Healthinc OCCAM RIS

Quick Reference Guide

Booklet 1- Appointments

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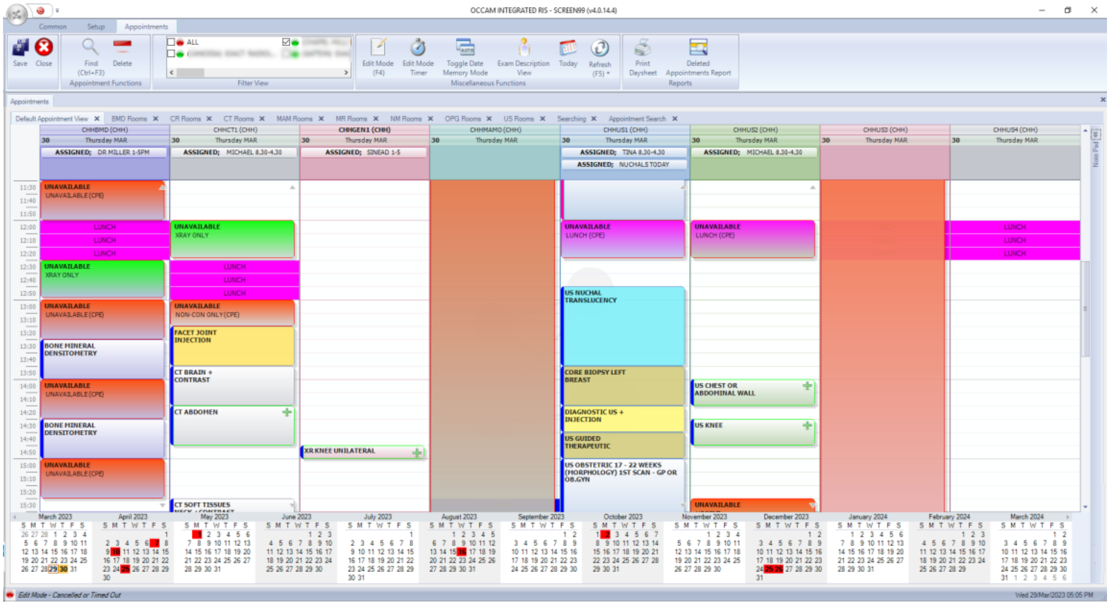
occam
INTEGRATED RIS

1. OCCAM RIS Fundamentals

1.1. OCCAM Modules

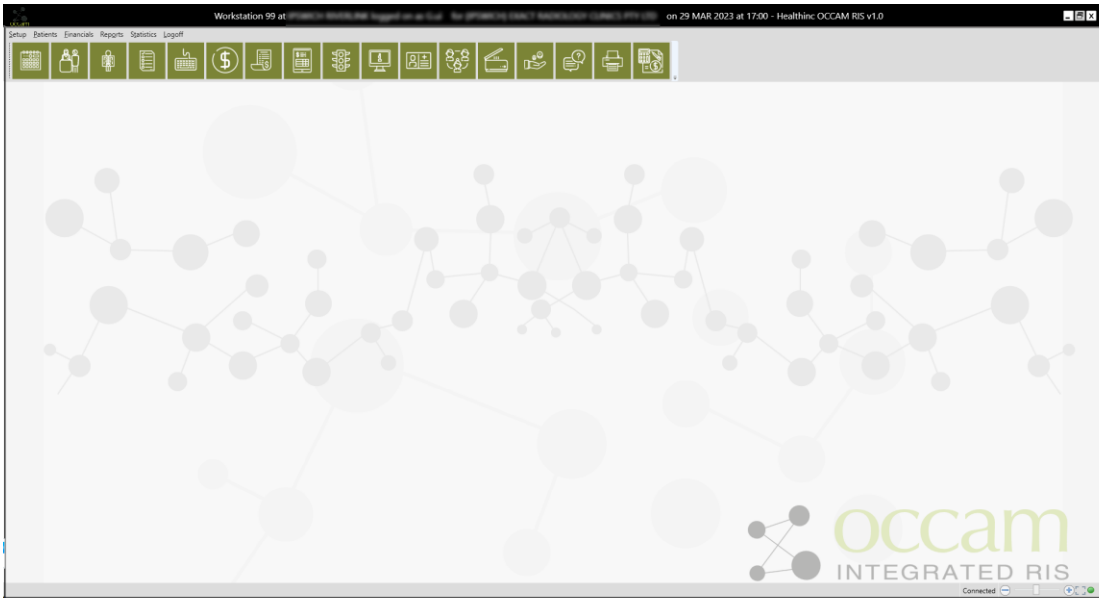
1.1.1. OCCAM RIS Appointments

OCCAM RIS Appointments module exists as a standalone application and supports the scheduling workflow the practice and is often used by administrative and technical staff.



1.1.2. OCCAM RIS Administration

This is the primary OCCAM RIS module and supports the workflow of all Administrative, technical, and financial staff members. Patient Registration, Billing, Typing, Radiographer, and administration workflows are performed within this application.



1.1.3. OCCAM RIS Radiologist Worklist

The OCCAM RIS Radiologist Worklist module exists as a standalone application and exclusively supports the workflow the Radiologist(s)

2. OCCAM RIS Appointments

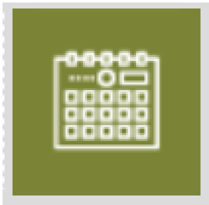
2.1. How to Launch OCCAM RIS Appointments

To access OCCAM RIS appointments, there are 2 ways.

1. Using the shortcut icon on your desktop or start menu. Or
2. Using the toolbar button on the OCCAM RIS main toolbar.

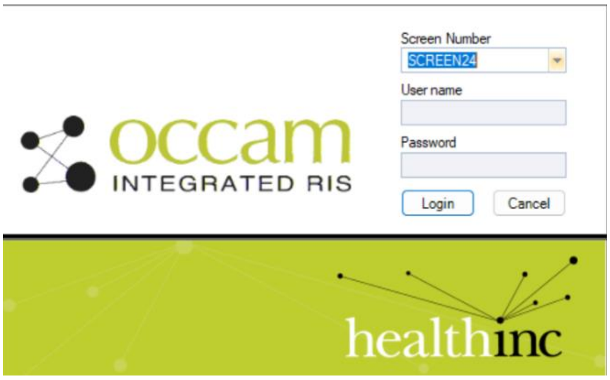
Launching OCCAM Appointments from Shortcut Icon

Launching OCCAM Appointments from the OCCAM Main Toolbar



2.2. Logging into OCCAM Appointments

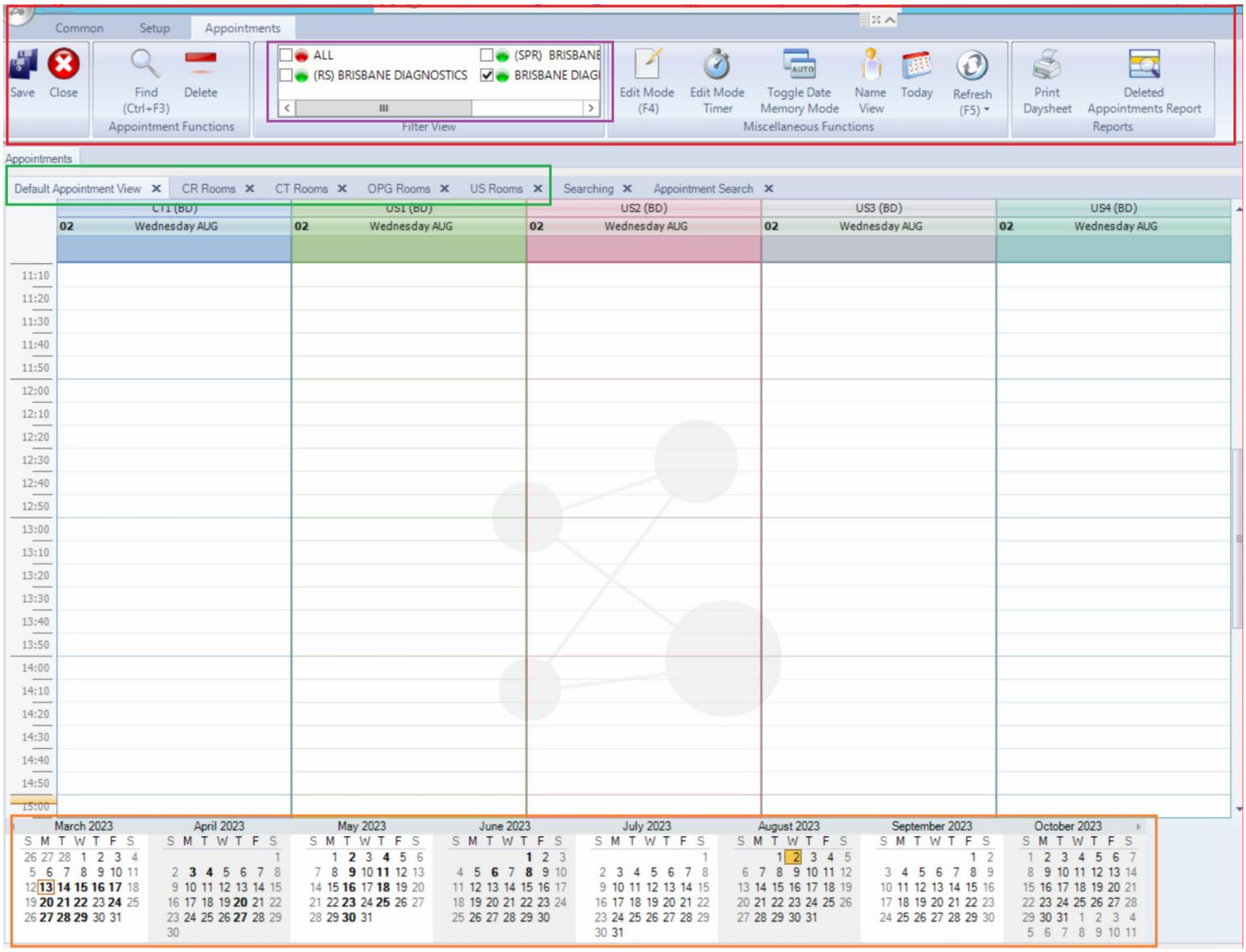
Choose the screen number which corresponds to your workstation and click the **Login** button



It is important to select the correct Screen Number to avoid issues of users attempting to make appointments in the same timeslot.

Notes

2.3. OCCAM RIS Appointments Main Layout



2.3.1. Choosing Branches

Location of where you would like to book the appointment.

2.3.2. Room View Control & Filter Tabs

You are able to narrow down the rooms seen in the appointment screen to help you with booking in the appropriate room.

2.3.3. Date Navigation Calendar

Select the date that you want to make the appointment, move the appointment, or view this day and or multiple days for a potential appointment. Hold shift to select multiple dates.

Notes

2.3.4. OCCAM RIS Appointments Ribbon /Toolbar

The ribbon bar contains three Tabs; **Common, Setup and Appointments**

1. **Common Ribbon Tab**

- **Appointments** will load the appointment booking/diary screen.
- **Expected Arrivals** provides a view to see today's appointments and if their arrival status.
- **Estimated Cost** will help you give an estimated price on the type of scan the patient is potentially booking themself in for, using the drop-down boxes to fill in the details to get your estimate.

2. **Setup Ribbon Tab**

- **Appointment Setup**

3. **Appointments Tab**

- **Save (F2)** This must be done after every appointment or change, otherwise these updates and appointment will not be there when you refresh.
- **Close** - Will close your Calendar leaving you with the grey appointment launch screen.
- **Delete** – provides a method to delete selected appointment(s)
- **Find (Ctrl+F3)** You can search appointments past and present by name and location.
- **Filter View** This is where you can select clinic location, you are able to select and view as many as you like.
- **Miscellaneous Functions**:
    - **Edit Mode**
    - **Edit Mode Timer**
    - **Toggle Date Memory Mode**
    - **Name View/Exam Code View/Exam Description View/Name Exam View**
    - **Today** quickly return the view to Today's date.
    - **Refresh (F5)** Refresh your booking screen.

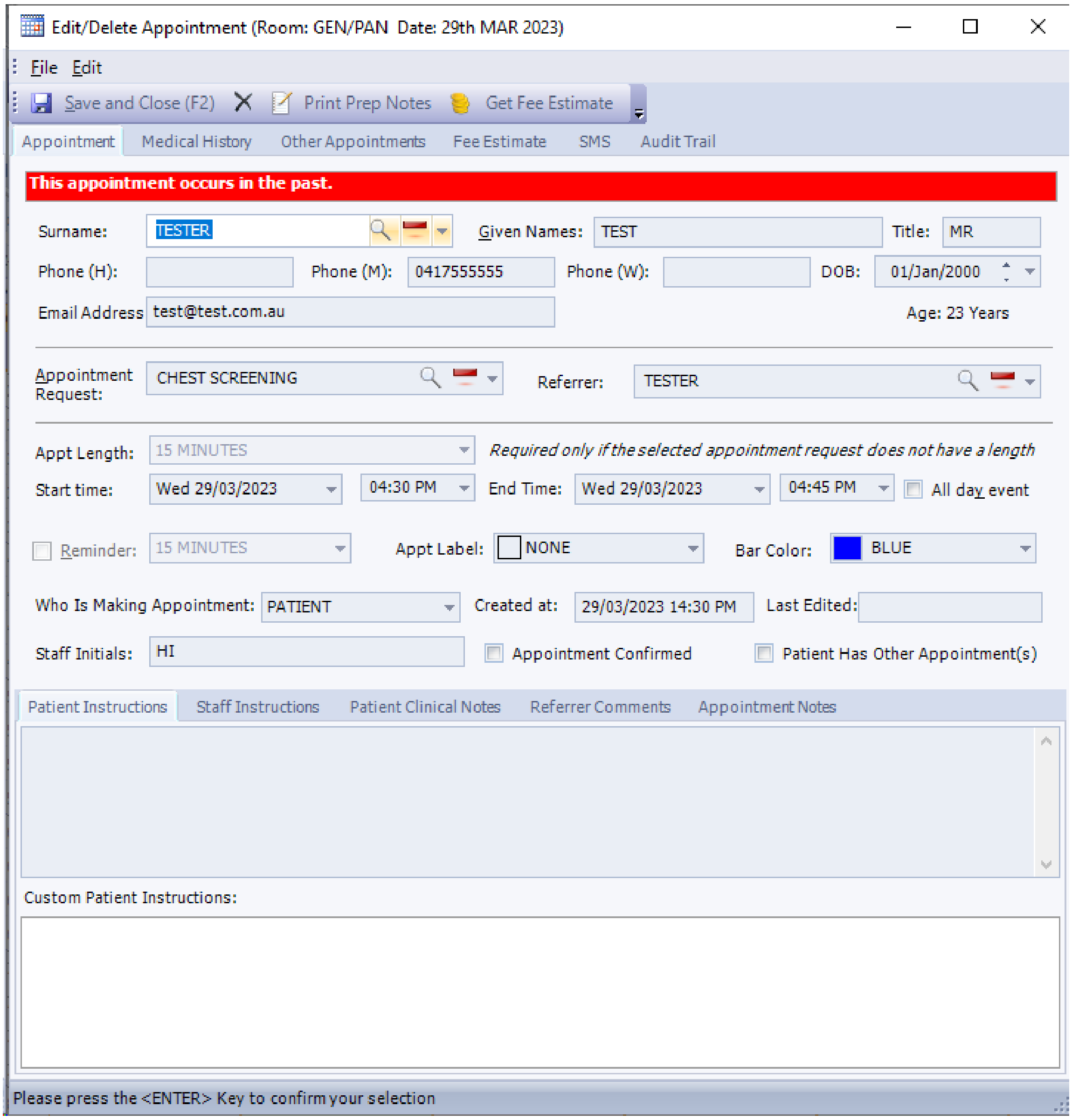
4. Reports

- **Print day sheets**- If you wanted to print your days appointment this is where you can do it.
- **Deleted Appointment Report**- by clicking here you can see if an appointment has been deleted on a certain day or within a certain time frame, it will also give you who deleted it, when, and why- (if there were notes left)

Notes

2.4. How To Create an Appointment

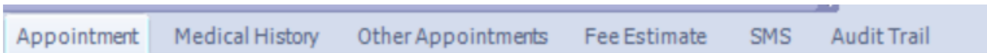
1. To make an appointment double click in the desired timeslot in the room that you wish for the appointment to be made in.
2. The **Make New Appointment** screen will open.
3. If the patient has had scans with your practice before you can search for that patient by pressing **F3 Search** in the Surname field and entering the appropriate search criteria.
4. Any patient records which match the search criteria will appear in a drop-down list in the Surname field, arrow down to the correct record and Press **Enter** to choose that patient record.



5. The patient details will prefill into the appointment screen. Please update or insert any missing detail or incorrect details.
6. **Appointment request** type in part of the description for the exam you wish to book. Perform an **F3 Search** to filter the available request codes to your search criteria. Select the desired appointment request code and press **enter**
7. **Referrer** (Optional) **F3 search** Dr surname and select if in the system.

Notes

8. **Appt length** this is usually set to a default time, you can change it in this spot if you need it to be less or more otherwise continue through, once booked you are able to drag down or shorten the appointment block to however long you need.
9. **Appointment Label** | **Bar Colour** - you can choose to colour code certain appointments or use the colour bar to represent either a confirmation, requested sonographer gender or a difficult case.
10. **Who is making the appointment?** the drop down will give you options, select the correct one.
11. **Staff initials** these are your work initials, so your team knows who booked it.
12. **Appointment Confirmed** over to the right this box would be ticked once you have done your confirmation calls or SMS.
13. **Patient has other appointment/s** tick this box if you have also made another appointment on the same day for this patient, this helps staff know that the patient is here for multiple scans and should not be sent away.
14. **Notes/Instructions**
    a. **Patient Instructions** Here you will find the preparation that you need to give the patient for this type of study.
    b. **Custom patient information** If they required additional or customised preparation.
    c. **Staff instructions -** instructions for staff such as ordering appropriate contrast agents, inform John Doe etc
    d. **Patient Clinical Notes** - notes such as Patient is allergic to x, is claustrophobic, patient is deaf, wheelchair etc
    e. **Referrer Comments** pertaining the referrer will appear here.
    f. **Appointment Notes** Any information you wish to regarding this appointment which are not required to be stored on the patient file this is the most appropriate place to put those notes.
15. **The appointment detail screen has following 6 Tabs.**



1. **Appointment** This is where you filled in all the booking details.
2. **Medical History** If this is a pre-existing patient you can see their previous studies and reports.
3. **Other appointments** If your patient has another scan booked elsewhere this will show you where and what time.
4. **Fee estimates** If you know that the type of scan you have book has a fee or that this patient is a private patient you can get an estimate on the expected fee. You will make the patient aware and add this in your Patient clinical notes space.
5. **SMS** To send an SMS you need to make sure there is a mobile number attached to this screen, you will be given options to when you want the SMS to be sent.
6. **Audit trail** This is a super helpful tab you can find out the movements of this appointment, was it moved? maybe shortened or a note was added you can see what time this happened and who updated this.

Above these 6 tabs you will find the following toolbar

16. **Save and Close (F2)** will save your appointment and take you back to the appointment screen.

    Optionally you can **Print Prep Notes** for those that have booked an appointment at the clinic and want their appointment time, date and preparation as a hard copy or provide a **Fee Estimate**

Notes

2.5. How to Resize, Move, Copy or Delete Appointments

2.5.1. Resizing Appointments in OCCAM Appointments

1. Hover your mouse at the bottom of the appointment you wish to resize until the resize mouse cursor appears.
2. Left mouse click and drag up or down to increase/decrease the appointment length
3. **F2** to save.

2.5.2. Moving an Appointment

1. To move an appointment to another day, using the date navigation calendar at the bottom of the screen, select the day your appointment is currently booked and the date whilst holding the CTRL key on your keyboard select the date you wish to move it to. This will bring those dates side by side.
2. **Left mouse click** on the appointment and drag the appointment to the desired new timeslot.
3. You will be prompted to enter your initials and a reason for the move)
4. If you are moving it to another location, make sure you selected the appropriate locations in the **Filter View** in the ribbon bar.

2.5.3. Copying an Appointment

1. **Left Mouse Click** to select the appointment you wish to copy. **Right Mouse Click** on the appointment and select **Copy** from the context menu
2. **Left Mouse Click** to select the timeslot where you wish to paste the appointment. **Right Mouse Click** and select **Paste** from the context menu.

A copy and paste you will duplicate only the patient and referrer details and not request code. Complete the rest of the details, **F2-Save and Close**. (You will be prompted to enter your initials and a reason)

2.5.4. Deleting an Appointment

1. Click on the appointment to highlight **Right Mouse Click** on the appointment and select **Delete** from the context menu.

2.6. Temporary Block outs

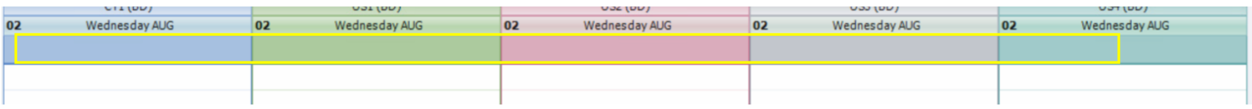
- Click, hold, and drag curser down to allocated time, let go,
- (Ctrl B) to block out
- Do you want to create a block out appointment. **YES**
- What is the reason for this block out? e.g.: UNAVAILABLE, HOLD, FNA, INJECTION
- Enter your initials.
- Defaults to Orange- to change colour double click **> YES to edit> change colour> choose your colour> OK > finished.**

Notes

2.7. Assigning Staff to Appointment Rooms

You can assign staff to appointment rooms. To do so

1. Double Click on the ALL DAY Appointment area of a desired appointment room.
2. You will be asked if you want to assign a person to this room. Choose **Assign Person**
3. **F3 Search** for the person to assign.
4. **Optionally record any notes**-. e.g., techs shift times, early finish.



2.8. OCCAM RIS Appointments Setup

2.8.1. Appointment Room Timeslot Messages

1. Select **setup** from the ribbon along the top of the appointment screen.

- **Appointment setup**
- At the very bottom of the screen there is a blue bar called **Appointment Rooms** click on this.
- Select **Timeslots Messages/Block outs.**
- Over to the right of the screen pick your **location** from the drop-down box.
- Choose the room you want the block out in.
- Pick your date (it will only let you pick a full week Sun-Sat)
- Add in a message (lunch/Injections/procedures)
- You can also select a colour for your block out.
- Select the time you would like the block out to begin and end.
- Tick which day/days you would like to block out.
- Click on **Add New**
- Click to highlight your new added block out.
- Click on **Update**
- Prompt will ask do you want to update your selected block out-**YES.**
- **Save**

1. If you need to delete or change a block out, follow the above instructions to get to your newly added block out click to highlight.

- **Click delete selected**
- **Save**

Notes

2.8.2. OCCAM RIS Appointments Location Open/Close Times

From the ribbon along the top on the Calendar find and click on **setup.**

3. **Setup> appointment setup > Location open/close times > select location from drop down> tick the days you want open> choose the time > save location open/close time.**

    This will be how you set your trading hours

2.8.3. OCCAM RIS Appointment location Holiday dates (Public Holidays)

4. **Setup> appointment setup >location holiday dates > select location from drop down> Holiday Name (Christmas) >Date of holiday> select colour if you wish> tick is location closed> add> at the bottom of your list select to highlight the holiday>save location holidays.**

Back to the Appointment Calendar on that day, a message will pop up to alert you that this location is closed, if you hit ok, you can see that there is a faded colour over the rooms and a yellow message bar along the top stating the holiday name.

Down in your Calendar along the bottom the dates that you have imputed the holiday will be highlighted in the colour you chose.

Notes

The Quick User Guide is covers high level overview and fundamentals of OCCAM RIS and a guidance on some of the common features you may use throughout your daily routine.

Please seek support from our friendly Healthinc Team for further guidance

Email support@healthinc.com.au
Phone **1800 882 443**

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