

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

© **Picis Clinical Solutions, Inc.** All Rights Reserved. **Picis** and the **Picis** logo may be trademarks or registered trademarks of **Picis Clinical Solutions, Inc.**, and/or its affiliates in the United States and/or other countries.

Picis Clinical Solutions believes the information in this document to be accurate and much care has been taken in its preparation. However, Picis Clinical Solutions does not accept any responsibility for the use or reliance on the information contained herein. The user should exercise care to assure that the use of the product and its related documentation is in full compliance with the laws, rules and regulations of the jurisdictions in which they are used.

Trade Secrets and Proprietary Notice: This material contains valuable confidential information of Picis Clinical Solutions and/or its affiliates and shall at all times remain the property of Picis Clinical Solutions. This material may not be copied, photocopied, reproduced, translated, or converted to any electronic or machine-readable form in whole or in part without the prior written approval of Picis Clinical Solutions.

Picis Clinical Solutions reserves the right to make changes to any product described in this document to modify its functionality or design. Picis Clinical Solutions is committed to duly notify its customers of any changes to product functionality or design which may affect the product performance or application. The information contained herein is subject to change and revisions may be issued from time to time. For current information, please contact Picis Clinical Solutions.

Intended Use: Picis Clinical Solutions software patient information system collects an electronic medical record utilizing commonly available hardware, and is classified as a "medical device" by regulatory agencies in certain jurisdictions. A patient record is populated with information from various sources, such as healthcare professionals, medical devices connected to the system, and data that archives via hospital and laboratory information systems. The application stores this information in a database, and it may analyze and/or display the data in different format for evaluation by healthcare professionals for informational purposes. The product is intended for use by healthcare professionals.

HIPAA and EU General Data Protection Regulation Compliance: Picis Clinical Solutions has put considerable effort into providing the capability to protect and audit access to patient personal health information in its products. It is highly recommended that those responsible for implementing the software fully utilize the delivered security functionality in order to ensure that only authorized users have access to the data; to facilitate meeting the HIPAA minimum necessary standard; and to facilitate meeting the EU General Data Protection Regulation's "privacy by design" requirement. Picis Clinical Solutions supports configuration that will permit authorized users to restrict access to certain features and functions, to allow view-only rights to protected information and to define editing rights. Also, native audit features and reports can be utilized periodically in order to monitor changes or particular instances of access to data.

Baution: The data displayed on Picis Clinical Solutions applications are for informational purposes only. Picis Clinical Solutions recommends that users always refer to primary devices for diagnosis and treatment.

Hardware Requirements: Detailed hardware requirements are provided during the contract process. Please contact your System Administrator or Picis representative should you require additional information.

Nomenclature: The expression "real-time data", "real-time variables", "real-time fluids" etc. are Picis expressions that refer to near real-time data collected from connected devices.

Removal of Picis software: For information on removing Picis software, please refer to the *Release Notes*.

Troubleshooting: If you encounter problems with the installation, configuration or use of the product, please contact your Picis representative or submit a support request.

Hard copy: Paper copies of certain guides are available. Please contact your Picis representative for details.



Picis Clinical Solutions, Inc.

100 Quannawitt Parkway, Suite 405, Wakefield, MA 01880 USA

Phone: 781-457-3000 • picis_info@garriscomputer.col • <https://www.picis.col/>



Refer to the *Release Notes* for date of manufacture.



Document may include cautionary statements.



Picis Clinical Solutions, S.A.U.

Carrer del Císter 2, Barcelona, 08022, Spain



Unique Device
Identifier (UDI)

For UDI information, refer to the *Release Notes*.

Contents

Introduction	5	Booking Notes Tab	57
Welcome	5	Validation Errors and Conflicts	59
Basic Concepts and Skills	7	Checks Performed when Saving	60
Logging On	7	The CONFLICT CHECKING Button	64
OR Scheduler Screen	8	The ISSUES Button	65
Booking Modes	12	Validation Error Indicators	66
Block Times	13	The Schedule Viewer	67
Physician Office Link	14	About the Schedule Viewer	67
Drop-down List Filtering	14	Features Common to OR Mode and PAT	
Star search	15	Mode	67
Scheduling	17	Grid Features	68
General Scheduling Workflow	17	Selecting Days	73
Specific Scheduling Workflows by Appointment Type	19	Selecting Rooms	75
Create a New Booking	20	OR Mode	76
Create a New Reservation	21	OR Mode Right-Click Menu	78
Create a New Request	22	Add a Booking to a Time Slot	80
Create a New WaitList Entry	22	PAT Mode	81
Booking Window	23	PAT Mode Right-Click Menu	82
Booking Options	24	Rearrange a Day	83
Booking Tab	27	Overview	83
Surgeon Region	28	Search Windows	87
Surgeon/Procedure Stats	34	Searching Overview	87
Equipment, Tray/Pack/Kit (TPK), Resources, and Anesthesiologists	37	Search fields	88
Patient Tab	39	Search OR Bookings	89
Patient Search	39	Search PAT Bookings	91
Standard Patient Data	43	Managing Bookings	95
Forms Tab	47	Overview	95
Viewing and Entering Data	48	Manage Screen Searches	95
Booking Grid Tab	55	Manage Bookings Search Screen Features	96
Grid Features	55	Managing Bookings	98
Selecting Days	55	Screen Notes	99
Selecting Rooms	56	Manage Booking Buttons	100
Information Shown for Existing Bookings	56	Managing Pre-Admit (PAT) Bookings	103
Adding a Booking to a Time Slot	56	Manage PAT Booking Buttons	105

Contents

Appendix A: Perioperative Integration **107**

Integration Overview 107

Picis Perioperative and Critical Care Workflow 108

Data Flow Between Applications 108

Data Elements 109

Changing the Patient Using OR Scheduler 113

Restrictions 114

Troubleshooting: Frequently Asked Questions 114

Index **115**

Introduction

Overview

Schedule is the iM Manager Schedule User Guide for Plan Management and Clinical Care. The iM Manager Scheduling Infrastructure allows you as iM Scheduler to plan scheduling staff by month, available time slots for patients while using such resources and equipment into consideration.

Note

For the following activities, you must use iM Scheduler:

- ▶ Creating and maintaining doctor's schedule for time slots for items and other settings for both iM Manager and iM Scheduler.
- ▶ Creating the plan for staff meetings; you can use iM Scheduler for viewing and creating them.
- ▶ Viewing and printing schedule reports.
- ▶ Printing patients and appointments.
- ▶ Creating reservation using notes.
- ▶ Creating reservation cards for diagnosis and procedure for generated patients and appointments.
- ▶ Manager has user access rights including description using for setting and supply management.

- Installing NewTrack
- Running reports

For more information, see the following guides:

- [Get Manager: New Track](#)
- [Get Manager: Configuration Guide](#)
- [New Track: User and Administrator Guide](#)

2

Basic Concepts and Skills

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

Topics in this chapter include the following:

- Logging On (this page)
- IBM iSeries – Screen on the next page
- Displaying Object Attributes on page 10
- Work Tables on page 10
- Displaying Objects on page 10

Logging On

Note: The IBM iSeries user is generally installed on the Windows desktop as:

Start > Programs > IBM iSeries

It may also be present on the desktop.



1. Double-click the IBM iSeries icon.
The first log-on screen appears.

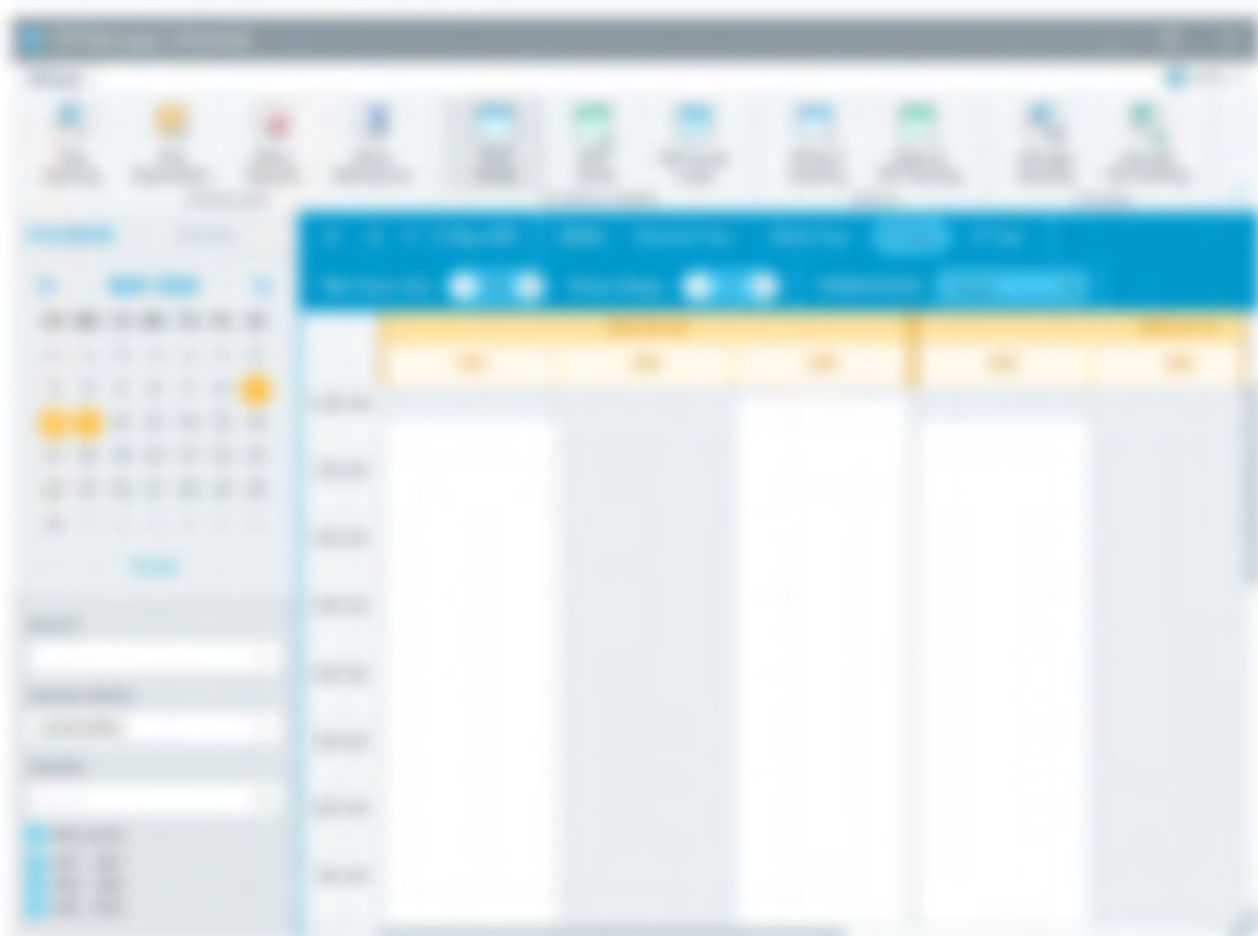
Basic Concepts and Skills

OIF Scheduler Screen

2. Enter a valid user name and password (user identified to log on user from step 10).

Note: Whether or not the **Change Password** button is present in login window depends on your system configuration of Windows. Service Authentication is used to log on user to present. If configured to your site, there is also a button for changing the **Password** to log on to.

OIF Scheduler Screen



When you open OIF Scheduler it shows the OIF Study Scheduler screen under the OIF tab. This is considered as the "Home" screen in OIF Scheduler.  Other at the top on the main window provide access to the following major functions.

Basic Concepts and Skills

Off-Schedule Service

Available Services	Services	Available Time To
Available 24/7	 New Booking	There is new booking, reservation, request or waiting list entry. Note: The service is active with all the public bookings, reservations, requests and is in the waiting and collectively referred to as appointments.
	 New Reservation	
	 New Request	
	 New Waiting List	
Available 24/7	 Off-Schedule	- There is off-schedule. - Booked an off-schedule or reservation. - Cancelled an off-schedule or reservation is a request or wait list entry. - There will or not an off-schedule. - It not an off-schedule. - Remove a block from the table following this entry. - Not a comment is a time slot.
	 High-Schedule	- There is high-schedule. - Cancelled a high-schedule. - Remove a block from the table following this entry. - Not a comment is a time slot.
	 Reschedule a Day	Reschedule the bookings in a day. The system opens Off-Schedule.

Available Functions	Buttons	Available Functions
Available	 Search Bookings	Access the JCL or JCL Bookings to perform the following: - View a JCL or booking - Show a booking in the alternate view - Copy a booking to create a new one - Cancel a booking - Rebook a confirmed booking - Convert an JCL appointment to a real booking
	 Search JCL Bookings	
Reserved	 Manage Bookings	These buttons open JCL Manager, not used to perform the following for existing bookings: - View and print suggested reports - View updates and assignments - View booking wall mode For more information, see the JCL Manager user guide.
	 Manage JCL Bookings	

Note: JCL does not use the time segments reserved for specific suggested appointments, appointments integration, groups, within bookings, or any combination of these things. A JCL does not use it as the segment reserved for a specific JCL booking status. For more information, see the JCL Manager Configuration Guide.

When you open the screen the filter is applied by default. You can remove the filter so that it only appears after you click the filter tab, as well as you click somewhere it will hide again.

How to remove the filter

1. In the bottom right corner of the screen, click the up arrow.



Temporarily show the filter when removed

1. Click:

- At the top left of the screen, click the Filter tab.

Remember: Close the screen when instructed.

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

Recent Bookings

The following screen appears on the right of the screen 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 in this extension.



	Booking 1100 - Appointment is scheduled
	Booking 1100 - Appointment is scheduled
	Booking 1100 - Appointment is not set
	Booking 1100 - Appointment is not set
	Booking 1100 - Appointment is not set
	Booking 1100 - Appointment is not set

The last pin icon shows an appointment is not set by clicking it. The appointment status for editing unless you do not have editing permissions or it is locked by another user. In which case it shows not set.

Booking Windows

Type	Description
Booking 	A booking is a departure 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 transferred to the "Revised" list when it can be used to release a room, but not a full package.
Reservation 	A reservation is a departure and a room and appears on the scheduling grid. However, unlike a booking, when a reservation is created it is only checked for "relevant" set of conflicts. A reservation must be converted to an active booking before it can be used to release a room. A scheduler typically creates a reservation while waiting for resource conflicts to be resolved.
Request 	A request has a departure, but does not have a room. Does not appear on the scheduling grid, and is not checked for conflicts. Requests can be processed via the Request Booking window. A request may be converted to a reservation or active booking for it to appear on the scheduling grid and active booking is needed to release a room. A scheduler typically creates a request when things is not sufficient to resolve a conflict.
Wait List 	A wait list entry does not have a departure, or room. Does not appear on the scheduling grid, and is not checked for conflicts. Wait list entries can be processed via the Request Booking window. When created a wait list entry, the user is prompted as to whether a priority should be used for waiting list. A wait list entry must be converted to a reservation or active booking for it to appear on the scheduling grid and active booking is needed to release a room. A scheduler typically creates a wait list entry when that waiting is sufficient for requests. Request is processed either as specific and active the flight is, especially if a confirmed one has not been selected.

Basic Concepts and Skills

Block Times

Skills

- You can use the **Block Times** to add all appointment types and, if necessary, change the booking mode. (For example, to change a booking to a walk-in only.)
- Reservations are imported again in the "Reserve slot" in the **Block Times**. You can also add them in several weeks from the **Booking Reservations** window.

The following table shows a summary of key differences:

	No. Locations	No. Slots & Types in pool	Shows in the Block Times Reservations ?
Booking	1	1	Yes
Reservations	1	1	1
Released	1	Yes	1
Not yet	Yes	Yes	Yes

Block Times

Block Times are the segments reserved for a specific resource in a particular pool. They are created in the **Block Times** window using the **Block Times** tool. For information on creating block times, see the **Block Times Configuration Guide**.

The **Block Times** block times can be reserved for different procedures, reservation categories, groups, other not used, or any combination.

Example: A clinic might reserve **Block Times** every Monday and Wednesday from 10:00 to 12:00, or **Block Times** might be reserved every Friday morning for certain surgeries.

Block times are either primary or secondary slot blocks.

- Primary Slot blocks** are the first-level main reservations.
- Secondary Slot blocks** are reserved for secondary slot blocks. These blocks automatically reserve second slot time if the associated Primary Slot Block is released.

Example: You might have a surgery slot time slot that will be released to a group's group in one month within 10 hours of the surgery. This released to general booking is created within 10 hours of the surgery.

Basic Concepts and Skills

Physician Office Link

Use POF records that were set up to interact to specific POF pending activities.

Example: During staff training Friday afternoon for telephone survey, POF were with status of "In Progress".

Physician Office Link

Off Manager and Off Schedule may be installed in physician office records as a hospital to enable doctors to schedule surgeries. Both status is referred to as a Physician Office Link.

Users receive a surgical appointment directly to Off Schedule. The appointment provider is used after call to facility to allow surgery. Once done, the appointment link is added to the schedule as the physician's office as a reservation and the schedule at your facility either confirms or rejects the requested appointment. Surgeon's office can respond to their status 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 any following ways:

- 1. Remote office has direct access to the network.
- 2. Remote office has access to the network through a Virtual Private Network.
- 3. Remote office has use Off Schedule as a data connection, which requires an additional dedicated server.

Security Manager restricts access to Off Schedule function by its the same way as authentication and users are restricted after the request. However, the **Physician Office Link** set in Security Manager provides higher restriction. For more information, see the Security Manager user guide.

Drop-down List Filtering

A drop-down list in the product has a "load" column and it may have additional columns. For example, the following information shows a list with three columns. The "load" column is labeled "Surgeon Link".



As soon as you start typing in the field at the top of a drop-down list it will filter to show only entries from the "list" column that begin with the text that you have typed.

How search

This is how search is performed in a "list" column. It filters up the entries that it is an external column next to the name. In the case of a drop-down list, however, the list filter is shown only within the search bar. The list filter is performed by typing an external column the search bar.

Note: The search bar can only search.

Example: To search the surface drop-down list and suggest, where names contain the text "John" you must enter the following text:

In drop-down lists with drop in more columns, such as the top of the professional sheet, you can search by any column that has a search bar in it. Using that search column of the external column.



Multi-column Search

This can search for text in more columns of entries at the same time using a search bar in each of them and providing each search bar with the relevant column for the column you want to search for.

Basic Concepts and Notation

Procedure Call Filtering

Example: To find the definitions only for the procedure identifier `insert-gopher` under the following text:

```
insert-gopher
```

Example: To find all procedures whose definitions contains the text `insert-gopher` and whose LITs only contains the text `100` under the following text:

```
insert-gopher 100
```

Note: The order of the settings does not matter.

3

Scheduling

General Scheduling Workflow

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

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

The bookings and reservations you can also start by right-clicking a listed seat for a room in the **Seating Chart**. In this situation, the seat and classroom in the **Booking Options** default to the seat and classroom you right-clicked.

(You can also start a new booking with the **CRM** > **My Confirmation**.)

Note: If your classroom is a multi-facility classroom, and this is the first time that you are using CRM functionality, 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 **OK/Cancel**.



Scheduling

General Scheduling Workflow

The scheduling screen appears:

- The currently selected facility will be shown at the top of the scheduling screen. If your hospital is a multi-facility installation, let you want to work with a different facility, click **CHANGE** next to the facility name.
- Click the Scheduling Options button in the top left of the scheduling window and set the options that you want:
 - Block out entries:** Set this Block out Priority.
 - Requests:** Set the requests.
 - Bookings and Reservations:** If you already know the exact date/time or month you will need that room. Otherwise, you can set them later in the Booking Grid pop.
- In the **Booking** tab, enter a sufficient procedure for this and any other tabs.
- In the **Request** tab, enter a request for the test type.
- In the **Room** tab, enter request data and any optional data as needed. Note that the forms and their contents depend on the selected procedure(s).
- The Block out entries and Requests, and the Bookings and Reservations that already have a date/time are made up in the **Booking Options**:
 - Click **OK** to complete the process. If there are any conflicts, appear or message that if they are unavoidable, a message will be shown to indicate that the next action was successful.
- The Bookings and Reservations that do not already have a date/time are made up in the **Booking Options**:
 - In the **Booking Grid** pop, click the Yes/No and you want and click **Book** tab. Then click **OK** to complete the process. If there are any conflicts, appear or message that if they are unavoidable, a message will be shown to indicate that the next action was successful.

Note: The scheduling screen also includes a new-only "Booking Request" tab. This is shown only from the Booking Home Dashboard or Off-Hour pop. The order shown depends on the selected request procedure and date.

Book Booking Grid

When creating an appointment, a "Book Booking" window may be open if there are any patients with similar names in both tabs who have been added to appointments within a certain number of days before or after the booking you are making. We intend to improve the window and configure it user-friendly and it is dependent on the appointment type and dates.

Double Bookings

From: [date] To: [date]
 From: [date] To: [date]

Below are double bookings for the following bookings:

ID	PC	Room	Procedure	Time
12345	123	2000A	Prostatectomy	09:00
12345	456	201	Prostatectomy	09:00
12345	123	2000A	Prostatectomy	09:00
12345	123	2000A	Prostatectomy	09:00

Based on the information shown in the window the user can click **CONFIRM to proceed with double booking or click **CANCEL** to cancel it.**

The Double 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 surgery when the procedures could have been combined in the same surgery

Note: The Double Bookings window by also be shown if the system can not find other meeting or waiting in appointments.

Specific Scheduling Workflows by Appointment Type

Note: The following workflow assumes you have already selected a facility to work with.

Scheduling

Create Scheduling Workflows by Appointment Type

Create a New Booking

Create a new booking in the New Booking button



1. Click **New Booking** on any the CTR, or any combination.
The scheduling screen appears.
2. If you already know the exact date/time or want 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 form tab.
3. In the **Booking** tab, enter a subject, procedure, location and any other data.
4. In the **Patient** tab, enter a patient and the last name.
5. In the **Form** tab, enter required data and any optional data as needed. Check that the forms and their contents depend on the selected procedure(s).
6. If you have already selected the date and location in the Booking Options screen, you can go ahead and click **Book** to complete the process.
7. In the **Booking** form tab, right-click the area and you want and click **Book** here. Type and click **Book** to complete the process.

Note: If there are any conflicts, cancel or conflicts that all day, is impossible. A message will be shown to indicate that go into action was impossible. For more information on conflicts, see [Scheduling Screen and Conflicts](#) on page 20.

Create a new booking directly in the All Work Schedule View

1. Right-click a time slot or to a spot in the Schedule View and click **New Booking**. (The date and location in the Booking Options default is the slot and location that you right-clicked.)
2. In the **Booking** tab, enter a subject, procedure, location and any other data.
3. In the **Patient** tab, enter a patient and the last name.
4. In the **Form** tab, enter required data and any optional data as needed. Check that the forms and their contents depend on the selected procedure(s).
5. Click **Book** to complete the process.

Note: If there are any conflicts, cancel or conflicts that all day, are impossible. A message will be shown to indicate that the slot action was impossible. For more information on conflicts, see [Scheduling Screen and Conflicts](#) on page 20.

Create a New Reservation

Create a new reservation via the New Reservation button.



1. Click **New Reservation**.
The scheduled screen appears.
2. If you already know the exact date/time or date you will select them using the **Scheduling Options** button in the top left of the scheduling screen. Otherwise, you will do them later in the Scheduling Workflow.
3. In the **Scheduling Info** enter a unique procedure number and any other data.
4. In the **Referral Info** enter a referral and the test type.
5. In the **Formal Info** enter required data and any optional data as needed. Check that the terms and their contents appear in the selected procedure(s).
6. If you have already entered the date and date/time in the Scheduling Options window, you can go ahead and click **OK** to complete the process.
7. In the **Scheduling Workflow** tab, sign that the time slot you want and click **Book Here**. Then click **OK** to complete the process.

Note: If there is any conflict, a red exclamation sign if they are incompatible. A message will be shown to indicate that the slot either was successful. For more information on conflicts, see [Appointment Status and Conflicts](#) on page 25.

Create a new reservation directly in the **SB Work Schedule View**.

1. Right-click a time slot for a week in the Schedule View and click **New Reservation**. (The date and date/time in the Scheduling Options shown in the next step determine that you right-clicked.)
2. In the **Scheduling Info** enter a unique procedure number and any other data.
3. In the **Referral Info** enter a referral and the test type.
4. In the **Formal Info** enter required data and any optional data as needed. Check that the terms and their contents appear in the selected procedure(s).
5. Click **OK** to complete the process.

Note: If there are any conflicts, a red exclamation sign if they are incompatible. A message will be shown to indicate that the slot either is successful. For more information on conflicts, see [Appointment Status and Conflicts](#) on page 25.

Scheduling

Search Scheduling Workflows by Appointment Type

Create a New Request

Create a new request via the New Request button



1. Click New Request

The scheduling request appears

Note: Requests do not have a limit, but are not checked for conflicts. Also, the schedule defaults to Today

2. If you already know the exact date and time you need, enter the information using the **Scheduling Options** button in the top left of the scheduling request.
3. In the **Scheduling** tab, enter a subject, procedure, location and any other data
4. In the **Patient** tab, enter a patient and age/race/gender
5. In the **Pages** tab, enter required data and any optional data as needed. Check that the form and their contents appear in the selected procedure(s).
6. Click **SAVE** to complete the process

Create a New Workflow Entry

Create a new workflow entry via the New Workflow button



1. Click New Workflow

The scheduling request appears

Note: Workflow entries do not have a limit or priority and are not checked for conflicts.

2. In the **Scheduling Options** window, enter a **Workflow priority**
3. In the **Scheduling** tab, enter a subject, procedure, location and any other data
4. In the **Patient** tab, enter a patient and the test type
5. In the **Pages** tab, enter required data and any optional data as needed. Check that the form and their contents appear in the selected procedure(s).
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:



Top

Shows the following information:

- How appointment type is loading in the booking window
- Patient Name column set in the Patient app
- Primary Surgery
- Primary Procedure

Header

Shows you to select a facility and shows the following information:

- Surgery date and time change for next day surgery
- Off hour surgery set in the Booking Options or Booking View app
- Patient ID set in the app or in the IT app app

Footer

Contains a Booking Options button and a Issues button

- The Booking Options button allows you to select the booking mode, and where relevant, the surgery date and time, off hour and that can priority
- The Issues button allows you to see conflicts for the booking

Top

The following table sets available:

Scheduling

Booking Options

- [Booking](#)
- [Forms](#)
- [Forms after you become available when you have referred a patient](#)
- [Booking time of the booking mode is booking via reception. \(This will become available after you have referred a patient, appointment with patient.\)](#)
- [Booking Notes](#)

Booking buttons

The booking buttons help you check for events, set times through the workflow for creating a booking.

Note: For creating bookings, the button also includes a [Cancel](#) button with which you can cancel the booking. When you also cancel a booking from the right-click menu in the [Off-Work Schedule](#) view.

View booking notes and/or patient instructions

- [View Page](#)

For more information, see [Booking Notes](#), tab on page 22.

Note: The button is disabled if there are no notes in the [Booking Notes](#) tab.

Check for calendar events and conflicts

- [View Conflict Checking](#)

For more information, see [Calendar Events and Conflicts](#) on page 25.

Open a tab

- [Directly click the tab or use the **Alt+Tab** and **Alt+F** 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 contains options for the booking mode you are working with, as shown in the following table.

Scheduling Mode	Scheduling Options Window	Options
Scheduling of reservations	Available options Available mode Booking Available reservations	• Drafts • All mode
Requests	Available options Available mode Request Available reservations	• Drafts
Web use	Available options Available mode Reservation Web use options	• Drafts Web use Priority

Change the scheduling mode

- Click the field currently **Scheduling Mode** and select the required scheduling type

Select a reservation for the booking

(This procedure applies to all booking modes except Draft mode only)

1. Under **Meeting Information**, click the calendar control.
The calendar control appears beneath the text.



2. Select the date and time on the date and time controls, respectively, outside the control to close it.
(You can quickly select the current date and time displayed in the text grid control with the **Today** and **Now** buttons, respectively.)

Note: A configuration parameter limits the number of days it allows that a procedure is in the system.

Note: If the **Display Project Details** is implemented, the date and time will be selected alternately and a user can edit.

Select a week

(This procedure applies to meetings and reservations only.)

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

Select a Meeting Priority

(This procedure applies to meeting entries only.)

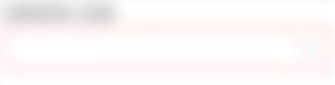
- Click the **Meeting Priority** text and select a priority for the entry.

Region Region

Fields

The following table shows the fields in the Region region of the working set.

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

Region ID 	Region ID The unique identifier of the selected region. Example: 1001
Region Name 	Region Name The region's full name. This field must be automatically used in the Region Code selection and cannot be edited. Example: 1001-1001
Off 	Off This field is only created for additional regions. It shows you in red the number of minutes into the operation that you additional region starts.
Procedure 	Procedure The first procedure available after you have selected a region. Depending on your system configuration, the list will either show all procedures or only those that the selected region is allowed to perform.
Duration 	Duration The full procedure name. This field must be automatically used in the procedure selection and cannot be edited.
Off Time 	Off Time The duration of the procedure. By default, this shows the average time in minutes it takes the region to perform the procedure. If the region has not performed enough operations to provide a stable average, the default will go from the Procedure duration in minutes.
Off 	Off The time up to the selected code the procedure is delayed in, such as 10, 100, 1000, etc.

 Add	Availability: The position on the pattern for this operation must be left right open etc.
 Add	Assignment: up to two assignments per surgery. Note: If two surgeons are working on the same procedure, all one of the surgeons do an assignment. do not add an additional surgeon.

Note: If bookings scheduled across more than one day.

Procedure Related Buttons

The following buttons are available to the right of the procedure information, not described in more detail in the following sections:



Procedure Information

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

 Add	 Add	 Add	 Add	 Add	 Add
Additional Procedure Description The additional procedure description section.			Additional Procedure Code 		

Scheduling

Scheduling Job

The section allows you to provide a custom procedure name to automatically determine a job name that changes and often will use to refer to various procedures. Depending on the configuration, the description that you enter may be used as the procedure name that appears on profiles and listing screens that are accessed through Storage Gateway to the console.

Example: The Procedure Scheduler's job description for a procedure is "Incremental Backup" and the job description is "Periodic incremental backup procedure." However, if the target action is "Run a Tape Drive Operation," you can provide an additional procedure name for the job instance to match the software's preference.

After assigning an additional procedure description as that appears in the Information field, users can view the target and the job to add a ready state to the information, as shown in the following example:



Set an additional procedure description

1. Click the down arrow to the right of the procedure.
2. In the panel that opens, type the text you want in the **Additional Procedure Description** box.

Set a GPT or WDD code for a procedure

1. Click the down arrow to the right of the procedure.
2. In panel that opens, click down arrow in the the **GPT/WDD Code** box and select a code.

Note: The list of codes available depend on the selected procedure.

Codes

Before being able to enter an additional description, you first also enter a GPT, WDD or WDD code related to the procedure. (For detailed codes a code is obligatory.)

Additional Procedure for the same target

If necessary, you can add additional procedures that will be performed by the same target, as part of the backup.

Add another procedure for the same surgery

- To add a second procedure for the same surgery, click the plus sign to the right of the first procedure (the button becomes available as soon as the first procedure has been added).



(To add any more procedures, click the plus sign to the right of the previous procedure.)

When there is two or more procedures, you can change their order and delete any of the procedures in the list.

Note: When you create procedures they remain linked to the surgery. If you have multiple surgeries, you cannot move a procedure to a different surgery.

Delete a procedure

- To the right of the surgery, click the "Remove" button.

This button is the best when there is only one procedure.

Note: Deleting a procedure does not remove any equipment or resources that were automatically added with the procedure.

- Click either delete any equipment, insert, delete, or resource that may have been added in association with the procedure you deleted, any others if whether they were added manually or automatically.

Move procedures - method 1

- Select a procedure and click the up or down arrow next to the offset box to move the procedure to the required location.

Note: These buttons are disabled when there is only one procedure.

Move procedures - method 2

- Move the cursor over the add up button to the left of the procedure.
The cursor changes to a floating blue dot above the procedure you have selected.
- Dragging the mouse button pressed "drag" the procedure up or down to the position you want. You know by the blue guidelines and that shows the mouse button as "drag".



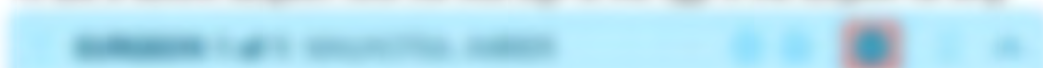
Additional Suggest

You can suggest multiple suggests to enter the queue at different times to perform parts of the operation. Then you add a second suggest you will also need to specify which of the additional procedures that the second suggest will be working on.

Note: This functionality is intended for doing a suggest mapping in an additional procedure. If all suggests are working on the same procedure you should instead set one of the suggests as a default.

Add an additional suggest

- To add a second suggest, click the plus sign in the top of the suggest toolbar.



A new suggest card appears.

- Click the field named in the procedure that the additional suggest will be working on.

Notes regarding the Offset field

- The additional suggests, the **Offset** field is available and allows you to set the number of seconds into the operation that the additional suggest starts.
- Offsets and durations cannot allow you give different suggestions. In instances, in there are two suggests in the toolbar, the offset of the additional suggest cannot be greater than the total length of the previous procedures.
- The value is relative to the start time of the first suggest, no matter which suggest you are editing the value for. (The number of seconds defaults to the total length of all procedures already selected, excluding the offset and duration fields.)
- If you change the function as a procedure, the start times of the suggests scheduled to occur after it are not automatically updated, you will need to update them manually as needed.

To add any more suggest, click the plus sign in the toolbar for the previous suggest.

When there are two or more suggests, you can change them, order and delete any of the suggests in the list.

Note: When you create a suggestion that overlaps with an other procedure, the system marks a conflict in a different procedure.

Collapsing/expanding suggestion periods

To help you focus on the information you need, you can toggle the visibility of suggestion periods.

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

Book a suggestion

1. To the right of the conflict, click the "booked" button. 
- This button is disabled when there is only one suggestion.

Note: When you book a suggestion it also creates the related procedures. Booking a procedure does not remove any dependencies or resources that were automatically added with the procedure.

2. You can also delete any equipment, dependencies, or resources that may have been added in association with the suggestion you selected, regardless of whether they were added manually or automatically.

Book a suggestion - method 1

- Book a suggestion and click the up or down arrow in the suggestion row heading to move the suggestion to the desired position.  

Note: These buttons are disabled when there is only one suggestion.

Book a suggestion - method 2

1. Click the cursor icon in the up or down arrow in the left of the conflict. 
- The cursor changes and a floating area box shows the suggestion you have selected.
2. Dragging the mouse button moves "drag" the suggestion up or down to the position you want as shown by the blue guidelines and then release the mouse button as "drag" is.



Self-Filtering by Facility

In multi-facility facilities, configuration settings determine whether or not the self-filtering facility filter all entries in the entry system, or only those self-entries that are authorized by the currently selected facility. If the facility for a facility is selected, the self-entries that result in facility access violations are filtered in real time.

For more information, see the Security Manager User Guide.

Surgeon/Procedure State

Note: There are several configuration options for adjusting Surgeon/Procedure State. For more information, see the Security Manager User Guide.

The Surgeon/Procedure State region shows statistics to help you predict how long it will take to complete the procedure.



When the system is first activated, procedure duration, setup, and time from time zone until the default time built in the Procedure definition, using the Manager.

The self-surgeon/procedure configuration allows you to configure number of users that have been performed and when they are created. The system calculates region specific average time that affect the time taken of the facility.

Over time, if a surgeon performs certain procedure faster or slower than the default, the default time from the Procedure definition, are effectively replaced by the surgeon's actual average time.

Time section



The Time section shows the setup, procedure and teardown times used for the testing. The **Procedure** value is visible in the **Procedure** field. The **Setup** and **Teardown** values are shown visible in the Time section.

Complex Cases

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

In all the complex cases, the next combination of multiple suggestions and procedures after a set configured number of identified cases have been performed the system can calculate suggest specific average times which can affect the test results.

Statistics NOT available

If statistics are not available for a complex case combination, the average time for each procedure/suggestion is not calculated and these average times are combined in the "Total" section in the testing. The **Procedure** value shows the total aggregated time for all combinations in the targets, the **Setup** and **Teardown** values are the longer value of all the procedures in the targets.

Example

	Setup	Procedure	Teardown
Procedure A	15	20	25
Procedure B	20	25	30
Value shown in Time section (used for planning the testing in the grid)	35	45	55

Statistics available

If statistics are available for a complex case combination, the data shown in the **Suggestion/Procedure** field section.

[View details](#) [View details](#)

The **Suggestion/Procedure** field shows statistics given in each of the individual suggestion/procedure combinations. (Note a procedure can be set up multiple times in 1).

The **SimpleAverage** subwindow also shows resource usage in the whole combined sample used. By default, the **Times** section shows the sample average times. You can access the subwindow again at any time. If you click any time, the values shown in the **Times** section are updated based on the value you just click and using sample address of the selected time. Also, if available, the sample is a combination sample for available. You can scroll back to the sample average section so that this update again in the **Times** section by clicking the **SPB** button.

Fields and Buttons in the SuggestProcedure State Region

Field/Button	Description
right section	Shows if a user want pressing state used to generate the statistics for the suggestprocedure subwindow.  The user includes the data, address, time and count that user want include with the suggest procedure window. you can designate some rows as Tracked again and state that is not included in computing SuggestProcedure. Note: Tracked are suggest procedures that is an exceptional recommendation and should not be included in the averages. Manually designate a procedure row as an outlier To go off of the user just you want to designate as an outlier, select Tracked and then click Tracked. The user is automatically removed from the list and the underlying times are removed from the user get statistics.
average	Shows average for sample used or use the Simple Average data for a sample used. Shows the suggest times, Tracked and Procedure times, as declared in the Procedure dictionary.

Code/Description	Description
1-1000000000	Shows the total number of times the engineering services contract has been performed.
10001-0 It is a value configured by user (integer)	Shows the average billing, Resources and Procedures times for the job it is associated with for the engineering services. Note: Deleted cases, complete cases (both free and paid), and incomplete cases are not included in these averages.
10002-0	Button only available in the Complete Storage tab. With complete cases, if you click the tab for a procedure, click a Resource, go where shown in the Times section and either select or go with and click through another of the individual times. You can reset this in the complete storage section by clicking the button. Note: If you have not made any calls to these times, clicking the button has no effect.

Equipment, TrayPackKit (TPK), Resources, and Bioethanollogists

[Equipment](#) | [TrayPackKit \(TPK\)](#) | [Resources](#) | [Bioethanollogists](#)

[Equipment](#)

Equipment, TrayPackKit (TPK), Resources, and Bioethanollogists select to from the Procedures dropdown. They can be either for a single procedure without affecting the default or go Procedures dropdown.

Note: Resources need to additional inputs, such as cases, Techniques and Consulting. Some, the need to complete and need to be assigned to a location for the purpose of facility sharing, with using.

Use Equipment, TrayPackKit, Resources, or Bioethanollogists entries, and the corresponding ID.

- To add the Equipment, TrayPackKit, Resources, or Bioethanollogists entries defined in the facility, add the corresponding ID.

Add or edit an entry

- To add an entry, click the corresponding tab and select the entry for the drop-down list in the left.

Example:



This example shows the Appointment drop-down list.

- The equipment, TPE, and appointment you wish select the quantity.

or



- Optionally, the equipment, TPE and appointment, you can also set the **Offset** and **Duration** values to specify the number of minutes into the length that the entry is needed (offset) and the length of time for which it is needed (dur).

or



Note: The offset is required for the entry and the offset value for the application assumes a value of 0.

Note: If the duration field is left empty, the application assumes the duration ends at the end of the appointment.

Note: The sum of **Offset** + **Duration** cannot be greater than the appointment time including other procedures and associated duration.

Note: For TPE items, the Type field indicates whether the selected item is a tag, with or without.

Note: To add average entry, click the drop-down in the left of the previous entry in the same category. 

Remove an entry

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

System Defaults

- To clear the equipment, IPR and resource fields to their original default values, click **Reset to Defaults**.

Reset to Defaults

Note: This does not affect the AppointmentPage tab.

Patient Tools

Before a patient is chosen, the Patient tool opens with the "Patient Search" tab. After a patient has been selected the user changes to the "Standard Patient List" tab.

Note

In the guide the following expressions are used synonymously:

- ⌘ Patient Search table system (PR)
- ⌘ Patient Information System (PR)
- ⌘ Health Care Information System (PR)
- ⌘ Clinical Information System (PR)

Patient Search

The Patient Search tool provides demographic fields and you to search for a patient in the PR system or IPR system. You can also add this tab to create new patient in the PR system.

It would show you a list of records that match your search criteria.

Scheduling

Patient List

After selected a scheduling pattern, you can select a new date you can add with more demographic data for the patient and then save the patient to the mapping.

After you save a patient for the mapping, you can no longer edit the basic patient information but you can still change it in a new entry mode. (The exception is the Personalize page, which you can edit and after you have selected the patient.)

Note: You can change the patient pattern or after it has been saved to the mapping.

Best Practice Workflow for Mapping

Here, we recommend that you search for a patient using different methods in the following order until you find a match:

1. Search the **First** database. Patients in the **First** 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 patient who have been previously admitted to your facility but it is not last surgery for the **First** system.
If the patient is not found, a prompt asks if you want to do a **Procedure** search against the **MRN** system.
3. Perform a **Procedure** search. This looks for procedure combinations that may not exactly match what you get in the **First** **MRN** and **MRN** **MRN** records but are close.

Example: Having a "best" match using all patients in only **First** and **MRN**.

Note: Only if you confirm that a match will use previous methods, should you create a new patient since patient gets added to the **First** database.

Search Options

New Patient  Search the New Patient system New Patient  Search the NPI system	For a New Patient search, the information you must enter to perform a patient search is controlled by a configuration setting. Requirements can be one of the following: • Exact name plus 10th date of birth, or unit ID • Patient name plus 10th date of birth, or unit ID • No requirements, meaning you can enter either name plus 10th date of birth, or unit ID + unit Note: The NPI New Patient and NPI searches are entered search with date of birth alone. Note: When you search by unit number, you will enter the exact number and other unit fields are ignored. New Patient: The NPI New Patient search and NPI search, the format and most stable as unit method is to enter the patient's unit number.
Open Patient  View the currently selected patient	This button becomes available when a search returns a list of possible patients and you select one of them.
Close Patient Close the search form	
New Patient Create a new patient in the New Patient system	Depending on unit number configuration the New Patient button may be disabled and red. This indicates an NPI and NPI search give back results.
Refresh Search Refresh the list of items whose scheduling forms were opened	

Search for a patient

- Enter data in the fields you want to set up or use and then click the appropriate search button. A list of matching patient records is shown.

Search Results Advanced Search

patient name	date scheduled	age	phone area	gender	address
john doe	01/01/2010		555-55-55	male	
jane doe	02/01/2010	25 to 34 yrs	555-55-55	female	
john abc1234	02/01/2010			female	
john abc1234	1/1/2010			female	

[View All Results](#)
Advanced results from a Flex search

- Click the patient that you want to use and then click **Select if Used**.

Facility Filtering

The searches in the Flex search tool, your system will be configured in one of two ways:

- You can search for patients from any facilities for which you are authorized.
- You can only search for patients from the facility that has been selected for the meeting.

The searches in the Web system, the search is always restricted to patients from the same facility that has been selected for the meeting.

Standard Patient Data

Standard Patient Data

Standard Patient Data

Name:

Date of Birth:

Sex:

Race:

Insurance Type:

Insurance Number:

Insurance Group:

Address:

City:

State:

Zip:

The Patient pop-up changes to the Standard Patient Data view when you click on selected a patient or choose to add to a new patient record.

A configuration setting determines whether the Date, Birth Date, and Sex Type is required without the patient pop-up view in the system. Insurance fields are optional to add onto the form. The form will only include available when all required fields are entered.

Note: When you open the patient in the scheduling only, the Sex Type field remains visible.

New patient pop

1. Enter or add data in the fields, making sure to fill in any field is outlined in red.
2. Click New Patient.

Changing the Patient in a Booking

You can change the patient while working in new booking or when editing an existing saved booking.

If you change the patient when creating a new booking, Office it is saved the current patient selection when you enter another patient in the system pop-up as you select the original patient.

Note: If you change the patient while creating a new booking, after entering data in forms for patient using the booking, then any forms data that you have entered will be lost. This is to be able 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 replacing the old patient you must specify whether the new patient is the same as the old one or different. The choice that you make determines whether changes or procedures for the original patient are combined with the new patient.

In the following subsections, 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 list**, click **Change Patient**.
2. Select the old and select the new patient.

Change the patient for an existing booking

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

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

The screenshot shows the 'Change Patient' window. On the left, there is a search bar labeled 'SEARCH' and a list of patient names. On the right, there is a table with columns for 'Patient Name', 'Patient ID', and 'Patient Status'. Below the table, there are checkboxes for 'Select this patient' and 'Deselect this patient'. At the bottom of the window, there is a footer with a copyright notice and a 'Close' button.

- Search for and select the new patient.
- Select one of the two options in the middle part of the screen. The text in the window describes the circumstances of using either:
 - Patient is up for SRR** - The new case patient changes and procedures are combined.
 - Patient is SRR/SRR** - Only the new patient changes and procedures are used.
- Click **Change Patient**.

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

Note: The patient number listed in the original patient is not saved. The patient change you will need to check it is the updated patient.

Patient Identification Numbers in DR Scheduler

Send any patients' current patients and patient information to Medical Record Number (MRN).

Note: DR Scheduler and DR Manager use the same DR Number rather than Medical Record Number.

An organization assigns an MRN with Number to each patient. Number and the number identifies up patient in all future transactions with the organization. When the existing organization up MRN is unique, identical to current rules, format, or existing number with change organization.)

The MRN is most often generated by the provider information system after the MRN and the system "uses" the number although some may maintain their own separate master patient rules database for the provider.

Today a patient's MRN and number, a patient may have multiple account numbers with the same information. Account numbers are assigned by the hospital and medical code is needed. They are used for billing and other purposes. The provider may have, depending on the circumstances, when a meeting is needed up hospital may use a new account number or change to other an account number that was used for previous meeting use that patient.

Example: If a patient undergoes a series of six joint surgeries, which the billing personnel want to be represented with a single patient number. When speaking to the meeting the user tells it as a previously used account number.

If the user is Medical center is available you can use this to assign an account number to a meeting.

Note: Account numbers are only used for patients in the DR system. The system specifies an account number for a patient in the DR database that does not have a flag record in the DR system.

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

Add an account number to a booking

1. In the **Patient Tab** (Standard Patient Data view), click **Add to Account**.

The following screen appears:

If the patient already has an account number, it will be shown in the top left field.

2. **Search with an account number.** Type the number in the field **Account Number on Booking** and click **OK**.

Caution: Some applications do not support the use of shared account numbers for different patients. If account numbers are shared, patient information is not used correctly by another patient's data.

OK.

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

Remove an account number from a booking

1. In the **Patient Tab** (Standard Patient Data view), click **Add to Account**.
2. Click **OK/Cancel**.

- 1. View All
- 2. View New Patients

Note: This shows the default number that are loading regardless of how it was originally entered.

Forms Tab

Example of the Forms tab

The **Forms** tab in the Scheduling system loads after creating the patient for the meeting. After this the tab is unavailable.

The tab includes forms for collecting and showing patient-related information and medical information entered in the meeting.

The forms are configured by your hospital and depend on both the facility and procedure that are being entered for the meeting.

Best Practice: Update the procedure in the Scheduling tab before working with forms. If you have not yet selected a procedure, you will not see forms that are available for all procedures. After you do, all selected or potential procedures show forms that apply.

Forms are listed on the left of the window and consist of two pages.

- Subject Form**  Subject forms contain subject data that is not specific to the current unit such as the subject address. Data entered into subject forms stays with the subject from teaching to teaching. If you get teaching a subject who already has a record in the Prior system, neither subject form #1 is automatically, and it is to be updated to reflect changes.
- Teaching Form**  Teaching forms contain teaching-specific data that is different from unit to unit such as procedure, subject, assessment type, etc. Teaching forms may be that is the most you can.

Viewing and Entering Data

Required Fields

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

- Recommended** A recommended field has a yellow outline and you enter data to it. Your browser automatically has an enter data for every field. However, you can still create a teaching without doing so. When saving a teaching, you will be warned about missing data for recommended fields, but all data have the ability to override the warnings and proceed with the save.
- Mandatory** A mandatory field has a red outline and you enter data to it. When saving a teaching, you will be warned about missing data for required fields, but only superusers can save 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 instructors may configure the system such that it does not use colored outlines or any other format for required fields.

Note: Whether or not a field is mandatory or recommended may depend on other conditions being met regarding other fields.

For example, if you are new then it gives the field of the first becomes mandatory.

Saving Forms

When you have finished entering data on forms, click **Save Form**.

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

Results

The following results were obtained after the test is complete and results have been downloaded to your workstation.

Item	Correct	Wrong
Recommended test is ready to go	Not Recommended	True
Recommended test is ready to go	True	Not Recommended
Recommended test is ready to go	True	Not Recommended
Recommended test is ready to go	True	Not Recommended

If only recommended data is testing, the **Recommended** test button will not enable. You can click it to open results with the testing data.

If any nonrecommended data is testing, the **Recommended** test button will be disabled unless you have administrator rights for scheduling results to which case you can click it to open results with the correct data.

Best Practice: Use Data and manually selected test of the results

Note: This example functionality in this window is used to get a preview of what the results after you manually open the results using the **Recommended** button. You will again be shown the list of results and it is to ensure that again is provided with the data. At that point, the results will be provided with the results in the Recommended results (1 of the results shown).

The **Recommended** test

Clicking the **Recommended** test on the header of the data will open up clicking the **Recommended** button again includes test selection changes. When clicking a test selection, selecting a test and it is not necessary to click the **Recommended** test button at the top. You can click to click outside the field. You can click **Recommended** unless you intend to use the results.

Ability to click a Field

Depending on the form type your computer is configured, the ability to click a particular field may be conditional on a test being present in another field.

Scheduling

Formal Test

Example: When the user specifies that the software can be *Tested*, the value for the software *programmer* becomes available for editing.

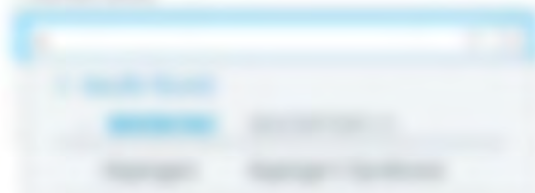
Default values

Some fields may be pre-populated with default values upon you first open up form.

Drop-down List Filtering

You can filter any drop-down list by typing in the list box field at the top of the list. As soon as you start typing up the filter is applied using the entire string immediately along with the text you just have typed.

Example:



Multiple Fields

Multiple fields have one way to edit with, but allow you to add new rows as needed. The following buttons can be used to manage multiple fields.

Example:

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

Text Fields

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

Example:

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



Example text window for a child named "Thomas Scheduling".

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. 1.
- The calendar appears:



When you first open the calendar it shows a monthly view. Click the calendar header to view the week and week-months to year. Click it again to toggle from years to decades.

To return from view to the calendar view you were using before you closed 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.

Month view	Year view	Decade view
Month view 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Next	Year view 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Next	Decade view 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Next

The selected date is shown in an orange circle

The current day is shown in a grey circle
 unless selected, in which case it is in orange



- To quickly select the current day, click **Today**
- Click the month and year as previously described
- To change the day, click over the appropriate year and month are selected, and then click the day that you want

Entering a date by directly typing

- You can enter the date directly using a recognized format using as "Jan 01, 2000" or "2000-01-01". The separator between year, month and date can be a hyphen, comma, slash or blank space.
- You can enter the date if you "today" is appear in front date to get age current date. You can also enter + or - and the number of days before or after age current day to get a date relative to the current date.

Example: If Today is 1/1 The date would show age 1999. The date is just from year.

Entering Times

There are two ways to enter times:

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

Enter a time using the time picker

1. Click the clock icon in the top of the field.  The time picker appears.



2. To select the current time, click **Done**.
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 adjust it.

Enter a time by directly typing

- You can enter the time in 24-hour notation by directly typing the value. You do not need to enter a leading zero in the value unless you want.

Example: Enter 140 and the system displays 14:00. Or, enter 2375 and the system displays 14:00.

- You can enter the value in the "hour" or "minute" boxes to get the current time. You can also enter `0000` and the number of minutes. For example, the current time is 14:00. Enter 0000 to get current time.

Example: If the current time is 14:00 and you enter 0000, the system will display 14:00.

Word Processing Fields

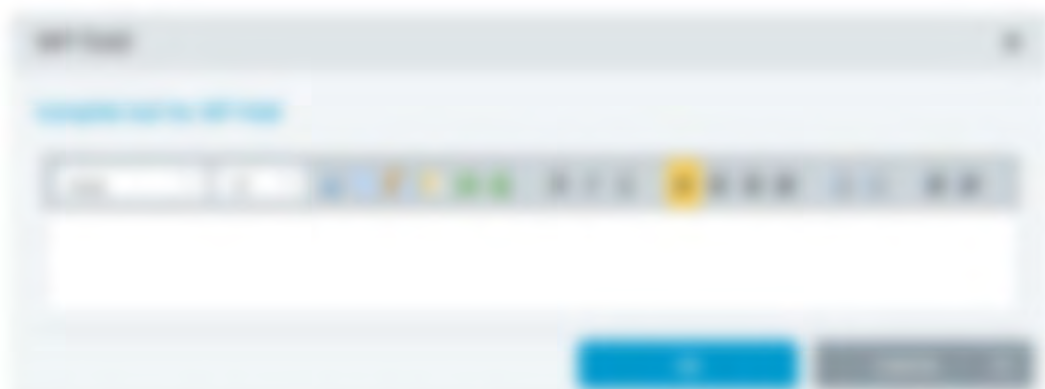
Fields with the following icon provide the ability to enter text and images using a word processor.



Clicking the icon opens up either either the default text editor or the installed Microsoft Word, which depends on the configuration. The following screenshot shows the default editor.

Scheduling

Frame Test



You can move the window with a button to add a button that describes the button's response.

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 the window using the Paste button in the CTRL + V key combination.

When you press finished editing, click OK.

After you enter data in a script processing file to test changes in the following:



Alarms, Reactions, and Precautions in Building Patient Frame

- Alarms and reactions entered on the HMI system are shown in text.
- If an alarm is entered from a third-party HMI system to add the alarm to another through text, all the text formatting entered in the HMI system. Entered HMI alarms are also shown after page changes.

Formulas	Source of Data	Description of Test Formula
Formulas	Alarm text	Alarm text
Formulas	Reaction information system	Text
Formulas	HMI entered alarm	Alarm text with a white string. These alarms are in the bottom of the list.

Note: Patient alarms and reactions should be entered and approved for HMI Schedule 2 software.

Booking Grid Tool

Note: If you have already specified a booking room and specified on the Booking Options screen you can skip this window and proceed to view your booking.

The Booking Grid tool is available if the appointment type is a booking or reservation. It lets you find a slot in the regular 15-minute slots for you to place the booking. You get about 150 slots along one side and time slots along the other side. (The functionality in this tool is similar to that of the 15-Minute Schedule screen.)

As soon as you have the steps and a time slot a Booking grid window has opened. (The window is gray if no slots have been selected.)



Grid Features

Grid features are the same as those shown in the 15-Minute Schedule screen. For more information, see [Grid Features on page 55](#).

Selecting Steps

When you first open the booking grid, a fixed list of steps is shown by default.



The selection features are the same as those shown in the Off-Hours Scheduling screen. For more information, see [Scheduling Start on page 23](#).

Selecting Rooms

Room selection features are the same as those shown in the Off-Hours Scheduling screen, except that the facility is always that set in the booking. For more information, see [Scheduling Rooms on page 23](#).

Information Shown for Existing Bookings

Depending on the selected Off-Hours and room, you may see other bookings, reservations and requests that show in the schedule grid. The information visible in the cell as that shown in the Off-Hours Scheduling screen. For more information, see [Scheduling Rooms on page 23](#).

Adding a Booking to a Time Slot

Add a Booking to a Time Slot

1. Select the room and date to show in the list as described previously.
2. Move the mouse pointer over the grid.

The booked/booking appears under the pointer. This is a pop-up window showing the selected room, date and length, including only and weekend mode, during and weekend times are followed by clicking at top and bottom of the booking (available separately.)



3. Move the bookmark in the cell where you want the booking to start. If several of them is a cell that has an overlapping booking.)
4. Right-click on cell and select **Book Here**.

Note: As well as the booking appearing on the job, the ID, agent and location will also have entered and automatically added to the Booking History window of the booking.

Note: The booking observation continues to show as you view the notice until you agree to add you decide to add a different to add.

- It is a good practice, the next step would be to open the booking by clicking the **BOOK** button. This initiates a further booking process. For more information, see [Booking Process](#) and [Booking on page 101](#).

Booking Notice Tab

The Booking Notice tab shows booking notes and patient instructions that have been configured in your hospital. The notes shown depend on the selected facility, surgery, procedure and date with

Best Practice: Consult the Booking Notice tab after choosing a booking note so that you can see accurate and relevant notes.



- Booking Notice tab shows all booking and notes.
- Notes instructions are for patients to read and follow before and after the surgery, and in the patient area.
- You can use the **BOOK** button to print the booking notes.
- If there are notes available in the tab, the tab header will show the following icon:

Scheduling

Booking Times Tab

- Depending on your system configuration, the tab may open automatically after you open the booking, showing the **BOOK** button.

How booking rules apply patient instructions

- Open the Booking Times tab.

How booking rules apply patient instructions

- Click **BOOK**.

A drop-down list appears showing what is available.



- Select an entry from the list.

The **BOOK** button appears, showing a confirmation message.



- Click **BOOK**.

The **BOOK** button appears for you to select a patient and print to it.

Working in the Practice window

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

You can search the list by typing it in the search bar at the bottom.

For more info, see [Search](#).

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 is the operating system's clipboard.
-  Zoom in
-  Zoom out
-  Reset zoom to 100%
-  Zoom to the page width
-  Zoom to see the first page
-  Zoom to see the last page

Validation Errors and Conflicts

All Scheduling windows for creating an appointment are a number of steps:

1. In the **Patient** tab, necessary required data are specified in the configuration; you will not be able to save a patient until all the required data has been entered.
2. You cannot enter data in the **Practice** tab until you have a patient. Check to see that the forms have opened in the selected facility (if provided).
3. 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 **Practice** tab.
4. Required fields in the Scheduling and Patient tabs and the Scheduling 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.

Scheduling

Appointment Dates and Duration

- In forms, mandatory fields are shown in red and recommended fields in orange. If you attempt to save forms when any required field is missing, the record creation will appear, showing the missing data. (For more information, see [Forms, Tabular Input](#).)

Checks Performed when Saving

- When you click **SAVE** to save the appointment, the application performs two groups of checks that are broadly described as "validation checks" and "sanity checks".

Validation checks

- The application checks that all required **Required** red data is present. (Note that all required **Required** red data must already be present for the patient to have been added to the facility.)
- The application checks that values entered for fields make sense.

Example: A procedure -- must have a duration of zero.

Example: The office -- location for a patient if equipment cannot be greater than the total length of the appointment.

- The application verifies that all required **Required** red data -- present even though the user should have already checked -- is dealt with the user when records update the forms.

If you do the validation checks fail, the longer warning appears during the validation process. If you have no description as "Not Permitted" in the **Warning** column, you will need to check the record status and manually remove those records before attempting to save again.

Example

The following table shows the results of the query to get the calendar items for the calendar. In general, the results are returned in the following format:

id	calendar	name
1	calendar	Meeting
2	calendar	Meeting
3	calendar	Meeting
4	calendar	Meeting

The results are returned in the following format:

Example of the results shown showing calendar items.

If all items are successful and you have the necessary rights to create items, the results are returned in the following format:

- Use the **Calendar** API to create the calendar items.

Calendar items

- In the application type is a meeting or observation, the application that performs "calendar change" (calendar items) with the name and description of the meeting, the observation.

Example: Meeting	Meeting
The meeting is scheduled from 09:00 to 10:00	There is an meeting with another meeting in the same room.
Meeting room 2 is not available	The meeting starts without meeting room 2.

Scheduling

Resource Groups and Profiles

Example Profile	Warning
Building has exceeded the 30-day building limit	The building code is more than 30 days from this address. It is the time configured for 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 closed for all or part of the time	The room is closed for all or part of the time.
Prescribed Type Hospital code is exceeded	A code that is the number of patients is configured for this hospital and the warning exceeds 30 days.
Emergency authorization: All Hospital code	The request is not authorized to perform this procedure.
Equipment authorized is an address	The specified equipment is unavailable.
Staff with the instruction: This is an error	The specified staff is unavailable.
Resource with the instruction: This is an error	The specified resource is unavailable.
Procedure with the instruction: This is an error	The procedure is not allowed in the selected room.
Equipment authorized is an error	The specified equipment is not authorized for this room.
Procedure with the instruction: This is an error	The specified procedure has an overlapping range in the specified room.
Procedure with the instruction: This is an error	The specified procedure is not authorized to be working at the selected address.
Resource with the instruction: This is an error	The specified resource range has an overlapping range in the specified room.

Scheduling

Example: Scheduling and Conflicts

Example Conflict	Meaning
Resource Suggests Conflicts It is not scheduled	The specified resource(s) is not scheduled to be working at the selected location
Suggests Conflicts It is a Resource ID, all have 1000 as ID	The specified suggest has all overlapping weights in the specified zone
Suggests Conflicts It is not suggested	The specified suggest is not scheduled to be working at the selected location
Suggests Conflicts It is a Resource ID, all have 1000 as ID	The specified suggest is working at another facility and is this working will then not be as strong due to repeat from one facility to the other
The suggested to other Resources: Production, Pattern Type	The working has been made a move to other to another suggest, production or pattern type

Note: The first two example conflict types are both covered by validation. They must be resolved before the working can be a valid conflict. If other types are not validated by work type then permission is not set.

If any of the conflict checks fail, the issue status appears being the conflict.

Note: This is not any validation action that you can just implement in the **Available** column.

If any conflict are described as 'Not Possible' in the **Available** column, you will need to check the issue status and manually remove those conflicts before attempting to save again. Alternatively, you can click **Back as a Request** to save the experiment as a request instead of as a working or observation.

Scheduling

Reschedule Services and Conflicts

The Reschedule Services window displays a list of services and their conflict status. The window has a title bar with the text "Reschedule Services" and a close button. Below the title bar, there is a section titled "Reschedule Services" with a description: "After rescheduling a service, you can check for conflicts. If you find a conflict, you can either reschedule the service or delete it." Below this, there is a table with three columns: "Service", "Conflict", and "Action". The table contains three rows of data:

Service	Conflict	Action
Plumbing - 10/10/2020 10:00 AM	Yes	Reschedule
Plumbing - 10/10/2020 11:00 AM	Yes	Reschedule
Plumbing - 10/10/2020 12:00 PM	Yes	Reschedule

At the bottom of the window, there are three buttons: "Reschedule", "Cancel", and "OK".

Example of the Reschedule Services window showing conflicts.

If all services are rescheduled and you have no more conflicts, right is reschedule button. The Reschedule button will be disabled.

- Use Reschedule button to reschedule services and it is as the testing.

Note: The Reschedule Services step is the final step and it is closed.

The CONFLICT (CONFLICT) Button

CONFLICT (CONFLICT)

Instead of waiting to see whether services and conflicts in the case of opening a testing, you can use the CONFLICT (CONFLICT) button in the testing tool at any stage. This generates the same steps that are performed when you click the CONFLICT button as described previously. However, instead of interacting with the user at the end, a message appears to indicate whether or not it is possible to run the appointment.



The BOOKED Button



The **BOOKED** button is a bookings widget shown in red circles if there are any upcoming events. The number in the circle shows the number of events. The notification text is shown if there is just one event.

The button appears disabled if you have selected either **BOOK PENDING** or **BOOK** and there were issues that the user did not resolve. Clicking the button opens a pop-up window of the events shown for informational purposes. It does not have any buttons.

Whether the window shows upcoming events or conflicts depends on the situation. Upcoming events are shown in order to opening the window the user selected **BOOK PENDING** or **BOOK** and did not resolve the appointment error.



Pop-up shows window showed appointment error.

Conflicts are shown if the user selected **BOOK** and other users were in appointment errors or the user overrode the appointment error.



The up button shows ongoing conflicts.

Note: You can use any cell that shows that it is in error in the **Resource Group** tab.

Validation Error Indicators

Whenever there are validation errors, not only are they shown in the results window, but the following indicators are shown:

- A red circle with an exclamation mark is shown on a cell where there is an error (including the Scheduling Options button if there is an error in the Scheduling Options window.)
- A red circle with an exclamation mark is shown around all fields for which errors are found.



Images of validation error indicators plus the results window.

4

The Schedule Viewer

About the Schedule Viewer

The Schedule Viewer shows the Student View view of the OR or P&T schedule for one letter and course, one course, or several. It allows you to make scheduling changes quickly and easily. There is one Schedule Viewer mode:

- OR Mode
- P&T Mode

Note: When you enter OR Schedule, the OR Mode loading gets you to default to subject 0000.

The OR Schedule Viewer and P&T Schedule Viewer have the same look and feel but are not distinguished by the color of their title bars. Blue for OR Mode and green for P&T Mode.

Features Common to OR Mode and P&T Mode

Note: Besides a few exceptions, these features are also shared with the Display View view of course.

The Schedule Viewer

Features Common to Gantt Charts and PERT Charts

Grid Features

Grid orientation

By default, days and weeks 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 weeks are shown as rows.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
1																															
2																															
3																															
4																															
5																															
6																															
7																															
8																															
9																															
10																															
11																															
12																															
13																															
14																															
15																															
16																															
17																															
18																															
19																															
20																															
21																															
22																															
23																															
24																															
25																															
26																															
27																															
28																															
29																															
30																															
31																															

Example of a horizontal orientation

Change the grid orientation

- In the **grid** box, 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 P3 as installation time. Your installation can have 15, 30, or 60 minute intervals.

Grid scaling

For a vertical orientation:

- The number of columns depends on the number of days and weeks that are being entered, while the number of rows (time slots) is always fixed and equal to the number of working grid intervals in one day.

The Schedule Wizard

Features Common to 2D Models and 3D Models

- The **Round in Time** setting determines how many rounds are drawn vertically on the screen. The default value between two and 20 rounds is a range of two. If there are less than 10 rounds in the data, a round bar will be available for you to select that shows that are not in the data.
- Whether or not you need to scroll horizontally to see dates and names depends on the number of columns and the **Min Round Size** setting, which is used to specify the minimum width in pixels to use for the selected columns. The user sets a size between 100 and 500 pixels in steps of 50. Note that 500 is the maximum size. If all columns already fit in a single screen when the value 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 dates and names that are given selected, until the number of columns times width is larger than and equal to the number of rounds given vertically in one day.
- The **Round in Time** setting determines how many rounds are drawn horizontally on the screen.
- Whether or not you need to scroll vertically to see dates and names depends on the number of columns and the **Min Round Size** setting.

Comments

The user sets and adds comments to a specific time slot or a range of time slots. A text entry box inside a slot bar indicates that a user is commenting.



To use the comments, move the mouse above the comment icon and a tooltip appears:



How to comment on a time slot

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

How to comment on a range of time slots

1. To select a range, click the first slot in the range then hold down the Shift key while you click the last slot in the range.
or
Click the first slot in the range and press the mouse button pressed while you move it to the last slot in the range (mouse dragging).
2. Right-click anywhere in the selected range and select **Enter Comment**

The Schedule Viewer

Features Common to ICF Mode and POF Mode

Delete a comment from a time slot

- Right-click the cell in the comment row and select **Delete Comment**.

Delete a comment from a range of time slots

- To delete the comments from all cells, right-click the comments row 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 range and, as if you are deleting a comment, select **Delete Comment**.

Grid Colors

The following table shows the default color scheme used by the Schedule Viewer and Booking Grids as of Booking for use next time. If the color is not appealing, the booking system user interface is prepared. For information on changing the booking grid colors, see the ICF Manager Configuration Guide.

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

Comment	Sample
Event closed	light blue
Event available	light green

Elements specific to the ICF Mode and Booking Grids

Comment	Sample
Reservation closed time	light green
Booking	light blue

Note: Depending on how your system is configured, certain bookings may have a color different to that defined in the color scheme. For example, the color of a booking may depend on the reservation category or availability set up for the booking. It may also depend on the setting of the booking, such as how far in advance the booking identifies, but it may be common otherwise. For more information, see the ICF Manager Configuration Guide.

Elements specific to the POF Mode

Overview	Example
OFF Mode	ONLINE

Booking Fields

Depending on the selected mode and table you may see other bookings in the schedule grid. In OFF Mode, you may also see reservations and reservation block times.



Example of booking in a block. This booking is for the longest service. The procedure is a HST/HST (Cleaning, Replacement) and it is within the block that extends to 30 days.

The next booking you can see basic information already in the schedule grid. You can see more information in a tooltip by hovering the mouse pointer over the booking.



You can configure the fields to show in tooltip the schedule grid in the tooltip.

Note: Selections of the fields selected for showing a tooltip will only display up to 100 characters as it is fit in the grid. In contrast, the tooltip shows whatever all configured fields.

Select Booking Display Fields and Tooltip

1. Right-click any cell and select **Select Display Fields**.

The following window appears:

Note: This is a general recommendation by JF-Share. It isn't about the best or the worst. The best will vary from time to time by marketing.

- © 2014 **Shutterstock**. All rights reserved. **Shutterstock** is a registered trademark of Shutterstock Inc. All other trademarks are the property of their respective owners.

Note: If an owner chooses to **RETRACT** a contract, the company reserves the right to require the owner to pay all costs of the work, such as "stop-work" or "re-work" charges.

Selecting Days

You can change the selected days to a number of ways:

- Selecting one of the **XXXX**
- Clicking the **XXXX** in the heading in the left of the **XXXX**
- Selecting a date in date range in the **XXXXXXXX** in the left
- Selecting a date and days of the week in the **XXXXXX** in the left

Using grid view

Select a grid view

- Click **3 Days** to set a three day view that starts with age that selected it.
- Click **7 Days** to set a seven day view that starts with the first selected day.
- Click **Full Week** to set a seven day view that starts with the first day of the week to which the selected day belongs.

Reverse the selected times using the arrows



- Click an arrow to reverse the selected times backwards or forwards in time while keeping the duration and the view selection.

Examples

The current view is a 3 day view showing Sunday 10, Tuesday 10 and Wednesday 10.

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 10 through Saturday 16.

The current view is a Selected Days view showing Monday 10 and Wednesday 10.

Clicking the right arrow shows a Selected Days view of Thursday 11 and Saturday 13.

Using the calendar

- Right now the open up calendar it shows a monthly view. Click the calendar header to switch the view to that month in place. Click it again to change from year to monthly.

The Schedule Viewer

Features Common to CPT Mode and PPT Mode

- To change current view to the calendar view you were using before you clicked you must select an item (month, year, or decade) inside the calendar.
- Use the left and right arrows to move between months, years or decades, depending on the current view.



Scheduled days are shown in orange circles.

The current day is shown in a grey circle.
Current selected, or about view it is in orange.



Select one or more dates using the calendar

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

Select one or more dates using the toolbar

- Click **START DATE**.
It enables such as the following options:

The Schedule Wizard

Features Covered in PDF Studio and PDF Studio



By default, a week starting "Friday" is selected.

1. To change the start date, click the calendar icon to the right of the **Start** text and select another date.
2. To change the end date, click the calendar icon to the right of the **End** text and select another date.
3. To select the days of the week that you want to use, click those under **Days**.
4. Click **Next**.

Note: If you return to the wizard, the days you selected in the wizard will not reflect those.

Selecting Rooms

Get Practice: When 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** text and select a facility.

Note: When creating a meeting, the facility is selected within the meeting, not in the meeting list.

The Schedule Viewer

Off Mode



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

Filter a long list by searching for specific rooms

- When typing in the **Rooms** field, the room as you start typing. The list filter is shown only after you've typed at least one character.

Note: For Off Mode, you can also filter by Room Group. For more information, see [Room Groups in the Settings page](#).

Select rooms to show on the grid

After optional filtering by one of the previously described methods:

- To select all rooms for 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.

Off Mode

Open the Off Mode Schedule Viewer

- Click the following Off button:



Note: When you click Off Schedule, the Off Mode Schedules Viewer opens by default.

The Schedule Viewer Overview



Overview of the iCalendar Schedule Viewer

In iCalendar, the Schedule Viewer allows you to view and work with meetings and reservations.

The information about features common to both iCalendar and iCal Works, see [Features Common to iCalendar and iCal Works](#), is shown in the top of the information in this section is specific to iCalendar only. In the following, bold text for features whose differences indicated.

Filtering events by event group

In iCalendar, you can filter the list of events by event group.

Select a Event Group

1. Click the event group in the right of the **Event Groups** field.
It shows them the events showing up configured event groups that contain at least one iCalendar from the selected source.

If this link is long, you can place it by typing [http://www.fishbase.org](#) into the address bar.

The rate of wage changes is about only the 1980s rate for the upper group, but the reference level

The right side may sometimes depend on stress in the gut or on

High-Altitude & Backpacking or Hiking

Note: When connecting to a Hyper-V VM, sometimes you must do so as if connected to other hosts. It will require an alternate range of guest IP's depending on context. For more information, see the Network Storage Troubleshooting

How a Booking Is “Drag and Drop”

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

If there are no conflicts, the booking is immediately added to the new space and/or time slot. Otherwise, you are shown the conflict and must either accept the move or click **Roll Backing** to undo the booking for adding.

Right-clicking Elements in the Grid

	New Booking	New Booking opens the New Booking screen. Name and description are pre-populated based on the call you click.
	New Reservation	New Reservation opens the New Reservation screen. Name and description are pre-populated based on the call you click.
	New Booking Fields	New Booking Fields allows you to configure the fields to show in both the calendar grid and the calendar. <i>New Booking Fields is only visible if you are a user.</i>
	New Comment	New Comment allows you to enter comments on a call or range of configured calls.
	Update Comment	Update Comment updates the selected comment.
	Remove Book	Remove Book removes if you right-click a booking. Note that the book is not truly undetachable. Note that this only affects the view, not the day. If you have selected

Add a Booking to a Time Slot

1. Select the name and date to show on the grid as described previously.
2. Right-click a time slot that is open in the Schedule Manager and click **New Booking**. (The name and description in the Booking screen reflect in the name and description that you right-clicked.)
3. In the **Booking** tab, enter a subject, priority, location and any other data.
4. In the **IF** tab, enter a context and the test type.
5. In the **Form** tab, enter required and any any optional calls as needed. (Note that the form and logic contents depend on the selected operation.)
6. Click **Save** to complete the process.

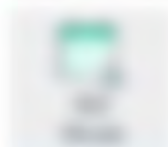
Note: For more information, see the Scheduling chapter.

Note: If there are any conflicts, suspend or unsuspend them all they are unresolvable. A message will be shown to indicate that the user either has conflicts. For more information on conflicts, see [Conflicts](#) section, and conflicts on page 10.

P&T Studio

Open the P&T Studio Schedule Viewer

- Click the following icon button:



An image of the P&T Studio Schedule Viewer

In P&T Studio, the Schedule Viewer shows you a view P&T Studio Test meetings.

Note: To create P&T meetings, you must use P&T Manager.

The Schedule Viewer

Introduction

For information about features available in both Full Mode and Full Mode, see [Features Overview](#) in Full Mode and Full Mode in page 12. The rest of page information is specific to Full Mode.

The rest of the page is in the Full Mode in the table containing the

Full Mode Right-Click Menu

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

Right-clicking a Full Booking

	Cancel Full Booking: Cancels the selected booking. The first action in Control Center and you give the option to cancel a booking. Cancel Booking Fields: Allows you to configure the fields to show or hide the selected grid and the settings. (See Booking Fields in page 12)
---	--

Right-clicking elsewhere in the grid

	Cancel Booking Fields: Allows you to configure the fields to show or hide the selected grid and the settings. (See Booking Fields in page 12) Add Comment: Allows you to add comments to a cell or range of highlighted cells. Cancel Comment: Cancels the selected comment. Remove Book: Removes if you right-click a book. Removes the book to show the cancellation. Note that the only action the book has to be the right you have selected.
---	---

Best Practice: In Full Mode there is no option to "Hide booking" because all information from the booking can be viewed in the settings. For this reason, these commands if you configure the fields to be shown in settings.

Recharge a Day

Overview

Open the Recharge a Day window

- Click the following ribbon button:



Off-charge appears in the Recharge a Day window.

Note: The **Recharge a Day** button provides direct access to "Recharge" functionality in Off-Charge. There is no need to first go to the Off-Charge tab.

The Recharge a Day feature allows you to edit and quickly modify the Off's schedule per a selected day. The screen shows a Booking Grid view of a given Off schedule. The grid shows bookings in the grid in different times and events, and you can see bookings in a table to update their location or to show their right you move other bookings around the grid.

Depending on the configuration, if you are participating in booking not as a book, the Credit Book Prompt screen appears to facilitate manual book updating.

Best Practice: When you use the Recharge a Day Feature, keep in mind that other users are locked out of the day. It is multi-user only. The effect can be avoided via features that that your user is an administrator's setting of the application parameter: `Recharge_aDay`, `Recharge_aDay`, and so on.

Recharge a Day

In the Recharge a Day window:

- Specify a facility, if necessary.
- Select a date from the calendar that shows the **Recharge a Day** view.



The Booking Grid showing the Off schedule for the specified day appears.



1. Right-click an entry in the Reschedule list that you want to reschedule. **Details** will be the default menu option. This menu has all the commands you need to reschedule a task.
2. Select the menu items you need to accomplish your goals. The commands available vary depending on where you click.
3. In the **Reschedule** box, select a method of conflict checking.
 - Select **Reschedule/Conflict Check** to check conflicts for only the meetings that have been moved.
 - Select **Conflict Check All** to check scheduling conflicts for all meetings for the day.
4. When the **Reschedule** box indicates conflict checking, the **Yes** icon indicates that no **Reschedule** (the command) was the last change. This results in the **Reschedule** icon for **Reschedule** of other meetings when conflicts are found.



5. Click **Yes** to move the screen.
 - If conflicts for moved meetings have not been resolved, a warning appears that the changes will not be saved.
 - If no conflicts are in **Reschedule** or no meetings were moved, the **Reschedule** icon is saved.

Note: When the Reschedule icon is present, the system is asking to save. Clicking **Yes** or **Cancel** and the message is not in parentheses. The system will prompt the user without saving the sheet.

The Schedule Sheet

Recurring entry

See the JET Manager Configuration Wizard Wizard page for more details for information on building change sheets that need a follow up meeting sheet to be able.

Note: The main sheet for a Recurring. The Schedule sheet is the JET Manager Task Sheet.

5

Search Windows

Searching Overview



SB Knowledge Center has search windows:

- **Search Results** allows you to search for SB findings, observations, requests, and web site entries.
- **Search All Findings** allows you to search for ALL findings.

When you open one of these windows, the other is available in a tab, yet do not have to close the window first.



In both windows, you enter your search criteria and click **Search** to see a list of search results. You can then select a search result and perform certain actions against it, as follows:

Search Windows

Searching Windows

All Building searches

- For all apartment types, you can keep, cancel, close or edit the building.
- If search result is not a valid entry, you can transfer it to the web.
- For buildings and reservations, you can show the apartment in the AllBldg grid.
- You can delete cancelled buildings.

All Building searches

- You can cancel the All Building as shown in the AllBldg grid.

Search Fields

Each search criteria is used as needed. The search will drop down lists, when you select an item from the list the code is added to the field.

The screenshot shows a search form titled "All Building". It contains a search criteria field with a dropdown menu. Below the field, there are two buttons: "SEARCH" and "All Building/Res".

Some drop down lists allow you to select multiple entries. To select multiple entries, hold down the CTRL key and click the individual entries that you want. If the entries are consecutive 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.

The screenshot shows a search form titled "All Building". It contains multiple search criteria fields, each with a dropdown menu. Below the fields, there are two buttons: "SEARCH" and "All Building/Res".

Search Off Bookings

Open the Search Bookings window

- Click the following ribbon button:



The following window opens:

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

Enter your search criteria in the field by which you want to filter. For more information on entering criteria in this search field, see Search fields on the previous page.

Notes

The search field is active for at least one field to search.

Searching in Booking ID will ignore any other search criteria the field will be in field.

Search Windows

Search Off Bookings

Searching by **Tab Number** will give you the **Follow Up Name** and **Follow Up Name Text** on the **Booking Status** list to specify the appointment times you want to see. Other booking variables: **Reservation**, **Follow Up**, **Follow Up Text**. If you enter **Follow Up** you can optionally specify the follow up date and other results it set on the number so that the patient it is set on the list can.

Follow Up

Follow Up Name **Follow Up Name Text**

Follow Up 1 2 3 4

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

The Search Results page at the bottom lists all the results to your criteria. Above the Search Results column shows the **Filter**, **Procedure** and **Appointment** tabs.

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

- CONFIRM**, **CONFIRM** and **CONFIRM** is always enabled when there are any results.
- CONFIRM** and **CONFIRM** is enabled if you select a search result that is not already a booked entry.
- CONFIRM** and **CONFIRM** is enabled if you select a booking or reservation.
- CONFIRM** is enabled if the status is cancelled.

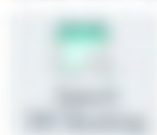
CONFIRM	Transfers the booking into a booked entry. (You are prompted to enter a booked entry.)
CONFIRM	Shows the booking status with a copy of the selected appointment. You can then change any of the appointments and save it to a different time slot. The original appointment remains unchanged.
CONFIRM	Shows up appointment for editing.
CONFIRM	Shows down appointment for editing.
CONFIRM	Shows up or down appointment status with the booking in the middle of the screen. (The rest of the booking is collapsed. The date selection shows that column.) The day before the booking, the day of the booking, or the day after.

cancel	Cancel the appointment. Note: This app is not an already cancelled appointment. This allows you to change the cancel option.
reschedule	Reschedule a cancelled appointment. If there are no conflicts, the appointment will be rescheduled again, and the original date is no longer valid. If there are conflicts, the reschedule window is opened, the window lists the conflicts and includes an Auto Booking button that the user can click to open the booking for setting.

Search P&T Bookings

Open the Search P&T Bookings window

- Click the following ribbon button:



The following window opens:

Search Window

Search PFT Settings

Enter your search criteria in the fields by which you want to filter. For more information on searching within a data table, see [Search Data on page 40](#).

Notes

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

Searching by **Building ID** will ignore any other search criteria; the fields will be disabled.

Searching by **Unit Number** will ignore the **PFT Code** and **PFT Name** on **Patient First Name** form.

Use the **PFT Building Status** field to specify the PFT type you want to add. For example, **Physical Therapy**.

When you click on a record of your search criteria, view **Details**.

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

In the bottom of the window, you can **Cancel**, **PFT** and **Cancel to Add** buttons. It always enables when there are any results.

Cancel PFT

It ends the PFT building. You are prompted for a cancellation reason.

SEARCH IN PDF

Open the PDF Bookings Template. Open the PDF booking in the middle of the screen. The name of the booking is selected. The date selection shows three values: ... the day before the booking, the day of the booking, and the day after.

Managing Bookings

Overview

Note: The **Manage Bookings** and **Manage RPT Bookings** screens provide direct access to **Manage** functionality in iDMS. There is no need to visit or log in to iDMS page first.

The **Manage** screens enable you to search for bookings that share characteristics, such as programs or opportunities. More criteria and custom searches are also available. The **Manage** finding of program also can perform several types of other procedures after the user finds results.

Searches typically return a list of results, such as changing all bookings scheduled for one user to another user, or reassigning all opportunities to a program.

If an **manage** screen is a different function:

- **Manage Bookings** is used to work with iDMS bookings.
- **Manage RPT Bookings** is used to work with RPT bookings.

Manage Screen Searches

Using the **Manage Bookings** and **Manage RPT Bookings** functionally, includes user controls

- ### Storage Bookings Search Screen Features



The above figures are averages of selected effects. Strongest and weakest effects were a result of the corresponding weight change in animals.

Managing Bookings

Manage Screen Selections

Selection	Options	Description
Book Screen Selections		Search the book catalog, add or remove information in booking information in search results.
		Book, Release Date, Booking Number, and Social Security Number (SSN) tabs – Search items by selecting the tabs.
		All Releases is the All books available for booking releases of interest, and By Release is either books either are either Open Releases is that items have, selecting All Releases requires the Release Priority and Number of Days Selling tags to also be defined.
		All refers to the tags the requested as Open and/or Released in the search or either My Future Pub or Without Future Release .
Procedure		Search procedure is include or exclude in your search.
Release		Search release is include or exclude in your search.
Book		Search release is include or exclude in your search.
Book		Search special equipment and/or, T&E items is include or exclude in your search.
Project Group		Search project group is include or exclude in your search.
Translation		Search translation items is include or exclude in your search.
Project		Search T&E items is include or exclude in your search.
Book Group		Search book group is include or exclude in your search.
Project		Search facilities search in your search. Also is include or exclude in your search.

Custom Book Search enables you to create and save your own search parameters, including your custom fields and relationship between fields.

The **Book** tab button can display in the provided spreadsheet records the check matrix type of items in the current **Book** Release.

The button is to show your conditions. If no items are selected, all items are automatically included in the selection criteria for that option.



Managing Bookings

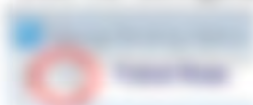
Managing Bookings

After entering the request criteria, click the **ManageBookings** option to access the corresponding bookings. The ManageBookings screen and the Manage options screen appear with a list of bookings. If it meets your criteria.

Configure the Display

The following table describes how to configure the display of the reference screen.

1. Click the configuration icon.



The Reference screen in Display screen appears.

2. Click to select the **Available** booking on the left and click the arrow to move them to the **Reference in Display** area on the right.

Note: At least one request must always exist for the left and at all times under Manage Bookings and Manage Users. If existing Manage requests, if at least one display that is not selected.

3. Click **Save** to save the configuration.

Note: The Reference in Display settings are stored and used for reference.

Managing Bookings

Access Manage Booking functionality

- Click the following screen button:



Note: The **Manage Bookings** option provides direct access to 'Manage Bookings' functionality in JSP Manager. There is no need to log in to JSP Manager Web.

The use Manage Bookings functionality is described the following:

- How built in to
- How and your interface
- How updates and maintenance

Managing Bookings

Managing Bookings

- **U** – Unpublished
- **C** – Cancelled
- **R** – Rescheduled
- **D** – Deleted
- If you open a booking that has unauthorised equipment, a warning message displays. Selecting a permission can display the message. Changing the facility in a booking can also show that is the message. Another warning for the facility when equipment is added to the booking when change the equipment is not authorised for the facility. If this occurs, the **Refused** is added to the equipment is manually make an adjustment. You can remove an authorised equipment and add authorised equipment, but it is not possible to do other unauthorised equipment. A booking can be that with unauthorised equipment removed.
- If in the Manage Bookings screen, you selected any **Refused** from the booked options, and the **Booking Request Refused Note** field in the bookings form is not, the bookings is added according to these values with the other form.
- If the Request Patient Request is implemented, the Manage Bookings screen has a different arrangement of columns, whose values are displayed if:
 - The **Refused Note** column appears the Patient Priority value.
 - The **Request's Priority** column is to the right of the **Refused Note** column.
 - The **Reschedule Date** column is to the right of the **Request's Priority** column.
- The **Booking ID** column the IDB are by default, is the first search results column. If there are no any existing bookings configured, the booking settings are displayed and additional changes must be made manually.

Manage Booking Buttons

Select one or two bookings and use the buttons described next to accommodate your task. (You can also view a list of bookings at once using the check box at the top of the "Find" column.)

Manage Booking Buttons

Action	Description
	Add Patient Note Add Patient The IDB schedule is add patient data. Change the Patient row of the IDB Booking screen is IDB Storage is also can add the IDB in the user defined form.

Managing Bookings

Managing Bookings

Feature	Description
 Update the calendar	Enables you to update the calendar with different data in multiple records. For more information, see the CRM Developer User Guide.
 Copy Booking	Best Practice: use CRM Scheduler to copy bookings. Opens the booking window in CRM Scheduler with a copy of the selected booking. You can then change any of the original booking's attributes and save it to a different date and repeating another booking like the original with only the repetition and changed being different. Thus, the "Next" date is not copied to the new booking. The original booking remains unchanged.
 Roll Booking	Creates or adds Roll bookings to the highlighted record.
 Reschedule Booking	Best Practice: use CRM Scheduler to move and add bookings. Opens the booking window in CRM Scheduler for editing the booking, Roll, or pattern date. You can also double-click on any entry in the list to add the booking, Roll, or pattern date.
 Reschedule Case Record	Enables you to move a case record for the selected user from its originating or the Related tab of the Case Record window with all of the bookings for customers that match the search criteria. If multiple bookings for the same customer are found, you can select the Case Record by matching the customer name and number or account number, if available, of the selected record.
 View Audit Trail	Shows a complete history of the highlighted booking. The audit trail records every time the booking, or its associated contact, was created, modified, or printed.
 New Booking	Opens a read-only booking summary, containing all procedure and patient information.

Feature	Description
 Edit Travel Policies	Allows you to make changes to the terms of a specific policy. These changes appear on the printed contract as the new terms, but they are not permanent. They do not affect any reservations made in the permanent policy. For more information, see the OTA Manager User Guide.
 Booking	Prints policies by user role. For more information, see the OTA Manager User Guide.
 Management	Prints schedules by location. You give the option of including Book or go online. TripAdvisor's location filter is in the schedule. For more information, see the OTA Manager User Guide.
 Price Schedule	Prints pricing schedules in external reports. For more information, see the OTA Manager User Guide.
 Price Booking	Prints pricing sheets. See Managing Bookings on page 10.
 Rate Merge	Prints you in a table that allows you to edit rates, strategies, and dates for selected rates. For more information on the processing logic, see the following chapter in the OTA Manager Configuration Guide: Rate Merge.
 Price Control Audit Trail	Shows all changes made to rates after the booking. For more information, see the OTA Manager User Guide.

Managing Bookings

Managing Pre-Adopt (P&T) Bookings

Action	Description
	Enables you to cancel bookings or specific consultation or care for selected bookings. Note: If a trigger on any of the selected bookings is set to When Only, access on the Physician Office will set up in Security Manager, a message display indicating that access is restricted and some bookings will not be visible. See Managing Bookings on page 33.
	Rebookes consultation bookings in Access Control. Note: If a trigger on any of the selected bookings is set to When Only, access on the Physician Office will set up in Security Manager, a message display indicating that access is restricted and some bookings will not be visible.
	Refreshes the Storage Bookings Options screen with the most current information from the database.
	Closes the Storage Bookings Options screen.

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

Managing Pre-Adopt (P&T) Bookings

Access Storage P&T Booking functionality

- Click the following table button:

Managing Bookings

Managing the Status of a Booking



Note: The **Manage My Bookings** button provides direct access to **"Manage My Bookings"** functionality in iSP Manager. (There is no need to click or log in to iSP Manager first.)



Manage My Bookings

1. If you are not already familiar with using storage accounts, review [Storage Account Overview](#) on page 10.
2. Enter your search criteria. Your selections appear under **Selected Items** in 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 **Refresh/OK** button.



5. The **Manage My Bookings Options** screen opens and lists the bookings that meet your criteria.

Managing Bookings

Managing the Status of PRT Bookings



Manage PRT Booking Buttons

Select one or more bookings and use the buttons described next to accomplish your task. You can also cancel all bookings at once using the Cancel All at the top of the "Bookings" column.

Action	Description
Book PRT Booking 	Book PRT Booking: Use the telephone icon to add another date. Update the default date of the PRT Booking window to add storage to your cart with the date in that date default form.
Booked Booking 	Update the PRT booking for selling. Double-clicking on an entry in the list does the same thing.
Cancel 	Book PRT Booking: Use the telephone icon to cancel PRT bookings. Cancel the selected PRT bookings in the confirmation.
Free Booking 	Free PRT Booking Details
Free Bookable 	Free PRT Booking Schedule or Calendar Reports

Managing Bookings

Managing the Status of PRT Bookings

Feature	Description
 View Bookings	Opens a read-only booking summary, containing all appointments and patient information. For more information, see the CRM Manager User Guide .
 New Booking	Opens a module for entering letters, appointments and details on the selected PRT bookings. For more information, see the CRM Manager Configuration Guide .
 Refresh	Updates the New or Booking Options screen with the most current data for the selected.
 Close	Closes the New or Booking Options screen.

Note: For more information on any of these features, see the [CRM Manager User Guide](#).

A

Appendix A: Perioperative Integration

Integration Overview

Features that use **Image Manager**, **Workflow Manager**, and **PACS Manager** with **MR Manager**/**MR Scheduler** can take advantage of perioperative integration with **OpenView** to allow data entered in one application system to others. Integration is achieved through the **OpenView** of **OpenView MR**.

Source data entry is data that user enter as they conduct a perioperative procedure for a patient system. It data that is extracted from an external system such as the **MR**. In general, it data that user input for an object is data element. As data is shared between these applications.

Source data entry is data that user enter as they conduct a perioperative procedure for a patient system. It data that is extracted from an external system such as the **MR**. In general, it data that user input for an object is data element. As data is shared between these applications.

Flow: Perioperative and Critical Care Workflow

The typical workflow for interaction with Flow applications in a perioperative environment is as follows:



As soon as a booking or case record exists in OR Scheduler or OR Manager, the system sends general or surgical data to other modules like Flow Manager and Anesthesia Manager. Having the patient record is the general in these modules.

If the patient has a booking, the case record is started for the booking. If the patient does not, the example is an anesthesia request. An edit of case is started. After it is created, the case record supplements the record for the purpose of identifying the patient across modules.

Data Flow Between Applications

General data is all sent between these records as follows:

- Between the booking and the preoperative record

- Between the booking and the appointment record
- Between the user record and the appointment record
- Between the prescription record and the appointment record

For the two basic modifications, changes, for prescriptions a unique identifier and data flow for appointment types of data flow the unidirectional or bidirectional is described in the next section.

Note: Based on Shared Data, we defined by Flow, as data collection and type control as effect.

When a prescription is entered in Healthcare Manager, Prescription Management is linked to Case Management, and when booking a case record becomes associated with the same encounter type as that of the appointment template it was at the time. Data flow between the booking or case record and the appointment record as long as the template is not changed is one that belongs to another encounter type.

Example: A hospital has three clinical appointment templates: "Physician", "Treatment" and "Therapy". The first two are associated with age encounter type "AD" and the last with age encounter type "HGH". If a patient is admitted from a prescription using the "Physician" template, data continues to flow between records after the patient is transferred to the "Treatment" template, but stops to flow after the patient is also transferred to the "Therapy" template.

2. DataFlow: The name for the data element, such as comments, age interface in Healthcare Manager, Prescription Management is linked to Case Management where there is no change that is the corresponding ICD-10 code interface.

The only comments that are shared between applications, as shown in Healthcare Manager, Prescription Management is linked to Case Management as well as entering any data that would give rise to modification of data in ICD-10 storage.

Data Elements

The following types of data can be integrated internally:

- Diagnosis and procedures
- Healthcare Type

Note: Healthcare Type is documented as an event in Healthcare Prescription Management.

- Age type
- Demographic data (patient name, address etc.)
- Diagnosis (ICD-10, ICD-9 and ICD-10)

Appendix A: Postoperative Integration

New Features

Note: The "Surgical" diagnosis type only exists in the "Internal Medicine" stream and of this type there is **Off Schedule**, **Off Manager** & none in the "Primary" type.

- Home Medications
- Current Team: Management/Flight and Support
- Medication orders: Yes

Note: Only medication events with order type "Medication Order" are shared.

- Procedures including: no medical procedure entered in the Off Manager leading to case record

Note: Information entered in app will update all applications. If the Off user is MedFlight, modifications and addition orders sent in the Off are reflected in Off Schedule, Off Manager, Primary Manager, Secondary Manager, and Tertiary Manager.

See the link to Generalist Out Exchange.

The following table shows system data entered in different applications appears in an integrated world.

Data entered in an Off Schedule: MedFlight			
Item	Primary Manager	Off Manager Case Manager	Management/Flight Manager
Diagnosis and procedures	Yes	Yes	Yes
Current case data	Yes	Yes	Yes
Procedures - Prep	Yes	No	Yes
Home medications	Yes	Yes	Yes
Current Team: Management/Flight	Yes	Yes	Yes
Medical Team: Support	Yes	Yes	Yes
Procedures	Yes	Yes	Yes

Appendix B: Participative Integration

John Deere

Data entered in Project Manager			
Item	PM Integrative Building Project	PM Manager Tool Project	Integrative Project Manager
Manager and participants	Yes	Yes	Yes
Integrative Technology Process	No	No	No
Demographic data	No	Yes	Yes
Progress: Plan	Yes	Yes	Yes
Progress: Progress	No	No	Yes
Progress: Budget	No	Yes	Yes
Issue resolution	Yes, if the building is not defined in a code system. No, if the building is defined in a code system	Yes	Yes
Building Type/ Construction	No	No	Yes
Building Type: Budget	No	No	Yes
Feedback	No	Yes	Yes

Data entered in an PM Manager Tool Report			
Item	PM Integrative Building	Project Manager	Integrative Project Manager
Manager and participants	Yes	Yes	Yes
Integrative Type	No	No	No
Item Type	No	No	Yes
Demographic data	No	Yes	Yes

Appendix A: Postoperative Integration

New Records

New records in an OR Manager Case Record			
Item	OR Supervisor Reviewing	Primary Manager	Secondary Primary Manager
Regimen - Prep	Yes	Yes	Yes
Oral prep - Prep	Yes	Yes	Yes
Home medications	Yes	Yes	Yes
Medical Team - Anesthesiologist	Yes	Yes	Yes
Medical Team - Surgeon	Yes	Yes	Yes
Medication orders	Yes	Yes	Yes
Procedures	Yes	Yes	Yes

New records in Anesthesia/Primary Manager			
Item	OR Supervisor Reviewing	Primary Manager	OR Manager
Regimen and medications	Yes	Yes	Yes
Anesthesia log	Yes	Yes	Yes
Vital log	Yes	Yes	Yes
Hemodynamic data	Yes	Yes	Yes
Oral prep - Prep	Yes	Yes	Yes
Regimen - Prep	Yes	Yes	Yes
Regimen - Surgeon	Yes	Yes	Yes
Home medications	Yes, if the recording is not linked to a case record No, if the recording is linked to a case record	Yes	Yes

Appendix B: Interoperable Integration Changing the Patient using OR Scheduler

Map interface to InterimHealthCare Manager			
Map	OR Scheduler Booking	Phys Manager	OR Manager Time Table
Patient Type • Anesthesiologist • Anesthesiologist Working • Anesthesia Room • Anesthesia Room • Other • Other Room	Yes	Yes	Yes
Medical Team Project	Yes	Yes	Yes
Procedure name	Yes	Yes	Yes
Procedure anesthesia procedure only	Yes	Yes	Yes

Changing the Patient using OR Scheduler

It is possible to change the patient in a booking in OR Scheduler. A patient ID tag must be assigned. If the patient name and/or medical group number in the booking is incorrect.

The change affects any linked records the patient has in OR Manager and also Phys Manager. The two linked data modules such as Phys Manager, Anesthesia Manager and Phys Manager will remain consistent. Similarly, you can link records created in these modules as records in OR Scheduler.

If a user record has not yet been created in OR Manager, any change to the patient in the booking affects records in Phys Manager and Anesthesia Manager.

Appendix A: Perspective Integration

Changing the Patient using IIR Database

When a case record is created, an update of patient must be performed to get case record in IIR Manager in order to update the records in the other modules. A patient change in the tracking must give an effect on the other modules.

Restrictions

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

This change does not affect any input records in other First Perspective and Contact Case applications. Do you want to proceed?

If you click **Yes**, the patient changes only in the tracking; records in the other modules continue to use the original patient name and data entered in any record 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 tracking in the system file, so I had a record for the same patient open in FirstPerspective Manager. Why didn't the patient change on the record in FirstPerspective Manager?

A: Did a case record exist in IIR Manager before you changed the patient in the tracking?

• If no, repeat the patient change in the case record in IIR Manager and it will update in FirstPerspective Manager.

• If yes, did you edit the record in FirstPerspective Manager under the name of the current patient before you changed the tracking to show the same patient? You can edit the FirstPerspective record to get case record by using the Edit Record command on the File/Right menu in IIR Manager.

A

- Adaptive UI
 - adaptive integration 10-11
- Advanced Manager
 - integration 10
 - UI Manager 10
 - Flow Manager 10
- Advanced app 10-11
- API app 10-11
- APIs 11
 - in Manager Settings Options Screen 10

B

- Booking as operator
 - Booking list app 10
- Booking profiles 11-12
- Booking reference attributes
 - Book Time
 - Book Status Primary 11
 - Book Status Secondary 11
- Booking list app
 - UI 11
 - connecting and connecting 10-11
 - in API Booking screen 10
 - the interface 10
- Booking list 10

C

- Calendar Office app 10

D

- Default UI 10
- UI 11
- Booking 11-12
- Day Booking 11
- Guest Book Page window 10

E

- Enterprise
 - adaptive integration 10-11
- Enterprise
 - adaptive integration 10-11
- Enterprise, Providers, that connects
 - action Enterprise
 - adaptive integration 10-11
- Enterprise, Providers, that connects
 - action Flow Manager
 - adaptive integration 10-11
- Enterprise data exchange 10

F

- Full Flow Flow app 10
- entering New Patients 10
- Event
 - adaptive integration 10-11

- Field-Level Audit Trail 145
 - Produce Print Label
 - Managing Bookings 47
- Global PIV updates 141
- MRN link
 - Workflow 143
- Initial Case Record 141
- Logging in 7
- New Mergs 145
- Manage Bookings
 - Configure the Display 46
 - MRN Patient Link 145
 - Print Booking 145
- Manage Bookings Options Screen 46
 - columns 11, 46
 - columns 145, 146
 - Filter column information 46
- Manage Bookings Screen
 - Custom Field Select 46
 - columns 46
- Manage Bookings Screen: selecting book
 - top 46
- Manage Case Records Screen
 - columns 46
- Manage PIV Bookings Options Screen
 - columns 145-146
- Manage PIV Bookings Screen
 - columns 46
 - selecting bookings 145
- Manage Screen: searching
 - columns 46
 - Custom Field Select 47
- Medical team
 - administrative integration 145-146
- Workflow Merg 141
- MRN Search button on MR Booking
 - screen 46
- New Patient button 46
- Office link 14
- MR Booking screen
 - Search/Filtering 47
 - Booking MRN 46
 - booking in operation 46
 - columns 46
 - expanding and collapsing 46, 46
 - new records 46
 - Booking 46
 - columns 47
 - Equipment 47
 - Patient 46
 - MR Search button 46
 - New Patient button 46
 - Medical fields
 - columns 46
 - rows 46

- [illegible]

