Scheduling Using the New Button

Scheduling an appointment using the New button, enables you to add more details to the appointment.

For example, on a New Patient appointment, patient wait times can be entered.

UHN reports these statistics to The Ministry of Health, and Long Term Care.

Click on the New button, at the top left corner of the Appointment Book window.

This will open two windows.

In the Patient Search window, enter the patient's MRN number into the Enterprise Person Number field, then click on the Search button in the top right corner.

Check the information in the Patient Search Results window to ensure that you have selected the correct patient, then click on the OK button at the top right of the window.

The Patient Scheduling Screen is where all appointment details are entered.
Start with the Unit field.

Enter your unit's name then click the magnifying glass to the right of the field.

Next, click the magnifying glass beside the Procedure field.

The procedures, which are specific to your unit, will appear in the Procedures and Sets window.

Select the appropriate procedure for your appointment and click OK at the bottom of the window.

Enter the practitioner's name into the Practitioner field.

Remember that there is a specific naming convention for clinicians in PHS,
which is the first four letters of the last name, and the first four letters of the first name.

Click the magnifying glass beside the field.

Enter the referring physician's name into the Referring field, then click the magnifying glass to search for the physician

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

Click on the magnifying glass beside the Appt. Class field.

Select the option that is appropriate to your workflow, then at the bottom of the 'Appointment Classes' window, click OK.

Click on the Request By button.

These fields are used by certain units to capture patient wait times.

We will enter the referral date.

Click on the calendar button beside the Referral and Order field,

If needed, use the arrows at the top of the window to navigate, and select the date when the referral was received.

Then click OK at the bottom of the calendar.

Click the OK button at the bottom left of the Appointment Request By window.

At Princess Margaret, you may also be required to use the Appointment Diagnosis button.

See the ‘Scheduling using the New button’ eManual topic for more information.

All the appointment details are complete and we can now move onto the visit details.

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

You must always click the New button, in the 'Visits for Patient' window.

This creates a new visit in EPR.

The 'Edit Visit for Patient' window, is where you 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, then 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 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, then at the bottom of the 'Plans' window, click OK.

The ‘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.

You will find your appointment at the bottom, in the Scheduling Package.

Green space in the Appointment Book indicates availability to book the appointment.

Drag your appointment from the Scheduling Package to the Green Space on the Appointment Book using the yellow dates and times on the grid to guide you to the correct time slot.

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 the New button:

- Click on the New Button from the toolbar to begin your appointment creation
- 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 a few characters into the field before you click the magnifying glass.
- Always click on the New button to generate Visit information.
- Drag and drop your appointment from the Scheduling Package onto the Green Space on the Appointment Book
- Green indicates appointment availability.

For more detailed information, please review the ‘Scheduling Using the New Button’ topic in the PHS eManual.