

## HOW TO RESCHEDULE APPOINTMENTS IN MEDINFORMATIX

### A. HOW TO RESCHEDULE APPOINTMENTS FROM THE SEARCH WIZARD:

**Step 1:** To reschedule a patient go to “Search Wizard”

- “Books View” is only used if the procedure is a “STAT” and there are no available appointments.

The screenshot displays the Medinformatix Workflow View interface. The title bar indicates the user is 'KSARKIS/MAIN - STANDARD/CSR' and the window is titled '[Search for Appointments]'. The interface includes a menu bar (File, Views, Patient, Utilities, Reports, Setup, Window, Help) and a sidebar with navigation options: Patient List, Search Wizard (highlighted), Books View, Appt Requests, Reading View, Master List, Appt List, Orders, and Reset.

The main configuration area includes the following fields:

- Starting Date:** 2/9/2018, with navigation buttons for Today, +1 Wk, and +1 Mth.
- Schedule Type:** [None]
- Facility Group:** All Facilities
- Multi-Facility Filter:** A list containing CB, ELM, GW, and OUT, with a Clear button.
- Start Time:** 07:00 AM
- End Time:** 09:00 PM
- AM/PM:** AM and PM checkboxes.
- Days:** Mon, Tue, Wed, Thu, Fri, Sat, Sun checkboxes.
- Facility Assigned to Wizard:** [Any]
- Wizard Group:** [None]
- Appointment Wizards:** [Select Manually]

Below these fields is a table for appointment configuration:

Appointment Book	Reason	Find	Day	Lag Minutes	Allotted	Seq
1: <None>		Find	0	0		
2: <None>		Find	0	0		
3: <None>		Find	0	0		
4: <None>		Find	0	0		
5: <None>		Find	0	0		
6: <None>		Find	0	0		
7: <None>		Find	0	0		
8: <None>		Find	0	0		

At the bottom, there is a Patient Summary section with fields for Patient Name and Referral Source, and an Appointment Choices table with columns for Book, Facility, ApptDate, Day, and Time. Additional options include 'Show first appointment in set only' (unchecked) and 'Use Layover Time' (checked).

**Step 2:** Click on “Patient List” and look up patient by entering DOB

**Step 3:** Highlight patient, then click on “View Appts”

Patient List

Select	New	Demographics	View Appts	Account Ngte	Bill	Payment	Send Message	
Exit	MPI	Balance	View Orders	Authorizations	Letters	Collect Note	Assign Room	Appt Requests

Search Criteria

Name	Account	DOB	HIC	Phone	Appt No	Recent Patients
TEST						
Guarantor	MR No.	MPI	PID	SSNO		Refresh Alphabet Clear

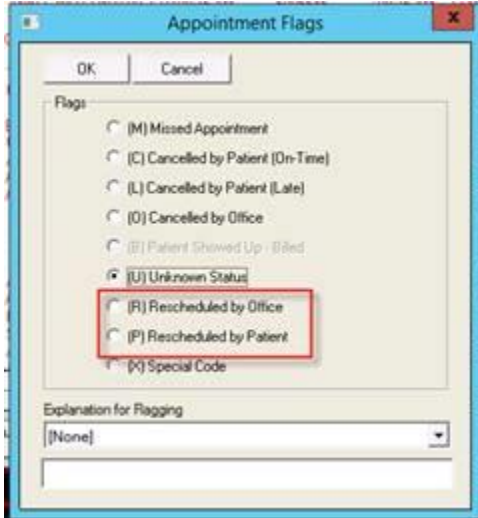
Last Name	I	Sex	First Name	DOB	Account	MR No	Patient Type	Dr	Home Phone
Test	M	M	Aa-test	06/20/2011	3018879	336416	STANDARD	N/A	999/999-9999
Test	M	M	Aaron	03/18/1975	0073911	249149	STANDARD	N/A	
Test	M	M	Adam	01/25/1997	3003188	318189	STANDARD	N/A	666/333-6666
Test	F	F	Allscripts	01/01/1955	306003426	306003426	STANDARD	NA	
Test	F	F	Allscripts	01/03/2001	3064199	382446	STANDARD	N/A	858/777-5554
Test	M	M	Allscripts	03/29/2010	3118718	436960	STANDARD	N/A	333/333-3333
Test	F	F	Allscripts	05/17/1979	3135782	454020	STANDARD	N/A	919/800-5505
Test	M	M	Andrew	01/01/2000	3053574	371821	STANDARD	N/A	555/555-5555
Test	F	F	Betty	03/03/1955	3154394	472630	STANDARD	N/A	619/589-8628
Test	M	M	Big	01/01/2001	3108957	427199	STANDARD	N/A	619/222-3333
Test	M	U	Block	01/01/1999	306005131	306005131	STANDARD	NA	
Test	M	M	C2c	10/11/1988	3071181	389428	STANDARD	N/A	
Test	M	M	Cam	06/12/1984	3054012	372259	STANDARD	N/A	999/999-9999
Test	F	F	Carol	10/20/1955	0074853	317662	STANDARD	N/A	999/999-9999
Test	F	F	Celine	06/01/2001	3154673	472909	STANDARD	N/A	
Test	M	M	Chest	01/17/2014	3053438	371685	STANDARD	N/A	999/999-9999
Test	M	M	Chris	01/01/2000	3115257	433499	STANDARD	N/A	619/222-2222
Test	F	F	Christian	04/26/1979	3143780	462017	STANDARD	N/A	619/889-6254

**Step 4:** Highlight the exam/appointment to be rescheduled and click Flag

Appointments for TEST, BETTY

Exit	All Appointments	Refresh	Note	Flag	Tag	H	View Auth	Edit Info
Date	Day	Start Time	Book	Flag Note	Flag User	Tag1 User		
11/07/19	Thursday	08:00 AM	CB_US		KSARKIS			
01/23/18	Tuesday	04:15 PM	GW_MR		KSARKIS			
01/23/18	Tuesday	04:15 PM	GW_CR		KSARKIS			
12/23/17	Saturday	02:00 PM	ELM_PET		AVEGA			
12/02/17	Saturday	07:10 AM	ELM_PET		LHERNANDEZ			
11/28/17	Tuesday	03:00 PM	GW_MG		CTURRUBIAT	KSARKIS		
11/27/17	Monday	03:15 PM	GW_MG		CTURRUBIAT	KSARKIS		
11/16/17	Thursday	08:15 AM	GW_CR		KSARKIS			
11/16/17	Thursday	08:20 AM	GW_CR		KSARKIS			
11/16/17	Thursday	08:25 AM	GW_CR		LHERNANDEZ			
11/16/17	Thursday	08:50 AM	GW_CR		LHERNANDEZ			
11/16/17	Thursday	12:26 PM	GW_CR		KSARKIS	KSARKIS		
11/16/17	Thursday	01:32 PM	GW_CR		LHERNANDEZ	KSARKIS		
11/16/17	Thursday	02:28 PM	GW_CR		LHERNANDEZ	KSARKIS		
11/15/17	Wednesday	08:30 AM	CB_CT		KSARKIS	KSARKIS		
11/15/17	Wednesday	02:54 PM	ELM_CR1		KSARKIS	KSARKIS		
10/16/17	Monday	07:00 AM	ELM_MR		DSANCHEZ			

**Step 5:** Select corresponding reason (for example rescheduled by Office or Patient)

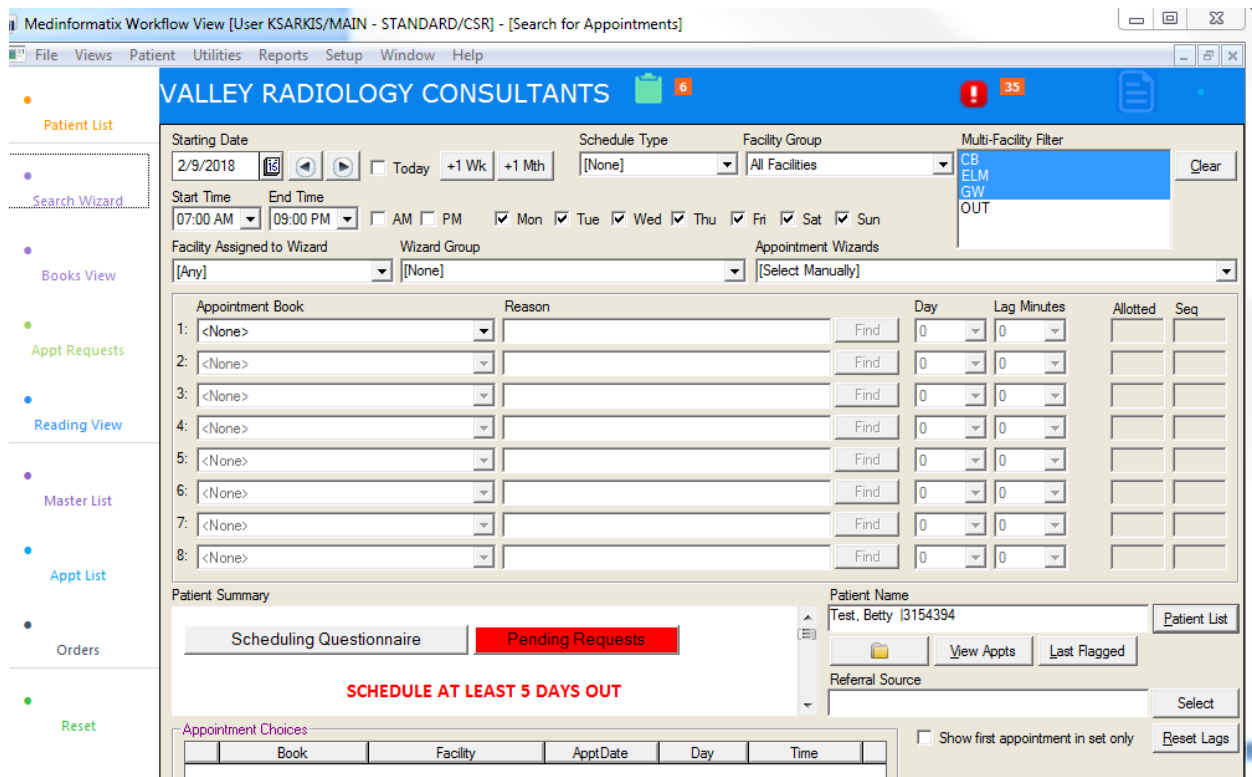


**Step 6:** Click “OK” (top left) wait for the font to turn color red

**Step 7:** “Appointment for patient screen” will appear - font should turn color red then click “Exit” (top left)

**Step 8:** “Patient List” window will appear – highlight the correct patient and click “Select”

**Step 9:** “Search for Appointment” window will open – under “Multi-Facility Filter” highlight preferred location



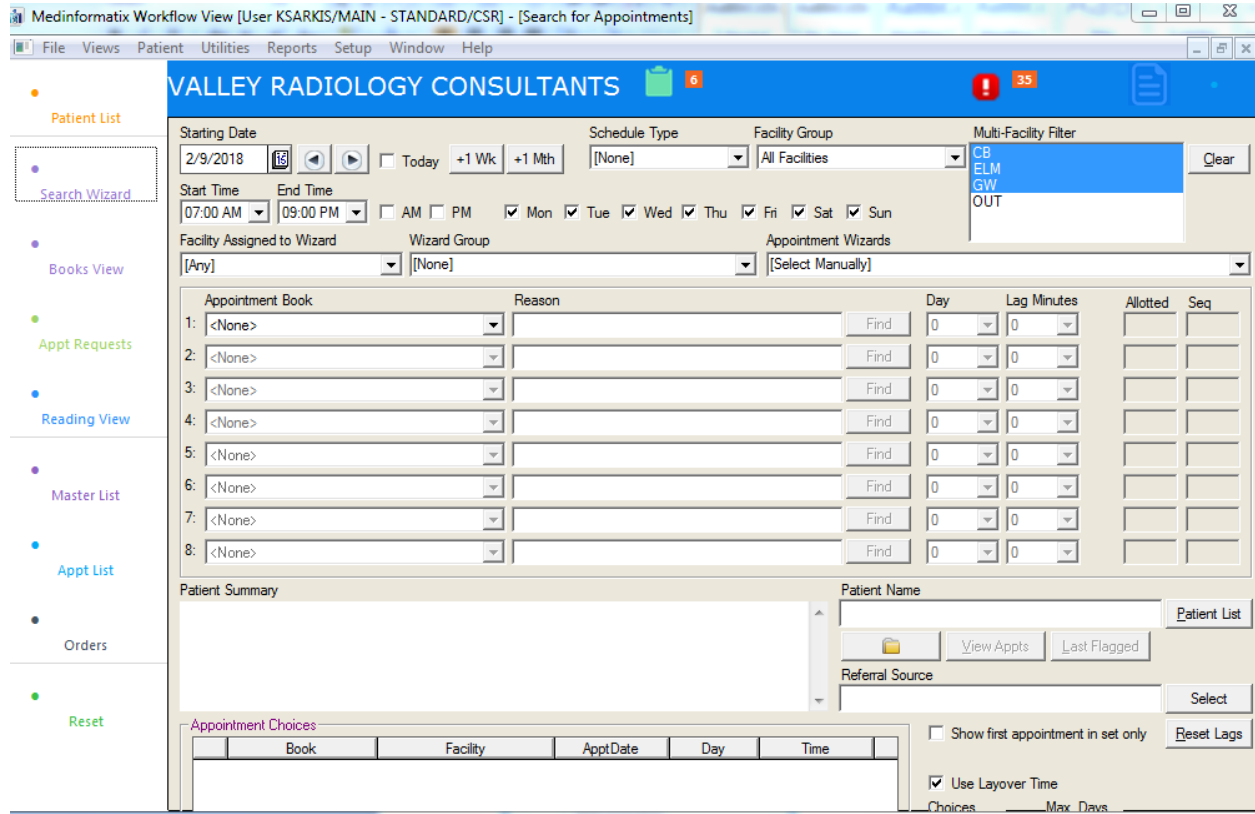
**Step 10:** Click “Last Flagged” (located under patient name)

- Step 11:** Search for desired date (calendar on upper left corner)
- Step 12:** Click Search for available date and time
- Step 13:** Highlight date/time patient agrees to and click “Set Appt”
- Step 14:** Then “Confirm Appointment” screen will open up. It will have all the appointment notes from the previous date and the referral source. Enter additional notes if needed on this screen.
- Step 15:** Click “OK” (top left) to schedule the appointment.

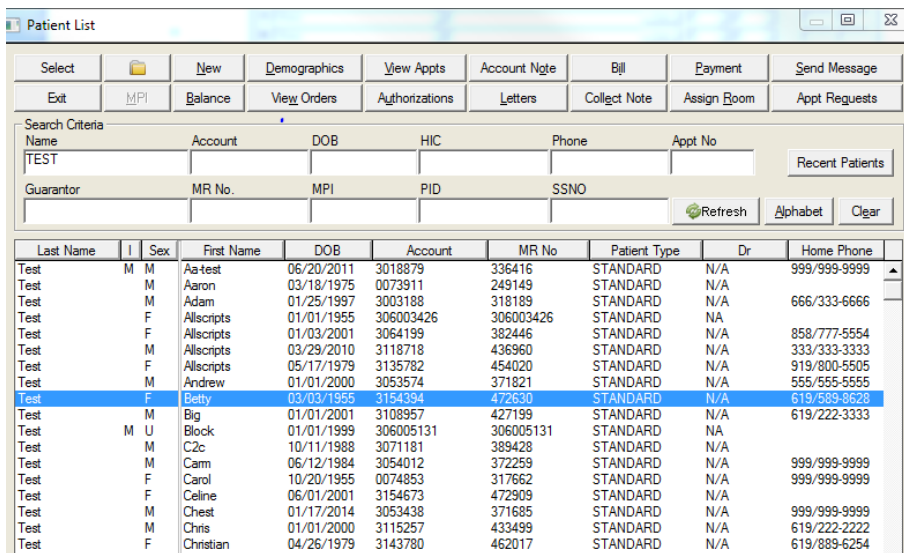
**Step 15:** Click “Exit” on “Edit Chart Document” screen, Screening Questionnaire, and Scheduling screen.

**B. HOW TO RESCHEDULE AN APPOINTMENTS FROM THE BOOKS VIEW:**

1. To reschedule a patient go to “Search Wizard”



2. Click on “Patient List” and look up patient by entering DOB  
3. Highlight patient, then click on “View Appts”



4. Highlight the exam/appointment to be rescheduled and click Flag

Date	Day	Start Time	Book	Flag Note	Flag User	Tag1 User
11/07/19	Thursday	08:00 AM	CB_US		KSARKIS	
01/23/18	Tuesday	04:15 PM	GW_MR		KSARKIS	
01/23/18	Tuesday	04:15 PM	GW_CR		KSARKIS	
12/23/17	Saturday	02:00 PM	ELM_PET		AVEGA	
12/02/17	Saturday	07:10 AM	ELM_PET		LHERNANDEZ	
11/28/17	Tuesday	03:00 PM	GW_MG		CTURRUBIAT	KSARKIS
11/27/17	Monday	03:15 PM	GW_MG		CTURRUBIAT	KSARKIS
11/16/17	Thursday	08:15 AM	GW_CR		KSARKIS	
11/16/17	Thursday	08:20 AM	GW_CR		KSARKIS	
11/16/17	Thursday	08:25 AM	GW_CR		LHERNANDEZ	
11/16/17	Thursday	08:50 AM	GW_CR		LHERNANDEZ	
11/16/17	Thursday	12:26 PM	GW_CR		KSARKIS	KSARKIS
11/16/17	Thursday	01:32 PM	GW_CR		LHERNANDEZ	KSARKIS
11/16/17	Thursday	02:28 PM	GW_CR		LHERNANDEZ	KSARKIS
11/15/17	Wednesday	08:30 AM	CB_CT		KSARKIS	KSARKIS
11/15/17	Wednesday	02:54 PM	ELM_CR1		KSARKIS	KSARKIS
10/16/17	Monday	07:00 AM	ELM_MR		DSANCHEZ	

5. Select corresponding reason (for example rescheduled by Office or Patient)

Appointment Flags

OK Cancel

Flags:

- (M) Missed Appointment
- (C) Cancelled by Patient (On-Time)
- (L) Cancelled by Patient (Late)
- (O) Cancelled by Office
- (B) Patient Showed Up - Billed
- (U) Unknown Status
- (R) Rescheduled by Office
- (P) Rescheduled by Patient
- (X) Special Code

Explanation for Flagging

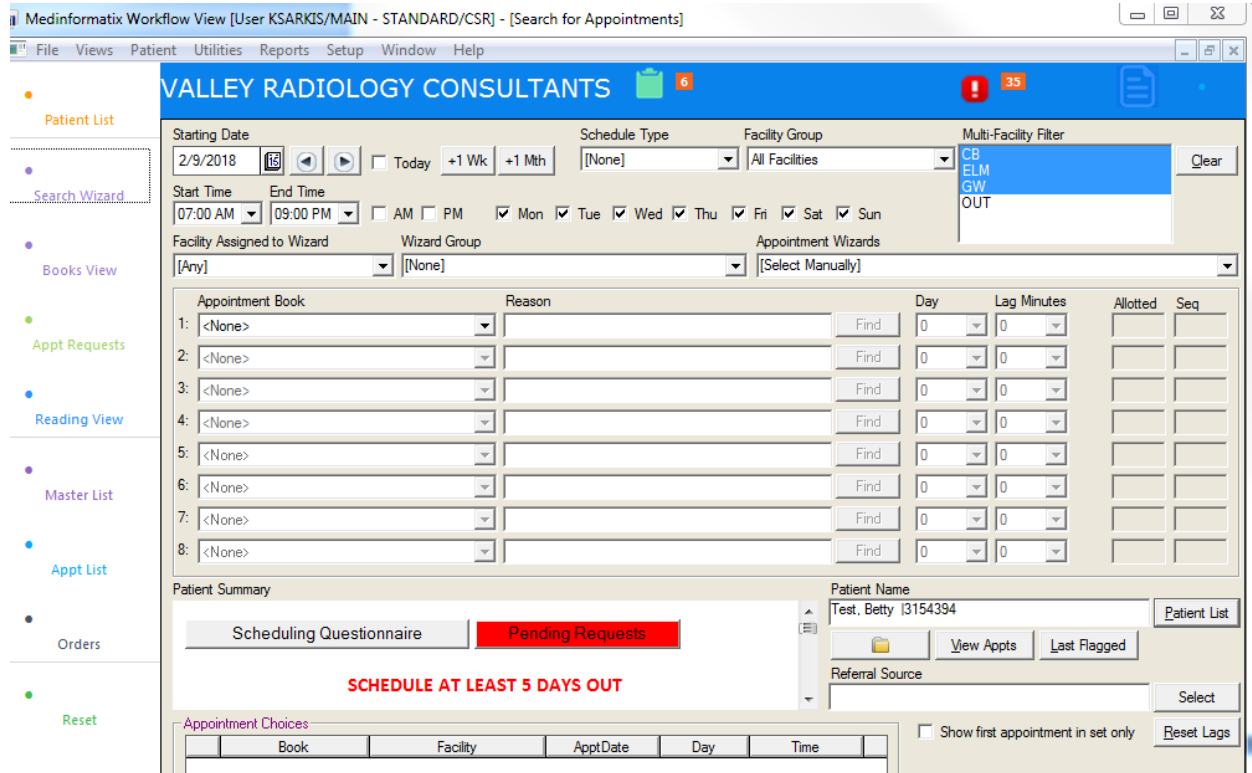
[None]

6. Click "OK" (top left) wait for the font to turn color red

7. "Appointment for patient screen" will appear - font should turn color red then click "Exit" (top left)

8. "Patient List" window will appear – highlight the correct patient and click "Select"

9. "Search for Appointment" window will open – under "Multi-Facility Filer" highlight preferred location



10. Click "Last Flagged" (located under patient name)
11. Search for desired date (calendar on upper left corner)
12. Click Search for available date and time
13. Highlight date/time patient agrees to and click "Set Appt"
14. Enter additional notes if needed on this screen (Confirm Appointment) and Click "OK" (top left)
15. Click "Exit" on "Edit Chart Document" screen, Screening Questionnaire, and Scheduling screen.
  - a) Find the new date/time in the Books View
  - b) Make sure you are in the correct book, and right click on the new time slot
  - c) Click 'Set Appointment from Clipboard'

- d) Find the patient that you just flagged in the clipboard and highlight them
- e) Click 'Select Patient'

	Patient Name	Reason	Appt Date	Appt Time	Book	Ac
1	Test Patient	234	10/28/19	09:30 AM	ELM_CT	3018

- f) The Confirm Appointment screen will open up. It will have all the appointment notes from the previous appointment date and the referral source.
- g) Click 'OK' to schedule it.