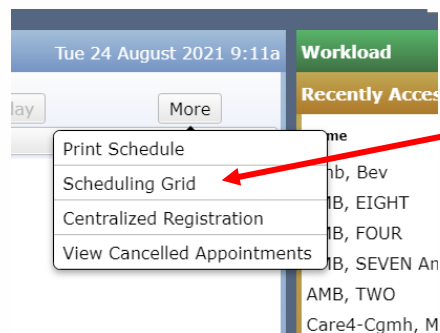
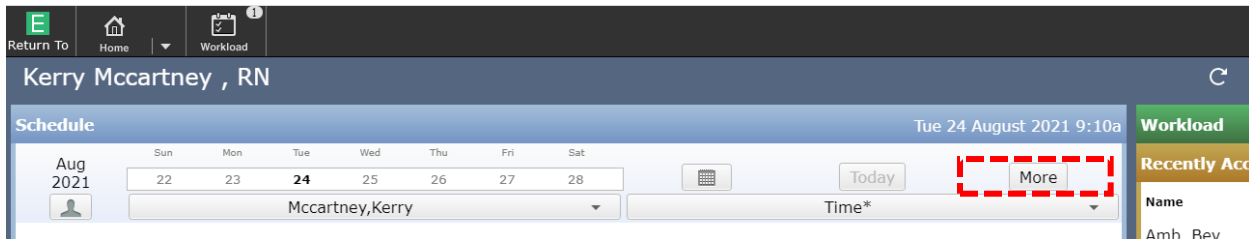


CARE4 MODULE NAME: AMBULATORY

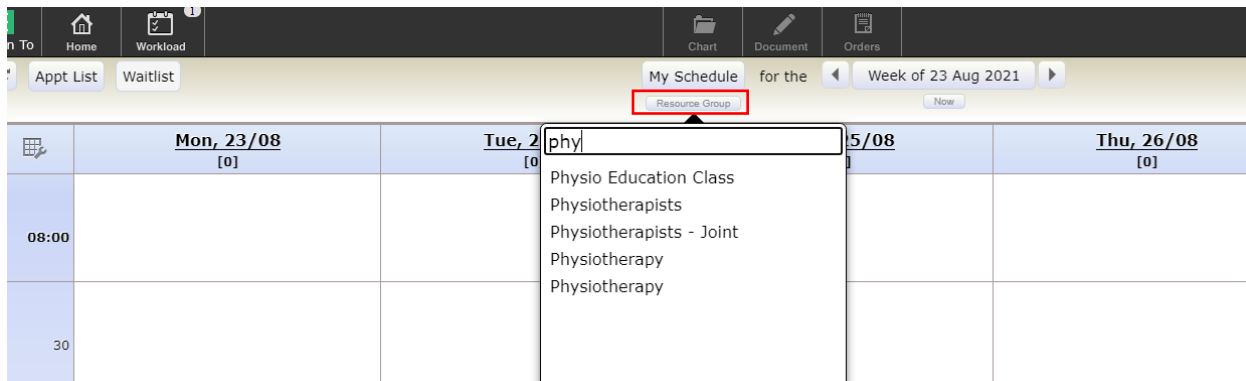
Booking/Checking In Patients (Clinical Home Screen/Scheduling Grid)

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.

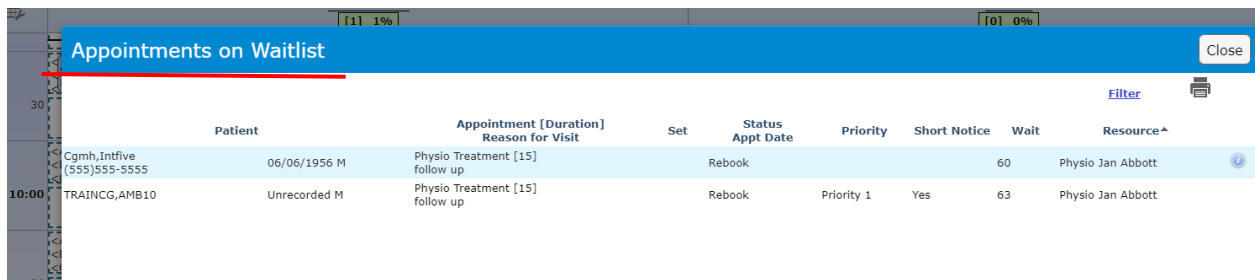
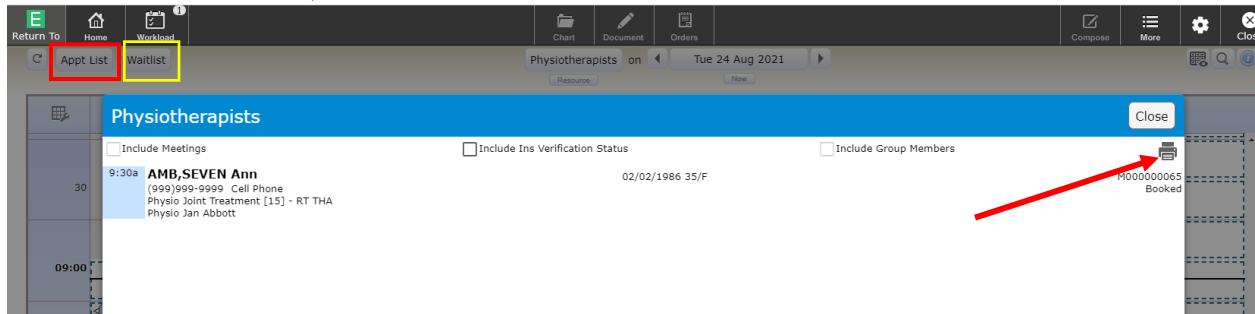
Log into Expanse and open your Ambulatory Clinical Home Screen. Once on the clinical home screen you can hit the **“more”** button located under the date and time.



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.

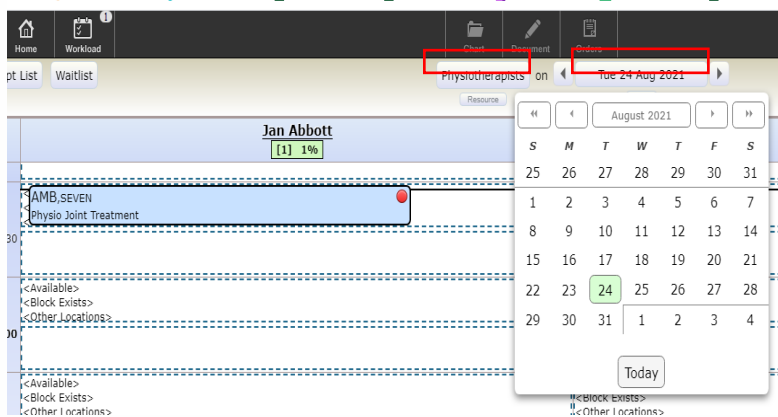
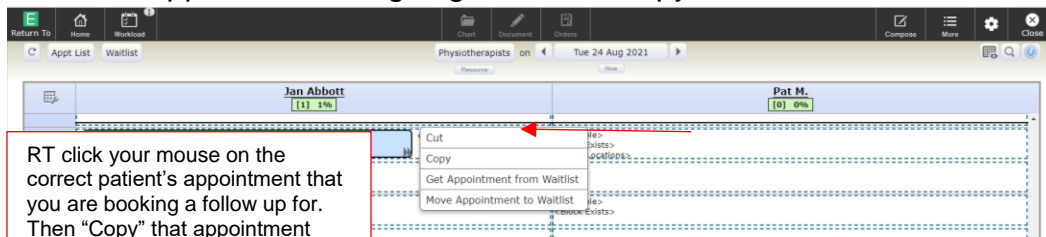


From this grid you have the ability to print the daily schedule, by clicking on the “Appt List” button located in the left upper corner under the home button. You also have access to the wait list, if there is one.



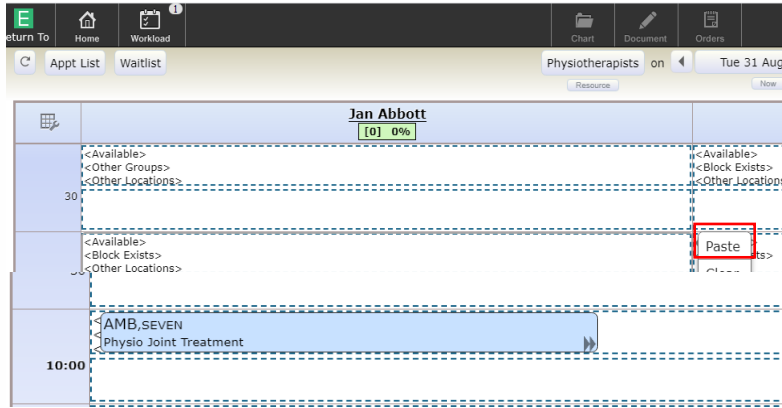
Booking a Follow Up Appointment Using the Copy Feature

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.

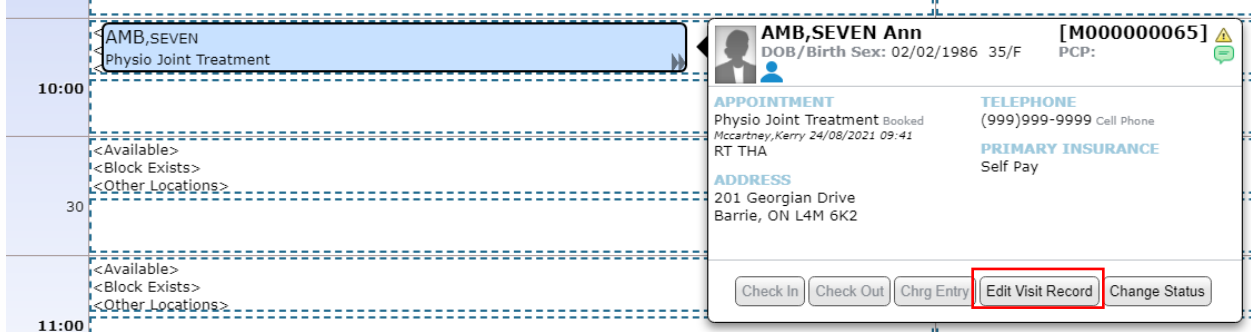
Select that date. The scheduling grid for that date will open with available appointment times, blocked off in the blue dotted lines.



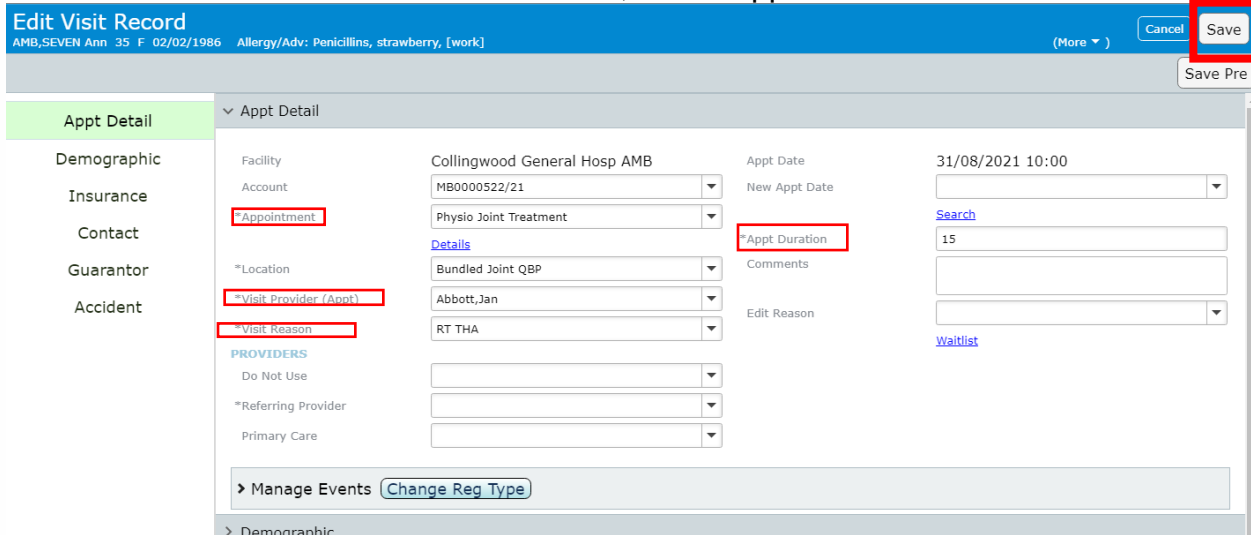
You then want to Right click on the time slot you want to select. (it is hard to see but the time slot is highlighted in grey) and then you are going to paste.

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”.



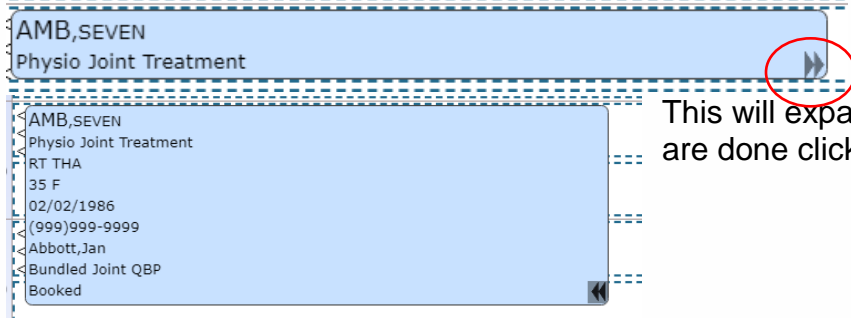
You will notice that check in is not available, as the appointment is set in the future.



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.

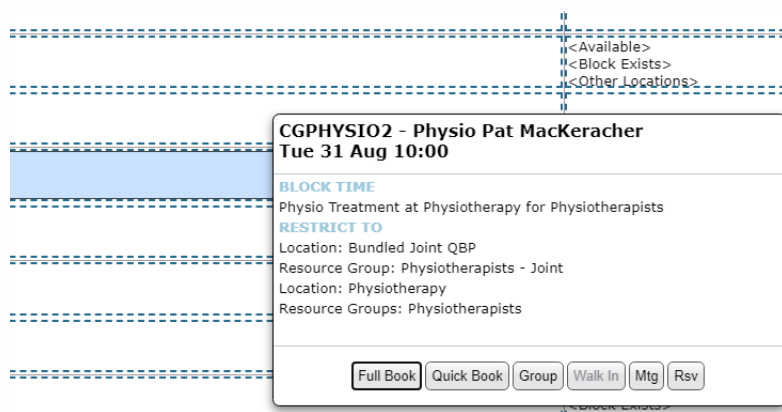
You have now successfully booked another appointment for your patient. To see more details about the appointment from the scheduling grid you may click on the double grey arrows located in the right bottom corner of the appointment block.



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

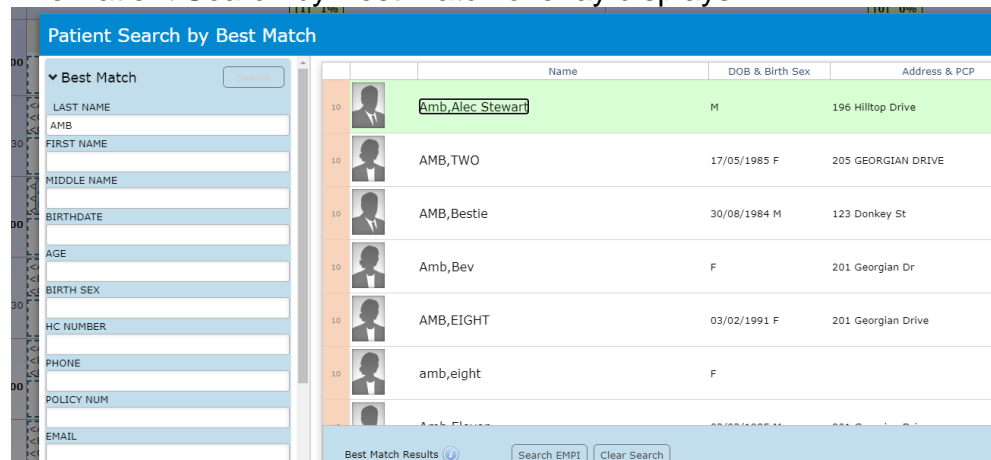
If you would like to book several appointments, you will need to copy and then paste each one, you cannot paste several times, only once per copy.

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.

Enterprise MPI Search Close

▼ EMPI Criteria

LAST NAME
AMB
FIRST NAME
SEVEN
MIDDLE NAME
Ann
BIRTHDATE
02/02/1986
AGE
35
BIRTH SEX
F
ADDRESS 1
201 Georgian Drive
ADDRESS 2

CITY
Barrie
PROVINCE
ON
POSTAL CODE
L4M 6K2

No results to display

Continue with Patient Selected from local MPI

Referred To Speciality

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.

Quick Book Cancel Save

AMB,SEVEN Ann [M000000065] ⚠
 DOB/Birth Sex: 02/02/1986 35/F PCP:

APPOINTMENT **TELEPHONE**
(999)999-9999 Cell Phone

ADDRESS **PRIMARY INSURANCE**
Self Pay

201 Georgian Drive
Barrie, ON L4M 6K2

*Facility

Account

*Appointment

Location

*Visit Provider

Visit Reason

Date/Time

[Full Book](#)

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

Return To Home Sch Grid Pt Sum Clin Chart Workload Cash Drawer Worklist Sch Meeting Statistics Phone Book Manage Portal

AMB, SEVEN Ann
35 F 02/02/1986

PCP:

Full Book Cancel Book Pre Book Sch

Appointment

Appointment Set Series Pending

*Facility Collingwood General Hosp AMB Date/Time 31/08/2021 10:30

Account <New> Comments Search

*Appointment Details

Location Duration *Reg Type Visit Reason

PROVIDERS

*Visit Absent Supervising Referring

Comments Appointment related comments this will only appear with this appointment

PATIENT
McCartney, Kerry 15 Dec 2020 8:16 am EST
Pt requires care giver to be prese

Special Indicators Edit

Interpreter Needed
Substance Use Disorder
Falls Risk
Hearing and/or Vision Assist
IPAC Suspect CJD (CRUZ-JACOB)
IPAC ESBL
IPAC VRE

Appt Detail

Demographic Edit

ADDRESS
201 Georgian Drive
Barrie
ON Province

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.

The screenshot shows a scheduling grid with time slots from 09:00 to 10:30. An appointment for 'AMB,SEVEN Physio Joint Treatment' is scheduled at 09:30. A red dot is on the appointment bar. A pop-up window displays patient information for AMB,SEVEN Ann (DOB: 02/02/1986, Sex: F, PCP: M000000065). The appointment details include 'Physio Joint Treatment Booked' on 24/08/2021 at 09:21. The address is 201 Georgian Drive, Barrie, ON L4M 6K2. A 'Check In' button is highlighted with a red box.

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 screenshot shows the 'Patient Reference' screen for AMB,SEVEN Ann (DOB: 02/02/1986, Allergy/Adv: Penicillins, strawberry, [work]). A table of 'Special Indicators' is displayed:

Indicator	Last Edited By	Last Edit Date/Time
Interpreter Needed	Mccartney,Kerry	02/09/2020 09:59
Substance Use Disorder	Mccartney,Kerry	03/09/2020 09:21

A 'Close' button is highlighted with a red box.

The screenshot shows the 'Check In' screen for AMB,SEVEN Ann (DOB: 02/02/1986). The 'Check In' button is highlighted with a red box. A red box highlights a list of 'Customer Defined' questions:

- *History of Falls
- *Did You Travel Outside of Canada in the Past 14 Days
- *Tested Positive for COVID-19 OR Close Contact With Confirmed
- *COVID-19 Test in Progress or had a Recent COVID-19 Test Comp
- *New/Worse Cough/Shortness of Breath
- *Feverish/Shakes/Chills
- *New Onset of Vomiting/Diarrhea in the Last 48 Hours
- *Do you Have a History of C. difficile
- Do you Currently Have or Have had a History of any of the

A red arrow points to this list with the text: "These questions are required for".

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.

Absent

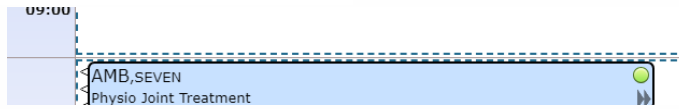
Supervising

*Referring 77Template_AmbDoctor

Choice

Validate Health Care Number?

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.

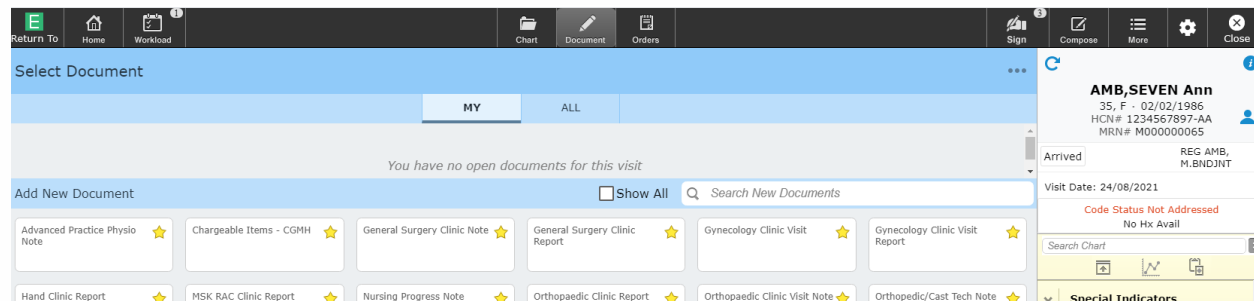
Check in is complete, and the patient will show in an Arrived status on the home screen.

Accessing the Chart from the Scheduling Grid

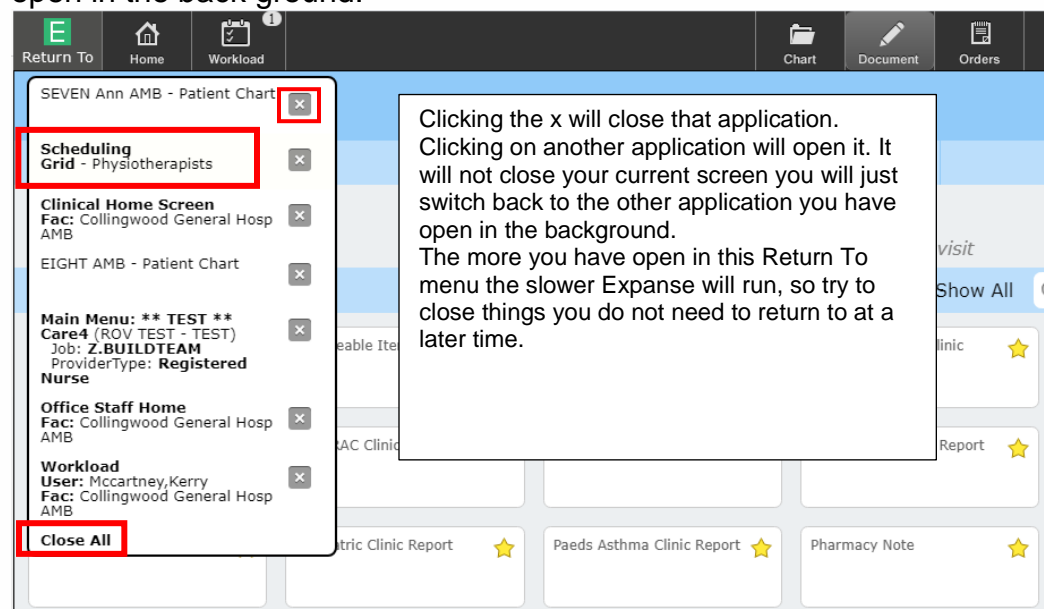
Navigating to select a document or opening the chart from the scheduling grid is also possible. You will notice that the black navigation bar is still there, with the options of, chart, document, and orders. Click on the patient you wish to document on or open chart, then go to the black navigation bar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

The screenshot shows a scheduling grid for 'Jan Abbott' with a patient appointment for 'AMB,SEVEN' at '09:00' for 'Physio Joint Treatment'. A red box highlights the 'Chart', 'Document', and 'Orders' buttons in the top navigation bar. A patient information pop-up is visible for 'AMB,SEVEN Ann' with details including DOB, Sex, PCP, and address.

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.