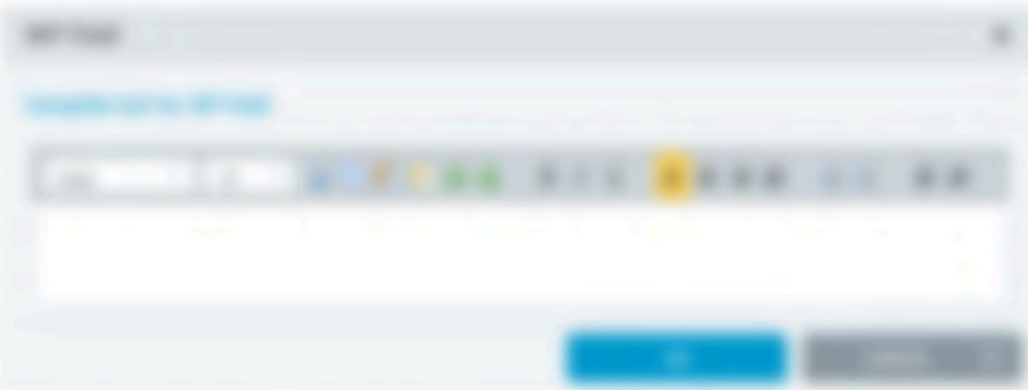
- You can enter the letter N (for "now") in upper or lower case to get the current time. You can also enter n+ or n- and the number of minutes after or before the current time to get a time relative to the current time.

  Example: If the current time is 1100 and you enter n+15, the system will display 1115.

Word Processing Fields

Fields with the following icon provide the ability to enter text and images using a word processor.

Clicking the icon opens the editor (either the inbuilt rich text editor or the installed Microsoft Word version dependent on the configuration). The following screenshot shows the inbuilt editor.



You can move the cursor over a button to see a tooltip that describes the button's purpose.

Note: To paste text or images into the window from a third party application, first copy it to the Windows clipboard using the method available in the third party application and then paste it into this window using the Paste button or the CTRL + V key combination.

When you have finished editing, click **OK**.

After you enter data in a small processing field, its icon changes to the following:

Allergies, Reactions, and Precautions in Booking Patient Forms

- Allergies and reactions entered via the HIS system are shown in bold.
- If an allergy is deleted from a patient's MR record it will be shown in strike-through font with the bold formatting removed in OR Schedule. Deleted OR allergies are also placed after regular allergies.

Example	Source of Data	Description of Text Format
Penicillin	Clinic form	normal font
Penicillin	hospital information system	bold
Penicillin	HIS deleted allergy	normal font with a strike-through These allergies sort to the bottom of the list.

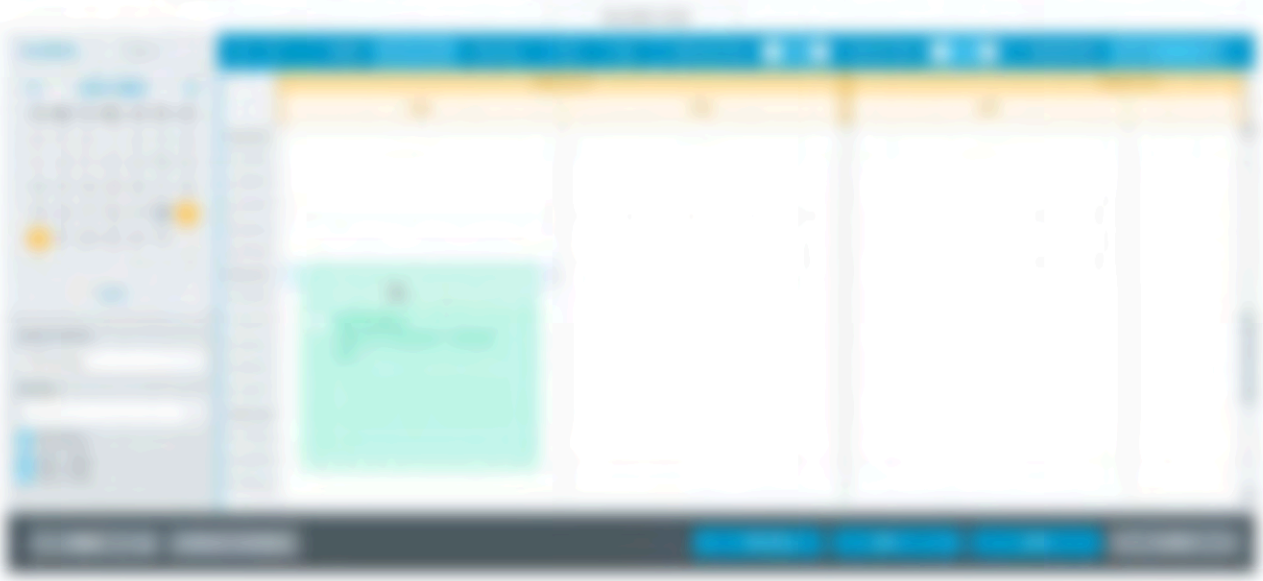
Note: Patient allergies and reactions should be reviewed and removed from OR Schedule if necessary.

Booking Grid Tab

Note: If you have already specified a booking room and date/time via the Booking Options window you can skip this window and proceed to save the booking.

The Booking Grid tab is available if the appointment type is a booking or reservation. It lets you find a slot in the hospital OR schedule for you to place the booking. The grid shows OR rooms along one axis and time slots along the other axis. (The functionality in this tab is similar to that of the OR Mode schedule viewer.)

As soon as you move the cursor over a time slot a floating green bookmark box appears. (The bookmark is gray if no room has been selected.)



Grid Features

Grid features are the same as those shown in the OR Mode Schedule Viewer. For more information, see Grid Features on page [illegible].

Selecting Days

When you first open the booking grid, a three day period starting yesterday is shown by default.

Day selection features are the same as those shown in the OR Mode Schedule Viewer. For more information, see Selecting Days on page [illegible].

Selecting Rooms

Room selection features are the same as those shown in the OR Mode Schedule Viewer, except that the facility is always that set in the booking. For more information, see Selecting Rooms on page [illegible].

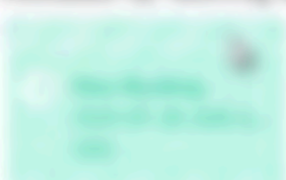
Information Shown for Existing Bookings

Depending on the selected OR code and dates you may see other bookings, reservations and reserved block time in the schedule grid. The information available is the same as that shown in the OR Mode Schedule Viewer. For more information, see Booking Cards on page [illegible].

Adding a Booking to a Time Slot

Add a booking to a time slot

1. Select the rooms and dates to show on the list as described previously.
2. Move the mouse pointer over the grid.
   The booking bookmark appears under the pointer. This is a placeholder showing the selected room, date and length, including setup and teardown times. (Setup and teardown times are indicated by hatching at the top and bottom of the booking placeholder respectively.)

3. Move the bookmark to the cell where you want the booking to start. (It cannot sit in a cell that has an overlapping booking.)
4. Right-click the cell and select **Book Here**.

Note: As well as the booking appearing on the grid, the OR room and date/time that you have selected are automatically updated in the Booking Options window of the booking.

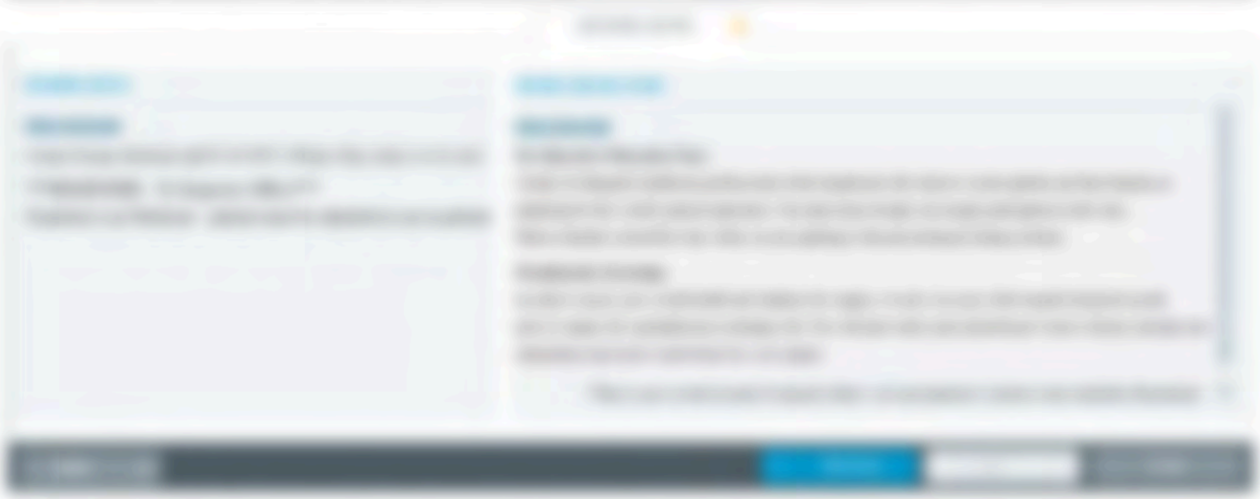
Note: The booking placeholder continues to move as you move the mouse pointer again in case you decide to pick a different time slot.

6. As a usual workflow, the next step would be to save the booking by clicking the **SAVE** button. (This initiates a conflict checking process. For more information, see Validation Errors and Conflicts on page 55.)

Booking Notes Tab

The Booking Notes tab shows booking notes and patient instructions that have been configured at your hospital. The notes shown depend on the selected facility, surgeon, procedure and date.

Best Practice: Consult the Booking Notes tab after choosing a booking slot so that you can see accurate date dependent notes.



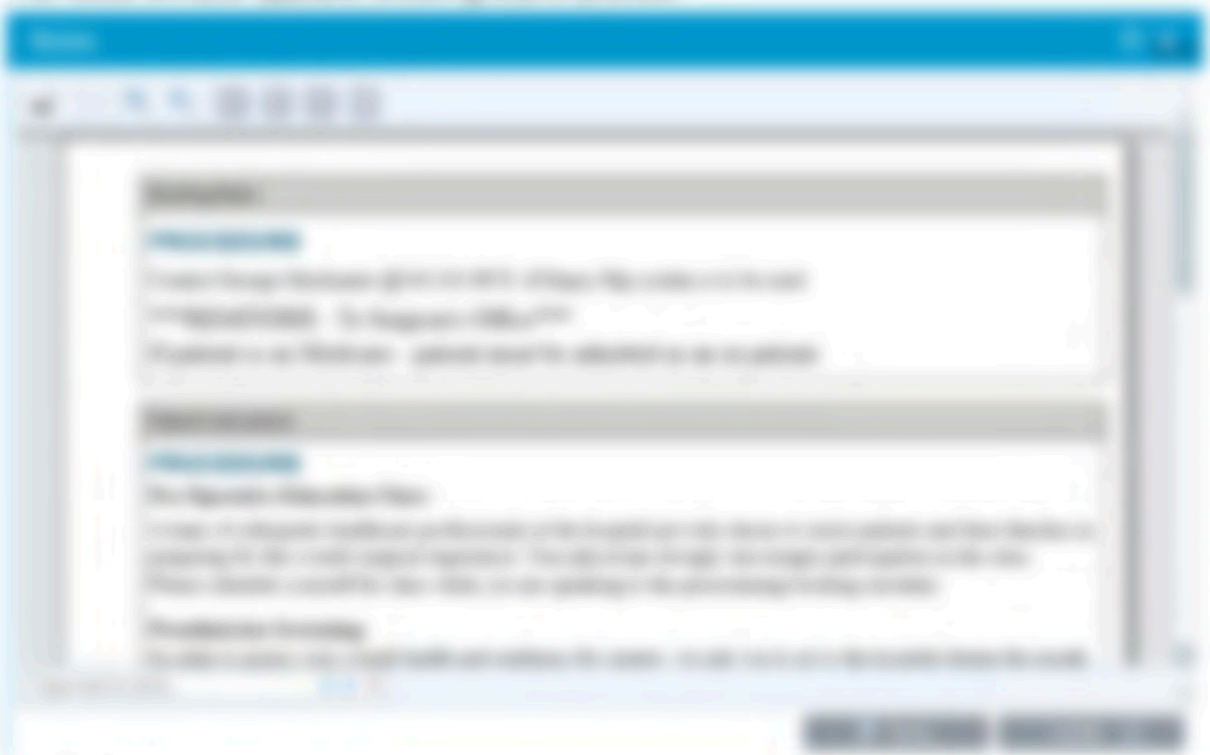
- Booking Notes are aimed at doctors and nurses.
- Patient Instructions are for patients to read and follow before and after the surgery are in the bottom pane.
- This tab use the **PRINT** button to print the booking notes.
- If there are notes available in the tab, the tab header will show the following icon:

- Depending on your system configuration, this tab may open automatically after you save the booking (clicking the **SAVE** button).

View booking notes and/or patient instructions

- Open the Booking Notes tab.

Print booking notes and/or patient instructions

1. Click **PRINT**.
   A drop-down list appears showing what is available.
   
2. Select an entry from the list.
   The Notes window appears, showing a print preview.
   
3. Click **Print**.
   The Print window appears for you to select a printer and print to it.

Working in the Preview window

You can move between pages using the scroll bar on the right.

You can search the text by typing it in the search box at the bottom:

You can perform various actions from the toolbar:

	Print. (Opens the Print window from which you can select a printer and print to it.)
	Copy selected text to the operating system's clipboard
	Zoom in
	Zoom out
	Reset zoom to 100%
	Zoom to one page width
	Zoom to see the full page
	Zoom to see two pages

Validation Errors and Conflicts

OR Scheduler enforces the creation of valid appointments in a number of ways:

- If the **Patient** tab contains required data (as specified in the configuration) you will not be able to save a patient until all the required data has been entered.
- You cannot enter data in the **Forms** tab until you have saved a patient. (Note: the forms shown depend on the selected facility and procedure.)
- The application will not allow you to save an appointment until you have saved a patient in the **Patient** tab and saved forms for that patient in the **Forms** tab.
- Required fields in the Booking and Patient tabs and the Booked Options window are outlined in red. (You must enter data for these fields.) Note that some fields show the red outline until data has been entered in other fields.

- In forms, mandatory fields are shown in red and recommended fields in orange. If you attempt to save forms when any required data is missing the Issues window will appear, showing the missing data. (For more information, see Forms Tab on page [illegible].)

Checks Performed when Saving

- When you click **SAVE** to save the appointment, OR Scheduler performs two groups of checks that can loosely be described as "validation checks" and "conflict checks".

  Validation checks:

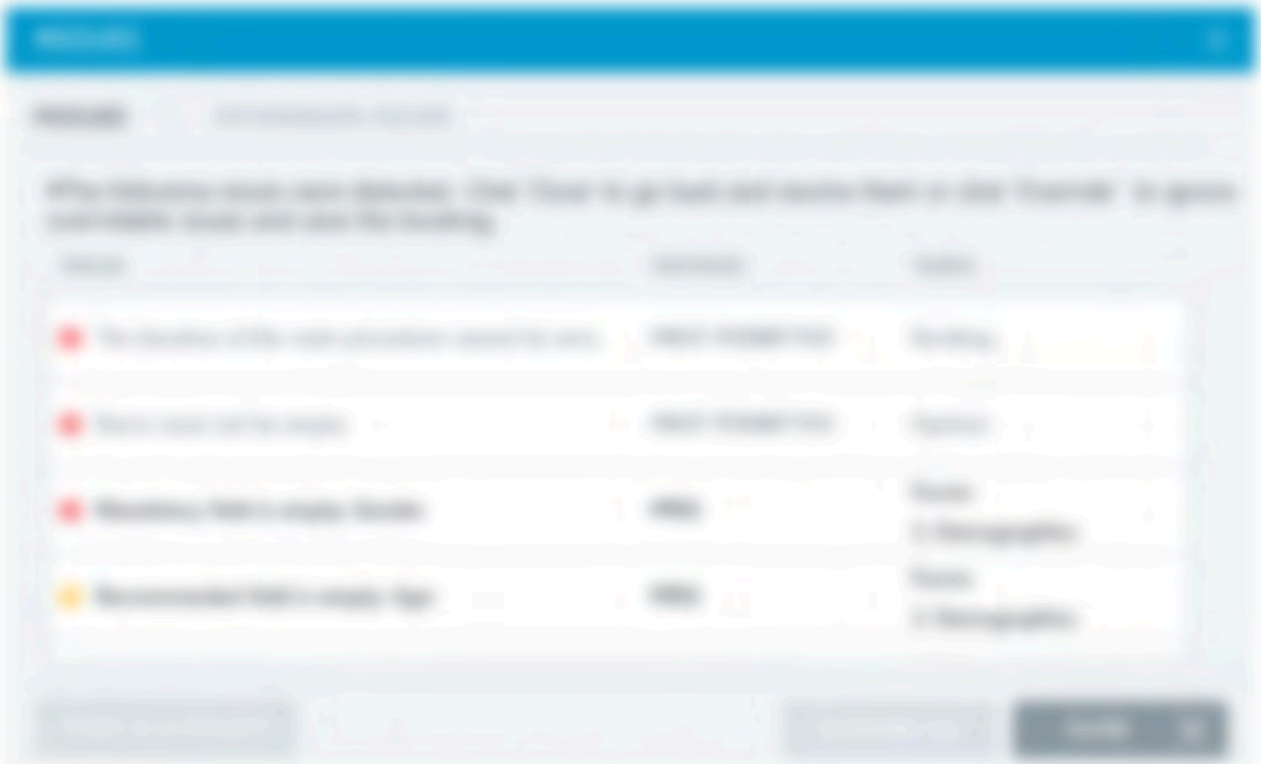
  - The application checks that all the required **Booking** tab data is present. (Note that all required **Patient** tab data must already be present for the patient to have been saved to the booking.)
  - The application checks that values entered for fields make sense.

> **Example:** A procedure cannot have a duration of zero.

> **Example:** The offset + duration for a piece of equipment cannot be greater than the total length of the appointment.

  - The application rechecks that all required **Forms** tab data is present (even though the user would have already checked - to deal with the case when he/she saved the forms).

If any of the validation checks fail, the Issues window appears listing the validation failures. If any issues are described as "Not Permitted" in the **Override** column, you will need to close the Issues window and manually resolve those issues before attempting to save again.



Example of the Issues window showing validation issues.

If all issues are overridable and you have the necessary rights to override issues, the **Override All** button will become enabled.

- Click **Override All** to override the validation issues.

Conflict checks

- If the appointment type is a booking or reservation, the application then performs "conflict checks". Conflict checks take the room and date/time of the booking into consideration.

Example Conflict	Meaning
The room is booked from 0800 to 1230	There is an overlap with another booking in the same room.
Cannot book past midnight	The booking starts before midnight but ends after it.

Example Conflict	Meaning
Booking has exceeded the 30 day booking limit	The booking date is more than X days from now, where X is the limit configured by your hospital
The room is Closed for All or Part of the time	The room is Closed for all or part of the time
The room is Frozen for All or Part of the time	The room is Closed for all or part of the time
Patient/Bed Type 'Inpatient' limit is exceeded	A daily limit on the number of patients is configured for this bed type and this booking exceeds that limit
Surgeon/proc authorization: [illegible]	The surgeon is not authorized to perform this procedure
Equipment LASERYAG is unavailable	The specified equipment is unavailable
Tray/P [illegible] Instrument Tray is unavailable	The specified SPD is unavailable
Resource XRT (X-Ray Technologist) is unavailable	The specified resource is unavailable
Procedure CYSTOSCOPY not Allowed to be performed in Room OR_28	The procedure is not allowed in the selected room
Equipment LASERYAG is unsuitable	The specified equipment is not authorized for this room
Anesthesiologist AANES is in Room OR_21 from 1015 to 1200	The specified anesthesiologist has an overlapped surgery in the specified room
Anesthesiologist is not scheduled	The specified anesthesiologist is not scheduled to be working at the selected date/time
Assistant Surgeon [illegible] is in Room OR_21 from 1015 to 1100	The specified assistant surgeon is in an overlapping surgery in the specified room

Example Conflict	Meaning
Assistant Surgeon AARONS III is not scheduled	The specified anaesthesiologist is not scheduled to be working at the selected date/time.
Surgeon AARONS III is in Room [illegible] from 1010 to 1045	The specified surgeon has an overlapping surgery in the specified room.
Surgeon AARONS III is not scheduled	The specified surgeon is not scheduled to be working at the selected date/time.
AARO is Fixed from 0710 to 0740 : is Surgeon - Start Time of next Booking : must be earlier th[illegible] 0740	The specified surgeon is working in another facility prior to this booking and does not have enough time to travel from one facility to the other.
Tile reserved for other Physicians / Procedures / Patient Types	The booking has been made in a block reserved for another surgeon, procedure or patient type.

Note: The first two example conflict types (in bold) cannot be overridden; they must be resolved before the booking can be saved. Conflicts of other types can be overridden by users who have permission to do so.

If any of the conflict checks fail, the Issues window appears listing the conflicts.

Note: You can see any validation errors that you do not override in the **Overridden Issues** list.

If any conflicts are described as 'Not Permitted' in the **Override** column, you will need to close the Issues window and manually resolve those conflicts before attempting to save again. Alternatively, you can click **Save as a Request** to save the appointment as a request instead of as a booking or reservation.

Example of the Issues window showing conflicts.

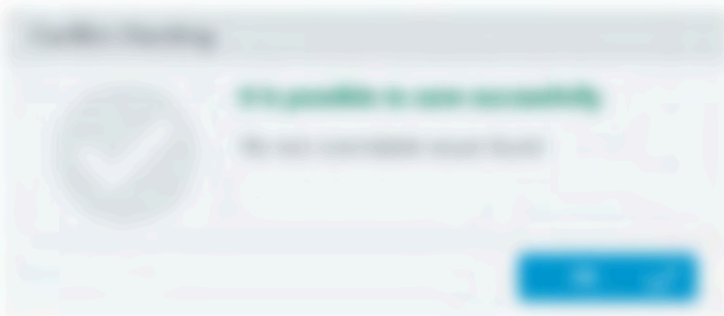
If all issues are overridable and you have the necessary right to override issues, the **Override All** button will become enabled.

- Click **Override All** to override the conflicts and save the booking.

Note: The Issues window stays in the foreground until it is closed.

The CONFLICT CHECKING Button

Instead of waiting to see validation issues and conflicts at the point of saving a booking, you can click the **CONFLICT CHECKING** button in the booking's footer at any stage. This performs the same checks that are performed when you click the **SAVE** button, as described previously. However, instead of proceeding with the save at the end, a message appears to indicate whether or not it is possible to save the appointment.



The ISSUES Button

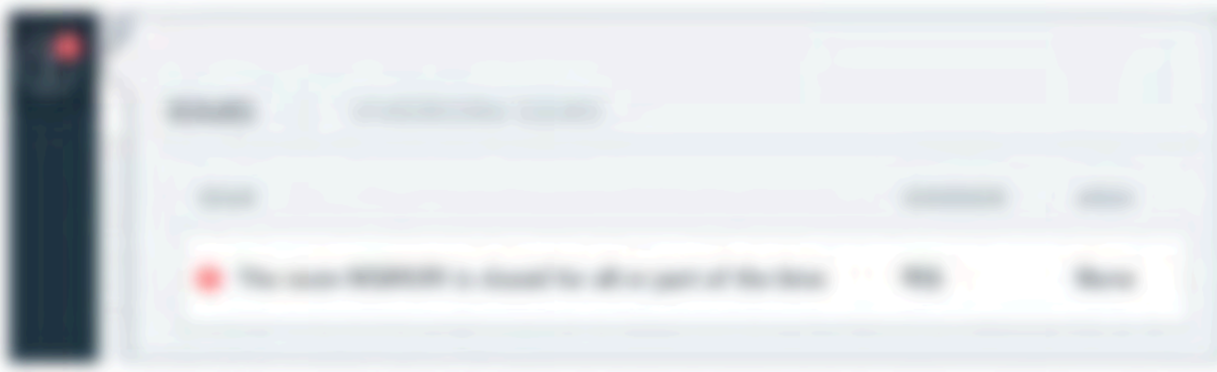
The **Issues** button in a booking's sidebar shows a red circle if there are any unresolved issues. The number in the circle shows the number of issues. (An exclamation mark is shown if there is just one issue.)

This button becomes enabled if the user has clicked either **SAVE FORMS** or **SAVE** and there were issues that the user did not override. Clicking the button opens a pop-up version of the Issues window for informational purposes (it does not have any buttons).

Whether the window shows validation errors or conflicts depends on the situation. Validation errors are shown if prior to opening the window the user clicked **SAVE FORMS** or **SAVE** and did not override the validation errors.

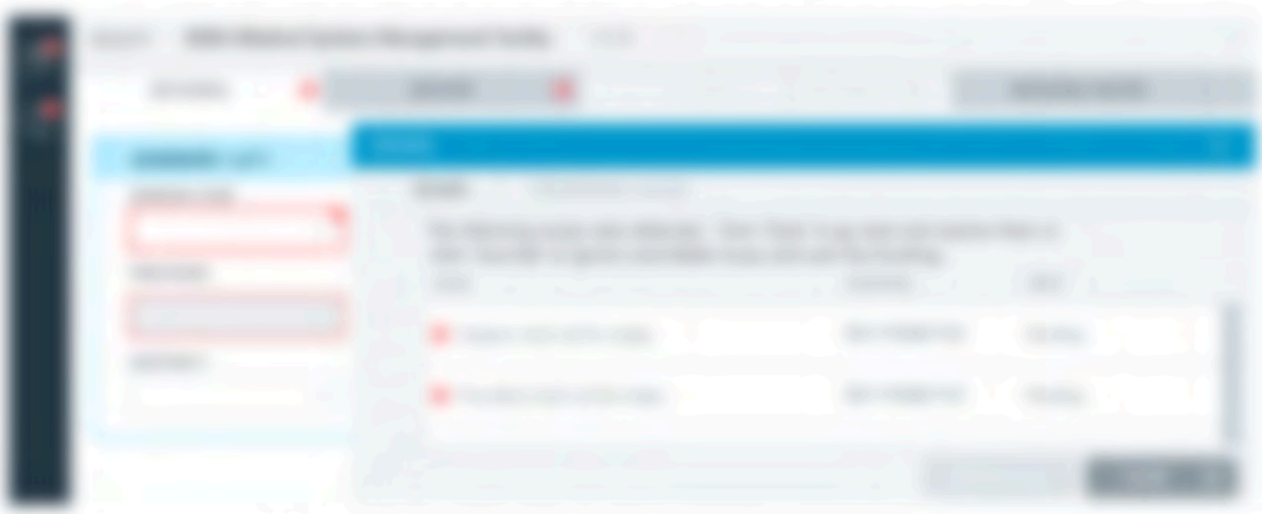
Pop-up Issues window showing validation errors

Conflicts are shown if the user clicked **SAVE** and either there were no validation errors or the user overrode the validation errors.



Pop-up Issues window ignoring conflicts

Validation Error Indications



Example of validation error indicators (plus the Issues window)

4

The Schedule Viewer

About the Schedule Viewer

The Schedule Viewer shows the Booked Grid view of the OR or PAT schedule for the dates and rooms you choose, allowing you to make scheduling changes quickly and easily. There are two Schedule Viewer modes:

- OR Mode
- PAT Mode

Note: When you start OR Schedule, the OR Mode booking grid opens by default on today's date.

The OR Schedule Viewer and PAT Schedule Viewer have the same look and feel but can be distinguished by the color of their title bars – blue for OR Mode and green for PAT Mode.

Features Common to OR Mode and PAT Mode

Note: Besides a few exceptions, these features are also shared with the Booking Grid tab in [illegible].

Grid Features

Grid orientation

By default, days and rooms are shown as columns. This is referred to as the "Vertical" orientation. However, if necessary, you can change to the "Horizontal" orientation in which days and rooms are shown as rows.

Example of a horizontal orientation

Change the grid orientation

- In the header bar, click the down arrow to the right of **Orientation**, and select Horizontal or Vertical, as required.

Grid intervals

The time intervals on the schedule grid are set up by Picis at installation time. Your installation can have 5, 10, or 15 -minute intervals.

Grid scaling

For a vertical orientation...

- The number of columns depends on the number of days and rooms that you have selected while the number of rows (time slots) is always fixed and equal to the number of booking grid intervals in one day.

- The **Hours in View** setting determines how many hours are shown vertically on the screen. You can select between two and 24 hours in steps of two. If there are less than 24 hours in the view, a scroll bar will be available for you to access time slots that are out of the view.
- Whether or not you need to scroll horizontally to see dates and rooms depends on the number of columns and the **Min Room Size** setting, which is used to specify the minimum width, in pixels, to be for the date/room columns. You can use a size between 100 and 500 pixels in steps of 50. Note that 100 is the minimum value. If all columns already fit in a single screen when the size is greater than 100 then decreasing it further will have no effect.

For a horizontal orientation, the situation is reversed:

- The number of rows depends on the number of days and rooms that you have selected, while the number of columns (time slots) is always fixed and equals to the number of booking grid intervals in one day.
- The **Hours in View** setting determines how many hours are shown horizontally on the screen.
- Whether or not you need to scroll vertically to see dates and rooms depends on the number of columns and the **Min Room Size** setting.

Comments

You can view and add comments to a specific time slot or a range of time slots. A blue note icon inside a time slot indicates that is has a comment.

To see the comments, move the mouse above the comment icon until a tooltip appears.

Enter a comment in a time slot

- Right-click the time slot and select **Enter Comment**.

Enter a comment to a range of time slots

1. To select a range, click the first cell in the range then hold down the SHIFT key while you click the last cell in the range.

   or

   Click the first cell in the range and keep the mouse button pressed while you move it to the last cell in the range before releasing it.
2. Right-click anywhere in the selected range and select **Enter Comment**.

Delete a comment from a time slot

- Right-click the cell or the comment icon and select **Delete Comment**.

Delete a comment from a range of time slots

- To delete the comment from all cells, right-click the comment icon and select **Delete Comment**.
- To delete the comment for a single cell in the range, right-click the cell and select **Delete Comment**.
- To delete the comment from more than one cell in the range, select the cells (in the same way as if you are entering a comment), [illegible] select **Delete Comment**.

Grid Colors

The following table shows the default color scheme used by the Schedule Viewer and Booking Grid tab of bookings for [illegible]. [illegible] For information on changing the booking grid colors, see the OR Manager Configuration Guide.

Note: These are the defaults. Your site may use different colors.

Element	Sample
Slot closed	sample
Slot available	sample

Elements specific to the OR Mode and Booking Grid tab

Element	Sample
Reserved block time	sample
*Booking	sample

Note: * Depending on how your system is configured, certain bookings may have a color different to that defined in the color scheme. [illegible] For more information, see the OR Manager Configuration Guide.

Elements specific to the PAT Mode

Element	Sample
PAT Booked	sample

Booking Fields

Depending on the selected node and dates you may see other bookings in the schedule grid. (In OR Mode, you may also see reservations and reserved block times.)

Example of a booking in a block. This booking is for the surgeon [illegible]. The procedure is a THR WP (Total Hip Replacement) and it is within the block time reserved for Dr. [illegible].

For each booking you can see basic information directly in the schedule list. You can see more information in a tooltip by hovering the mouse pointer over the booking.

You can configure the fields to show in both the schedule grid and the tooltips.

Note: Regardless of the fields selected for display a booking will only display as much information as it fits in it on the grid. In contrast, the tooltip always displays all configured fields.

Select booking display fields and tooltips

1. Right-click any cell and select **Select Display Fields**.
   The following window appears.

Note: [illegible]

2. [illegible]

Note: [illegible]

3. [illegible]
4. [illegible]

[illegible]

Note: [illegible]

5. [illegible]

Selecting Days

You can change the selected dates in a number of ways:

- Selecting one of the VIEWS
- Clicking the arrows in the header to the left of the VIEWS
- Selecting a date or date range in the CALENDAR on the left
- Selecting a date and days of the week in the PICKER on the left

Using grid views

Select a grid view

- Click 3 **Days** to see a three day view that starts with the first selected day.
- Click 7 **Days** to see a seven day view that starts with the first selected day.
- Click **Full Week** to see a seven day view that starts with the first day of the week in which the selected day falls.

Sweep the selected times using the arrows

- Click an arrow to sweep the selected times backwards or forwards in time while maintaining the distribution and the view selection.

Examples:

The current view is a 3 day view showing Monday 10, Tuesday 11 and Wednesday 12.
Clicking the left arrow shows a 3 Days view of Friday 7, Saturday 8, and Sunday 9.

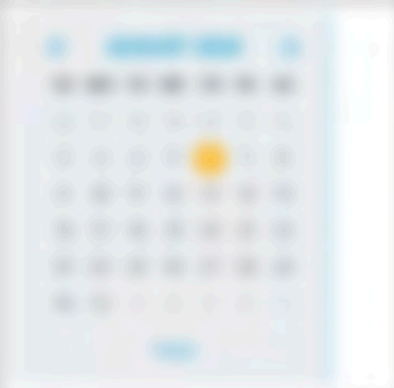
The current view is a Full Week view showing Sunday 10 through Saturday 16.
Clicking the right arrow shows a Full Week view of Sunday 17 through Saturday 23.

The current view is a Selected Days view showing Monday 10 and Wednesday 12.
Clicking the right arrow shows a Selected Days view of Thursday 13 and Saturday 15.

Using the calendar

- When you first open the calendar it shows a monthly view. Click the calendar header to zoom the view out from months to years. Click it again to change from years to decades.

- To return (zoom in) to the calendar view you were using before you clicked you must select an item beneath the calendar header.
- Tap the left and right arrows to move between months, years or decades, depending on the current view.

Month view	Year view	Decade view
		

Selected days are shown in orange circles.

The current day is shown in a gray circle (unless selected, in which case it is in orange).

Select one or more dates using the calendar

1. Click **CALENDAR** if it is not already displayed.
2. To quickly select the current day, click **TODAY**.
3. Change the month and/or year as previously described.
4. To select the day, make sure the appropriate year and month are selected and then click the day that you want.
5. To select multiple days, you can also hold down the CTRL key and click the individual dates that you want to see. If the dates are continuous you can also hold down the SHIFT key and click the first and last date in the range, or you can click the first date and keep the mouse button pressed while you move it to the last cell in the range before releasing it.

Select one or more dates using the picker

1. Click **PICKER**.
   A window such as the following appears:

By default, a seven day range starting "today" is selected.
2. To change the start date, click the calendar icon to the right of the **FROM** field and select another date.
3. To change the end date, click the calendar icon to the right of the **TO** field and select another date.
4. To select the days of the week that you want to see, click them under **DAYS**.
5. Click **Refresh**.

Note: If you return to the calendar, the days you selected for the picker will be reflected there.

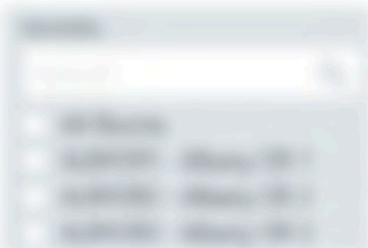
Selecting Rooms

Best Practice: Prior to selecting rooms, select a facility (otherwise the list shows rooms for all facilities).

Select a facility

- Click the drop-down arrow to the right of the **Facility** field and select a facility.

Note: When creating a booking the facility is selected within the booking, not in the booking grid.



A list of all rooms from the selected facility is shown on the left. (For OR Mode, the list shows OR rooms; for PAT Mode, it shows OBT rooms.)

Filter a long list by searching for specific rooms

- Start typing in the **Rooms** field. As soon as you stop typing, the list filters to show only the entries that match.

Note: For OR Mode, you can also filter by Room Group. (For more information, see Select a Room Group on the Startup page.)

Select rooms to show on the grid

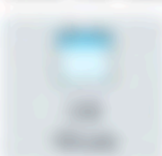
After optional filtering by one of the previously described methods:

- To select all rooms from the list, click **All Rooms**. (Clicking it a second time will clear all rooms.)
- To select specific rooms from the list, click each of them.
- To remove a specific room from the selection, click it again.

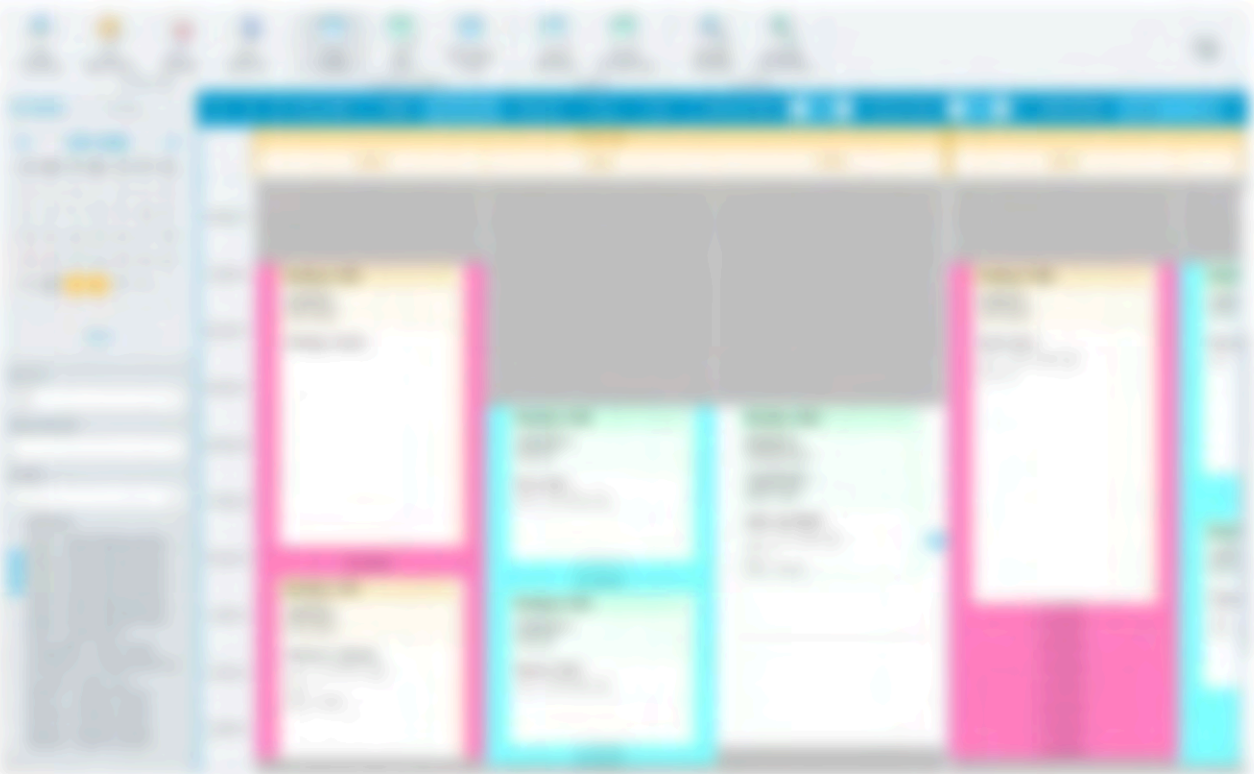
OR Mode

Open the OR Mode Schedule Viewer

- Click the following ribbon button:



Note: When you start OR Scheduler, the OR Mode Schedule Viewer opens by default.



Example of the OR Mode Schedule Viewer

In OR Mode, the Schedule Viewer allows you to view and work with bookings and reservations.

For information about features common to both OR Mode and PAT Mode, see Features Common to OR Mode and PAT Mode on page [illegible]. The rest of the information in this section is particular to OR Mode (and for the Booking Grid tab for bookings unless otherwise indicated).

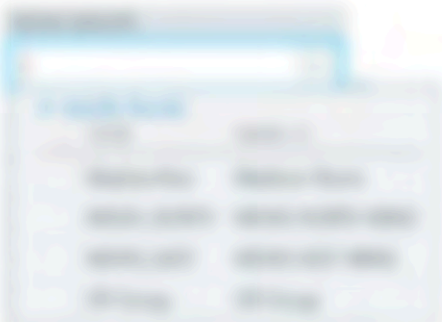
Filtering rooms by room group

In OR Mode, you can filter the list of rooms by room group.

Select a Room Group

1. Click the down arrow to the right of the **Room Groups** field.

   A drop-down list appears showing the configured room groups that contain at least one OR room from the selected facility.



If the list is long, you can filter it by typing text in the field to show only the entries that match.

2. Click the room group that you want.

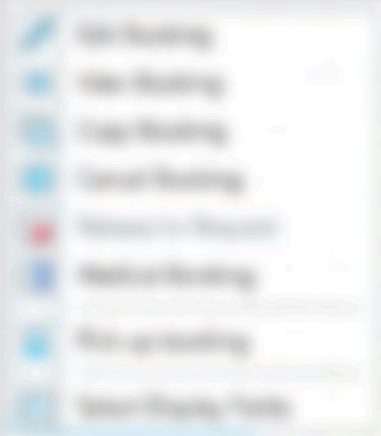
The list of rooms changes to show only the ORs from the room group (for the selected facility).

OR Mode Right-Click Menu

The right-click menu commands depend on where in the grid you click.

Right-clicking a Booking or Reservation

Note: When accessing via a Physician Office link, restrictions may prevent the use of commands on certain bookings. In such instances, an information message will appear upon selecting the command. For more information, see the Security Manager User Guide.

	**Edit Booking:** Opens the booking for editing. **View Booking:** Opens a read-only version of the booking. **Copy Booking:** Opens the booking screen with a copy of the selected booking. You can then change any of the parameters and save it to a different time slot. The original booking remains unchanged. **Cancel Booking:** Cancels the selected booking. You must select a Cancel Reason and you have the option to enter a comment. **Release to Request:** (Available for reservations only) Transforms the reservation into a request, removing it from view. **Waitlist booking:** Transforms the booking into a waitlist entry, removing it from view. (You are prompted to enter a waitlist priority.) **Pick up booking:** Changes the booking into a floating bookmark so that you can drop it into another time slot. **Select Display Fields:** Allows you to configure the fields to appear in both the schedule grid and the tooltips. (See Booking Fields on page 73.)

If you click **Pick up booking**, and then right-click a time slot, the following commands appear in the right-click menu:

Reset pick up booking: Leaves the original booking as it was (the floating bookmark disappears).

> **Note:** (You can also click the Escape key, Esc.)

Drop Booking: If there are no conflicts, the booking is immediately moved to the new room and/or time slot. Otherwise you are shown the conflicts and can either cancel the move or click **Edit Booking** to open the booking for editing.

Note for multi-facility sites: Depending on the system configuration, if you attempt to drop a booking in a room that belongs to a different facility OR Scheduler may check to see if the surgeon and anesthesiologist are authorized to work in that facility and will abort the process if they are not.

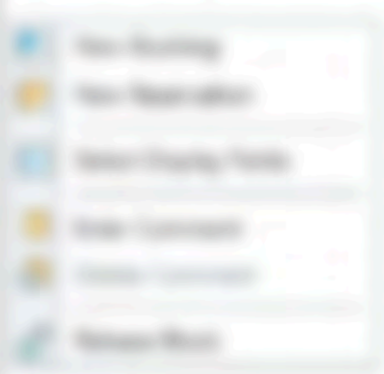
> **Best Practice:** You can also move bookings by "drag and drop". This is the recommended method when the new room and time slot are already visible.

Move a booking by "drag and drop"

1. Click the booking.
2. Keeping the left mouse button pressed, move the pointer to the new rool and/or time slot.
3. Release the left mouse button.

If there are no conflicts, the booking is immediately added to the new room and/or time slot. Otherwise, you are shown the conflicts and must either cancel the move or click **Edit Booking** to open the booking for editing.

Right-clicking Elsewhere in the Grid

	**New Booking:** Opens the New Booking screen. Room and date/time are pre-populated based on the cell you click. **New Reservation:** Opens the New Reservation screen. Room and date/time are pre-populated based on the cell you click. **Select Display Fields:** Allows you to configure the fields to show in both the schedule grid and the tooltips. (See Booking Fields on page 77.) **Enter Comment:** Allows you to enter comments on a cell (or range of contiguous cells). **Delete Comment:** Deletes the selected content. **Release Block** (enabled if you right-click a block): Releases the block to open time (unreleased). Note that this only affects the block time for the day of / you have selected.

Add a Booking to a Time Slot

1. Select the rooms and dates to show on the grid as described previously.
2. Right-click a time slot for a room in the Schedule Viewer and click **New Booking**. (The room and date/time in the Booking Options default to the room / at date/time that you right-clicked.)
3. In the **Booking** tab, enter a surgeon, procedure, duration and any other data.
4. In the **Patient** tab, enter a patient and the bed type.
5. In the **Forms** tab, enter required tab plus any optional tabs as needed. (Note that the forms and tab contents depend on the selected procedures.)
6. Click **SAVE** to complete the process.

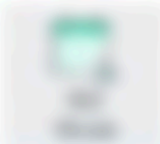
Note: For more information, see the Scheduling chapter.

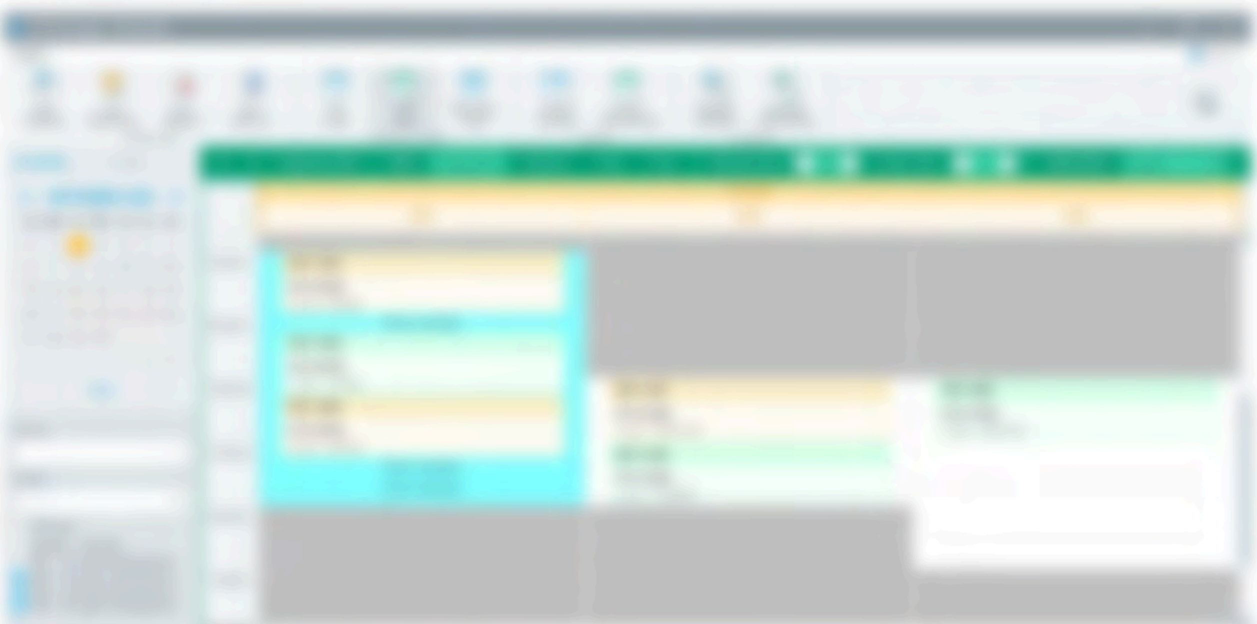
Note: [illegible]

PAT Mode

Open the PAT Mode Schedule Viewer

- Click the following ribbon button:





[illegible]

[illegible]

Note: [illegible]

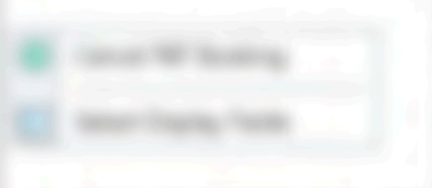
For information about features common to both OR Mode and PAT Mode, see [illegible] on page [illegible]. The rest of the information in this section is particular to PAT Mode.

You can view all details related to the PAT booking in the tooltip [illegible].

PAT Mode Right-Click Menu

The right-click menu commands depend on where in the grid you click.

Right-clicking a PAT Booking



Cancel PAT Booking: Cancels the selected booking. You must select a Cancel Reason and you have the option to enter a comment.

Select Display Fields: Allows you to configure the fields to show in both the schedule grid and the tooltips. (See Booking Fields on page [illegible].)

Right-clicking elsewhere in the grid

Select Display Fields: Allows you to configure the fields to show in both the schedule grid and the tooltips. (See Booking Fields on page [illegible].)

Enter Comment: Allows you to enter comments for a cell [illegible].

Delete Comment: Deletes the selected comment.

Release Block: [illegible] if you right-click a block. Releases the block [illegible]. Note that this only affects the block time for the day that you have selected.

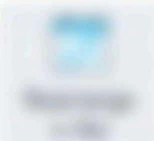
Best Practice: [illegible] In PAT Mode there is no option to "View booking" because all information from the booking can be viewed in the tooltip. For this reason, [illegible] recommends that you configure all fields to be shown in tooltips.

Rearrange a Day

Overview

Open the Rearrange a Day screen

- Click the following ribbon button:



OR Manager opens to the Rearrange a Day screen.

Note: The **Rearrange a Day** button provides direct access to "Rearrange" functionality in OR Manager. (There is no need to start or log in to OR Manager first.)

The Rearrange a Day feature allows you to view and quickly change the OR's schedule for a selected day. The screen shows a Booking Grid view of a day's OR schedule. You can move bookings on the grid to different times and rooms, and you can put bookings in a queue to change their duration or to store them while you move other bookings around the grid.

Depending on site configuration, if you are rescheduling a booking out of a block, the Credit Block Prompt screen appears to facilitate manual block crediting.

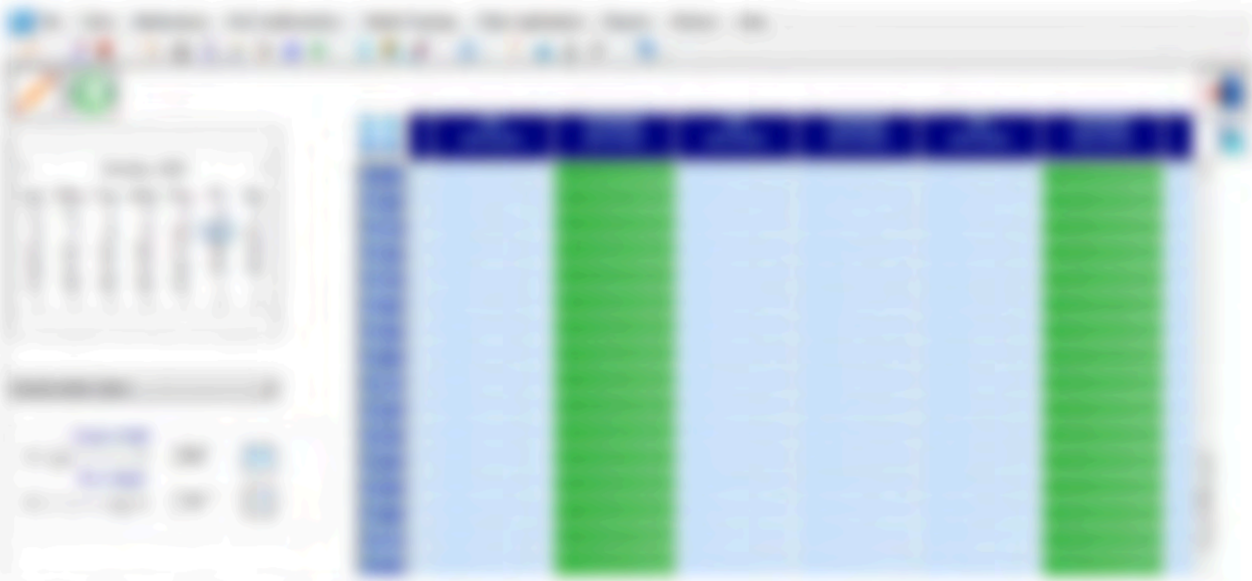
Best Practice: While you use the Rearrange a Day Feature, keep in mind that other users are locked out of this day. In a multi-facility site, this lockout can be avoided for facilities other than your own by an administrator's setting of the application parameter rearrange_conflict_scope_[illegible] to [illegible].

Rearrange a Day

In the Rearrange a Day screen:

1. Specify a facility, if necessary.
2. Select a date from the calendar, then click the **Retrieve/Edit** ribbon.

The Booking Grid, showing the OR schedule for the specified day, appears.



3. Right-click an entry in the Booking Grid that you want to move, delete, etc.
   The shortcut menu appears. This menu has all the commands you need to rearrange a day.
4. Select the menu items you need to accomplish your tasks. The commands available vary, dependent on where you click.
5. On the **Retrieve** box, select a method of conflict checking.
   - Select **Save/Conflict Check** to check conflicts for only the bookings that have been moved.
   - Select **Conflict Check All** to check scheduling conflicts for all bookings for the day.
6. Click the **Go** button to initiate conflict checking. See [illegible] for a discussion of what happens when conflicts are found.

7. Click **Close** to close the screen.
   If conflicts for moved bookings have not been resolved, a warning appears that the changes will not be saved.
   If no conflicts are left unresolved or no bookings were moved, the Rearrange a Day screen closes.

> **Note:** When the booking prior to processing is setup to send a booking follow up email and the toggle is set to prompt, the system will prompt the user before sending the email.

See the OR Manager Configuration Guide Booking Auto Email Settings for information on booking change actions that cause a follow-up booking email to be sent.

Note: For more information on Rearrange a Day functionality, see the OR Manager User Guide.

5

Search Windows

Searching Overview

OR Booking searches:

- For all appointment types, you can copy, cancel, view or edit the booking.
- If a search result is not a waitlist entry, you can transform it into one.
- For bookings and reservations, you can show the appointment in the OR Mode grid.
- You can rebook cancelled bookings.

PAT Booking searches:

- You can cancel the PAT booking or show it in the PAT Mode grid.

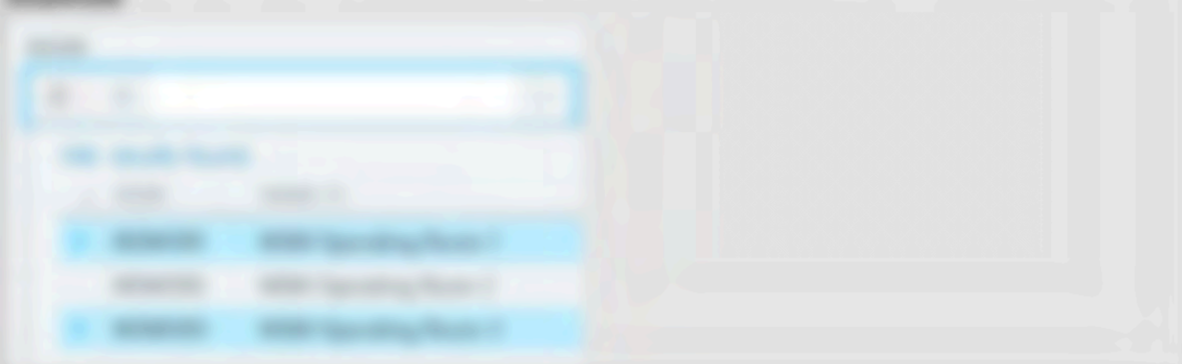
Search fields

Enter search criteria in each field as needed. For fields with drop-down lists, when you select an item from the list its code is added to the field.

Example

Some drop-down lists allow you to select multiple criteria. To select multiple entries, hold down the CTRL key and click the individual entries that you want. If the entries are contiguous you can also hold down the SHIFT key and click the first and last entry in the range. The number of selected entries is shown in the field.

Example

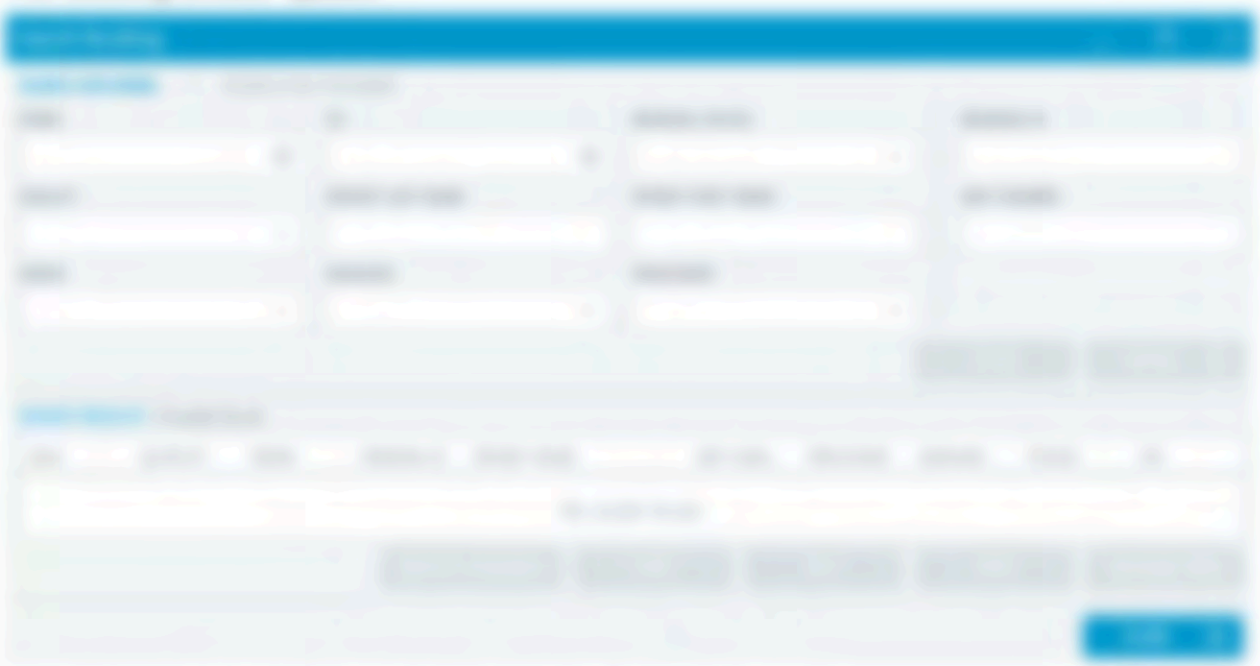


Search OR Bookings

Open the Search Bookings window

- Click the following ribbon button:

The following window appears:



You can search for a booking, reservation, request or waitlist entry.

Enter your search criteria in the fields by which you want to filter. (For more information on selecting entries in drop-down lists, see Search fields on the previous page.)

Notes:

You must enter a value for at least one field to search.

Searching by **Booking ID** will ignore any other search criteria (the fields will be disabled).

Searching by **Visit Number** will ignore the **Patient Last Name** and **Patient First Name** fields.

Use the **Booking Status** field to specify the appointment types you want to see (Active booking, Cancelled, Reservation, Request, Waiting List). If you select Waiting List, you can optionally specify the waitlist priority and show results based on the number of days the patient is/has been on the Wait List.

When you have selected all your search criteria, click **SEARCH**.

The Search Results pane at the bottom lists all the entries fit to your criteria.

(Note the SUPRISE column shows the Setup, Procedure and Teardown times.)

The buttons available at the bottom of the screen depend on the situation:

- **COPY**, **EDIT**, **VIEW** and **CANCEL** is always enabled when there are any results.
- **WAITLIST BOOKING** is enabled if you select a search result that is not already a waitlist entry.
- **SHOW IN GRID** is enabled if you select a booking or reservation.
- **REBOOK** is enabled if the status is cancelled.

WAITLIST BOOKING	Transforms the booking into a waitlist entry. (You are prompted to enter a waitlist priority.)
COPY	Opens the booking screen with a copy of the selected appointment. You can then change any of the parameters and save it to a different time slot. The original appointment remains unchanged.
EDIT	Opens the appointment for editing.
VIEW	Opens a read-only version of the appointment.
SHOW IN GRID	Opens the OR Book Schedule viewer with the booking in the middle of the screen. (The size of the booking is selected; the date selection shows three columns — the day before the booking, the day of the booking, and the day after.)

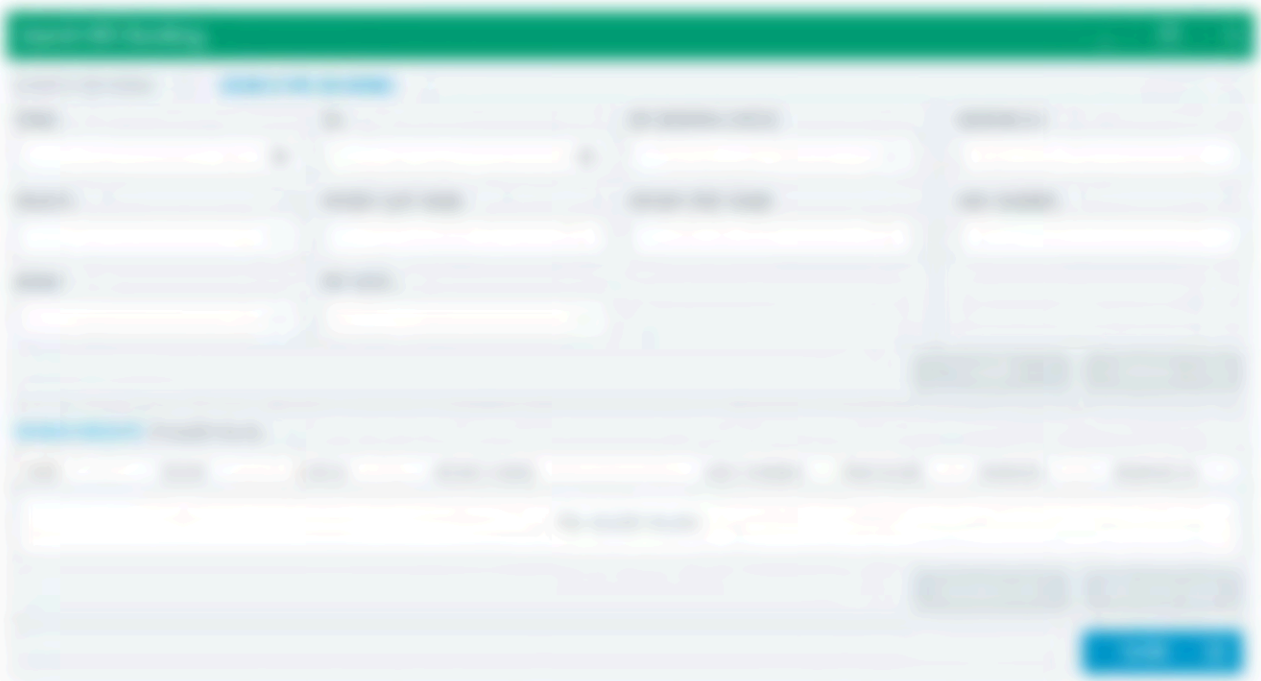
CANCEL	Cancels the appointment. **Note:** You can cancel an already cancelled appointment. This allows you to change the cancel reason.
REBOOK	Rebooks a cancelled appointment. If there are no conflicts, the appointment will be booked again (with the original room and attendees). If there are conflicts, the Issues window is opened; the window lists the conflicts and includes an **Edit Booking** button that the user can click to open the booking for editing.

Search PAT Bookings

Open the Search PAT Bookings window

- Click the following ribbon button:

The following window appears:



Enter your search criteria in the fields by which you want to filter. (For more information on selecting entries in drop-down lists, see Search fields on page [illegible].)

Notes:

You must enter a value in at least one field to search.

Searching by **Booking ID** will ignore any other search criteria (the fields will be disabled).

Searching by **Unit Number** will ignore the **Patient Last Name** and **Patient First Name** fields.

Use the **PAT Booking Status** field to specify the PAS types you want to see (for example "Placed", "Surgery").

When you have selected all your search criteria, click **SEARCH**.

The Search Results pane at the bottom lists all the matches to your criteria.

At the bottom of the screen, the **CANCEL PAT** and **ZOOM IN GRID** buttons are always enabled when there are any results.

CANCEL PAT	Cancels the PAT booking. You are prompted for a cancellation reason.

SHOW IN GRID	Opens the PAT Mode Schedule Viewer with the PAT booking in the middle of the screen. (The room of the booking is selected; the date selection shows three columns -- the day before the booking, the day of the booking, and the day after.)

6

Managing Bookings

Overview

Note: The **Manage Bookings** and **Manage PAT Bookings** buttons provide direct access to "Manage" function [illegible] in OR Manager. [illegible]

The "manage" screens enable you to search for bookings that share characteristics, such as surgeons or procedures. More complex and custom searches are also available. For example, finding all surgeons who are performing several types of [illegible] procedures within the next three months.

Searches typically serve a [illegible] purpose, such as changing all bookings scheduled for one room to another room, or rescheduling all operations for a surgeon.

Each manage screen is for a different function:

- **Manage Bookings** to locate and work with OR bookings.
- **Manage PAT Bookings** to locate and work with PAT bookings.

Manage Screen Searches

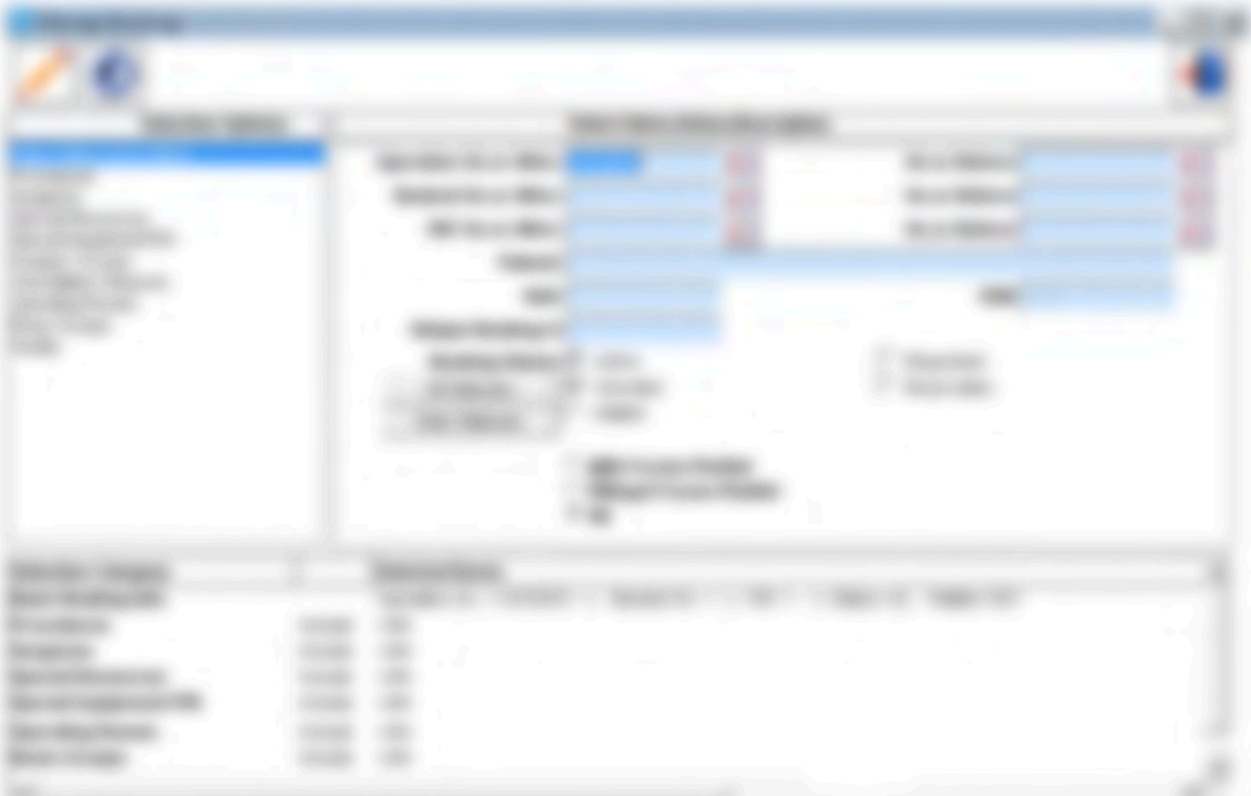
Using the Manage Bookings and Manage PAT Bookings functionality involves two screens:

- A manage screen, where you enter search criteria.
- A manage options screen, where you select bookings from the list returned by the search.

Manage Bookings Search Screen Features

This section describes how to use manage screens, including various boxes, search options, and buttons. Note that not all the features described here are on all of the manage screens.

This is an example of a typical Manage Bookings search screen:



Selection Options

The Select Options are categories of selection criteria. Clicking each category opens a screen where the corresponding search criteria is entered.

Selection Option	Description
Dates, Status, Description	Specify the date range(s), patient information or booking information to search on. **Date, Patient, Unit, Booking Number, and Social Security Number (SSN) Data** — Specify these by selecting the boxes. **All Statuses** or **Clear Statuses** specifies the booking statuses of interest. Click **All Statuses** to select every status and select **Clear Statuses** to clear every status. Selecting **All Statuses** requires the **Waitlist Priority** and Number of **Days waiting** range to also be defined. **Hil**: Select this to map the occurrence as frozen available bookcount to the search or select **Wthg Frozen Pick** list or **Without Frozen Flowlist**.
Procedures	Specify procedures to include or Exclude in your search.
Surgeons	Specify surgeons to include or Exclude in your search.
Special Resources	Specify resources to include or Exclude in your search.
Special Equipment/TPK	Specify special equipment and/or TPK items to include or Exclude in your search.
Surgeon Groups	Specify surgeon groups to include or Exclude in your search.
Cancellation Reasons	Specify cancellation reasons to include or Exclude in your search.
Operating Rooms	Specify OR rooms to include or Exclude in your search.
Room Groups	Specify room groups to include or Exclude in your search.
Facility	Specify facilities (based on your access rights) to include or Exclude in your search.

Custom Field Select enables you to create and save your own search parameters, including your custom fields and relationships between fields.

The **Clear List** button (not shown on the preceding screenshot) removes the check marks from all entries in the current **Select Options**.

The bottom of the screen shows your selections. If no items are selected, all items are automatically included in the selection criteria for that option.

Configure the Display

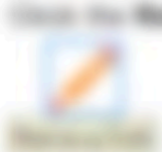
Managing Bookings

Best Practice: You can also use the go Booking functionality in OR Manager for the following, although Picis recommends that you use OR Scheduler for these actions:

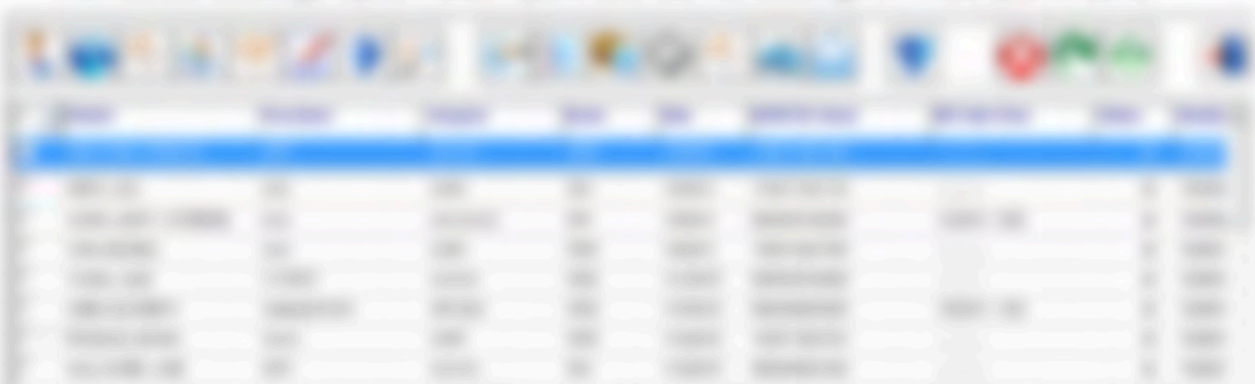
- Edit booking data (time, room, duration, etc.)
- Edit patient data
- Cancel bookings

Select Bookings

1. If you do not already familiar with using manage screens, review Manage Screen Overview on page 70.
2. Enter your search criteria. Your selections appear under **Selected Items** at the bottom of the screen.
3. (Optional) Click **Custom Field Select** and enter your custom field information.
4. Click the **Retrieve/Edit** button.



The Manage Bookings Option screen opens and lists the bookings that meet your criteria.



Screen Notes

- An asterisk (*) next to a patient's name indicates a multiple procedure surgery.
- The **SU/PR/TD Times** column shows the beginning Setup/Procedure/Tear Down times for the procedure.
- The **PAT Date/Time** column shows the date and time of the Pre-Admit Tests for this booking.
- The **Status** column uses these abbreviations:
  - A — Active

- [illegible] — Requested
- [illegible] — Cancelled
- [illegible] — Reservation
- [illegible] — Wait List
- [illegible]
- [illegible]
- [illegible]
  - [illegible]
  - [illegible]
  - [illegible]
- [illegible]

Manage Booking Buttons

[illegible]

[illegible]

Button	Description
Edit Patient Data 	**Best Practice:** [illegible] [illegible]

Button	Description
Global Fix Update	Enables you to update the same user-defined field in multiple records. For more information, see the OR Manager User Guide.
Copy Booking	**Best Practice:** Use OR Scheduler to copy bookings. Opens the booking screen in OR Manager with a copy of the selected booking. You can then change any of the original booking's parameters and save it to a different time slot, creating another booking like the original with only the parameters you changed being different. Only the PAT data is not copied to the new booking. The original booking remains unchanged.
PAT Booking	Create or edit PAT bookings for the highlighted case.
Move/Edit Bkng	**Best Practice:** Use OR Scheduler to move and edit bookings. Opens the booking on the OR Booking screen for editing the booking, PAT or patient data. You can also double-click on any entry on the list to edit the booking, PAT, or patient data.
Link to Case Record	Enables you to link to a case record for the selected open item by bringing up the **Patient** tab of any Case Record screen with all of the bookings for patients that match the search criteria. If multiple bookings for the same patient are found, you can limit the Case Record by matching the patient's name, unit number, or account number, if available, of the selected record.
Show Audit Trail	Shows a complete history of the highlighted booking. The audit trail records every time the booking, or its associated entities, was viewed, modified or printed.
View Booking	Opens a read-only booking summary containing all procedure and patient information.

Button	Description
Edit Frozen Picklist	Allows you to make changes to the items on a case's picklist. These changes appear on the printed list and on the case record, but they are not permanent. They do not affect the preference card or the permanent picklist. For more information, see the OR Manager User Guide.
Picklist	Prints picklists by case cart. For more information, see the OR Manager User Guide.
Worksheet	Prints worksheets by booking. You have the options of including [illegible] and/or [illegible] Instruction Notes on the worksheet. For more information, see the OR Manager User Guide.
Print Schedules	Prints booking schedules or external reports. For more information, see the OR Manager User Guide.
Print Booking	Prints booking sheets. See: Managing Bookings on page 85.
Mail Merge	Takes you to a module that allows you to print letters, envelopes, and labels for selected cases. For more information on the preceding topic, see the Mail Merge chapter in the OR Manager Configuration Guide: Mail Merge.
Field Level Audit Trail	Shows all changes made to fields within the booking. For more information, see the OR Manager User Guide.

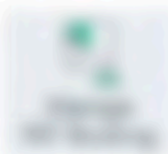
Button	Description
Cancel	Enables you to cancel bookings or clarify cancellation or sync for selected bookings. **Note:** If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and some bookings will not be updated. See: Managing Bookings on page
Re-book	Returns cancelled bookings to Active of list. **Note:** If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and some bookings will not be updated.
Refresh	Updates the Manage Bookings Options screen with the most direct information from the database.
Close	Closes the Manage Booking Options screen.

Note: For more information on any on these features, see the OR Manager User Guide.

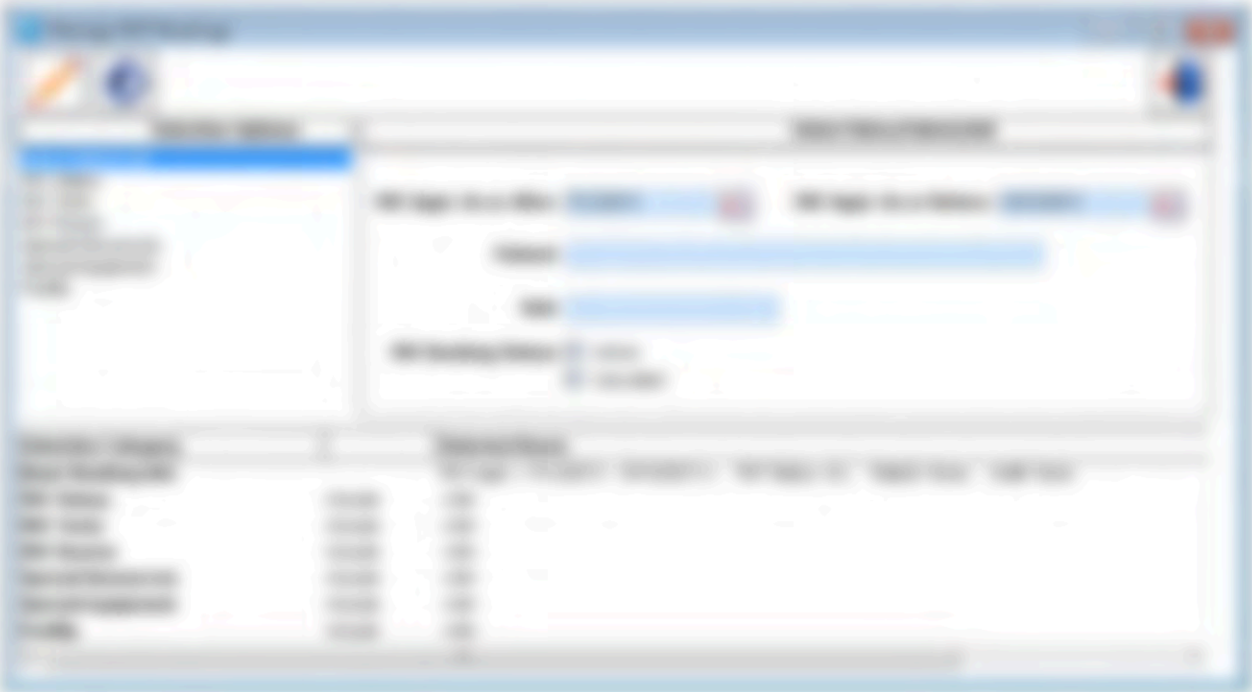
Managing Pre-Admit (PAT) Bookings

Access Manage PAT Booking functionality

- Click the following ribbon button:

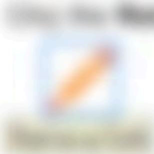


Note: The **Manage PAT Bookings** button provides direct access to "Manage PAT Bookings" functionality in OR [illegible]. (There is no need to start or log in to OR Manager [illegible].)

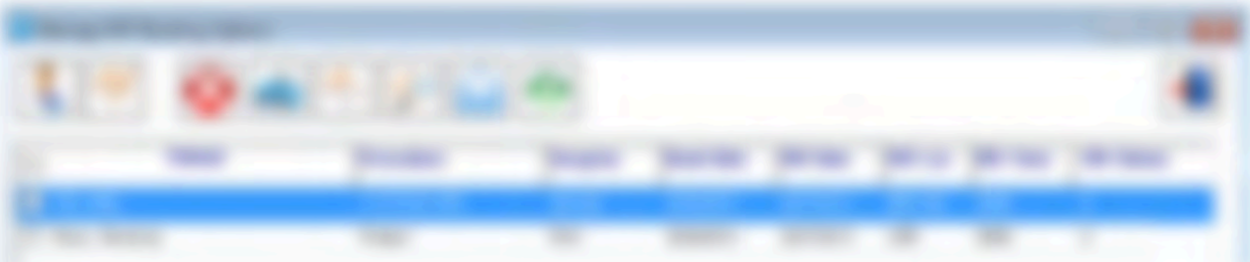


Select PAT Bookings

1. If you are not already familiar with using manage screens, review [illegible] on page [illegible].
2. Enter your search criteria. Your selections appear under **Selected Items** at the bottom of the screen.
3. If you are using Custom Field Select, click **Custom Field Select** and enter your custom field information.
4. Click the **Retrieve/Edit** button.



5. The Manage PAT Booking Options screen opens and lists the bookings that meet your criteria.



Manage PAT Booking Buttons

Select one or more bookings and use the buttons described next to accomplish your task. (You can select/deselect all bookings at once using the check-box at the top of the "Patient" column.)

Button	Description
Edit Patient Data 	**Best Practice:** Use OR Organizer to edit patient data. Opens the **Patient** tab of the OR Booking screen in OR Manager so you can edit the data in the user-defined form.
Move/Edit Booking	Opens the PAT booking for editing. Double-clicking on an entry in the list does the same thing.
Cancel 	**Best Practice:** Use OR Scheduler to cancel PAT bookings. Cancels the selected PAT bookings. (No confirmation)
Print Booking 	Prints PAT Booking Sheets.
Print Schedules	Prints PAT Booked Schedules or Outpatient Reports.

Button	Description
View Booking	Opens a read-only booking summary containing all operations and patient information. For more information, see the OR-Manager User Guide.
Mail Merge	Opens a module for printing letters, envelopes and labels for the selected PAT bookings. For more information, see the OR-Manager Configuration Guide.
Refresh	Updates the Manage Bookings Options screen with the most current information from the database.
Close	Closes the Manage PAT Booking Options screen.

Note: For more information on any of these features, see the OR-Manager User Guide.

A

Appendix A: Perioperative Integration

Integration Overview

[illegible]

[illegible]

[illegible]

Picis Perioperative and Critical Care Workflow

The logical workflow for interactions with Picis applications in a perioperative encounter is as follows:

OR Scheduler to create a booking

↓

Preop Manager to create a preanesthesia evaluation

↓

OR Manager to document surgical data (in a case record created on the day of surgery)

↓

Anesthesia Manager to document anesthesia data

↓

PACU Manager to bring the anesthesia record and document the patient's recovery from anesthesia

↓

If **Critical Care Manager** is used, the patient chart in this application includes data from Anesthesia Manager and PACU Manager for postoperative patients.

As soon as a booking or case record exists in OR Scheduler or OR Manager, the patient name appears on various lists in other modules like Preop Manager and Anesthesia Manager, allowing the patient's record to be opened in those modules.

If the patient has a booking, the case record is started for the booking. If the patient does not, for example in an emergency surgery, an add-on case is started. After it is created, the case record supersedes the booking for the purpose of identifying the patient across modules.

Data Flow Between Applications

Certain data is shared between linked records as follows:

- Between the booking and the preoperative record

- Between the booking and the anesthesia record.
- Between the case record and the anesthesia record.
- Between the preoperative record and the anesthesia record.

Data flow for home medications, allergies, and precautions is always bidirectional; data flow for other types of data may be unidirectional or bidirectional, as described in the next section.

Note: Shared or Shared Fields are defined by Picis, so their definition and type cannot be edited.

When a preadmission is admitted in Anesthesia Manager, PACU Manager, or Critical Care Manager, any linked booking or case record becomes associated with the same encounter type as that of the admission "template" in use at the time. Data flows between the booking or case records and the anesthesia record as long as the template is not changed to one that belongs to another encounter type.

Example: A hospital has three clinical admission templates: "Preop Holding", "Anesthesia" and "PACU"; the first two are associated with the encounter type "OR" and the last with the encounter type "PACU". A patient is admitted (from a preadmission) using the "Preop Holding" template. Data continues to flow between records when the patient is transferred to the "Anesthesia" template, but ceases to flow when the patient is later transferred to the "PACU" template.

⚠ **CAUTION:** For some free text data elements, such as comments, the interface in Anesthesia Manager, PACU Manager, or Critical Care Manager allows more text to be entered than in the corresponding OR Manager interface.
For long comments that are shared between applications, an ellipsis is shown in Anesthesia Manager, PACU Manager, or Critical Care Manager as soon as entering any more text would give rise to truncation of data in OR Manager.

Data Elements

The following types of data can be integrated (shared):

- Allergies and precautions
- Anesthesia Type

  Note: Anesthesia Type is documented as an event in Anesthesia / PACU Manager.

- ASA type
- Demographic data (patient name, address etc.)
- Diagnoses - Dietary, Postop and Surgical

> **Note:** (The "Surgical" diagnosis type only exists in the "clinical modules". When data of this type flows to OR Scheduling or OR Manager it maps to the "Preop" type.

- Home Medications
- Medical Team - Anesthesiologist and Surgeon
- Milestone events. See [illegible]

> **Note:** Only milestone events with event type "Milestone Event" are shared.

- Procedure (including [illegible] modified procedure entered in the OR Manager booking as case record)

> **Note:** Information entered in the HIS updates all applications. If the [illegible] used is [illegible], modifications and deletions carried out in the HIS are reflected in OR Schedule, OR Manager, Preop Manager, Anesthesia Manager, and [illegible] Manager.

See the [illegible] to Dynamic [illegible] Exchange.

The following tables show [illegible] data entered in different applications appears in an integrated system.

Data entered in an OR Schedule Booking			
Data	Preop Manager	OR Manager Case Record	Anesthesia/[illegible] Manager
Allergies and precautions	Yes	Yes	Yes
Demographic data	Yes	Yes	Yes
Diagnosis - Preop	Yes	No	Yes
Home medications	Yes	Yes	Yes
Medical Team - Anesthesiologist	Yes	Yes	Yes
Medical Team - Surgeon	Yes	Yes	Yes
Procedures	Yes	Yes	Yes

Data entered in Preop Manager			
Data	OR Schedule Booking Screen	OR Manager Case Record	Anesthesia Data Manager
Allergies and precautions	Yes	Yes	Yes
Anesthesia Technique Planned	No	No	No
Demographic data	No	Yes	Yes
Diagnosis - Preop	Yes	Yes	Yes
Diagnosis - Postop	No	No	Yes
Diagnosis - Surgical	No	Yes	Yes
Home medications	Yes, if the booking is not linked to a case record. No, if the booking is linked to a case record.	Yes	Yes
Medical Team - Anesthesiologist	No	No	Yes
Medical Team - Surgeon	No	No	Yes
Procedure	No	Yes	Yes

Data entered in an OR Manager Case Record			
Data	OR Schedule Booking	Preop Manager	Anesthesia Data Manager
Allergies and precautions	Yes	Yes	Yes
Anesthesia Type	No	No	No
ASA Type	No	No	Yes
Demographic data	No	Yes	Yes

Data entered in an OR Manager Case Record			
Data	OR Scheduler Booking	Preop Manager	Anesthesia/PACU Manager
Diagnosis - Preop	No	Yes	Yes
Diagnosis - Postop	No	No	Yes
Home medications	Yes	Yes	Yes
Medical Team - Anesthesiologist	No	No	Yes
Medical Team - Surgeon	No	No	Yes
Milestone events	No	No	Yes
Procedure	No	No	Yes

Data entered in Anesthesia/PACU Manager			
Data	OR Schedule Booking	Preop Manager	OR Manager Case Record
Allergies and intolerances	Yes	Yes	Yes
Anesthesia type	No	No	Yes
ASA type	No	No	Yes
Demographic data	No	Yes	Yes
Diagnosis - Preop	Yes	No	No
Diagnosis - Postop	No	No	Yes
Diagnosis - Surgical	No	No	Yes
Home medications	Yes, if the booking is not linked to a case record. No, if the booking is linked to a case record.	Yes	Yes

Data entered in Anesthesia/PACU Manager			
If is	OR Schedule Booking	Preop Managers	OR Manager Case Record
Medical Team: • Anesthesiologist • Anesthesia Attending • Anesthesia Relief • Anesthesia Resident • CRNA • CRNA Relief	No	No	Yes
Medical Team – Surgeon	No	No	Yes
Milestone events	No	No	Yes
Procedure (anesthesia procedure only)	No	No	Yes

Changing the Patient Using OR Scheduler

It is possible to change the patient in a booking in OR Scheduler. A patient change would be necessary if the patient name and/or medical record number in the booking is incorrect.

The change affects any linked records the patient has in OR Manager and other Peri-operative and Critical Care modules such as Preop Manager, Anesthesia Manager and PACU Manager with certain exceptions. Similarly, you can link records created in these modules to records in OR Scheduler.

If a case record has not yet been started in OR Manager, any change to the patient in the booking affects records in Preop Manager and Anesthesia Manager.

After a case record is created, any change of patient must be performed in the case record in OR Manager in order to update the records in the other modules; a patient change in the booking would have no effect on the other modules.

Restrictions

In certain cases, other modules will reject a patient change in order to maintain data integrity in existing records. When this happens, OR Scheduler displays the following message:

This change does not affect any linked records in other Picis Perioperative and Critical Care applications. Do you want to proceed?

If you click **Yes**, the patient changes only in the booking; records in the other modules continue to use the original patient name and data entered in one module do not flow to the other. If you click **No**, the patient change does not occur in any module.

Troubleshooting: Frequently Asked Questions

Q. I changed the patient in a booking at the same time as I had a record for the same patient open in Anesthesia Manager. Why didn't the patient change on the record in Anesthesia Manager?

A. Did a case record exist in OR Manager before you changed the patient in the booking?

- If so, repeat the patient change in the case record in OR Manager and it will change in Anesthesia Manager.

- If not, did you start the record in Anesthesia Manager under the name of the second patient before you changed the booking to show the same patient? You can link the anesthesia record to the case record by using the Link Record command on the File/Edit menu in OR Manager.

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