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Help

TELPHONE HELP: Call H-E-L-P (4357) The UHN Customer Care Centre is available 24 hours, 7 days a week.

NOTE — PHS On Call hours are Mon-Fri 8am to 5pm

For training inquiries, please contact SIMS Education
Email: SIMSEducation@uhn.ca
Phone: 416 340-5091

New Users need:
- Access to PHS Icon
- PHS Training
- Login ID & Password

To get the PHS icon installed on your desktop, a user should submit a Network Access Request Form (NARF) to the Service Desk.

PHS Training: for either full scheduling or read only is provided by SIMS Education. New users will need to contact SIMS Education to schedule into a class prior to gaining access to PHS.

A PHS Access Request Form is required where the new user specifies the type of access required (read only or full scheduling and the specific resource units. This form requires manager approval.

Once training has occurred, a Login ID and Password to PHS is provided.

Amendments to existing PHS IDs require submission of a PHS Access Request form.

Changes to PHS Grids
Changes include requests to add, delete or change:
- the schedule of a practitioner
- procedures
- colour coding
- existing custom reports (which include schedules, itineraries, stats)

Requests for changes to existing units require the submission of a PHS Change Request Form.

Questions or Technical Issues
General “how to” questions, requests for information about a specific functionality or capability of system can be sent to the UHN Service Desk (ext. 4357 as noted above)

Similarly, if you experience a technical issue or error message while using PHS, contact the Service Desk immediately. Remember to request assistance from the PHS on call.

For additional resources visit the UHN intranet site to access the PHS manual (UHN- TR sites)

http://intranet.uhn.ca/departments/sims/phs/index.asp

Logging on to PHS
1. Launch the PHS program by double-clicking on the PHS icon
2. Type in your User ID and Password
3. Click the OK button or press Enter.

PHS is used to manage Out Patient appointments. eg. create, edit and view appointment.

Launching the Appointment Book
1. Maximize the Programs window.
2. Double-click on the Appointment Book icon.

To close the program:
1. Open the Security Server window
2. Click Exit
### Toolbar Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New" /></td>
<td><strong>New</strong>: Opens the Patient Search and Patient Scheduling windows so you can enter a new appointment.</td>
</tr>
<tr>
<td><img src="image" alt="Cancel" /></td>
<td><strong>Cancel</strong>: Cancels appointments.</td>
</tr>
<tr>
<td><img src="image" alt="Find" /></td>
<td><strong>Find</strong>: Allows you to search the appointment book for patient specific appointments or by practitioner and/or Unit.</td>
</tr>
<tr>
<td><img src="image" alt="Exit" /></td>
<td><strong>Exit</strong>: Closes the appointment book.</td>
</tr>
<tr>
<td><img src="image" alt="In" /></td>
<td><strong>In</strong>: Shortens the time intervals displayed in the Appointment Book grids.</td>
</tr>
<tr>
<td><img src="image" alt="Out" /></td>
<td><strong>Out</strong>: Lengthens the time intervals displayed in the Appointment Book grids up to a maximum of two hours.</td>
</tr>
<tr>
<td><img src="image" alt="Pool" /></td>
<td><strong>Pool</strong>: The Pool View displays the availability of all resources for one unit, one day at a time.</td>
</tr>
<tr>
<td><img src="image" alt="Week" /></td>
<td><strong>Week</strong>: The Week View displays the availability of one resource for an entire week.</td>
</tr>
<tr>
<td><img src="image" alt="Waitlist" /></td>
<td><strong>Waitlist</strong>: Stores waitlisted appointments by priority, for scheduling at a later date.</td>
</tr>
<tr>
<td><img src="image" alt="Inbox" /></td>
<td><strong>Inbox</strong>: Stores unscheduled appointments for scheduling at a later date.</td>
</tr>
</tbody>
</table>

### FAQ: Guideline for Copying Appointments

**Question:**
I need to book a few more follow up appointments for a patient. Can I copy the last follow up appointment?

**Answer:**
When making copies of an appointment, it is recommended to book one instance and make copies from this appointment.

The PHS system sends a message to EPR to create a unique and individual visit for each appointment.
**FAQ: Update an Appointment**

**Question:**
The patient’s appointment is already on the Grid. Can the procedure be changed without creating a new appointment?

**Answer:**
Yes. Use the following steps to update patient appointments information such as changing Physician, Procedure, etc.

1. Drag the appointment to the scheduling package
2. **Right-click** on the appointment and select 'Update Appointment'
3. Edit the information in the boxes
4. Select **Save**
5. Drag the appointment back to the scheduling grid.
6. If prompted, enter a rescheduling reason and **click** the **OK** button

**FAQ: Can I drag appointments on the grid?**

**Question:** I discovered that I can drag appointments across the grid to a new date/time or practitioner. Is this a shortcut that I can pass on to my co-workers?

**Answer:**
This method should **NOT** be used to reschedule appointments. By doing so, the appointment dates and visit information will not be updated in EPR. The best practice is to reschedule appointments using the right click menu and selecting Reschedule appointment. This will ensure the data integrity and update EPR with the visit information, keeping the visit dates synchronized.

**FAQ: Discharge Appointments**

**Question:** Is it necessary to discharge the patient in PHS? How are appointments discharged in PHS?

**Answer:**
It is not necessary to discharge a patient from PHS. The act of Arriving a patient in PHS will update the visit status in EPR from Pended to Active. The EPR system will discharge the visit automatically at midnight.

**PHS and EPR connectivity**

**PHS and EPR Connectivity**

Patient appointments are created and scheduled in PHS (Pathways Healthcare Scheduling.)

Upon creating an appointment, a temporary visit number (**T number**) is created. PHS will send this temporary number and visit information to EPR (Electronic Patient Record).

The EPR receives the visit information and temporary visit number from PHS and automatically creates the visit. At this point EPR creates the True visit number and sends this back to PHS. PHS will replace the temporary number with the True visit number.

**Creating an Appointment**

**Scheduling an Appointment using the NEW Button**

1. Click the **New button**.
The Patient Scheduling and Search Windows appears.

**Patient Information:**

2. Enter the patient’s MRN and/or First and Last name in the spaces provided.
3. From the search results, select the correct patient and click **OK**.
Creating an Appointment (con’t)

The selected patient’s information will now be populated in the Patient section of the Patient Scheduling window.

QUICK TIP—SEARCHING

Mnemonic searches are quickest for selecting data for the fields. Enter the first 2-3 characters of the required information for the field and click the magnifying glass. This will pull up a predefined table to select from.

Enter the Appointment information:

1. Select the Resource Unit.
2. Select the Procedure.
3. Select the Practitioner (use abbreviation: first 4 characters of Last Name and first 4 characters of First Name).
4. Select the Appointment Class.
5. Enter the Referring Physician. (Always use Abbreviation: it will be necessary to enter partial or full abbreviation of the physician. The list is very long. Note—Referring Physician codes end in 2 digit numbers.)

Visit Information:

1. Click Find Visit (bottom left corner)

FAQ: Visit number and Workload

SAMPLE SCENARIOS:
The table below reflects some sample scenarios for No Show visits in PHS and the recording in Workload.
FAQ: How to fix Inaccurate visits (cont’d)

Step 4:
- Click Find Visit Button
- Click New
- Enter the Patient Type and Insurance. Click OK.
- Click OK to return to the Appointment Search Results screen and OK again to return to the Scheduling Grid.

Tip:
Appointment visits can also be fixed directly from the grid.
- Right click on the appointment
- Click Visit Information from the menu
- Follow Step 4 above.

FAQ: Visit Number and Workload

Question: I need a visit number from PHS to attach my Workload. The patient was a NoShow, should I arrive the patient to get a visit number?

Answer:
The simple answer is  DO NOT ARRIVE a NoShow patient.
Patients visits should only be Arrived when the patient Arrives and if the service took place.

If the patient did not show, the visit should be cancelled in PHS with NoShow reason.

Creating an Appointment (con’t)

Visit Information (cont’d):

2. The Patient Visit window will open.
   **ALWAYS** click New

Tip: this creates the T number for the appointment

The Edit Visit Window opens.

3. **ALWAYS** select OP as the Patient Type.
4. Click the OK button.
   Note: Once this action is completed, the Insurance fields become active and ready for entry.

Insurance Information:

Quick Tip: Click on the Plan magnifying glass button. Once selected, all 4 fields will populate.

1. Click OK at the top right corner of the Edit Visit screen. (returns to the Patient Scheduling window)
2. Click Save.

Note:
The creation of the appointment is now complete and ready to be scheduled on the Grid or moved to the Waitlist.
**Scheduling Appointment**

The patient’s appointment will now appear in the **Scheduling Package**. (section just below the scheduling grid)

---

**Direct Scheduling on the Grid**

A quick method to schedule appointments on the grid is by double clicking on the time slot under the Practitioner’s column. This method bypasses the Scheduling package step.

**Note:** this method can only be used to book singular appointments.

1. **Change the calendar** and select the time for the appointment.
2. **Double click** on cell and time slot where you want to schedule the appointment. (under the practitioner’s column and time slot)
3. **The Patient Search window appears.**
   Enter the patient information and click **Search**.
4. **Select** the correct patient.
5. **Enter the Appointment details.**
   **Note:** the Unit, Facility and Practitioner will be populated based on your selection.
6. Click **Find Visit**.
7. Click **New** and continue to complete **Patient Type** and **Insurance Information**.
8. Click **Save**.

The appointment is saved and scheduled to the grid where you originally double-clicked.

---

**FAQ: How to Fix Inaccurate Visits**

**Step 1:**
Refer to the Audit Report by Resource Unit, to identify the list of appointment visits to be fixed.

![Audit Report By Resource Unit](image)

**Step 2:**
- **Launch PHS** to search for the appointment to be corrected.
- Click **Find icon** in the toolbar.
- Click **Find Patient**, and enter the patient’s MRN into the Enterprise Person Number field to find the patient by clicking **Search**
- Click **Search** (Appointment Search window)
- Referring to the **date column** in the Appointment Search Results window, scroll to find the appointment for correction.
- **Highlight** the desired appointment
- Click **Visit Information** from the menu on right of screen.
FAQ: Guidelines for Rescheduling

**Question:**
What do I need to consider when trying to reschedule an appointment for a patient who was a NoShow?

**Guidelines for Rescheduling Appointments:**
- Current dated appointments that have not been activated/arrived can be rescheduled and the visit will follow.
- You cannot pull an appointment from a past date to reschedule it. Information will follow.

**What should occur:**
A. Cancel the original appointment with NOSHOW reason. Rebuild a new appointment for the patient. This will cancel the visit in EPR. A new visit will then be created as you build a new appointment for the new date and time.

OR

B. Right click on the NoShow Appointment
- >Select **Visit Information** from the menu
- >Select **Find Visit**
- >Select **New**
- >Enter patient type as **OP**
- >Enter Insurance information, click OK
- >Save and drag the appointment to the new date and

FAQ: Where can I find the Visit Number?

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

The EPR visit number is listed as Acct. no.

**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.

**Tip:** Both of these dates should be the same for visit created accurately.

Appointment Right Click Menu

**Making Changes to Appointments on the Grid.**

1. Right click on the appointment to be Changed.

2. The drop down **right click menu** appears with various options.

Guidelines for these menu functions are provided in the next few pages.

- **View/Edit (duration)**
- **Rescheduling**
- **Copy/Cyclical**
- **Cancel/No Show**
- **Arrive (activate the visit)**

Edit the Appointment

**Edit the duration:**

1. **Right click** on the appt.

2. Select **View/Edit** from the menu

3. A secondary menu opens. Select the field you wish to modify. Eg. **Duration**

4. In the **Edit Duration** window, enter the desired duration.

5. Click **OK**.

The Appointment on the Grid will reflect the updated duration.
Rescheduling an Appointment

1. **Locate the visit** to be rescheduled (from the scheduling grid) and **right click** on the appointment.
2. Select **Reschedule Appointment** from the menu. This will move the appointment down to the **Scheduling Package**.
3. Make any necessary changes to the **Calendar date**.
4. **Drag the appointment** from the Scheduling Package to the new date/time.
5. A pop up window may appear prompting the user for the **Reschedule Reason**. Click on the magnifying glass and select a reason.
6. Click **OK** to complete the action.

**Note:** Rescheduling appointments in the Scheduling package will also update and communicate the visit details to the EPR system.

Copy an Appointment

**Tip:** Copy feature works well for making exact replicas appointments (same practitioner, same procedure) which are to be scheduled at varied dates and time.

1. Select **Copy Appointment** from the right mouse menu.
2. Enter the **Number of copies** to be made.
3. These **copies will appear in the scheduling package** along with all other appointments the patient has scheduled.
4. The appointment records with a checkmark in the Date/Time fields indicate they already exist in the Appointment Book.
5. The copies (records without date/time) are ready to be scheduled.
6. Make the appropriate changes to the **Calendar date**.
7. Drag and drop the first appointment to the time and date on the Grid.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Unit</td>
<td>Clinic Name. (the site location usually appears before the clinic name. eg. LC– Nursing )</td>
</tr>
<tr>
<td>Resource</td>
<td>The resources consists of either Equipment, Facility or Practitioners which will be booked.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> most often it will be the Practitioners that appear in the Scheduling Grid.</td>
</tr>
<tr>
<td>Facility</td>
<td>Site (Eg. TRI for Toronto Rehab, TGH for Toronto General Hospital, etc.)</td>
</tr>
<tr>
<td>Procedure</td>
<td>Name and abbreviation for the type of appointment eg. NEWAX New Assessment</td>
</tr>
<tr>
<td>Practitioner</td>
<td>Eg. Clinician, Nurse, Physician</td>
</tr>
<tr>
<td>Enterprise Person Number</td>
<td>Same number as patient’s MRN</td>
</tr>
<tr>
<td>Pool View/ Week</td>
<td><strong>Scheduling Grid Views:</strong> Pool view of All Resources for scheduling in the Unit</td>
</tr>
<tr>
<td></td>
<td>Week– view of selected Resource for a week</td>
</tr>
</tbody>
</table>
**Edit Blocks**

**Edit Block:**
1. From the Grid, right click on the Block.
2. Select **Edit Block** from the menu.
3. The Block window opens. Edit **Reason**, and/or **Start/Stop time**.

**Remove Block:**
1. From the Grid, right click on the Block.
2. Select Remove Block or Release Block from the menu.
3. The Block will be removed from the Grid.

---

**Viewing/Printing Reports**

1. In the Program window, **Double-click** the Standard Reports icon.

- The Standard Reports Window appears

2. Select the report type from the Report Type drop-down menu.
3. Indicate a date range for your report.
4. Specify the required parameters (e.g., practitioner name, resource unit).
5. Click the **View** button to preview the report

   - A print preview window appears.
   - To print the report, **Click** the **Print** button on the toolbar.
   - To close the report, **Click** the **Close** button.

- OR -

6. Click the **Print** button to print the report

---

**Cyclical Appointment**

1. Right click on the appointment which cyclical copies will be made, and select **Copy Appointment** from the menu.
2. There are 2 options on the Copy Appointment window. Check the second option **Schedule this copied appointment as cyclical**.
3. The window below will open to define the pattern for the appointments.
4. Select the **Define Pattern** button.
Cyclical Appointment (con’t)

5. The **Define Pattern** window will open as shown below.
   Proceed to **configure the scheduling pattern** you wish to apply.
   Based on your pattern selection, the appointment dates will be displayed in both text and calendar.

![Define Pattern Window]

6. Click **OK** and you will be returned to the Scheduling Grid to complete the appointment booking.
7. The **cyclical appointment record** will appear in the Scheduling package as one line item.
   A symbol appears in the procedure column indicating it is a cyclical appointment.

![Cyclical Appointment Record]

8. The calendar will default to the Begin date defined for the cyclical appointment.
   **Drag** the appointment to the desired time. The remaining cyclical appointments will be scheduled onto the Scheduling Book based on the pattern and time defined in the pattern. PHS will create a unique visit number for each appointment in the cycle.

**Tip:**
Cyclical appointments may also be initiated when creating appointments with the New icon in the toolbar. **Click on the Cyclical button on the right**

Blocks (cont’d)

3. In the Block Maintenance window, select **Resource Unit** as the owner type from the dropdown list.
4. Next, select your unit as the **owner abbr.** from the drop down list
5. Switch to the **Block Creation** tab.

6. Click the **Add Resources** button

![Add Resources Button]

7. Select **Staff** as the **Resource Type**
8. Enter the **Staff abr.**
9. **Search**
10. Click the **Add Resources** button at the bottom of the screen.
11. Click **Save**
12. Click the **Define Pattern** Button. This will open the

![Define Pattern Window]

12. **Define the pattern** for the Blocks.
12. Enter the **duration** or **Frequency** for the blocks.
13. Click **OK**

These will be illustrated in text or highlighted in calendar view.

13. Enter
   - **Start Time**
   - **Stop Time**
   - **Reason**
   - **Block Type (DO NOT)**

14. **Save**

![Blocks Configuration]
Blocks

Blocks can be created in PHS to indicate where patient appointments should not be booked. (eg. due to other commitments of the practitioner)

Creating Quick Blocks:

1. Right-click on the header of the resource column for which you wish to create a block
   The Create Block dialog box appears.
   ![Create Block dialog box]

2. From the “Owner type” drop-down list, select “RESUNIT”
3. From the “Block owner” drop-down list, select your Resource Unit. (clinic name)
4. Enter the start and stop time for the block
5. Select DO NOT as the block type. (ie. Do Not book patient appointments in this block)
6. Enter the Block reason and comment (if required)
7. Click the OK button.
   The block will now appear on the scheduling grid.

Recurring Blocks:

Use the following procedure to create recurrent blocks.

1. Open the Pathways Healthcare Scheduling window.
2. Select Definitions, Block Maintenance from the Menu Bar.

Cancel/No Show Visit

3 Methods to Cancel /NoShow Visit:

Method 1
1. From the grid, right click on the appointment
2. Select Cancel Appointment.
3. Select the reason from the Cancellation Code field
   Note: No Show visits are processed in the same manner as a cancelled visit. The Cancellation Code reason would be NoShow

Method 2
1. From the grid, drag the appointment to the Cancel bin on the toolbar.
2. Enter the Cancellation Code reason and the Canceler abbr.

Method 3
1. Use the Find icon to locate the appointment. (see table of contents)
2. Select Cancel Appointment from the menu on the right.

Reverse Cancel

Cancelled visits remain in the Cancel bin until the end of the day. During this time the appointment may be rescheduled back to the grid.

1. Click on the Cancel Bin
2. Click on the folder icon by the patient’s name to expand.
3. Select the appointment record and drag to the Scheduling Package. (cont’d next page)
Reverse Cancel (cont’d):

4. Drag the appointment to the grid for the new date and time.

Note: When reverse cancelling an appointment it is necessary to recreate the Visit.

5. Right click on the newly scheduled appointment
6. Select Visit Information.
7. Click Find Visit. Click New.
8. Enter the Patient Type and Insurance Information. Click OK, then Save.

Arrive Visit

1. Right click on the visit and select Appointment Tracking.
2. Under Status, check the Schedule radial button.
3. The Arrival date and Arrival time fields will default to current data.
4. Note—do not change the date / time.

Important:
1. Only Arrive visits when the patient has physically arrived.
2. Do Not use the No show button.

Waitlist Management (con’t)

Search the Waitlist by
-> Patient or
-> combination of Unit, Priority, Availability, Practitioner and Procedure

1. Click on the Waitlist Icon. The Waitlist Search Window will open.

Search the Waitlist by Patient:
2. Click Find Patient button. The Patient Search window will open.
3. Enter the patient information and click Search.
4. Select the patient and click OK.
5. Click the Search button (upper right of the Waitlist Search window)
   The Waitlist Search Results window opens.

6. The menu on the right of the Waitlist Search Results menu may be used on the appointment to Schedule, Cancel, or Edit (ie. Priority or Availability)

Search the Waitlist by a combination of Unit, Priority, Availability, Practitioner and Procedure:
2. The steps are the same as above. Except instead of Find Patient, complete the criteria based on your search needs.
Waitlist Management

Referrals may be entered into PHS and then moved to the Waitlist function for processing. (Waitlist icon in toolbar)

These appointments are available to be moved onto the Scheduling Grid if approved or they may be removed from the waitlist.

Creating and Moving the Appointment to the Waitlist:

1. Create an Appointment beginning with the New icon in the toolbar.
2. Complete all required information. (Patient information, Appointment Information, Visit information) and Save.
3. The appointment should now appear in the Scheduling Package.
4. Drag the appointment to the Waitlist icon.

Enter the Waitlist Information:

5. The Enter Waitlist Information window opens.
7. Click the Move to Waitlist button. The appointment will now reside on the Waitlist under the specified parameters

Searching the Waitlist:

Search the Waitlist by:
- Patient
- combination of Unit, Priority, Availability, Practitioner and Procedure

1. Click on the Waitlist Icon. The Waitlist Search Window will open.

Finding an Appointment

The Find icon in the top toolbar is used to locate, cancel, reschedule and review patient appointments.

To Find a Visit:

1. Click the Find icon.
2. Search for appointment(s) by:
   - Patient’s Name, Medical Record Number or Health Card, OR
   - Practitioner within a specific period, OR
   - Resource Unit (i.e. Clinic)

Search for appointments by Patient:

2. Click Find Patient

3. Enter Patient’s Name and MRN
4. Click Search
5. Select the correct patient from the Patient Search Results window
6. Click OK
Finding an Appointment (cont’d)

The patient’s information will be pulled from EPR and populate the fields in the Appointment search window.

7. Click the **Search** button at the top right to **search the patient’s appointments in the book**.

The Appointment Search Results will display all visits for the patient.

The menu options in this window are very similar to the right click menu from an appointment on the grid.

**Search for appointments by Practitioner or Resource Unit:**

1. Enter the **Practitioner and/or Resource Unit**

2. **Always** enter the **First and Last Date** for the search.

3. Click **Search**

4. Select your patient

5. The Appointment Result window will display.

**Appointment Conflicts**

**Conflicts:**

If there is an **overbooking**, or other conflict in the schedule, the **Conflicts/Appt Summary** window is displayed; do one or more of the

<table>
<thead>
<tr>
<th>Click...</th>
<th>To...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Explain/Detail</strong></td>
<td>Open the Appointment Conflict Detail window where you can view detailed information about the conflict.</td>
</tr>
<tr>
<td><strong>Goto &amp; Accept</strong></td>
<td>Accept the conflict(s), schedule the appointment(s), and go to the appointment that is generating the selected conflict in the Resource Focused grid. This button is specifically intended for cyclical appointments that can cause conflicts for more than one date.</td>
</tr>
<tr>
<td><strong>Undo</strong></td>
<td>Return the appointment to the Scheduling Package.</td>
</tr>
<tr>
<td><strong>Accept</strong></td>
<td>Accept the conflict(s) and schedule the appointment. Note—this is only permitted if the scheduler has overbooking privileges to the specified Resource Unit.</td>
</tr>
</tbody>
</table>