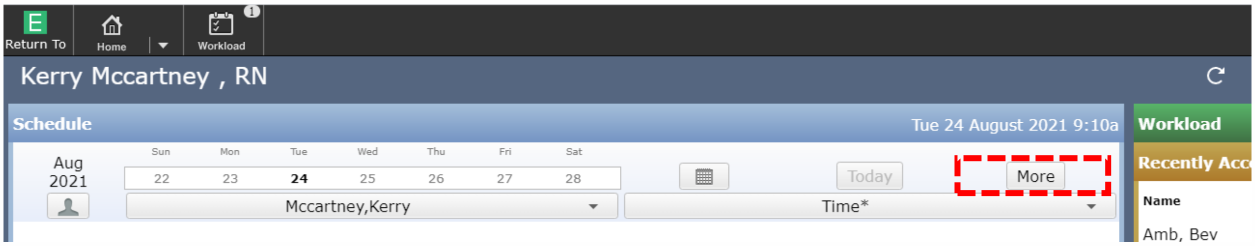
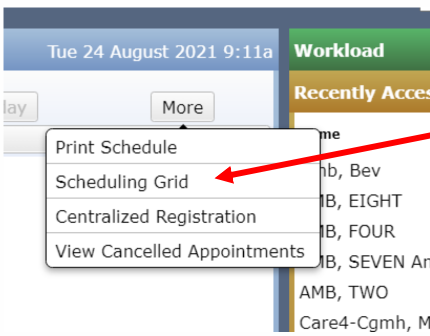
CARE4 MODULE NAME: AMBULATORY

Booking/Checking In Patients (Clinical Home Screen/Scheduling Grid)

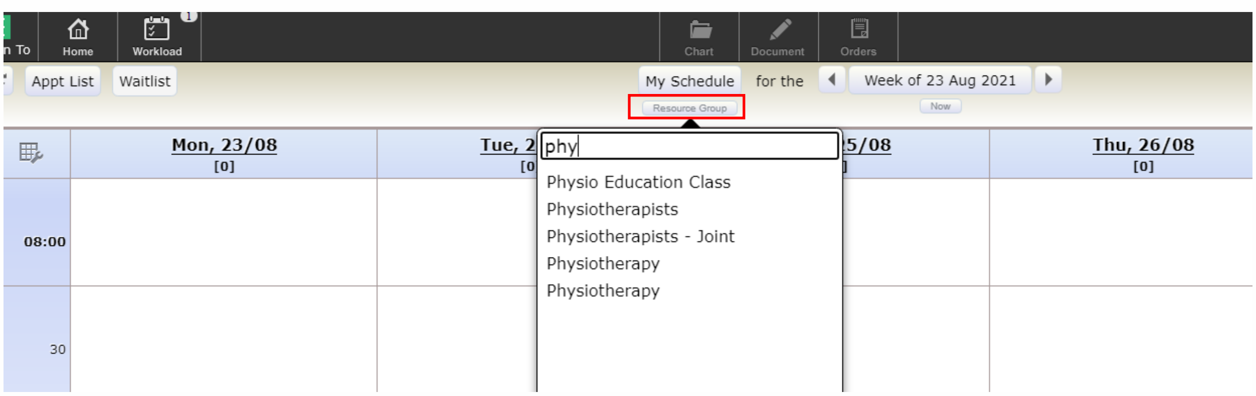
This tip sheet provides an overview of how you book or check in a patient when the scheduling grid is accessed through the Clinical Home Screen.

Log into Expanse and open your Ambulatory Clinical Home Screen. Once on the clinical home screen you can hit the "more" button located under the date and time.

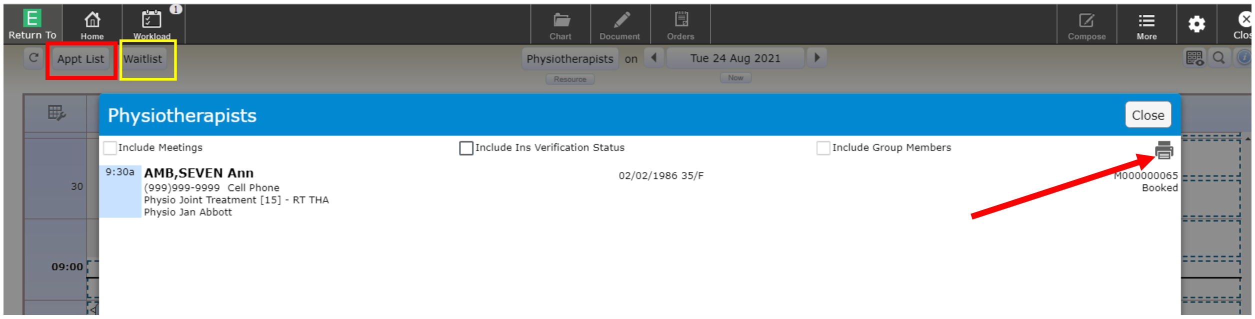


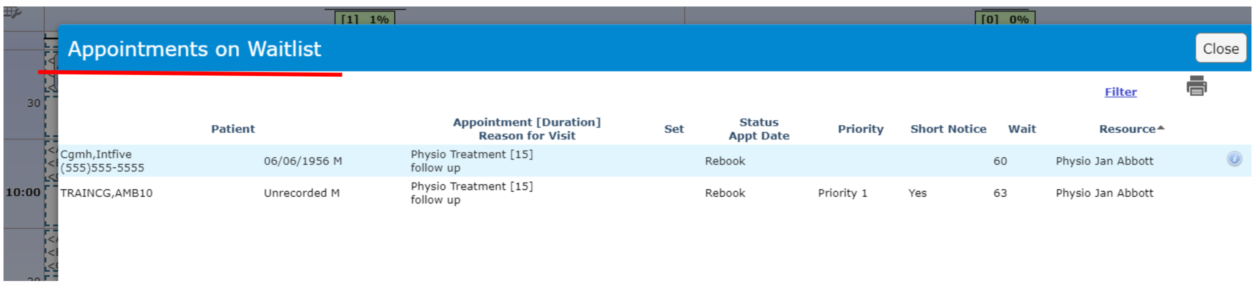


From the "more" menu select "Scheduling Grid" This will launch you to the Scheduling Grid. From the grid you need to click on the "Resource Group" box and select the correct resource group that you would like to see the schedule for.



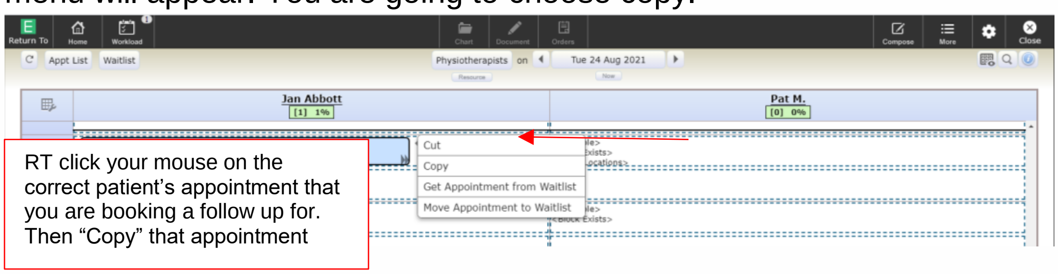
From this grid you have the ability to print the daily schedule, by clicking on the "Appt List" button located in the left upper corner under the home button. You also have access to the wait list, if there is one.

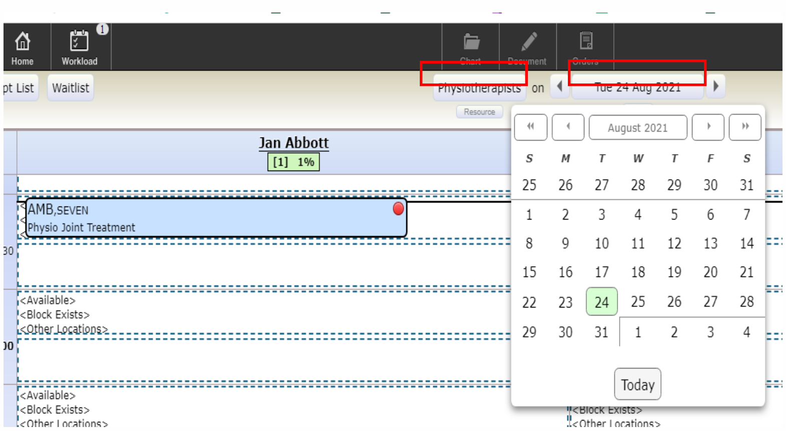




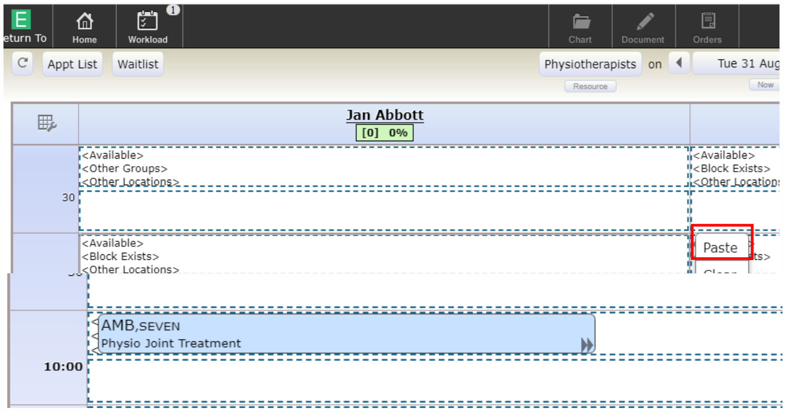
Booking a Follow Up Appointment Using the Copy Feature

If you are booking a follow up appointment using the same appointment type and reason, you need to Right click your mouse on the current appointment booking, and a menu will appear. You are going to choose copy.





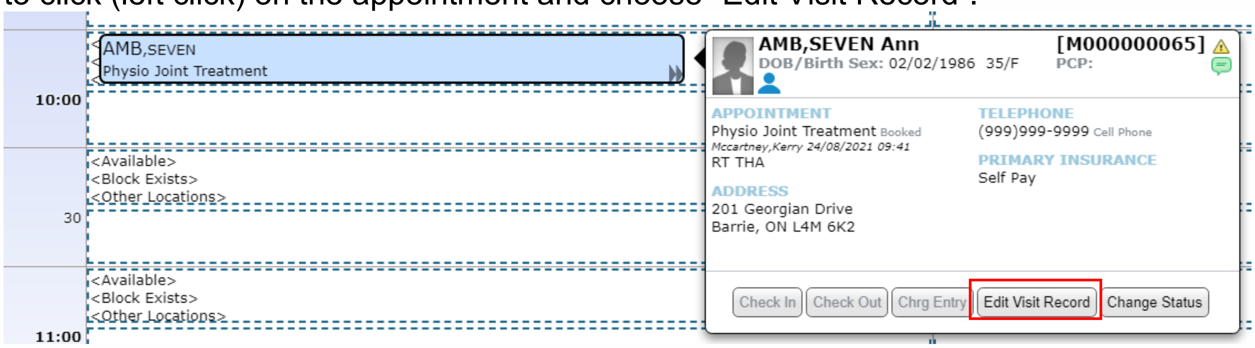
Then click on the date located at the top in the middle of the screen under the black tool bar, and find the date you would like to book the follow up for.
Select that date. The scheduling grid for that date will open with available appointment times, blocked off in the blue dotted lines.



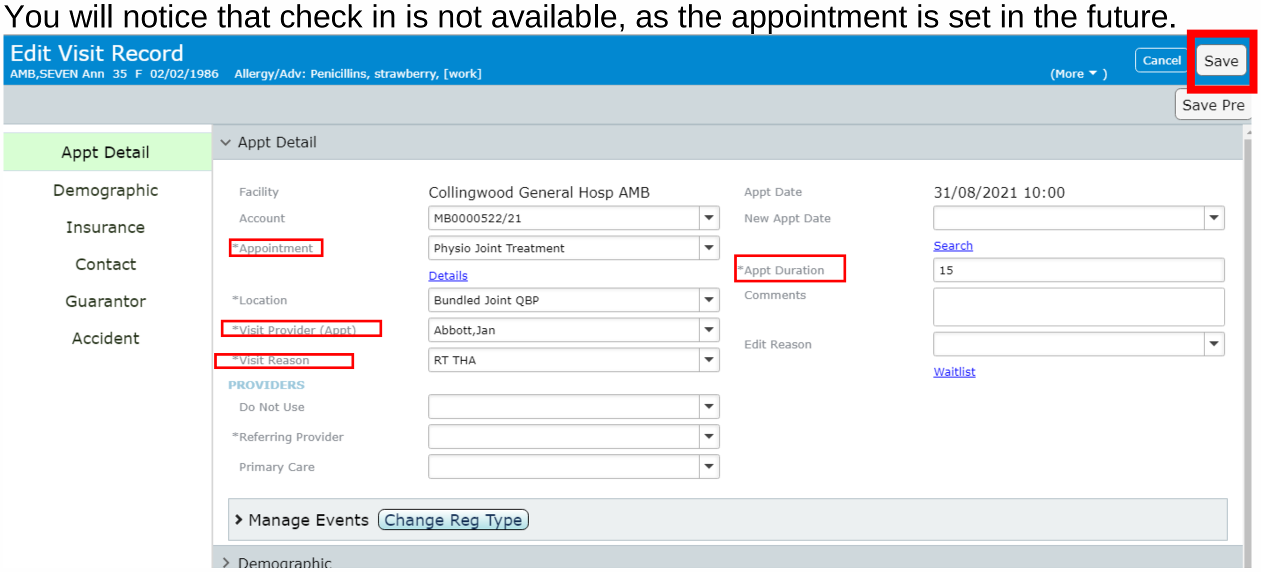
You then want to Right click on the time slot you want to select. (it is hard to see but the time slot is highlighted in grey) and then you are going to paste.

That same appointment type will be added to the time slot selected.

If there are any changes that need to be made to that appointment type you then have to click (left click) on the appointment and choose "Edit Visit Record".



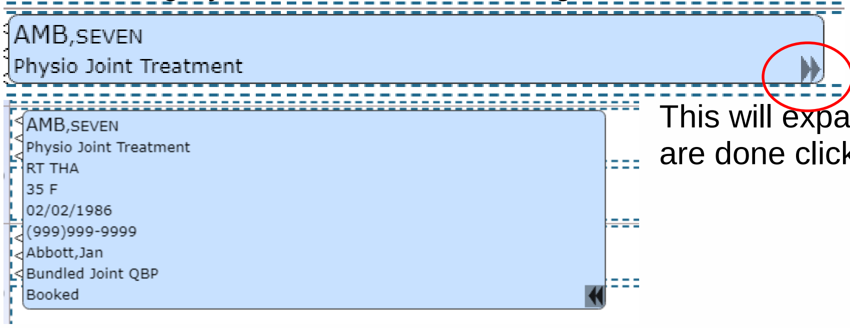
You will notice that check in is not available, as the appointment is set in the future.



From this layover, you are able to edit things like, the appointment type, i.e., going from an initial appointment, now to a treatment appointment. You are also able to change the provider, if someone else is going to see the patient that day for whatever reason, you may also change the appointment time, and duration if that patient requires more time or less time than what auto populates for that appointment type.

When you are finished changing the details of the appointment you can hit "Save" in the top right corner of the visit record box.

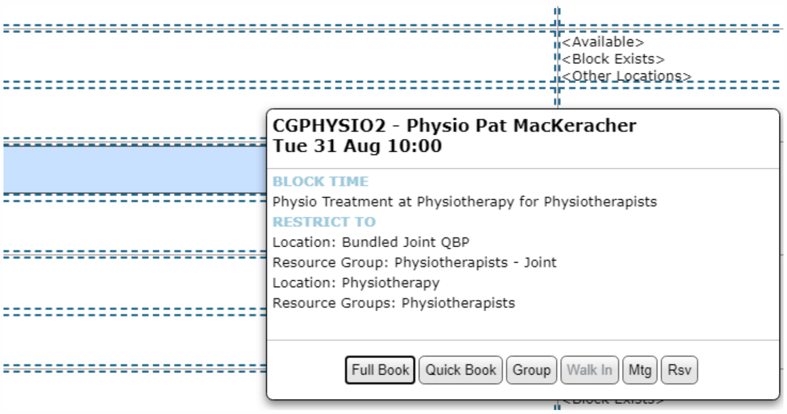
You have now successfully booked another appointment for your patient.
To see more details about the appointment from the scheduling grid you may click on the double grey arrows located in the right bottom corner of the appointment block.



This will expand the box. And when you are done click it again to shrink it back.

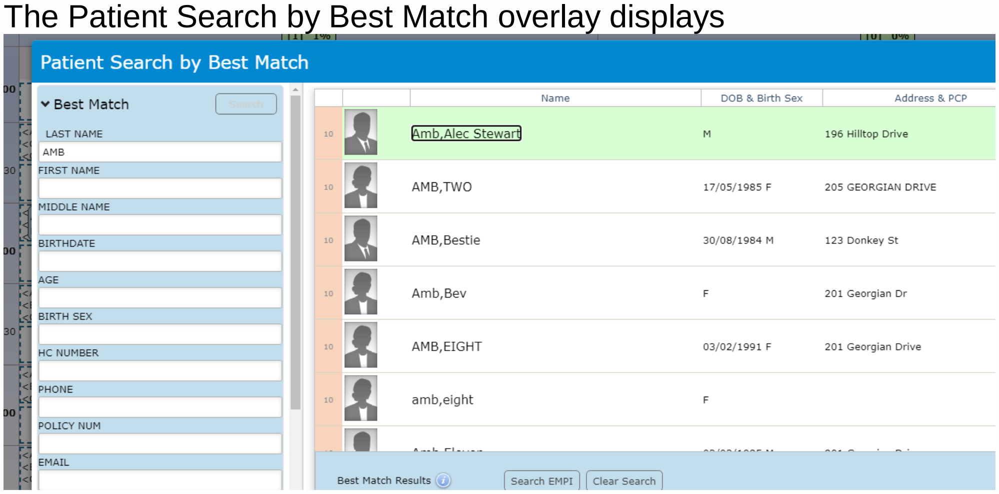
If you would like to book several appointments, you will need to copy and then paste each one, you cannot paste several times, only once per copy.

Booking a New Appointment

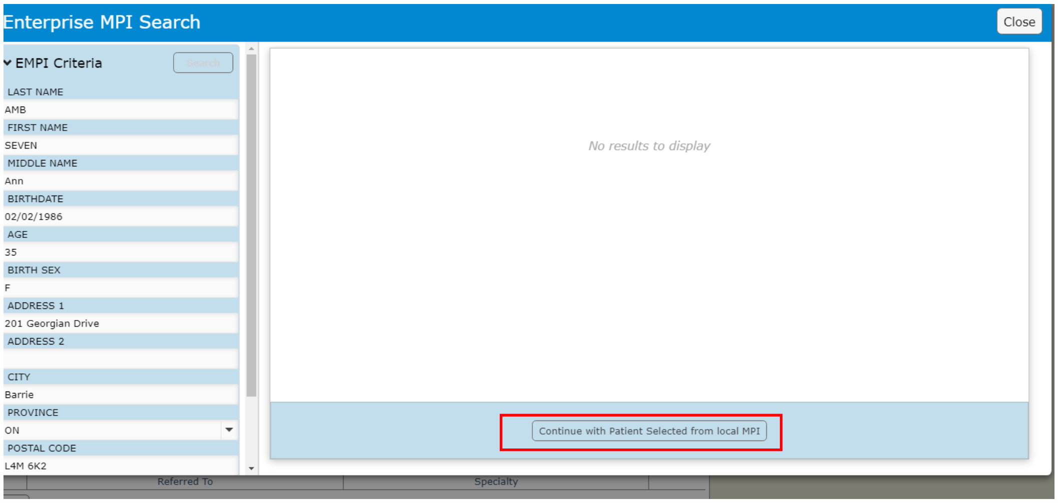


Follow the same instructions to get to the scheduling grid and find the resource group you want to book under. Then select the date that you want to book for. This time you are going to choose your time slot and go to full book or quick book.

The Patient Search by Best Match overlay displays

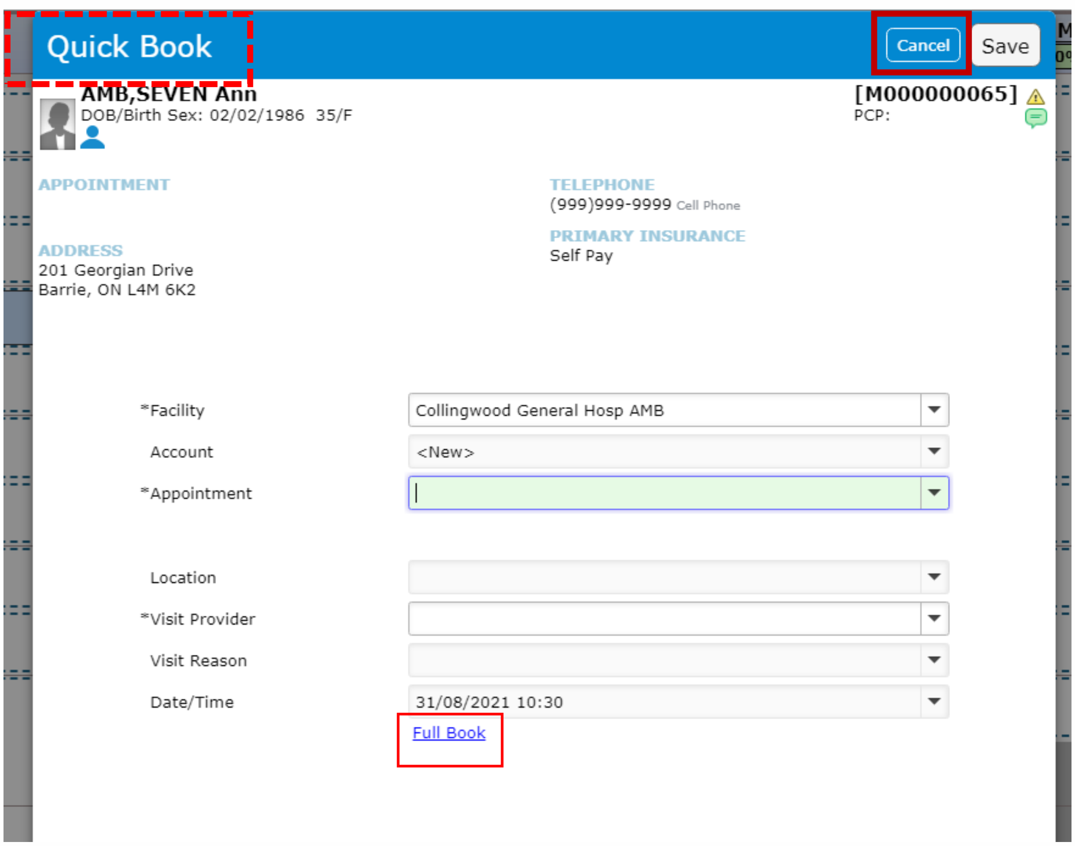


You then can search for your patient by any of the means listed. Health card number is probably the most accurate way to verify the correct patient.

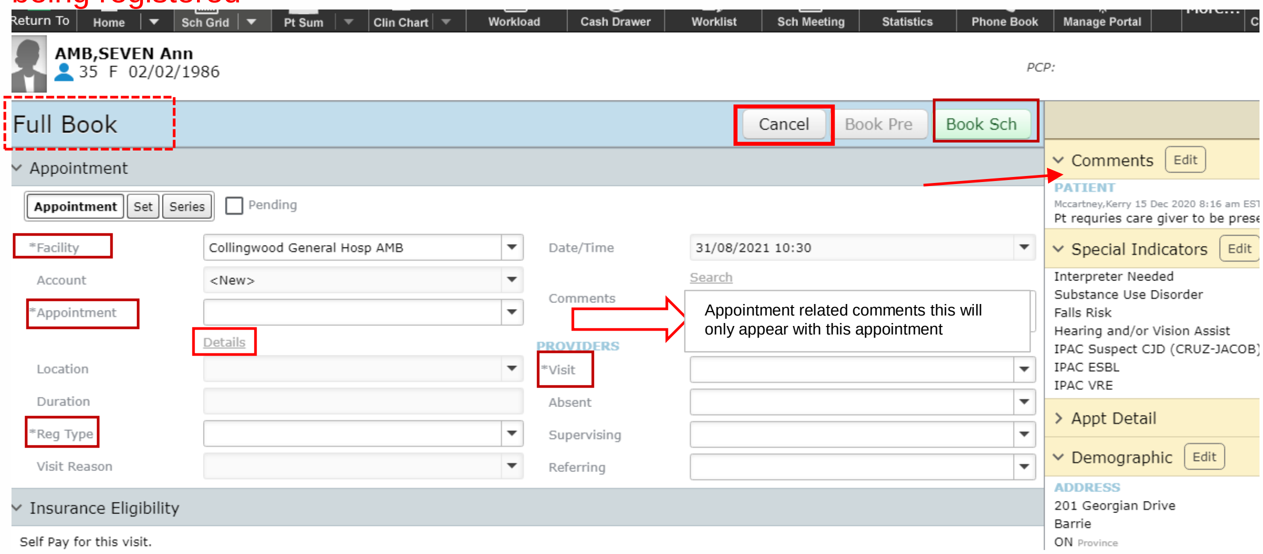


You then click continue with patient selected from local MPI, and it takes you into the booking screen.

The difference between quick book and full book is the amount of information that is available to put in while booking the appointment. Quick book is the minimum amount of info needed to book the appointment, but when in quick book there is always the option to go into full book from that screen if required.



Click the arrows to search for required information. Anything with an * is a required field and you cannot book without filling in these fields.
NOTE: The Referring Provider should be entered as it's required when the patient is being registered



As mentioned, you have the ability to add more information to the visit when you book in full book than in quick book, but all the mandatory information remains the same. The comment box in the appointment booking section is for comments that are relevant to that appointment only. You can see these comments when you click on the green comment bubble on the home screen.

The comment section in the reference section (right column), stay on the patient's registration record and will appear every time an appointment is booked and when the patient gets registered for an appointment.

The Reg type should auto populate based on the appointment that you choose.
You will have to type in at least 2 letters of the provider's name before the search function will work.

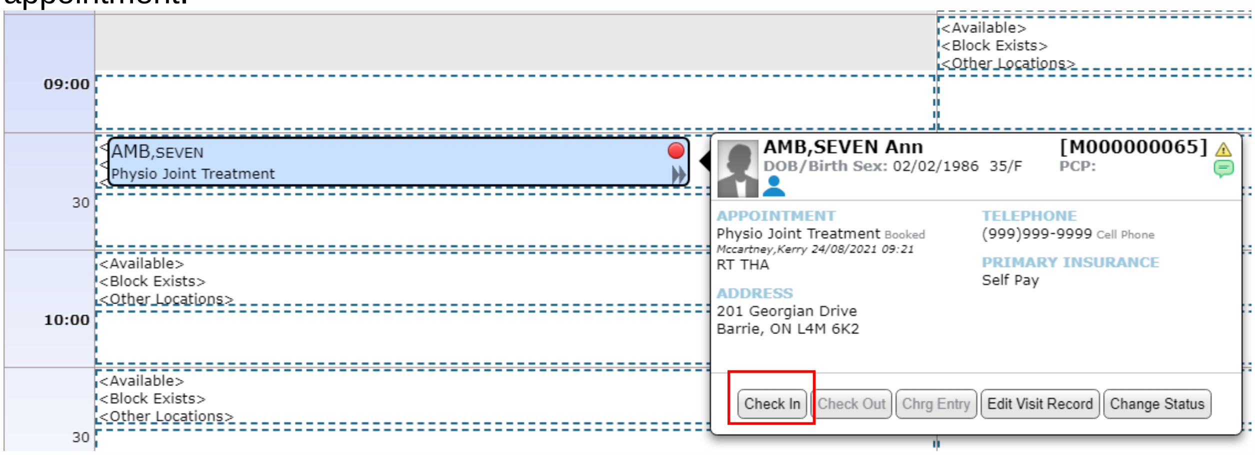
When you are done putting in all the information you can click save or book sch in the top right corner of the overlay screen. And if you notice during the booking process that you have the wrong patient, then beside that save or book sch button is a cancel button, so you can always cancel and start over again.

NOTE: If changing the appointment duration you have to ensure that the duration is also changed within the Details (See above Details button is located above the Location field). If the duration doesn't match you will get a warning.

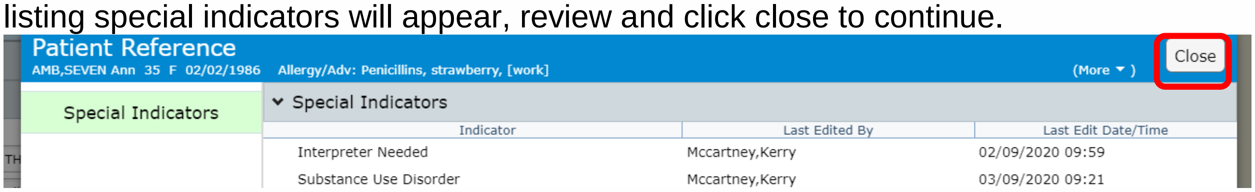
Checking in your patient for their appointment

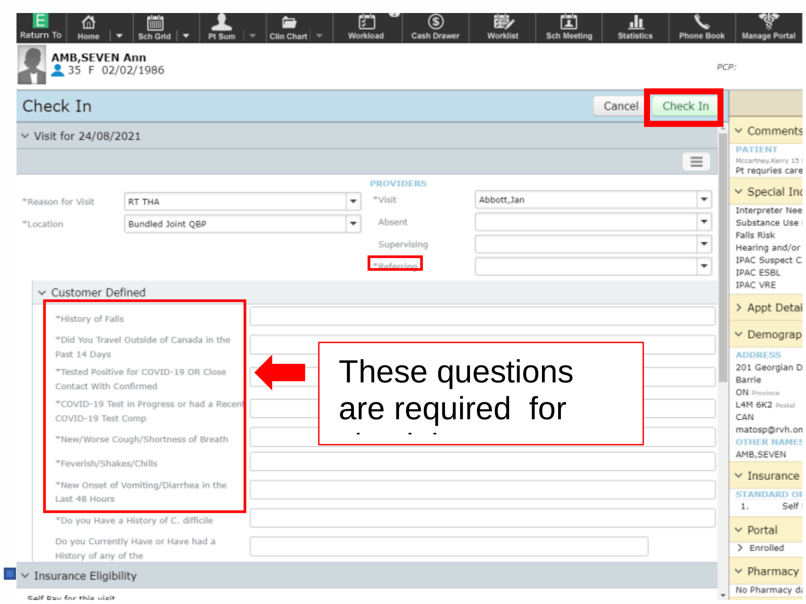
To check a patient in for their appointment you are going to follow all the same steps described above to get to the scheduling grid. Once on the scheduling grid you are going to select the appointment that you wish to register (Check In).

In the example below you will notice a red dot on the visit, this means that the patient has not yet registered and the appointment start time has passed, this dot will turn green when the patient is registered. The dot remains if the patient No Shows to their appointment.



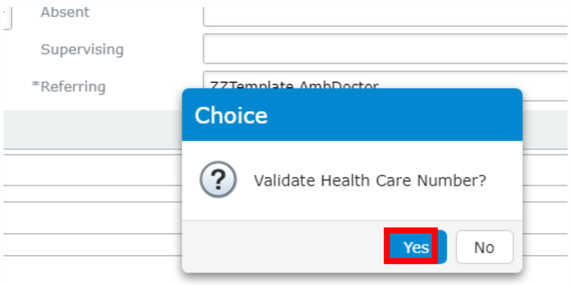
Right Click the appointment you want to Check In. Select the "Check In" box. A screen listing special indicators will appear, review and click close to continue.



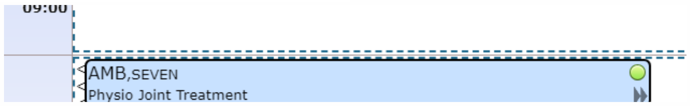


The check in screen displays, like the booking screen, there is an * by everything that is required before you are able to complete the check in process.

When you are done click on the "Check In" box on the top right. If you have missed any mandatory information a warning will appear for you to complete.



Once everything is filled in, a pop up to validate health care number will come up. You will have to then validate the Health Card Number.

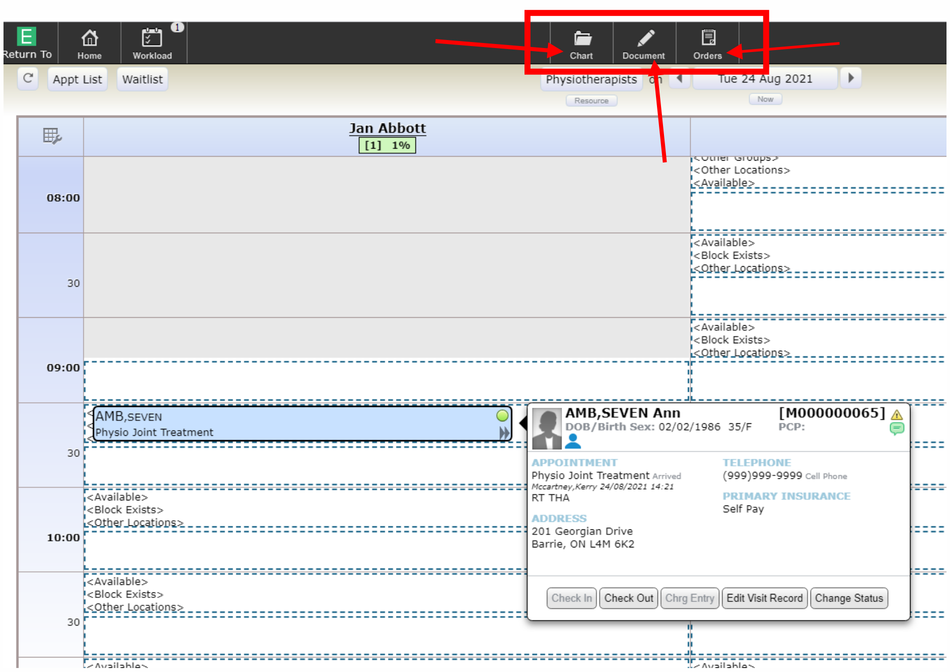


Now that the patient is checked in the dot on the patients booked appointment has turned to green.

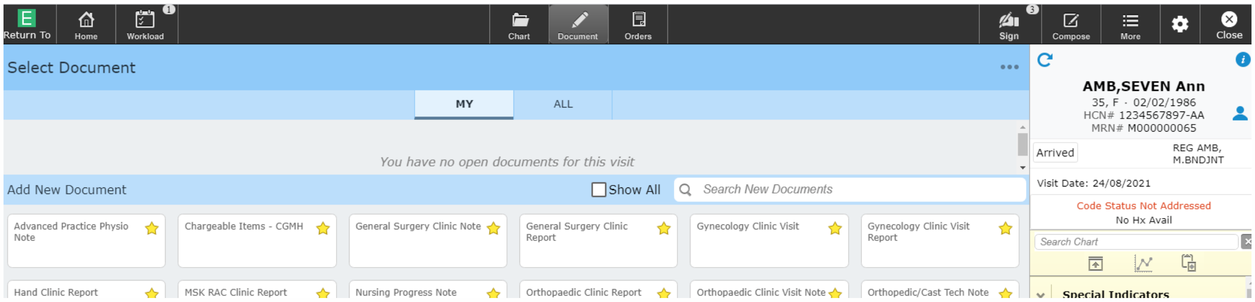
Check in is complete, and the patient will show in an Arrived status on the home screen.

Accessing the Chart from the Schedulling Grid

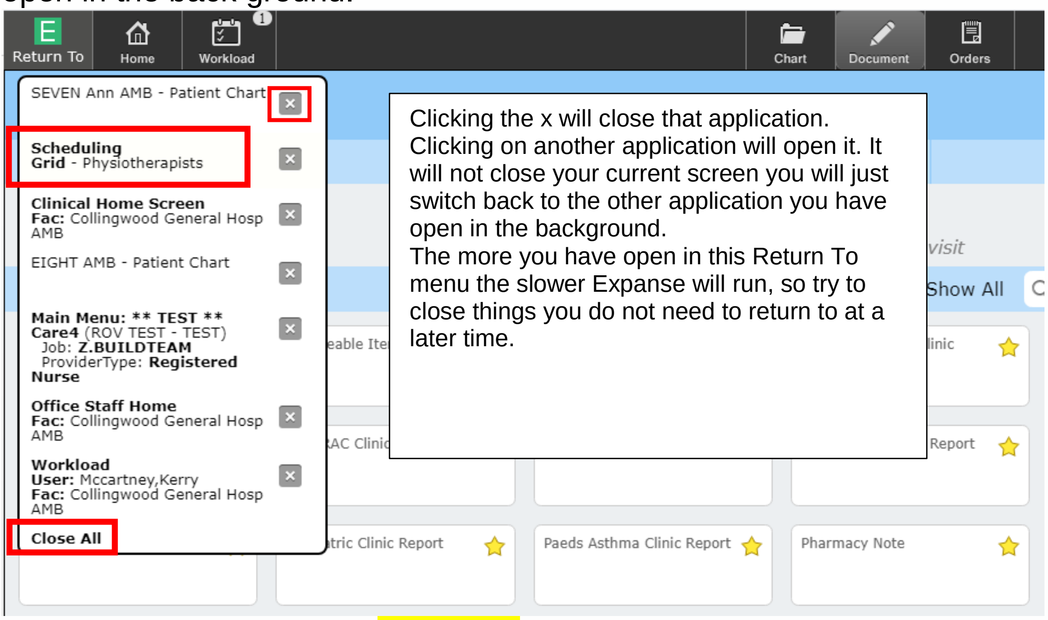
Navigating to select a document or opening the chart from the scheduling grid is also possible. You will notice that the black navigation bar is still there, with the options of, chart, document, and orders. Click on the patient you wish to document on or open chart, then go to the black navigation bar and click on documtent or chart, ignore the visit information that will pop up.



Clicking on Chart or Document launches you into the patient's visit record, in the example below Document was selected which launched the user into the “Select Document” screen.



To return to the Scheduling grid use the “Return To” in the top left corner of the black navigation bar to either close the chart and return or just return and leave this chart open in the back ground.



You may have to click on “Return To” a couple of times to close all the applications you want. Clicking the close all button will close your active section and log you out of Expanse.