eIVF Scheduling System

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eIVF Scheduling Overview

The Schedule is your primary tool for making and tracking appointments for Providers, Labs, Staff, or Other Resources. An initial setup is performed to customize the calendar for each person or resource that will appear in the Schedule.

This section describes how to access the Schedule, select a Schedule, open a Schedule, and maneuver through the Schedule.

eIVF scheduling system is categorized into 4 distinct modules:

1. Global View (Multiple Schedule View)
2. Provider Schedule
3. Lab Schedule
4. Monitoring Schedule
5. Resource (Operating Room) Schedule
Provider Schedule

Provider Schedule is the primary tool for making and tracking appointments. Appearance is based on the Schedule Setup created in the Provider Setup by the System Administrator: time slots, duration, appointment type and sometimes color-coded time blocks.

The Schedule allows the user to book, cancel, reschedule, copy and delete appointments.

Scheduled patients are displayed with Status, Reason for Visit and Duration (of visit).

To open a Provider Schedule

1. Click the Schedule tab.
2. Expand the Doctor or Nurse Practitioner folder.
3. Select the name of the Provider from the list (will automatically open the selected providers schedule for the current date).

Provider Schedule views

eIVF displays provider schedule in 3 different views. Select the appropriate option from the radio buttons located on the top right hand side of the screen.

- Day
- Week
- Month
**Day View**
Displays patient and non-patient appointments for the selected day.

**Week View**
Displays patient and non-patient appointments, organized by day, for the given week (Monday through Sunday).
Month View
Displays count of patient and non-patient appointments, organized by day, for the given month (first day of the month through last day of the month).

Multiple Provider View
Many medical practices find it useful to be able to view several schedules at one time. This is especially useful when two resources need to be scheduled together, (for example, a staff member and a particular room in which a procedure will be performed).

To view multiple providers at the same time:

1. Click on Multiple Provider View radio button.
2. Select providers from the Provider List by clicking on the empty check-box next to the Provider Name column.
3. Click on Show Schedule for Selected Providers button.
Provider Schedule buttons

The Today button returns the Schedule to today’s date.
The Search button allows the user to search scheduling specific information for the provider.
The Report button prints a formatted report of the day’s schedule.
The Close button closes the Schedule.

Available through right click options. The schedule will automatically be updated with Check-In and Check-Out information. When Billing is selected, eIVF will display current day’s billing transaction for discharge.

Search Schedule

When scheduling patients, you will want to find the available time slots suitable for each patient’s needs. Perhaps the patient will need a 1-hour checkup and is only available on Tuesdays or Thursdays or the patient may need an appointment within two weeks with the provider. Whatever the appointment criteria, eIVF can quickly find the suitable time slot for you.

To find a time slot

1. Click the Search button on the bottom right hand side of the Provider Schedule screen.
2. The Search Free Provider Schedule window will appear.

Searching Schedule

Show Schedule for Selected Providers

Show Patient Schedule

Displays schedule information for selected providers when the View Mode is “Multiple Provider View”.

Displays all of selected patient’s schedule.
3. In **Search Appointment Based On** choose “Particular Day” and then either type in a date or click on the down arrow to activate the “Date Control” floating calendar. Click on your desired date to enter that date.

OR

4. If you want to search a variable range of dates, click on the down arrow next to **Search Appointment Based On** to access the drop-down list. Select “Days From”, “Weeks From”, or “Months From”. Once you select one of these categories, a text box will pop up to the immediate right. Enter the number, i.e. 10 Days from, to search. Then either type in a date or select one from the pop up calendar.

5. In **Select Provider** utilize the drop down lists to select a specific Provider you want included in your search.

6. In the **Visit Type** and **Duration** Criteria section, utilize the Visit Type drop-down list to select a type of visit (i.e. Consult, Lab Review). You can also click directly next to Duration to enter a minimum amount of time to search for.

7. Check the boxes of the days on which the patient is available.

8. Enter the number of days to be searched.

9. Click the **Search** button. Appointments matching your criteria will be listed in the Appointment Results Window. If there are no matching appointments, you can retry the search using less restrictive criteria.

10. Double click on desired entry or select the entry and click on Schedule button to book the appointment.

### Search Free Providers Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Duration</th>
<th>Visit Type</th>
<th>Provider Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thu 07/07/2005</td>
<td>03:15 AM</td>
<td>15</td>
<td>Any Visit</td>
<td>Tina L. Levendoski</td>
<td>Dallas</td>
</tr>
<tr>
<td>Thu 07/07/2005</td>
<td>03:30 AM</td>
<td>15</td>
<td>Any Visit</td>
<td>Tina L. Levendoski</td>
<td>Dallas</td>
</tr>
<tr>
<td>Thu 07/07/2005</td>
<td>04:45 AM</td>
<td>15</td>
<td>Any Visit</td>
<td>Tina L. Levendoski</td>
<td>Dallas</td>
</tr>
<tr>
<td>Thu 07/07/2005</td>
<td>06:00 AM</td>
<td>15</td>
<td>Any Visit</td>
<td>Tina L. Levendoski</td>
<td>Dallas</td>
</tr>
</tbody>
</table>

### To print provider schedule

1. To print a copy of the appointment schedule, click on the **Report** button on Provider Schedule screen.
To find patient appointments

To find all past and future appointments of a patient who has an appointment on provider schedule:

1. Click on the Appointment time slot.
2. Click on **Show Patient Schedule** button. eIVF will display all Provider, Lab and Resource appointments of the given patient. You may want to utilize **Provider**, **Lab** and **Resource** radio buttons to view the respective appointments.

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Provider</th>
<th>Visit Type</th>
<th>Facility Name</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>10/1/2022</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>10/2/2022</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>11/1/2022</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>12/1/2022</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>2/8/2023</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>2/9/2023</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>6/22/2023</td>
</tr>
<tr>
<td>Linda C. Twin</td>
<td>Tina L. Personal</td>
<td>New Patient</td>
<td>Dallas</td>
<td>5/7/2023</td>
</tr>
</tbody>
</table>
Provider Schedule Tasks

Provider Schedule Tasks are schedule reminders normally created via the Reminder screen from User Home. Please review the Reminder training sections for scheduling reminders.

To view scheduling tasks, click on Schedule Task radio button.

To book an Appointment for the Task

1. Double click on the selected Task and the respective Provider’s daily schedule will appear with task information on the bottom of the screen.
2. Double click in a time slot and the Appointment Details window appears with respective information with all default values already filled in.
3. Select a Visit Type.
4. Select a Location, if appropriate.
5. Change the Duration, if appropriate.
6. Change the Appointment Status, if appropriate.
7. Enter Notes, if appropriate.
8. Click the Save button.
Patient Check In (Out)

When the patient arrives at the clinic or leaves the clinic, he/she is Checked In or Checked Out. This allows the Registration and Scheduling personnel to initiate procedures that will allow the patients appointment to proceed smoothly through the clinic.

Checking In or Checking Out a patient

1. Right click on the patient’s name in the Schedule slot.
2. Select Check-In or Check Out.
3. The slot will change color to acknowledge that status, based on the legend above it.

Quick access to billing transactions (Superbill)

The eIVF Billing Interface is used to summarize, validate, and export billing-related encounter data. The encounter data can be exported to external systems using eIVF-Connect or printed as a Superbill (billing summary) from a user-defined format.

To automatically code the encounter and create a billing discharge transaction:

1. Right click on the patient’s name in the Schedule slot.
2. Select Billing. Billing discharge window will appear. Review your CPT and ICD-9 codes, make changes, and click on the Save button to document billing. You may also utilize the Print button to print the Superbill (billing summary) or send an electronic transaction directly to your billing application.
Provider Appointments

The Schedule allows the user to book, cancel, reschedule, copy and delete appointments.

Provider Appointment Types

In eIVF you can schedule two types of appointments:
1. Patient Appointments
2. Non-Patient Appointments

Components of Patient Appointment

1. Patient ID - Gives Patient Identifier in the eIVF system.
2. Visit Type - Drop down list box tracks the patient’s Visit Type.
3. Location - Drop down list box tracks the locations where appointments are scheduled.
4. Date - Date of Appointment.
5. From Time - Starting time of the Appointment.
6. To Time - Ending time of the Appointment.
7. Duration - Duration of the Appointment. The Duration defaults to the time allotted for the selected appointment slot, but can be changed.
8. Notes - Free text area to document notes and special instructions for the visit.
10. Phone Numbers - Table displaying all phone number from the Patient Profile.
11. Schedule Status - Drop down list box to track patient’s pre and post visits.
12. Task - Checklist to create a Task for self.
To create a new Patient Appointment

1. Double click in a time slot on provider schedule.
2. Select Patient radio button to signify Patient Appointment.
3. When the Appointment Details window appears, call up the patient of your choice through Patient Search functionality. See Patient Search for additional information.
4. Select a Patient. Patient Name and Phone numbers will be displayed from patients demographic screens.
5. Select a Visit Type.
6. Select a Location.
7. Change the Duration, if appropriate.
8. Change the Appointment Status, if appropriate.
9. Enter Notes, if appropriate.
10. Click Save button.

To create a new Non-Patient Appointment

1. Double click in a time slot on provider schedule.
2. Select Non-Patient radio button to signify Patient Appointment.
3. Enter Visit Type.
4. Select a Location.
5. Change the Duration, if appropriate.
6. Enter Name (Person's name or description of the meeting).
7. Enter Contact Name.
8. Enter Phone Number, of appropriate.
9. Change the Appointment Status, if appropriate.
10. Enter Notes, if appropriate.
11. Click Save button.
To double book Appointments

1. Double click in an empty time slot next to the slot that already contains an appointment (see figure below) and a New Appointment Details window appears.
2. Follow instructions on To create a new Patient Appointment or To create a new Non-Patient Appointment depending on your requirements.

Note: On schedule Screen, the appointment with the longest duration appears on the first column followed by the next longest duration appointment and so on.

To modify an Appointment

1. Double click on the appointment (in a time slot that already contains an appointment) on provider schedule.
2. The Appointment Details window appears.
3. Make necessary changes and Click Save.
To move an Appointment

4. Double click on the appointment (in a time slot that already contains an appointment) on provider schedule.
5. The Appointment Details window appears.
6. Change Date, From Time, To Time when necessary.
7. Click Save.

To delete an Appointment

1. Double click on the appointment (in a time slot that already contains an appointment) on provider schedule.
2. The Appointment Details window appears.
3. Click the Delete button.
4. Confirm record deletion.

Note: In order to better maintain practice statistics it may be more efficient to enter a Status of Canceled instead of deleting appointments.

To create a Welcome Kit

While making an appointment with new patients, it is often necessary to create a personalized welcome kit for the patient. To do so:

1. Double click on the appointment (in a time slot that already contains an appointment) on provider schedule.
2. The Appointment Details window appears.
3. Click on Welcome Kit button. The New Documents (see below) window will appear.

4. Select Patient Instruction on Template Category dropdown menu.
5. Select Welcome Letter on Template Name dropdown menu.
6. Click the Open button. eIVF will generate a personalized kit for the patient, using your standard template and the information from Patient Demographics and Patient Explorer screens. After you review and modify the document in Word, close Word and you’ll be returned to Documents window.
7. Click the Save button.
Quick access to Patient Insurance

While making an appointment, sometimes it is necessary to access patient insurance information quickly. To do so:

1. Click on an appointment to select it.
2. Click on Insurance. Insurance Verification window (see below) will appear in read-only mode.

Quick access to Patient Demographics

While making an appointment, sometimes it is necessary to access the entire demographics, insurance, partner and referring physician details of the patient. To access patient demographics detail screens:

1. Click on an appointment to select it.
2. Click on Patient Demographic icon immediately to the right of Patient ID field. A minimized version of the Patient Demographic window (see below) will appear.
Quick access to patient’s Procedure Orders

While making an appointment, sometimes it is necessary to view all relevant information about the procedure orders of the patient. Perhaps, you maybe interested on the trigger date or the cycle reference, or even anesthesia information. To access patient procedures order screens:

1. Click on an appointment to select it.
2. Click on ProcedureSch button in the left corner of the window. The Procedure Orders List screen (see below) will appear.
3. To view or modify the Order, double click on the entry.

<table>
<thead>
<tr>
<th>Cycle Ref</th>
<th>Procedure Type</th>
<th>Anesthesia</th>
<th>Trigger Date</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>IVF-274</td>
<td>Procedure</td>
<td></td>
<td>06/14/2004</td>
<td>admin</td>
</tr>
<tr>
<td>IVF-282</td>
<td>Procedure</td>
<td></td>
<td>06/16/2004</td>
<td>admin</td>
</tr>
<tr>
<td>IVF-282</td>
<td>Procedure</td>
<td></td>
<td>06/17/2000</td>
<td>admin</td>
</tr>
<tr>
<td>IVF-308</td>
<td>Procedure</td>
<td></td>
<td>07/20/2000</td>
<td>admin</td>
</tr>
<tr>
<td>IVF-367</td>
<td>Procedure</td>
<td></td>
<td>07/21/2005</td>
<td>iya</td>
</tr>
<tr>
<td>IVF-367</td>
<td>Procedure</td>
<td></td>
<td>07/21/2005</td>
<td>iya</td>
</tr>
</tbody>
</table>

Quick access to Documents

Often there is a need for a quick access to generate letters, correspondences, consent forms, clinical reports or chart notes while you are making appointments or reviewing appointments. To do so:

1. Double click on the appointment (in a time slot that already contains an appointment) on provider schedule.
2. The Appointment Details window appears.
3. Click on Welcome Kit button. The New Documents window will appear.
4. Select desired category on Template Category dropdown menu.
5. Select desired template on Template Name dropdown menu.
6. Click the Open button. eIVF will generate a personalized kit for the patient, using your standard template and the information from Patient Demographics and Patient Explorer screens. After you review and modify the document in Word, close Word and you’ll be returned to Documents window.
7. Click the Save button.
Lab Schedule

- Primary tool for making and tracking lab appointments. Security Access dictates the functions to the user in the window.
- Labs that can be scheduled are defined as Lab Type and Internal and External labs.
- The Schedule Tool is a floating calendar window that allows quick changes between days and months.
- To access the lab schedule, click on the Labs button, in the left frame panel.

Lab Types

Depending on your practice setup, eIVF maintains independent scheduling books for each lab type. Appearance is based on the Schedule Setup created in the Facility Setup by the System Administrator: time slots, duration, appointment type and sometimes color-coded time blocks.

The most commonly used lab types in eIVF are:

Blood
Ultrasound
Semen Analysis
IUI
Pathology
Urine

In addition, you can maintain independent scheduling books for internal or external lab type. For example, if a Lab was done by a satellite facility, you may want to maintain a separate scheduling book to keep track of the patients and ordered labs.
Lab Schedule views

eIVF displays the lab schedule in 3 different views. Select the appropriate option from the radio buttons located on the top right hand side of the screen.

- **Day**
- **Week**
- **Month**

**Day View**
Displays lab appointments for the selected day.

**Week View**
Displays lab appointments, organized by day, for the given week (Monday through Sunday).
**Month View**

Displays count of lab appointments, organized by day, for the given month (first day of the month through last day of the month).

**Multiple Facility View**

Many medical practices find it useful to be able to view several schedules at one time. This is especially useful when two resources need to be scheduled together, (for example, a staff member and a particular room in which a procedure will be performed).

To view multiple providers at the same time:

1. Click on the Multiple Facility View radio button.
2. Select the **Lab Type** you want to view schedules for from the pull-down menu.
3. Select lab facilities from the **Lab Facility List** by clicking on the empty check-box next to the **Facility Name** column.
4. Click on **Show Schedule for Selected Facilities** button.
Lab Schedule buttons

The **Today** button returns the Schedule to today's date.

The **Search** button allows the user to search scheduling specific information for the facility.

The **Report** button prints a formatted report of the days schedule.

Available through **right click**. The schedule will automatically be updated with **Check-In and Sample Drawn**. The **Create Bar Code** option displays the Bar Code screen.

Displays **Contact** information for selected facility.

Displays special **Notes** information for selected facility.

Displays schedule information for selected facilities when the View Mode is "**Multiple Facilities View**".

Prints either Follicular Ultrasound or Obstetrical Ultrasound Report based on user selection.

Displays Ultrasound Results screen.

**Note:** The appearance of Schedule buttons may vary depending on Lab Type. For example, Datasheets and Ultrasound Test Results button are only active on the Ultrasound Schedule screen.

To open a Lab Schedule

1. Click the **Schedule** tab.
2. Select Lab Type from the drop down list.
3. Select Internal or External radio button.
4. Select a Facility.
5. Click on Schedule radio button.
6. eIVF will automatically open the selected Facility's schedule for the current date.

Searching Schedule

When scheduling patients and ordering labs you may want to find the available time slots suitable for each patient's needs. Perhaps the patient is only available on Tuesdays or Thursdays or the patient may need an appointment. Whatever the appointment criteria, eIVF can quickly find the suitable time slot for you.
To find a time slot

1. Click the **Search** button on the bottom right hand side of the Lab Schedule screen.
2. **Search Free Lab Schedule** Window will appear.

3. In **Search Appointment Based On** choose “Particular Day” and then either type in a date or click on the down arrow to activate the “Date Control” floating calendar. Click on your desired date to enter that date.

   **OR**

4. If you want to search a variable range of dates, click on the down arrow next to **Search Appointment Based On** to access the drop-down list. Select “Days From”, “Weeks From”, or “Months From”. Once you select one of these categories, a text box will pop up to the immediate right. Enter the number, i.e. 10 Days from, to search. Then either type in a date or select one from the pop up calendar.

5. In **Select Facility** utilize the drop down lists to select a specific facility you want included in your search.

6. In the duration criteria section **Time (min)**, enter a minimum amount of time to search for. Or simply click on Free Appointment radio button to search all available time slots for the given criteria.

7. Check the boxes of the days on which the patient is available.

8. Enter the number of days to be searched.

9. Click the **Search** button. Appointments matching your criteria will be listed in the Appointment Results Window. If there are no matching appointments, you can retry the search using less restrictive criteria.

10. Double click on desired entry or select the entry and click on Schedule button to book the appointment (see below).
To print lab schedule

1. To print a copy of the appointment schedule, click on Report button on Lab Schedule screen.

To find patient appointments

To find all past and future appointments of a patient who has an appointment on lab schedule:

1. Click on the Appointment time slot.
2. Click on Show Patient Schedule button. eIVF will display all Provider, Lab and Resource appointments of the given patient. You may want to utilize Provider, Lab and Resource radio buttons to view the respective appointments.
Lab Schedule Tasks

Lab Schedule Tasks are schedule reminders normally created via either the Flowsheet screen or by a referring physician from the Referring MD Portal. For example, once a test is ordered from a flowsheet (using the check-mark boxes) or from the Referring MD Portal, it is automatically placed into the “Schedule Task” window organized by the ordering provider.

To view scheduling tasks, click on the Schedule Task radio button and open Provider folders.

To book an Appointment for the Task

1. Double click on the selected Task and the respective labs daily schedule will appear.
2. Double click in a time slot and the Lab Order window appears with respective information with all default values already filled in.
3. Open folders in Lab Request List to see the labs.
4. Select the labs you wish to schedule clicking on Schedule checkbox.
5. Enter Notes and Comments, if appropriate.
6. Click the Save button.
To print billing transaction (Superbill)

eIVF automatically codes the encounter with appropriate CPT codes depending on services rendered to the patient. To automatically print the billing summary (Superbill) which will include all Provider and Lab services:

1. Click on Billing Transaction button on the bottom of Schedule screen.

3. Click on either the Select All checkbox or choose the individual patients for whom you wish to print superbills.
4. Click on Print button to print the Superbill (billing summary).

To print Lab Schedule

If you would like to print a list of who is “Due In” Today for the given Lab Tests. Note this option will only print the schedule for the selected lab facility. You will have to repeat this process if you wish to print the schedule for multiple labs.

1. Click Report button.
To print bar code for blood samples

If you would like to print a bar code for the sample drawn:

1. Click on the appointment entry (Patient Name) you wish to print the bar code for.
2. Click on the Print Bar Code button and the Lab Schedule Bar Code window appears.

3. Make necessary changes and click on Print button.

To print Ultrasound Datasheets

If you would like to print datasheets for the patients who are “Due In” Today for follicular and obstetrical ultrasound:

1. Click Datasheets button on Ultrasound schedule screen.
2. Print Datasheets window appears with Follicular option as a default and all patients who are scheduled for Follicular Ultrasound on the list.

3. Click on Select All checkbox or on the Select checkbox next to individual patients for whom you wish to print datasheets.
4. Click on Print button to print the datasheets.
5. Click on Obstetrical radio button. Repeat steps 2-4 to print Obstetrical datasheets.
Lab Appointments

The Schedule allows the user to book, cancel, reschedule, copy and delete appointments.

Lab Appointment components

1. Patient ID: Lists Patient Identifier in the eIVF system.
2. Patient Name: Offers Patient Find query option (See eIVF Basics).
3. Age: Lists Patient Age.
4. DOB: Lists Patient Birth Date.
5. Schedule Date: Date of Appointment.
6. From Time: Start time of the Appointment.
7. To Time: End time of the Appointment.
8. Duration: Duration of the Appointment. The Duration defaults to the time allotted for the selected appointment slot, but can be changed.
9. Status: Status of the Appointment. The Status defaults to Unconfirmed, but can be changed.
10. Patient Allergies: Selection list box to track patient’s allergies.
11. Schedule Content: Lists what is scheduled for patient.
12. Allergy Comment: Lists any specifics in relation to the patient allergies.
13. Phone Numbers: Table displaying all phone numbers from the Patient Profile.
14. Lab Name: Name of facility.
15. Lab Location: Address of Facility.
16. Provider: Dropdown list of Providers.
17. Lab Request List: Selection list to schedule respective lab types.
18. Lab Order Notes: Freeform text to enter lab order notes.
19. Comments: Freeform text to enter general comments.
To create and order and schedule Lab Appointments

1. Click on a time slot you wish to schedule the appointment.
2. Right click and choose New Lab Order/Schedule option.
3. The Lab Order window will appear.
4. Follow Instructions on Patient Lab Orders section of this manual to order labs.
5. Click on Save button and eIVF will return Lab Schedule window. You’ll see your appointment and the labs ordered on the time slot.

To double book Lab Appointments

1. Click in an empty time slot next to the slot that already contains an appointment (see figure below) and a New Appointment Details window appears.
2. Follow instructions on To create and order and schedule Lab Appointments, above.

Note: On schedule Screen, the appointment with the longest duration appears on the first column followed by the next longest duration appointment and so on.
To modify an Appointment

1. Double click on the appointment (in a time slot that already contains an appointment) on lab schedule.
2. The Modify Lab Appointment window appears.
3. Make necessary changes and Click Save.

To move an Appointment

1. Double click on the appointment (in a time slot that already contains an appointment) on lab schedule.
2. The Modify Lab Appointment window appears.
3. Change Date, From Time, To Time when necessary.
4. Click Save.

To Add-On a lab to an existing lab appointment

1. Double click on the appointment (in a time slot that already contains an appointment) on lab schedule.
2. The Modify Lab Appointment window appears.
3. Click on the Addon Lab button in lower left corner.
4. Follow Instructions on Patient Lab Orders section of this manual to order labs.
5. Click Save. Now you have returned to the original order, you must click on the folder in the right-hand side Lab Request List that you just created and click on the check box to add this new lab.
6. Click on the Save button.
7. Click Close.

To attach a lab to a flowsheet

1. Double click on the appointment (in a time slot that already contains an appointment) on lab schedule.
2. The Modify Lab Appointment window appears.
3. Double click on Provider Name in the Lab Request List section of the window.
4. The Lab Order window appears.
5. If the lab is not attached / ordered from the flowsheet the Cycle Ref dropdown field will be active.
6. Choose the respective **Cycle Ref** from the dropdown window.
7. **Click Save.** Now you have attached this lab to the flowsheet and the results will appear on the flowsheet for the given day and given lab column.

8. Now you have returned to **Modify Lab Appointment.**
9. **Click Close.**

**To delete an Appointment**

1. Double click on the appointment (in a time slot that already contains an appointment) on lab schedule.
2. The **Appointment Details** window appears.
3. Click the **Delete** button.
4. Confirm record deletion.

**Note:** This activity will delete the appointment but not lab orders.

*In order to better maintain practice statistics it may be more efficient to enter a Status of Cancelled instead of deleting appointments.*
External / Reference / Satellite Facilities

Sending Labs

To send a sample to an outside facility (e.g., Quest, LabCorp, Genzyme, etc.) for processing:
1. Right click on the patient’s name in the Schedule slot
2. Select Sample Details window will appear on the screen.

3. Click on Facility Sent and select the facility from dropdown list.
4. Hit Tab. You’ll see that all labs below your selection will be marked to the same facility.
5. Click on the Save button.
6. Click on Print Req. This will display the Requisition Detail screen with all Req types and documentation details of the reference lab.

7. Select Patient Diagnosis from the dropdown list.
8. Double Click on the desired Document Name you wish to generate. This will automatically create a paper requisition specific to the Facility. Attach the requisition to the sample.
9. Click on OK button and you’ll be directed back to the Sample Details window.
10. Click Close.
Patient Check In / Sample Collected

When the patient arrives at the clinic, he/she is Checked In or when the sample is withdrawn. This allows the Registration and Scheduling personnel to initiate procedures that will allow the patients appointment to proceed smoothly through the clinic.

Checking In

The Check-In process will automatically update the Monitoring Window on Schedule Tab, where lab personnel is notified as who is waiting outside for the lab appointment.

It is always advisable to Check-In patients at the front desk as they arrive. This is extremely important for the Stenographer, lab personnel and phlebotomists to keep track of the patient flow and order.

To Check-In patients as they arrive:
1. Right click on the patient’s name in the Schedule slot.
2. Select Check-In. The Appointment color will automatically change to orange.