Direct Scheduling

Direct scheduling, is the easiest way to create an appointment in PHS.

The first step is to click on the calendar icon at the top left corner of the appointment book.

Use the arrows at the top of the calendar to navigate to the date you want to book the appointment.

Double-click inside the preferred time slot.

This will open two windows.

Search for your patient by entering their MRN number in the Enterprise Person Number field.

Confirm that the patient name in the Search Results window is correct, then click OK at the top right of the window.

The Patient Scheduling screen appears.

Since this is the direct scheduling method, notice that many of the fields have already been filled out.

Complete the remaining required appointment details.

Starting with the Procedure field click the magnifying glass to the right of it to see the list of options.

The list of options depends on the workflow of your unit.

Confirm with your manager about the procedures used for your appointments.

Select the procedure and at the bottom of the 'Procedures and Sets' window, click OK.

Enter the referring physician’s name into the Referring field.

There is a specific naming convention for clinicians in PHS.

Names appear with the first four letters of the last name and first four letters of the first name.

Once entered click the magnifying glass, to the right of the field, to search for the physician.

Select the correct physician from the search results, then at the bottom of the 'Referring Physician' window, click OK.

Next click on the magnifying glass to the right of the Appointment class field.

Select the appropriate option based on the workflow of your unit, then at the bottom of the 'Appointment Classes' window, click OK.

Then click the Find Visit button at the bottom right of the Patient Scheduling window.

You must always click the New button, on the right, in the ‘Visits for Patient’ window.

This creates a new visit in EPR.

The ‘Edit Visit for Patient’ window is where you would enter more details about the visit.

Click on the magnifying glass at the right side of the Patient type field.

The Patient Type selection is important for funding.

Please see the topic called “Patient Types and Insurance Options in PHS” for more details.

Select the Patient Type according to your workflow, and at the bottom of the 'Patient Type' window, click OK.

Once you’ve completed the Patient type field, at the top right corner of the 'Edit Visit for Patient' window, click OK.

You are reminded to enter the Client Server Carrier, and the Client Server Plan information.

These are the insurance details.

Click the OK button at the bottom, to close this window.

Click on the bottom right magnifying glass in the Insurance group, to open a list of insurance options.

By completing this field, all four mandatory Insurance fields will also be completed.

Select the appropriate Insurance Plan for this visit then at the bottom of the 'Plans' window, click OK.

Your Edit Visit for Patient window should now have all the required information.

On the top right, click OK, to close the window.

In the Patient Scheduling window, double check that all the required fields are complete.

If there are any patient preparations for this appointment, the Patient Preps button will be outlined in red.

Be sure to read this information and communicate it to your patient.

At the top left of the 'Patient Scheduling' window, click Save to finish.

After clicking Save, sometimes a Procedure Comments window appears.

Be sure to read the information thoroughly and communicate to the patient as necessary.

To close this window, at the bottom, click OK

For some appointments, a question window may also appear.

Respond to questions as required then at the bottom, click OK.

Your appointment is now on the Appointment Book.

Click on a different part of the Appointment Book to see the appointment with your patient’s name.

Key points to remember when you’re creating an appointment using direct-scheduling:

- Double click inside the time slot
- Use the Enterprise Person Number field to search for your patient
- Click on the magnifying glass beside each field to get your list of options. You can narrow down your list of options by first typing info into the field before you click the magnifying glass.
- Always click on the New button to generate Visit information.

For more detailed information, please review the Direct Scheduling topic in the PHS eManual.