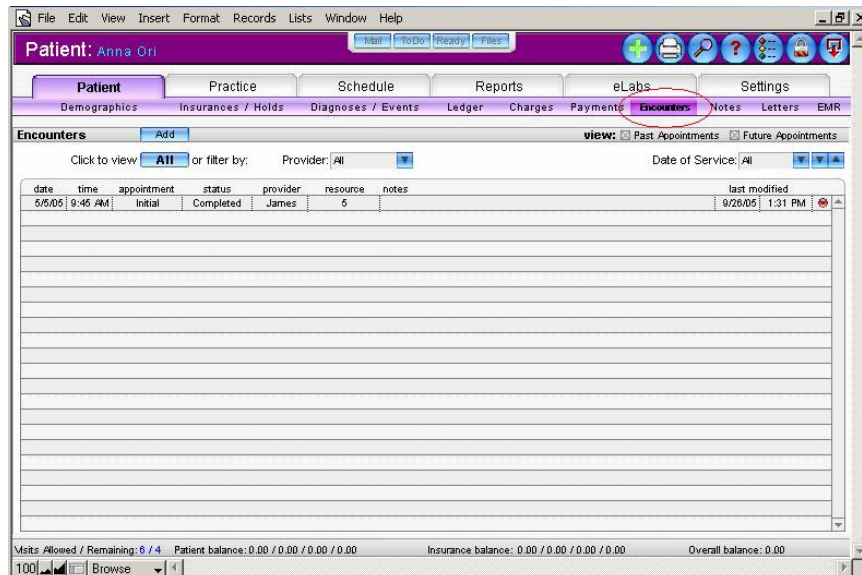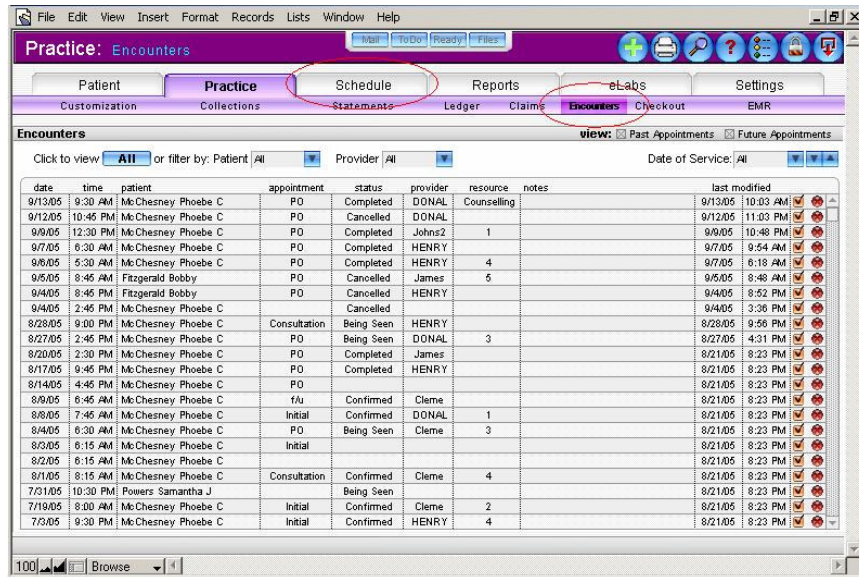**Workflow – Appointments and Encounters**

This section outlines typical workflow routines when using Practice Suite, and the relationship between Appointments and Encounters. Please note descriptions are representative of a typical office - each office must determine the utility of workflow tools and techniques found within Practice Suite.

Where to find Appointments and Encounters
Within Practice Suite are two tightly linked areas – The Schedule module and Encounters. The Schedule module contains appointments for the practice and is found by clicking the Schedule Tab found in almost every screen. Encounters are found within the Practice and Patient sections, the Practice / Encounter screen showing all encounters for the practice and the Patient / Encounter screen showing all encounters for a specific patient.

The difference between Appointments and Encounters

Most users are well versed with appointments, which are simply scheduled events **that may take place**. Within Practice Suite, on the day of the patient's appointment, the appointment is converted to an "Encounter":

An Encounter is a patient event that becomes part of the medical record and either **is** taking place**, did** take place**,** or **did not** take place.

Moreover, the encounter can be modified during the time the patient is in the office, providing a means of communicating to all staff where the patient is, with whom, and in what stage of the visit (encounter). An analogy might be the system of colored flags next to an exam room door found in some offices.

Perhaps most important, an encounter is an excellent access point to the patient record for creating notes, (which will described in more detail), viewing information, and as the basis for reports on patient visits, no-show rates, etc.
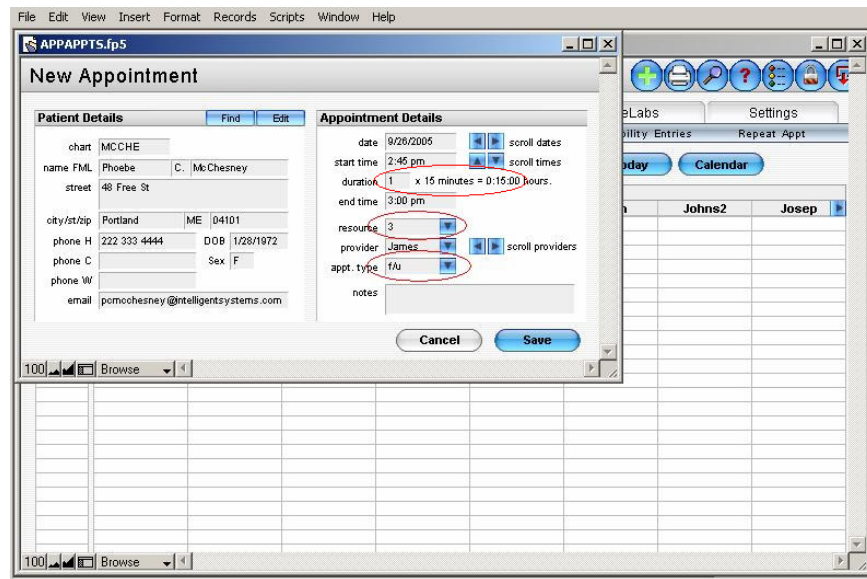
Making an Appointment

In either the EMR or billing module create an Appointment by selecting a patient, clicking the Schedule button, using the calendar navigation tools to get the date and time you want, and finally clicking any open slot. For new patients you can first create the registration normally then proceed as just described, or find the open slot first and use the search and new patient tools within the appointment window.
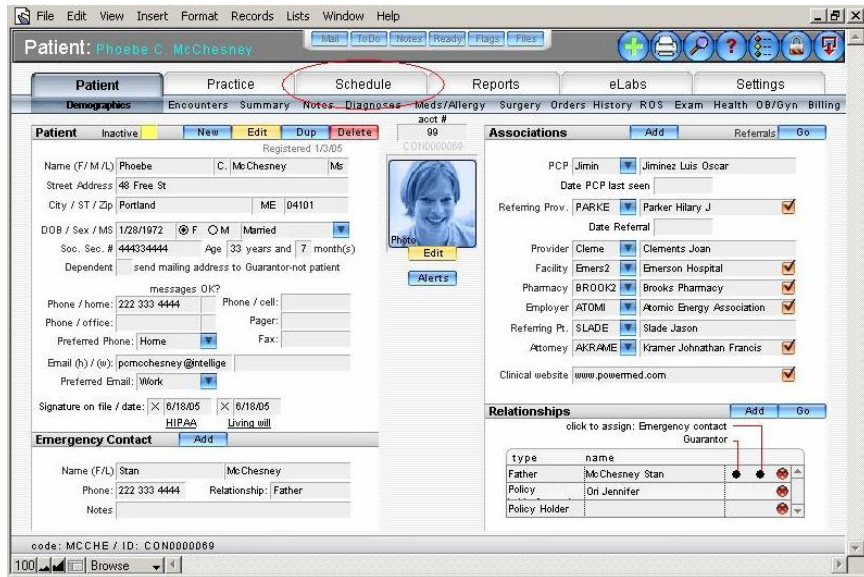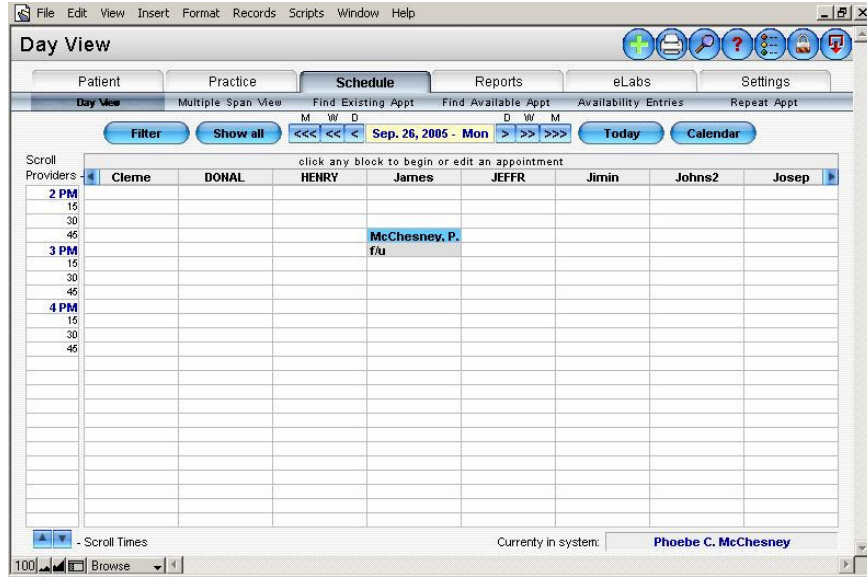

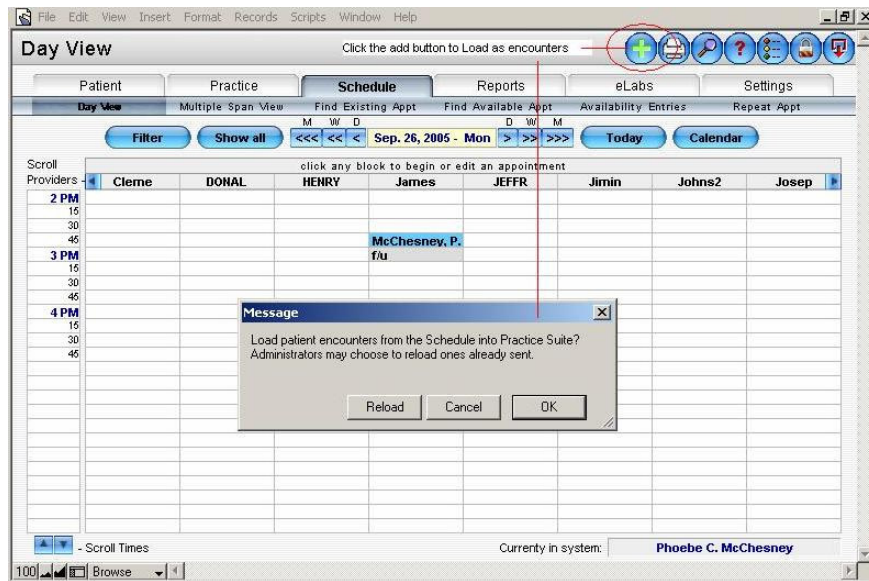click the schedule button from within any patient screen
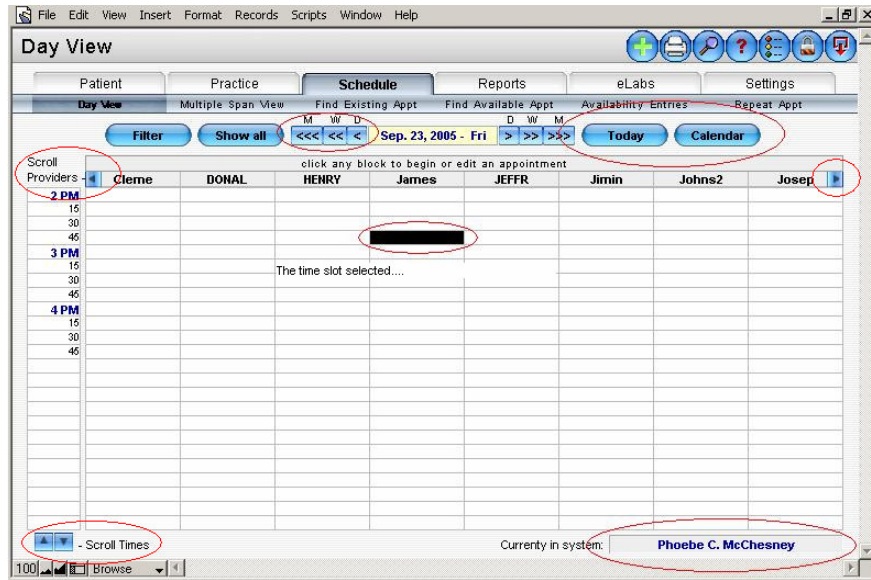
Calendar tools to get the time and date desired, and clicking the appointment slot…
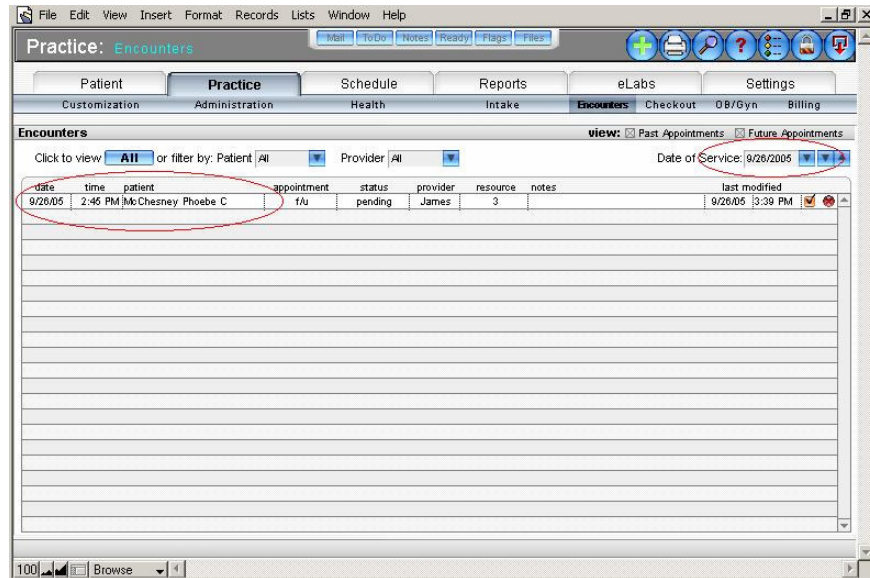

Entering additional details as desired…

The completed appointment...clicking the appointment shows details / edit.

Using the Add center to load the appointments for the day into Encounters…

The loaded appointment - now an encounter.

Next steps
After an encounter is created, the user can access the patient record by clicking on the patient entry in Practice / Encounters, or click on the yellow check mark on the far right of the encounter to edit the encounter information.

Workflow options
Offices divided into sections for intake (vital sign and non-physician HPI entry) and checkout may also opt to use Practice Intake (EMR) and Practice Checkout (EMR and Billing. Both Intake and Checkout are tied directly to Encounters; clicking on a patient record in those screens provides limited - but focused - access to patient encounter functions such as printing out progress notes, labs, medications and chargeslips.

Schedule customization
Several manual chapters review Appointment customization and should be reviewed:

- Settings - schedule preferences, which must be done before using the Appointment module
- Practice Customization – for lists such as Appointment types and providers
- Personal Customization - preferences such as auto-navigation to specific screens and staff views

The following section review basic use of the Appointment module.

Appointment Module Review
The module is divided into 2 main screens, Day and Multiple span view. Multiple span view shows any 8 day span and up to 8 staff members simultaneously. Change staff or dates by clicking directly on the item at the top of any column. The Fill Staff button changes the staff in all columns to the one selected in the first column. The Fill Dates button increments the dates by one day, starting with the date shown in the first column.
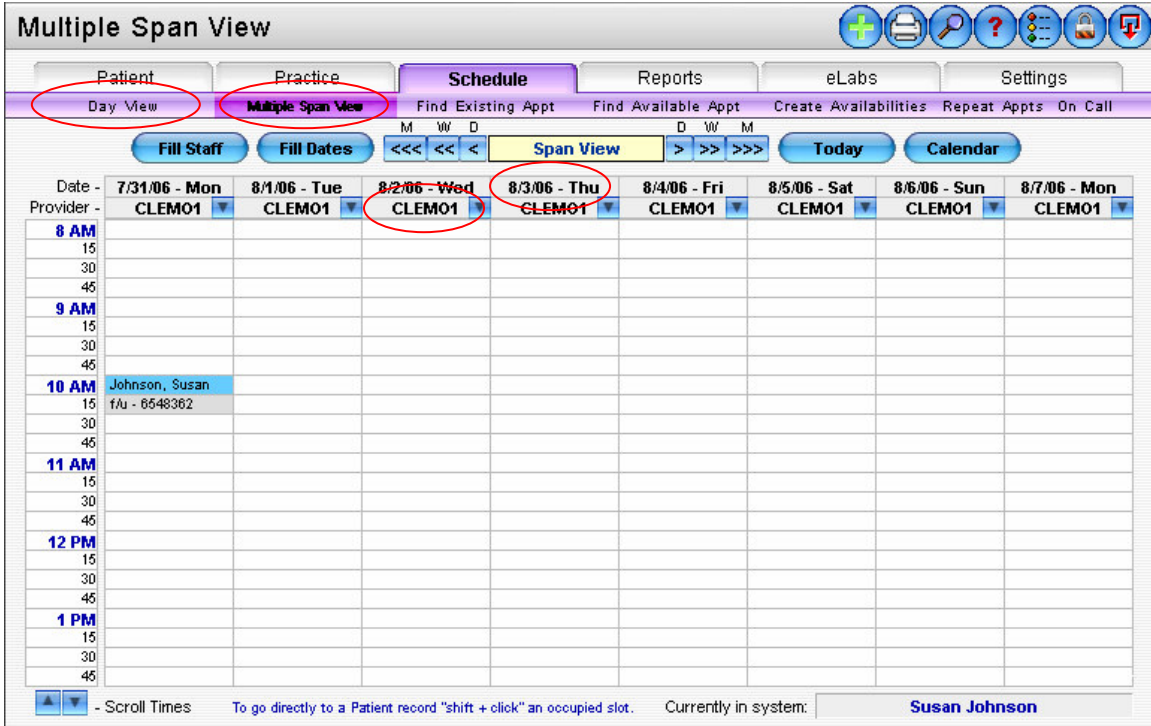

Multiple Span view shown above

Major screen access and function buttons found in all Appointment screens:

- Scroll Times – show earlier or later day appointments
- MWD (month, week, day) - forward and back navigation
- Today – sets the date to today
- Calendar – displays a calendar tool for selecting a date
- Find Existing Appt – search for a specific patient's appointments
- Create Availabilities – blockout time for specific appointment types or other uses
- Find Available Appt – search for an available time for a specific type of appointment (used in conjunction with Create Availabilities)
- Repeat Appointments – create a series of appointments for a patient at one time.
- On Call – enter or edit the provider on-call display for the current week.
- Add Center – load today's appointments into Encounters
- Print Center – options to print the schedule and Appointment reminder cards
- Search, Help, Personal settings, Lock, Quit Center – find a different patient, access program help, configure personal preferences, lock screen, shut down program.

Each of the major screens is reviewed in the next few pages, but first we'll review a few items in the Day View screen….

Buttons found only in the Day view screen:

- Scroll Providers – show the next 8 staff members
- Filter – change the staff member(s) shown
- Show all – fill all columns with different staff
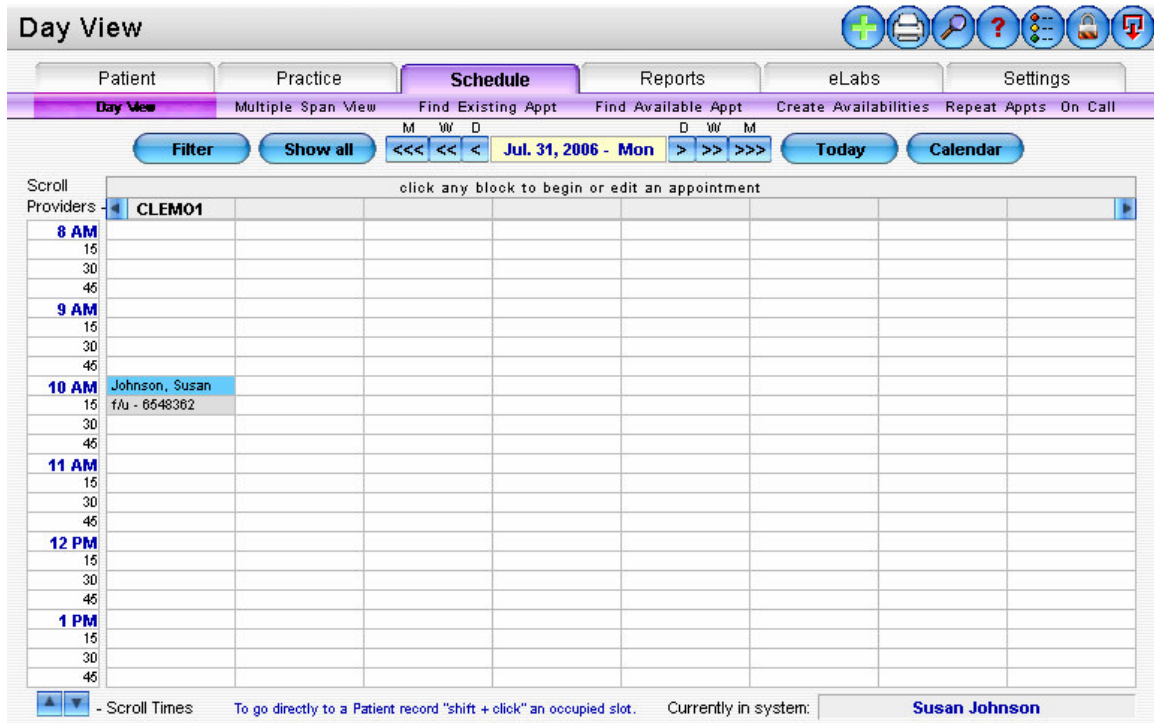
Other major screens in the Appointment module are:

- Find Existing Appt
- Find Available Appt
- Create Availabilities
- Repeat Appt

These screens are reviewed next…

<u>Find Existing Appointment</u>
Enter the first or last name then press tab key or Show button. Click on desired entry to display their existing appointments in the system. Then click on the specific appointment on the bottom half of the screen to view details.

Search for Appointment

Find Patient

Enter first few letters of First or Last Name
and press tab or Show to view matches   [Johnson_____]   [Show] [Clear]

Select a Patient to view their existing appointments

Patient Name	Chart #	Address	Phone	
Johnson Austin	JOHNS2	22 Pine Street	2076548362	▲
Johnson Susan	JOHNS1	22 Pine Street	2076548362	
				▼

Selected Patient - **Susan Johnson**

Duration = Units x 15 mins.

Provider	Date	Start Time	Units	Appt Type	Resource	
CLEM01	7/31/06 - Mon	10:00 am	2	f/u	2	▲
						▼

[Exit]

Create Availabilities
This screen is used to create blocks of time to be used for specific Appointments or things. To create an availability for an Appointment type first find the date and time you want to use, then enter the Appointment type from the pull-down menu (shown below) and the amount of time (in units). Lastly, click on the start time of the Availability. In the example below it was 9am.

Alternatively, a free text "blockout" note can be entered in the block of time rather than a specific appointment.

Find Available Appointment
Use this screen to find any available block of time created in the Create Availabilities screen. Required items are shown in red. After entering the desired criteria click the blue Find button.

Repeat Appointments
This screen is used to enter in serial appointments for a patient. Appointments made here are "linked" that is upon deleting any one of them, an option is presented to delele them all.

Repeat Appointment

Patient Details   Find   Edit

chart JOHNS1
name FML Susan Johnson
street 22 Pine Street

city/st/zip Brownfield ME 04041
phone H 2076548362 DOB 3/23/1971
phone C 2072334545 Sex F
phone W 2078552222
email sjohnson@aol.com

Appointment Details

date range [...] to [...]
start date end date

Days *Interval*
☐ Monday ☐ Friday ☐ 1st ☐ Last
☐ Tuesday ☐ Saturday ☐ 2nd
☐ Wednesday ☐ Sunday ☐ 3rd
☐ Thursday ☐ 4th

All None All None

start time ▼
duration 1 x 15 minutes = 0:15:00 hours.
end time 12:15 am

provider ▼
appt. type ▼
resource ▼

notes

Cancel Save