Patient Healthcare Scheduling (PHS)
TIP SHEET

PHS BASIC TERMS

Resource Unit: Your clinic, office or unit

Practitioner: The clinician seeing the patient (you could be scheduling to a room or equipment)

Procedure: The reason for the appointment

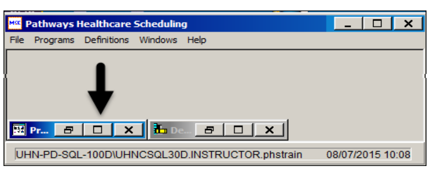
Appointment Class: The category of appointment (i.e. Inpatient, Research, Offsite).

Note: This is what colour codes the appointment

Enterprise Patient Number: Medical Record Number
**Do not use the Medical Record Number field in PHS*

LOGGING ON

1. Double click **PHS icon** on desktop
2. Enter **Login name** and **Password** (Your TID and password)
3. Click **OK**
4. Open the **Programs** window by clicking on the maximize button



5. Double click on the pink **Appointment** Book icon
6. Double click on the **Resource Focused** window to open up the Appointment Book
7. Click on the **drop down arrow** beside the **Unit** field and select your unit (on Appointment Book)
8. Use the **scroll** button on the right hand side to go to the clinic time

SIGNING-OFF

1. Ensure **no appointments** remain in the Work List or Scheduling Package
2. Click on **Exit** from the Appointment Book toolbar
3. Click the top right hand **X** button to close the two remaining PHS icons

TIP: FROZEN SCREEN?

Are you are on the Appointment Book, with the hour glass displaying, and unable to make any selections?

SOLUTION: You have opened the **Patient Search Screen** and clicked off of it, and are now on the Appointment Book. Click on the PHS icon on your task bar and select the **Patient Search Screen**. You can now proceed with finding your patient.

BASIC SCHEDULING

1. Choose the **New** button on the toolbar
2. Enter **patient MRN** in the **Enterprise Person Number** field
3. Select patient and click **OK**
4. Select the **Unit**
5. Select the **Procedure**
6. Select the **Practitioner**. Enter the first 4 letters of last name and first 4 letters of first name i.e. LASTFIRS
7. Enter the **Referring** Clinician. This is an important field to enter as this is required information in the EPR visit

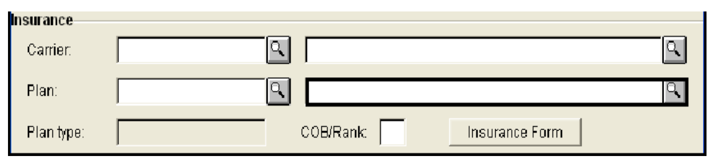
   (Enter in Appointment Class if mandatory field for your unit)

Visit Information

8. Click on the **Find Visit** button (bottom right corner)
9. Click on the **New** button (always choose NEW). If you don't select the NEW button, you will not get a visit in the EPR
10. Enter **Patient Type** & click **Save**. EPR visit type - CP, OP, SP
11. Click **OK**

Insurance Information

12. Type the first few letters of the Insurance Provider such as (Sun for Sun Life) in the long field beside **Plan** in the bottom

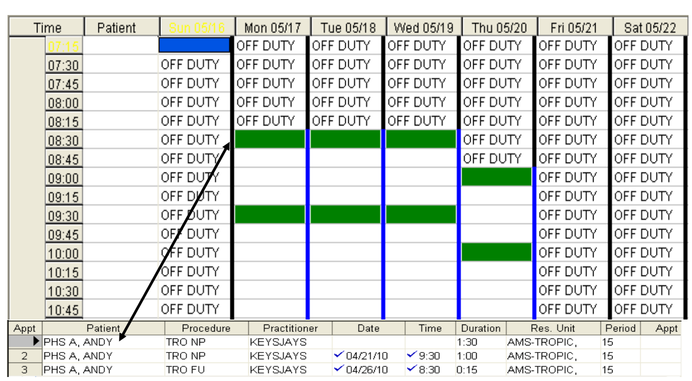


right hand corner. Click the **Magnifying Glass** icon to search and select. All four insurance fields will now populate.

13. Click **Save** and **OK**
    (You will return to the Patient Scheduling window)
14. Click **Save** to return to **Appointment Book** grid

Scheduling the Appointment

15. Using **calendar**, find the date to schedule the appointment. ***NOTE:*** The calendar will display green for available times for scheduling the appointment
16. Drag the **appointment** from the Scheduling Package onto the desired timeslot on the grid and drop it



BLOCKS

1. Right click on the very **top** of a **column** and select **create block**
2. Select **Pract** In the Owner Type field (Note: If blocking a room select **RESUNIT)**
3. Enter the **Block Owner**. It should be same as the Resource. (If blocking a room enter the **Resource Unit**, found in Unit field, under PHS toolbar)
4. Enter **Start** and **Stop** times for block
5. Select **Block Type** (Select **Do Not** for **absences)**
6. Enter **Reason** such as MEETING
7. Choose button **OK**

The block will appear on the grid. Additional information can be entered in the **Comments** field

To **edit/release/remove** the block, right click on the block (The block text on Appointment Book) for options.

EDITING YOUR APPOINTMENT

Edit using the Right Click Menu

1. Right click on an **appointment** on the grid
2. Choose **View/Edit**
3. Select desired option to edit
   - **Answers** (pre/ post scheduling questions)
   - **Appointment Class** (appointment colour)
   - **Appointment Duration**
   - **Referring Physician**
   - **Schedule Procedure Name** (for comments that have been entered on the appointment)

NOTE: Right click and select **Visit Information > Edit Visit** to make changes to:

- **Patient Type** or **Insurance Info**

Edit from the Patient Scheduling Screen

Use this option to change items like the Resource **Unit**, **Procedure** and **Practitioner**.

Warning: You must drag the appointment to Scheduling Package which means that someone could schedule an appointment in that time slot (in a busy clinic).

All fields may be edited with this method

1. Drag **appointment** to **scheduling package**
2. Right click and choose **Update Appointment**
3. Update any fields as required
4. Click **Save**
5. Drag appointment back to the grid
6. Enter in **reschedule reason**

RESCHEDULING AN APPOINTMENT

IMPORTANT: DO NOT drag appointments from column to column. Drag them to the scheduling package first.

Find appointment on the grid and then either:

- Drag down to scheduling package, then drag back up to new time. Enter in a reschedule reason
- Right click an appointment on the grid and choose **Reschedule Appointment**. It will now be in the scheduling package. Drag up to new time. Enter in a reschedule reason

PATIENT SEARCH / FIND BUTTON

1. Click the **Find** button on the toolbar
2. Click the **Find Patient** button
3. Enter **Patient** search information (preferred search method is to enter the UHN MRN in the **Enterprise Patient Number** field)
4. Click **Search**. Select your patient and click **OK**
5. Click **Search** on the Appointment Search window for a list of patient appointments

DIRECT SCHEDULING

This is a **quick method** to schedule appointments as many fields will be auto-populated.
Note: Can only be used to book **single** appointments

1. On the **Appointment Book**, change the **calendar date** and select the **time** for the appointment
2. Double click on time slot cell where you want to schedule the appointment for the **practitioner**
3. The Patient Search window appears. Enter **patient MRN** in the **Enterprise Person Number** field and click **Search**
4. Select your patient
5. Enter the **Appointment details** (apt class, procedure, etc…)Be sure to enter the **referring physician.**

Follow **Steps 8 to 16 on page 1** under Basic Scheduling for:

Visit Information or **Insurance Information** or **Scheduling the Appointment**

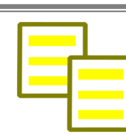
CANCELLING/NO SHOW APPOINTMENT

Find **appointment** on the grid and then either:

- Drag appointment to **Cancel basket** and enter cancel reason
- Right click appointment and choose **Cancel Appointment**.
- Enter cancellation reason. The appointment moves to **Cancel bin**

Note: No Show appointments are processed in the same manner as a cancelled appointment. The **Cancellation Code** reason would be **NoShow**

COPYING A NEW APPOINTMENT



Best Practice: Create a new appointment and copy

1. Create a **new** appointment and schedule on the grid
2. Right click on appointment and select **Copy Appointment**
3. Select Copy Method and desired # of copies

   The copied appointments appear in the Scheduling Package
4. Drag the copied appointments up to grid

AUDIT LOG

1. **Find appointment** on the grid
2. From the grid**, right click** on **appointment** and select **Audit Log**

The Audit Log shows all activity for appointments (i.e. Copy, Move, past reschedules, scheduler's T number and changes made)

DATA QUALITY / FINDING VISIT ERRORS

Certain actions must be taken to ensure **PHS appointments** and **EPR visits** are accurate. Inaccurate information can **impact UHN funding** and **Ministry reporting**.

Reports are made to the Ministry of Health and Long Term Care on patient volumes, activity, and practitioner interactions. Poor data quality can result in **loss of revenue for UHN programs**.

What can be done to ensure good data quality?

If you use both PHS and EPR, check **both** application details.

Use PHS to make updates and changes as the interface between the two applications starts there. Check EPR to see if the changes have been transferred back to that application.

Changes to look for end of each day:

- all patients who attended clinic have activated appointments
- no shows have been cancelled indicating no show as reason
- rescheduled visits are updated using the scheduling package
- check EPR, which should now indicate activated, no show or cancelled visit details

Arriving Patients - Audit Report

Staff who *arrive* their patients in PHS should run the report:

Audit Report by Resource Unit/Patient Arrival

This report will indicate arrived patients appointments. Run this report periodically or where there is a data quality concern.

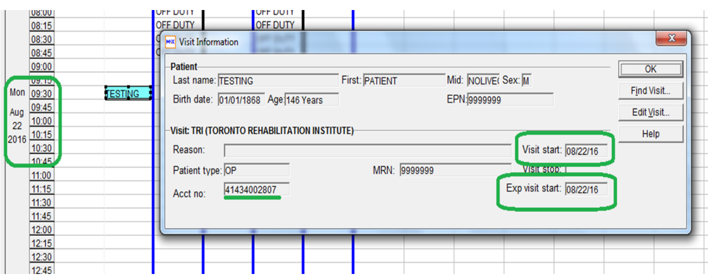
What to look for, indicating poor data quality?

For the visit to be accurate in EPR, PHS appointments need to have the same **Appointment Date**, **Visit Start date** and **Exp. Visit Start date**. When there is a discrepancy, usually it is because a visit does not exist. To correct the issue, please do the following:

1. Right click the appointment and select **Visit Information**. If the visit appears as follows, no further action is required

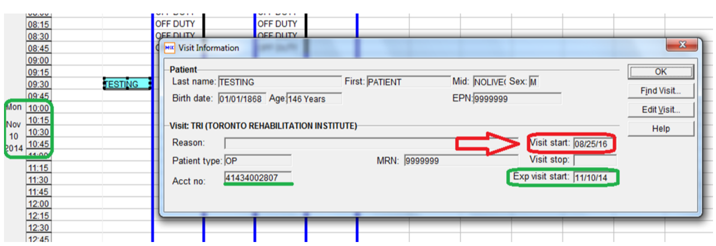
Correct Visit: All Dates Match

2. If the appointment has some discrepancy as pictured below, click on the **Find Visit** button on the right to create a visit (while still on the Visit Information Screen)



3. Follow **Steps 9 to 14** on page 1, Basic Scheduling
4. Check to ensure that all dates now match

Incorrect Visit: Dates Do Not Match



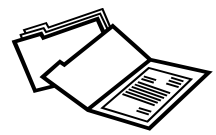
REPORTS

Patient Itinerary

1. Right click on the **appointment** on the grid
2. Select **Print**
3. Select **Itinerary**
4. Select desired **Patient Itinerary Report**
5. Choose **View** and the report will load
6. A warning message appears. Click **OK** to bypass.
7. To print choose **printer** button in top right corner

Standard Reports

1. From the main **Programs** window (where the pink Appointment Book icon is located), double click **Standard Reports**
2. Enter/select the desired **Report Name** (the list will filter as you type your report name)
3. Choose **View**
4. Enter the **start and end date** for the report
5. Enter the **Resource Unit** and/or Practitioner
6. Click **OK** and the report will load. View report if correct
7. Choose **printer** button at the top of the window



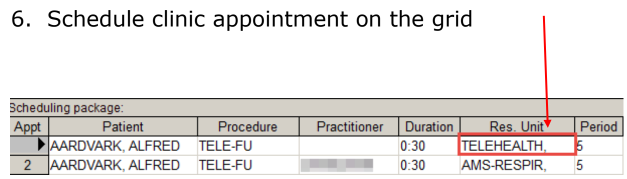
PHS SHORTCUT KEYS

F2	**Saves** the appointment while on the Patient Scheduling Window; will also **prompt** you for the next mandatory field to fill in
F5	Reschedules the appointment, moves it from the grid to the scheduling package **Click on appointment & select F5**
F7	Schedules the appointment, moves it from the scheduling package to the grid **Click on desired spot on grid, select F7**
F8	Cancels the appointment **Click on appointment & select F8**
ALT + Down Arrow	Activates the magnifying glass button in the selected field

SCHEDULING SETS

Scheduling sets are used for complex appointments (such as Telehealth or LC Robson Clinic procedures). These *must* be initiated by using the New button.

1. Follow **Steps 1 to 14** on page 1, Basic Scheduling
2. When indicating a procedure, as per Step 5, click **Yes** to the scheduling set question
3. 2 or more appointments will be in the Scheduling Set
4. If required, answer the Telehealth Form questions
5. If required, drag the Telehealth appointment to the Inbox in the toolbar at the top of the screen
6. Schedule clinic appointment on the grid

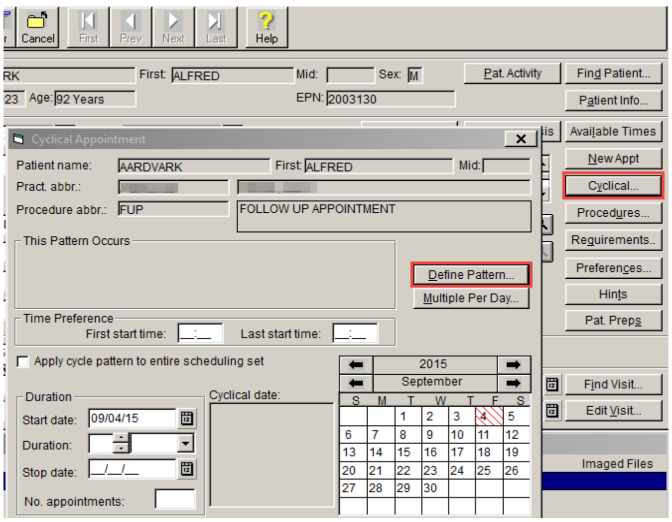


CYCLICAL APPOINTMENTS

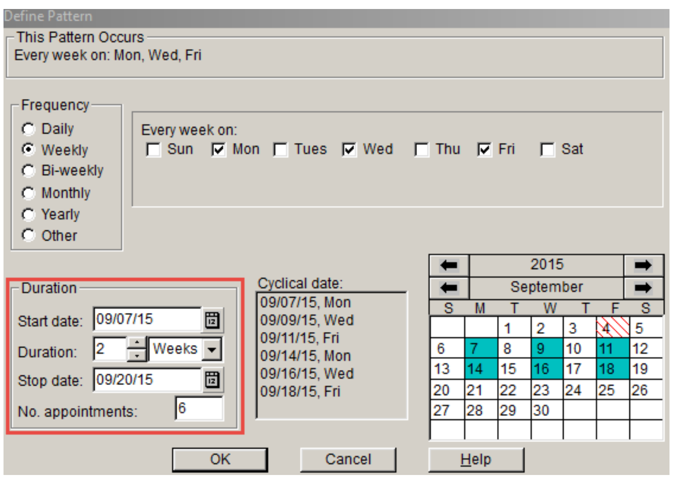
Cyclical appointments allow for quick booking of multiple appointments, where the reoccurrence is identical (i.e. same weekday and time each week).

These *must* be initiated by using the New button.

1. Follow **Steps 1 to 14** on page 1, Basic Scheduling
2. Prior to adding Visit and Insurance Information (Step 8), click **Cyclical** button on right hand side
3. Click **Define Pattern**



4. Input **Duration** details and click **OK**

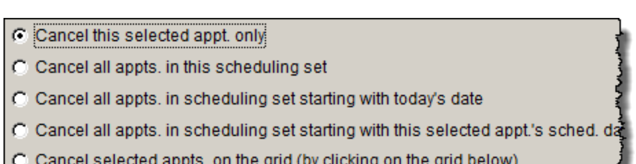


Scheduling the Appointments

5. Using the **calendar**, find one of the dates and times to schedule the appointment
6. Drag the **appointment** from the Scheduling Package onto the desired timeslot on the grid and drop it. All other appointments will fill in according to the specified duration in the cycle

Editing and Cancelling Cyclical Appointments

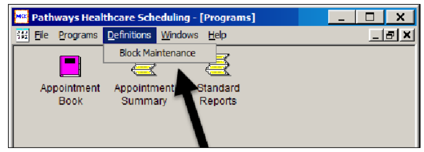
If you need to edit or cancel a cyclical appointment, PHS will present you with **options** to edit/cancel. If cancelling the entire series, select **Cancel all appts. in scheduling set starting with today's date** to ensure past appointments don't get cancelled.



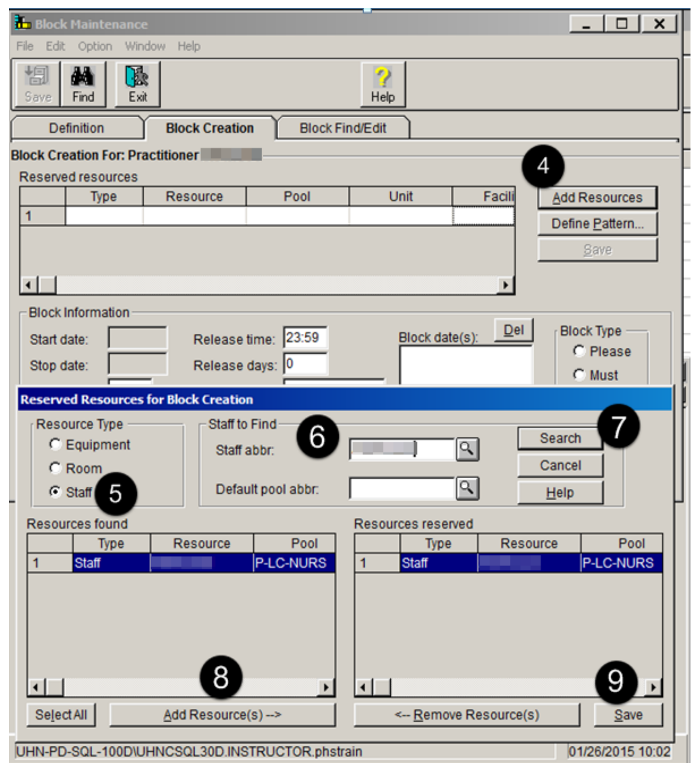
MULTIPLE BLOCKS

This functionality allows for the creation of **multiple blocks** that are reoccurring, on the Appointment grid (i.e. vacation).

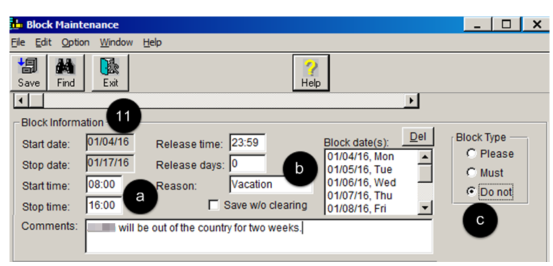
1. From **Programs window**, click **Definitions** then **Block Maintenance**



2. Indicate **Practitioner** under Owner Type
3. Input **Practitioner name** (first 4 letters of last name, first 4 letters of first name) in Owner Abbr field
4. Click **Block Creation tab** and **Add Resources** button
5. Indicate **Staff** for block creation
6. In Staff abbr: input **Practitioner name** (as in Step 3)
7. Click **Search** button to bring up Resources found section
8. Click **Add Resource (s)** button
9. Click **Save** in bottom right hand corner



10. Click **Define Pattern** button to open the Define Pattern Screen (see Step 4 screen shot, Cyclical appointments for example). Input **Duration** details, click **OK**
11. Input **Block Information** (Start & Stop time, Reason, Block Type and Comment if necessary)
12. Click **Save** and **Exit**

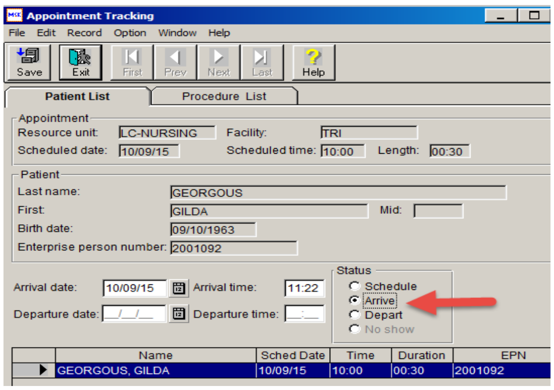


APPOINTMENT ARRIVAL & EPR VISIT ACTIVATION

– **It is best practice to activate the visit in the EPR. Only activate in PHS if you do not have access to EPR!**

– If your workflow does not have the option to activate the visit in EPR, you can activate the visit from PHS, by using the **Appointment Tracking** feature

1. **Right click** on the visit and select **Appointment Tracking**.
2. Under Status, check the **Arrive** radial button, click **Save** and **Exit**



3. The **Arrival date** and **Arrival time** fields will default to current data.

– **Only Arrive visits when the patient has physically arrived**

– **Do Not use the No show button. Indicate No Show as the reason for a *cancelled* appointment.**

ARRIVAL FUNCTIONALITY EDITING

To change the Arrival date, and to ensure the PHS—EPR visit integrity, you must do 2 things:

1. **Create a new visit for EPR, in PHS**
   Right click on the appointment and from the Rt Click Menu, select **Visit Information> Find Visit> New Visit> Patient Type &** fill in **the Insurance Info**
2. **Perform the Arrival Function again**
   The arrival date should always be the current date

CHECKING ARRIVED APPOINTMENTS

– At the end of every day, **double check** that all appointments have been "arrived" for patients who attended their appointment.

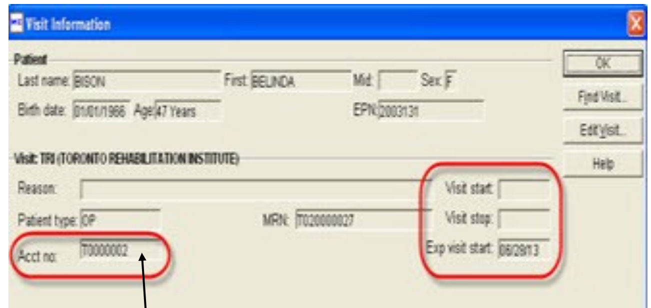
– You can also run the report **Audit Report by Resource Unit/Patient Arrival**

TIP

When **copying or scheduling multiple appointments**, you can **refresh** the Patient Scheduling Package by **double clicking on the patient's name** in the Worklist in the bottom right hand corner. The unscheduled appointment will go to the top, allowing you to easily drag your appointment to the Appointment Book. Repeat if necessary for multiple appointments.

WHERE CAN I FIND THE VISIT NUMBER?

Right click on the appointment. Select **Visit Information**.



Account no.

This is the visit number. The letter **T** in front of the number indicates a temporary number.

Visit Start: the Date of visit in EPR
Exp. Visit Start: Date of appointment on the grid in PHS.
Both of these dates should be the same for visit created accurately.

COMMON PHS REPORTS

DAILY PATIENT LISTS

Resource Unit Pt List with Com-Pract
Prints a patient list with comments for every practitioner in the clinic
Patient List by Pract Chron-Health Ins
A chronological patient list with the health insurance number printed for one practitioner
Patient List for Res by Prac Chron-Short
A chronological patient list for every practitioner in the clinic with minimal info, so the list is short
Alpha Patient List– Pract
An alphabetical patient list for a single practitioner with comments
Alpha Patient List– Resunit
An alphabetical integrated patient list for all practitioners in the clinic, with comments

PATIENT ITINERARIES

Patient Itinerary (There are several versions)
A list of all the patient's appointments across UHN. When printed from Standard Reports displays both past and pending appointments. When printed from the appointment (Rt click menu) displays pending appointments.
Patient Itinerary (Big Print) - in large font
Patient Itinerary by ResUnit—a list of the appointments in the clinic specified only (not all UHN appointments)
Note: Custom Patient Itineraries exist for TGH, PMH, TWH + TR

OTHER REPORTS

Active Patient Directory by Practitioner
A patient directory for the designated practitioner
Cancelled and Rescheduled Appointments
Lists all the cancelled and rescheduled appointments for the clinic selected, for the date selected
Physician Statistics by Resunit
Displays patient load percentage for all practitioners in the clinic

PHS AUDIT REPORTS

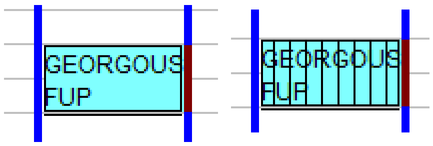
Audit Report by Resource Unit/Scheduler
Enter your PHS ID to obtain a list of all the appointments that you created. Identifies visits not properly created.
Note: Must wait 24 hours after visit activation
Audit Repot by Practitioner
Identifies all appointments with visits that aren't created properly or the appointment has not been activated for a single practitioner. This report must be run 24 hours after visit activation.

VIRTUAL CARE REPORTS

Virtual Care Volumes by Resource Unit
Virtual Care volumes for the specified clinic only (not all UHN)
Virtual Care Volumes by Practitioner
Virtual Care volumes for the specified practitioner only

USING THE CONFIRMATION FEATURE

1. **Right Click** on the desired appointment to open the **Right Click Menu**
2. Select **Request/Edit Confirmation**
3. If desired, enter a confirmation **reason** and **click OK**
4. Black vertical lines will appear on your appointment



CONFIRMING YOUR APPOINTMENT (REMOVE THE LINES)

1. **Right Click** on the Appointment to open the **Right Click Menu**
2. Select **Confirm**
3. If desired, enter a **comment** and click **Confirm**
4. The black vertical lines will be removed from your appointment

HOW TO ADD/EDIT A COMMENT ENTERED ON THE APPOINTMENT:

CONFIRMATION FEATURE TIP

To view the confirmation **reason** and **comments**, **right click** on the appointment to open the Right **Click Menu**. Select **Appointment Detail** and open the **Confirm tab**.

WHERE CAN I FIND MORE PATIENT INFO?

Right Click on your patient's appointment and select **Appointment Detail** to find the following information:

– The patient's full name, address & phone number
– Insurance info
– The procedure long name and any comments entered

ADD OR EDIT AN APPOINTMENT COMMENT

– **Right click** on the appointment and select **View/ Edit**
– Select **Scheduled Procedure Name**
– **Add** or **edit** the appointment comment

HELP

NEW USERS NEED:

1. Access to **PHS Icon**
2. **PHS Training (PHS eManual)**
3. An activated **Login ID & Password** (your TID and password)

1. Access to PHS Icon: Managers must request PHS access through the Service Portal **https://digital.uhn.ca/sp** in advance of students attending PHS training. (or visit the PHS website)

2. PHS Training both full scheduling or read only access training is accessed through the PHS eManual.

www.uhn.ca/corporate/For_Staff/Digital_Education/Pages/PHS-eLearning

3. A PHS Access Request Form is required for a PHS ID.

The new user must specify the type of access required (read only or full scheduling) and the specific resource units.

This form requires manager approval. The PHS Access Request form can be found on the **https://digital.uhn.ca/sp portal.**

(or visit the PHS website)

Once training has been completed your PHS login ID and password (your TID and password) will be activated by the PHS team.

Amendments to existing

PHS Access require submission

of a PHS Access Request form.

CHANGES TO THE PHS APPOINTMENT BOOK

Changes include requests to add, delete or change:

- the schedule of a practitioner
- procedures
- colour coding
- existing custom reports (which include schedules, itineraries, stats)

Submit any change requests through the Service Portal **https://digital.uhn.ca/sp**

ADDITION OR CHANGE TO A REFERRING PHYSICIAN

Please go to the **Corporate Intranet**, select the **Forms Tab**, and select **PHS Physician's Address Change/ Add Request.**

Be as accurate as possible!

QUESTIONS OR TECHNICAL ISSUES

General "how to" questions, requests for information about a specific functionality or capability of the system can be sent to the UHN Digital Customer Support at ext. 4357 or help@uhn.ca

Similarly, if you experience a technical issue or error message while using PHS, contact the UHN Digital Customer Support immediately. **X4357**

For other inquiries, please email **PHSOnCall@uhn.ca**

Note that the on-call mailbox is monitored Monday to Friday from *8:00am to 5:00pm*