

RSS BOOKING

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Note: Please remember you have signed a Patient Confidentiality agreement and you must keep all patient information confidential. Always verify you have identified the correct patient and that they have a UK Medical Record Number. Be sure to dispose of patient information into a confidential destroy box/basket.

Common Keys Used in RSS (for Booking Purposes)

- PF14** *Returns to the previous page within the same screen*
- PF15** *Returns to the previous screen*
- PF16** *Returns to the Appointment Scheduling Menu*
- PF17** *Accesses the PM system (used to book new patients, or to bring existing patients over from PM that are not found in RSS)*
- PF18** *Found on the Patient Verification screen and is used to access the PM system to update patient demographic information for permanent UK medical record numbers*
- PF21** *Suspend Key (allows you to suspend one transaction to do another). Press <PF21> again to restore original transaction*
- PF22** *Refreshes the screen (especially useful if your screen is locked up or you've accidentally typed over a default field.)*
- PF23** *Accesses the Application Selection Menu (allows you to sign on to another system; i.e., Patient Management or TAO Mail)*
- PF24** *Help Key (you must place cursor in appropriate field)*
-
- END (PC)** *Erases the (entire field) End-of-Field*
-
- Page Down (PC)** *Toggle key used to jump between sessions (PM & RSS)*
-
- Tab (PC)** *Moves cursor forward to the next field*
-
- SHIFT TAB** *Moves cursor backwards to the next field*
-
- New Line** *Moves the cursor down to the next line*
Note: the New Line key(s) may vary by workstation

Booking the Appointment (Patient Found in RSS)

1. Refer to the **PATIENT INQUIRY** instructions in the Inquiry manual for finding the correct patient. Be sure to use the proper naming convention. Remember the suffix belongs with the first name field and no periods nor commas. Example of correct first name fields: William III or Wilbur Jr for William Jones III and Wilbur Smith Jr.

NOTE: If a permanent appointment case cannot be found, refer to the *Problem Scenarios and Resolutions/Creating a Permanent Case* section.

2. You must be at the **PATIENT VERIFICATION** screen in order to schedule an appointment.
3. From the **PATIENT VERIFICATION** screen, press <ENTER> to schedule a patient's appointment.
4. The **SCHEDULE APPOINTMENT** screen will be displayed.

SCHEDULE APPOINTMENT		12/23/04	1128
PT NAME: SZELUGA	MARY	MED REC NO: T98036134223	CHB:
DOB:11/11/1969	SEX: F	PHONE: 606-223-3394	WORK: CR: FC: F

RES CD: _____	ACTV TY: ___	PT STS: _	DT: _____
DESC: _____	DAYS: _____	WKS: _____	MTHS: _____
CLINIC/LOC: _____	RES GRP/TY: _____	_____	
PCP/REF DR: _____	PASSWORD: _____	_____	
AUTH#/VISITS : _____	FOR _____	_____	
BILL DET PV: _____	FREQ: _	CASE:980361342234	X TEMPORARY APPT. CASE
GU PV: _____	ENC ID: _____	CREATE ENC IND: Y	RADIOLOGY:N
PROC CD: _____	WAIT LIST IND: _	OUTGUIDE IND	_____
PT COMMENTS: _____	* _____		
LOW/HI STS: 40 / 55	INSTRUCTIONS	FOR PHYS/CLINIC CMNTS: PF24	

5. There are several different methods for scheduling appointments. Choose the preferred method of your clinic and refer to the appropriate instructions in the following pages.
 - **RESOURCE NEXT AVAILABLE TIME SLOTS (RNAT) by Activity Type**
 - **RESOURCE NEXT AVAILABLE TIME SLOTS (RNAT) by Duration**
 - **GROUP NEXT AVAILABLE TIME SLOTS (GNAT)**
 - **SPECIFIC DATE REQUESTED**
 - **WALK-IN APPOINTMENTS**
 - **RECURRING APPOINTMENTS**

Resource Next Available Time Slots (RNAT) / Searching by Activity Types

Restricted (or Exception) Activity Type: any activity the resource wants to see on a specific day and/or at a specific time of day. For example, a resource may choose to space out new patients throughout the day in order to allow the schedule to stay on track. Therefore, a new patient (NP) would be considered a “restricted” activity type.

1. From the **SCHEDULE APPOINTMENT** screen, enter the appropriate resource code in the **Res Code:** field.
2. <TAB> to the **Actv Type:** field and enter the appropriate activity type.
3. <TAB> to the **Pt Sts:** (patient status) field and enter the appropriate status. The patient status will be either: “1” (a new patient to the institution), “2” (a new patient to your department/division), “3” (a return patient to your clinic), or “4” (a reactivated patient).
4. To schedule an appointment a specified number of days, weeks, or months from the current date, <TAB> to one of these fields (**Days:**, **Wks:**, or **Mths:**) and enter a number. If these fields are left blank, the system will show appointments from today through the next 30 days. These are not required fields.
5. Insurance information is required. Enter information in the following fields (**PCP/Ref Dr.**, **Auth# or pre-cert #/Visits/Date of Initiation**, and **For:** (insurance name, type and co-pay). If the patient has no insurance, enter “Full Pay” in the **For:** field. **See Handout J.**
6. Press <PF3> for Resource Next Available Time Slots.

DISPLAY RESOURCE NEXT AVAILABLE TIME SLOTS							12/23/04	1139
RESOURCE: KBROWN		START DATE: 08/23/00		DURATION: 20				
# OF DAYS: 30		DESC: NEW PATIENT VISIT						
LINE NO	APPT DATE	START TIME	RESOURCE GROUP	DAY OF WEEK	ACTV TYPE	LOCATION		
! 1	082500	0820	KFMCGEN	FRI	NP	FMCGEN		
! 2	082500	0840	KFMCGEN	FRI	NP	FMCGEN		
! 3	082500	0900	KFMCGEN	FRI	NP	FMCGEN		
! 4	082500	0920	KFMCGEN	FRI	NP	FMCGEN		
! 5	082500	0940	KFMCGEN	FRI	NP	FMCGEN		
! 6	082500	1000	KFMCGEN	FRI	NP	FMCGEN		
! 7	082500	1020	KFMCGEN	FRI	NP	FMCGEN		
! 8	082500	1040	KFMCGEN	FRI	NP	FMCGEN		
! 9	082500	1100	KFMCGEN	FRI	NP	FMCGEN		
! 10	082500	1120	KFMCGEN	FRI	NP	FMCGEN		
! 11	082600	1300	KFMCGEN	SAT	NP	FMCGEN		
! 12	082600	1320	KFMCGEN	SAT	NP	FMCGEN		
KEY IN A NUMBER ___ AND PRESS ENTER PF11 SEARCH AGAIN DATE _____ TIME _____ PF15 CANCEL/RETURN PF17 PRINT LIST								
I5848: SEARCH FOUND 12 OF 12 TIMESLOTS REQUESTED FOR PERIOD 082300 TO 082600								

7. The **DISPLAY RESOURCE NEXT AVAILABLE TIME SLOTS** screen will be displayed. If no digits were entered in either the **Days:**, **Weeks:**, or **Mths:** fields, RSS

will search for available time slots beginning with the current date through the next 30 days. Press <PF11> to page through the time slots until the desired appointment time slot is found. If you need to choose a date/time that showed earlier in the list, <TAB> to the PF11 Search Again Date: field, type in the desired date and press <PF11>.

8. Select the desired line number and press <ENTER> to return to the **SCHEDULE APPOINTMENT SCREEN**.

SCHEDULE APPOINTMENT		12/23/04	1152
PT NAME: SZELUGA	MARY	MED REC NO: T98036134223	CHB:
DOB: 11/11/1969	SEX: F	PHONE: 606-223-3394	WORK: CR: FC: F

RES CD: KBROWN	ACTV TY: NP	PT STS: 1	DT: 082500 TIME: 0820 DUR: 20
DESC: NEW PATIENT VISIT		DAYS: _____	WKS: _____ MTHS: _____
CLINIC/LOC: FMCGEN		RES GRP/TYPE: KFMCGEN MD	
PCP/REF DR: Maxwell MD, Alan		PASSWORD:	
AUTH#/VISITS: Precert#/Auth# 1/4 date FOR: (insurance name/type/co-pay)			
BILL DET PV: _____	FREQ: _____	CASE: 980361342234	X TEMPORARY APPT. CASE
GU PV: _____	ENC ID: _____	CREATE ENC IND: Y	RADIOLOGY: Y
PROC CD: _____	WAIT LIST IND:	OUTGUIDE IND	
PT COMMENTS: Please bring all your _____ medications. *			
LOW/HI STS: 40 / 55	INSTRUCTIONS	FOR PHYS/CLINIC CMNTS: PF24	
PLEASE REPORT TO THE 1ST OR 3RD FLOOR INFORMATION DESKS 15 MINUTES PRIOR TO YOUR APPOINTMENT IN ORDER TO BE REGISTERED. PLEASE REMEMBER TO BRING PROOF OF YOUR INSURANCE COVERAGE.			

9. Review the following fields and make changes if necessary:
 - a. **Clinic/loc:** View for the proper clinic code required for this appointment.
 - b. **PCP/Ref Dr Name:** Enter the primary doctor (city and phone number are optional).
 - c. **Create Enc Ind:** If this field contains a "Y", an encounter number is automatically created when the appointment is scheduled for the purpose of tracking fees. If the resource code is a "Test Only" resource (where no professional billing should occur), the system will automatically change the indicator to "N" before scheduling is complete.
 - d. **Radiology Outguide Ind:** This field contains a "N" as the default. The system will automatically change the indicator to a "Y" before the scheduling is complete for those resource groups or resources (loaded into a Profile) that always produce an outguide. You must manually key a "Y" in this field if you need an outguide for that individual appointment. These outguides will be produced by batch 3 days prior to the appointment. Any appointment scheduled 1 to 2 days prior to the appointment date that requires a Radiology Outguide (indicator is valued to "Y", or Resource Group or Resource is in the Radiology Outguide profile), the system automatically generates a request that is printed immediately in the film library. **You must call Radiology to request films for walk-in or same day scheduled appointments.**

Note: Contact the Resource Scheduling Administrator for any resource or resource group that should always produce an outguide.

- e. **Patient Comments:** There are two lines available for entering general comments (i.e., instructions specific to the patient – deposit amount, test times, etc.).

- f. These comments print on the daily appointment reports and patient appointment reminders. **No confidential information is allowed on these two lines.**
- g. * (Phys/Clinic Cmnts): **You must have the cursor on the “*” then do <PF24>** to access this field. There are four lines available for entering **confidential** patient information specific to the resource or clinic. These comments print on the clinic daily reports and resource appointment listings but **not** on the patient appointment reminders. They will also appear on the **DISPLAY RESOURCE SCHEDULE** screen. Type appropriate (HIPAA) comments and press <TAB> at the end of each line to move between the lines. Press <ENTER> to update and return to the **SCHEDULE APPOINTMENT** screen. Referring information is entered here, too, in the same format.

SCHEDULE APPOINTMENT		12/23/04	1152
PT NAME: SZELUGA	MARY	MED REC NO: T98036134223	CHB:
DOB: 11/11/1969	SEX: F	PHONE: 606-223-3394	WORK: CR: FC: F

RES CD: KBROWN	ACTV TY: NP	PT STS: 1	DT: 082500 TIME: 0820 DUR: 20
DESC: NEW PATIENT VISIT		DAYS: _____	WKS: _____ MTHS: _____
CLINIC/LOC: FMCGEN	RES GRP/TYPE: KFMCGEN MD		
PCP/REF DR: Maxwell MD, Alan		PASSWORD:	
AUTH#/VISITS: Precert#/Auth#/date of initiation FOR ins.name/type/copay/Term. date			
BILL DET PV: _____	FREQ: _____	CASE: 980361342234	X TEMPORARY APPT. CASE
GU PV: _____	ENC ID: _____	CREATE ENC IND: Y	RADIOLOGY: Y
PROC CD: _____	WAIT LIST IND:	OUTGUIDE IND	
PT COMMENTS: Please bring all your _____ medications. *			
LOW/HI STS: 40 / 55	INSTRUCTIONS	FOR PHYS/CLINIC CMNTS: PF24	

10. Press <ENTER> to schedule the appointment.

NOTE: If warning messages appear, take appropriate action. If you are unsure of what action to take, consult your supervisor.

11. The **SCHEDULE APPOINTMENT - SUMMARY SCREEN** will be displayed. A message at the bottom of the screen will indicate if the scheduling function has completed or an encounter number has been created.
12. The **SCHEDULE APPOINTMENT - SUMMARY SCREEN** will be displayed. Press one of the following to continue: Press **<PF1> (same pt) or <ENTER> (new pt).**

Resource Next Available Time Slots (RNAT) / Searching by Duration

1. *General Activity Type:* any activity type the resource may choose to use when the day/time does not matter. For example: 1) a resource may not be choosy when he/she sees any type of patient; i.e., follow-up patient, new patient, established patient, consult patient, etc. or 2) a resource may want to see all new patients at a specific time (restricted activity types) but has no preference when follow-ups, established, consults, etc. are to be seen. When scheduling General Activity Types, you can search either by the activity type or by duration.

2. From the **SCHEDULE APPOINTMENT** screen, enter the appropriate resource code in the **Res Code:** field.
3. **<TAB>** to the **Pt Sts:** (patient status) field and enter the appropriate status. The patient status will be either: **"1"** (a new patient to the institution), **"2"** (a new patient to your department/division), **"3"** (a return patient to your clinic), or **"4"** (a reactivated patient).
4. **<TAB>** to the **Dur:** field and enter the appropriate duration for the appointment.
(Skip the Acitivity Type field.)

SCHEDULE APPOINTMENT		12/31/04 0800	
PT NAME: SZELUGA	AGGIE MAY	MED REG NO: 000010849727	CHB:
DOB: 10/25/1966	SEX: F	PHONE: 859-257-6543	WORK: CR: FC: F

RES CD: KBROWN	ACTV TY: __	PT STS: 2	DT: _____ TIME: _____ DUR: 60
DESC: _____		DAYS: _____	WKS: _____ MTHS: _____

5. To schedule an appointment a specified number of days, weeks, or months from the current date, **<TAB>** to one of these fields (**Days:**, **Wks:**, or **Mths:**) and enter a number. If these fields are left blank, the system will show appointments from today through the next 30 days. These are not required fields.
6. If insurance information is required, enter information in the following fields (**PCP/Ref Dr.:**, **Auth# or pre-cert #/Visits/Date of Initiation**, and **For:** Insurance name/type/co-pay. If the patient has no insurance, enter "Full Pay" and the deposit amount in the **For:** field. **See Handout J.**
7. **Press <PF3>** for Resource Next Available Time Slots.
8. The **DISPLAY RESOURCE NEXT AVAILABLE TIME SLOTS** screen will be displayed. If no digits were entered in either the **Days:**, **Weeks:**, or **Mths:** fields, RSS will search for available time slots beginning with the current date through the next 30 days. Press **<PF11>** to page through the time slots until the desired appointment time slot is found. . If you need to choose a date/time that showed earlier in the list, **<TAB>** to the **PF11 Search Again Date:** field, type in the desired date and press **<PF11>**.
9. Select the desired line number and press **<ENTER>** to return to the **SCHEDULE APPOINTMENT SCREEN**.
10. **Enter the appropriate description** for the appointment in the field "DESC".
11. Review the following fields and make changes if necessary:
(See page 5, 6 for detailed description of fields.)
 - a. **Clinic/loc**
 - b. **PCP/Ref Dr Name.**
 - c. **Create Enc Ind**
 - d. **Radiology Outguide Ind**
 - e. **Patient Comments**
 - f. **(Phys/Clinic Cmnts)**

- Press <ENTER> to schedule the appointment.

NOTE: If warning messages appear, take appropriate action. If you are unsure of what action to take, consult your supervisor.

- The **SCHEDULE APPOINTMENT - SUMMARY SCREEN** will be displayed. A message at the bottom of the screen will indicate if the scheduling function has completed or an encounter number has been created.
- Press one of the following to continue: Press <PF1> (same pt) or <ENTER> (new pt).

Group Next Available Time Slots (GNAT)

Group Next Available Time Slots: this feature displays available times for a specific activity type or duration with other resources established within that group.

- From the **SCHEDULE APPOINTMENT** screen, <TAB> to the **Actv Type:** field or the **Dur:** field and enter the appropriate search criteria.
- <TAB> to the **Pt Sts:** (patient status) field and enter the appropriate status. The patient status will be either: “1” (a new patient to the institution), “2” (a new patient to your department/division), “3” (a return patient to your clinic), or “4” (a reactivated patient).
- <TAB> to the **Res Grp/Type:** field and enter the appropriate resource group.

SCHEDULE APPOINTMENT		12/31/04	0825
PT NAME: SZELUGA	AGGIE MAY	MED REC NO: 000010849727	CHB:
DOB: 10/25/1966	SEX: F	PHONE: 859-257-6543	WORK: CR: FC: F

RES CD: _____	ACTV TY: EP	PT STS: 3	DT: _____
DESC: _____	DAYS: _____	TIME: _____	DUR: _____
CLINIC/LOC: _____	RES GRP/TYP: <u>KFMCGEN</u>		

- To schedule an appointment a specified number of days, weeks, or months from the current date, <TAB> to one of these fields (**Days:**, **Wks:**, or **Mths:**) and enter a number. If these fields are left blank, the system will show appointments from today through the next 30 days. These are not required fields.
- Insurance information is required. Enter information in the following fields (**PCP/Ref Dr.:**, **Auth#** or **pre-cert #/Visits/Date of Initiation**, and **For:** (insurance name/type and co-pay). If the patient has no insurance, enter “Full Pay” and the deposit amount in the **For:** field. ***See Handout J***
- Press <PF4> for Group Next Available Time Slots.

7. The **RES GRP NEXT AVAILABLE TIME** screen will be displayed. If no digits were entered in either the **Days:**, **Weeks:**, or **Mths:** fields, RSS will search for available time slots beginning with the current date through the next 30 days. Press **<ENTER>** to view additional pages. Press **<PF14>** to page back. Press **<PF1>** to search the next 30 days or a desired date.
8. Select the desired line number and press **<ENTER>** to return to the **SCHEDULE APPOINTMENT SCREEN**.
9. Review the following fields and make changes if necessary:
(See page 5, 6 for detailed description of fields.)
 - a. **Clinic/loc**
 - b. **PCP/Ref Dr Name.**
 - c. **Create Enc Ind**
 - d. **Radiology Outguide Ind**
 - e. **Patient Comments**
 - f. *** (Phys/Clinic Cmnts)**
10. Press **<ENTER>** to schedule the appointment.

NOTE: If warning messages appear, take appropriate action. If you are unsure of what action to take, consult your supervisor and/or template manager.

11. The **SCHEDULE APPOINTMENT - SUMMARY SCREEN** will be displayed. A message at the bottom of the screen will indicate if the scheduling function has completed or an encounter number has been created.
12. Press one of the following to continue: Press **<PF1> (same pt) or <ENTER> (new pt)**.

Walk-In Appointments

Walk-In Appointments: this feature allows you to schedule an appointment for a patient that has called in to be scheduled the same day or for a patient who has come into the clinic unannounced to see a doctor.

1. From the **SCHEDULE APPOINTMENT** screen, enter the appropriate code in the **Res Code:** field.
2. **<TAB>** to the **Actv Type:** field and enter the appropriate activity type.
3. **<TAB>** to the **Pt Sts:** (patient status) field and enter the appropriate status. The patient status will be either: **"1"** (a new patient to the institution), **"2"** (a new patient to your department/division), **"3"** (a return patient to your clinic), or **"4"** (a reactivated patient).
4. Enter the insurance information as explained in **Handout J.**

5. * (Phys/Clinic Cmnts): Press <PF24> if needed.
6. Press <PF6> to select Schedule Walk-In.
7. The **SCHEDULE APPOINTMENT - SUMMARY** screen will be displayed. The current time and date will default and an encounter will automatically be created.
8. Press one of the following to continue: Press <PF1> (same pt) or <ENTER> (new pt).

Recurring Appointments

Recurring Appointments: this feature allows you to schedule several appointments for a patient by indicating the number of days, weeks, or months from the first appointment that the next appointment should occur.

1. From the **SCHEDULE APPOINTMENT** screen, enter the appropriate data depending on the scheduling method you are using. Refer to the previous instructions for scheduling any of the following:
 - **RESOURCE NEXT AVAILABLE TIME SLOTS (RNAT) / Searching by Activity Types**
 - **RESOURCE NEXT AVAILABLE TIME SLOTS (RNAT) / Searching by Duration**
 - **GROUP NEXT AVAILABLE TIME SLOTS (GNAT)**
 - **SPECIFIC DATE REQUESTED**
2. <TAB> key to the **Freq:** field and enter a value to indicate how often the appointments should occur. Allowable values include:
 - 1-7 Every 1, 2, 3, 4, 5, 6, or 7 days
 - M Once a month
 - B Bi-weekly
 - W Weekly (Default)
 - T Every 3 weeks
 - S Every 6 weeks

RES CD: KBROWN	ACTV TY: EP	PT STS:3	DT: _____	TIME: _____	DUR: _____
DESC: _____	DAYS: _____	WKS: _____	MTHS: _____		
CLINIC/LOC: _____	RES GRP/TYPE: _____				
PCP/REF DR: _____	PASSWORD: _____				
AUTH#/VISITS: _____	FOR _____				
BILL DET PV: _____	FREQ: M	CASE: 108497279993	X	PERMANENT APPT. CASE	
GU PV: _____	ENC ID: _____	CREATE ENC IND: Y		RADIOLOGY: N	

3. Press <PF5> to schedule a recurring appointment. The message at the bottom of the screen indicates the appointment has successfully been scheduled.

4. Depending on the value you entered in the **Freq:** field, the system will calculate a new date in the **Date:** field. To schedule a recurring appointment on this date press <PF5>.
5. Each time the <PF5> key is pressed, the message line will indicate if the appointment has successfully been scheduled and a new date will be calculated. You may enter a new value in the **Freq:** field if necessary. If a particular date is not acceptable to the patient, you may press the <PF3> key to search by *Resource Next Available Time Slots* to find an acceptable time.
6. Repeat the above step as often as necessary.
7. Press <ENTER> to schedule the final appointment.
8. The **SCHEDULE APPOINTMENT - SUMMARY SCREEN** will be displayed. Press one of the following to continue: Press <PF1> (same pt) or <ENTER> (new pt).

Specific Date Requested

1. From the **SCHEDULE APPOINTMENT** screen, enter the appropriate code in the **Res Cd:** field.
2. <TAB> to the **Actv Type:** field and enter the appropriate activity type.
3. <TAB> to the **Pt Sts:** (patient status) field and enter the appropriate status. The patient status will be either: “1” (a new patient to the institution), “2” (a new patient to your department/division), “3” (a return patient to your clinic), or “4” (a reactivated patient).
4. <TAB> to the **Date:** field and enter the date for the appointment in **MMDDYY** format. Be careful with the year as it will allow you to back date as well as future date.

SCHEDULE APPOINTMENT		12/31/05	0838
PT NAME:SZELUGA	AGGIE MAY	MED REC NO: 000010849727	CHB:
DOB: 10/25/1966	SEX: F	PHONE: 859-257-6543	WORK: CR: FC:F
RES CD: KBROWN	ACTV TY: EP	PT STS: 3	DT: 090100
DESC: _____	TIME: 1000	DUR: _____	
	DAYS: _____	WKS: _____	MTHS: _____

5. <TAB> to the **Time:** field and enter the time of day that the appointment should occur in military format. For example, if the appointment should occur at 2:00 p.m., enter 1400 in this field.
6. Enter the insurance information as explained in **Handout B and Handout J**.
7. Review the following fields and make changes if necessary:
See page 5, 6 for detailed description of fields.)
 - a. **Clinic/loc**
 - b. **PCP/Ref Dr Name.**
 - c. **Create Enc Ind**
 - d. **Radiology Outguide Ind**

- e. Patient Comments
- f. * (Phys/Clinic Cmnts)

8. Press <ENTER> to schedule the appointment.

NOTE: If warning messages appear, take appropriate action. If you are unsure of what action to take, consult your supervisor and/or template manager.

9. The **SCHEDULE APPOINTMENT - SUMMARY SCREEN** will be displayed. A message at the bottom of the screen will indicate if the scheduling function has completed or an encounter number has been created.

10. Press one of the following to continue: Press <PF1> (same pt) or <ENTER> (new pt).

NOTE: When scheduling with this method, you will not always know if the time slot is available. It is very important to read all warning messages at the bottom of the screen and act accordingly.

Booking the Appointment (Patient Not Found in RSS)

1. If the patient cannot be found in RSS, the message “Patient not found” will be displayed or the patient will not be listed on the **PATIENT INQUIRY - MULTIPLE MATCH** screen. However, they can have a Medical Record Number in the PM system because they were born here or they were a guarantor for another patient.

NOTE: You may have to enter the last name of an existing patient or use a wildcard “*” for the entire first name in order to get to the MULTIPLE MATCH screen.

2. From the **MULTIPLE MATCH** screen or the **PATIENT VERIFICATION** screen, press <PF17> to access the PM Registration System to search for the patient in the Hospital CPI (Corporate Person Index).

3. The **CPI UPDATE** screen will be displayed. The system will have already done a search and a list of patients with similar names will also appear on the screen. This search is not in alphabetical order.

CPI UPDATE		UNIVERSITY HOSPITAL		12/13/04 13:30		
Search starting with: THOMAS						
----- CPI PERSON SELECTION -----						
Select Line Number	Mother's Maiden Name	**AKA Indicator	S R Ttl Sfx V	DOB	Exp Cr	Generated=G Soc Sec #
		St	CPI Nbr			
01.	THOMAS, ANN	F	KY 009799479	10/22/1942		009-79-9479G
02.	THOMAS, ANDREW SMITH	M	KY 012736890	12/22/1970		012-73-6690G
03.	THOMAS, BOY	M	W 009698408	03/12/1996		009-69-8408G
04.	THOMAS, BUTTERCUP WILLIAMS,	* F	W KY 009889098	10/10/1955		123-56-4684
05.	THOMAS, BRENDA	F	KY 009550674	12/22/1979		009-55-0674G
06.	THOMAS, EVR JORDAN	F	W KY 012881959	12/22/1970		134-56-7590
07.	THOMAS, GLORIA LYMAN,	* F	B KY 000940403	11/10/1951		402-74-4506

PF8-FWD PF9-BOOK
YAS46NZ User Id ICTMAS Termid 4FLB Function CPIU

Press <F3> to go back to the CPI search screen and enter appropriate information. Be

sure you are searching on the patient’s correct last name and first name (*not on a wildcard **) **Ways to search the CPI extensively:**

- If the CPI# is not available, search by the patient’s Social Security # (obtain that number from the patient). Do not enter dashes nor leave spaces. Leave all other

fields blank when searching by SS#. If a duplicate social security number is identified, this information should be forwarded to the Medical Records Department.

- If the CPI and the Social Security numbers are not available, search by: Patients' last, the first three letters of the first name, and the date of birth. The next search would be by last name and first initial of first name, using the soundex /phonetic search and mother's maiden name if available.
 - Remember to use the proper naming convention. The suffix is part of the first name field. For example: Jones, William Jr or Jones, William III
- Also, search alphabetically using the patient's last name and <F10> key. **You may need to do the alphabetical search several times. Try the wildcard (*) after the last name in case the proper naming convention was not used or to find hyphenated last names.**

```

CPI UPDATE          UNIVERSITY HOSPITAL      B H 01  12/16/05  08:10
-----
----- CPI SEARCH PARAMETERS -----
-----

Last Name.. Thomas*

First Name .....
Middle Name .....
Title .....
Suffix .....
Sex .....
Race .....
Birthdate .....          (MM DD CCYY)
Mom's Maiden Name..
State of Residence.

CPI Number .....

Social Security Nbr ....

PF9-SAME ACCOUNT   PF10-ALPHA SEARCH
YAP02NZ           User Id,SZELUGA  Termid  Function CPIU
  
```

You must check the Patient Management system thoroughly to ensure the patient does not already have a CPI number (Medical Record Number).

```

CPI UPDATE          UNIVERSITY HOSPITAL      B H 01  12/16/05  08:16
Search starting with: THOMAS
-----
----- CPI PERSON SELECTION -----
-----

Select Line Number      *=AKA Indicator          Generated=G
      S R Ttl Sfx V      DOB      Exp Cr      Soc Sec #
      Mother's Maiden Name      St      CPI Nbr
01.  THOMAS, ANDREW          M          12/22/1970      012-73-6690G
      SMITH                    KY  012736690
02.  THOMAS, ANN            F          10/22/1942      009-79-9479G
      KY  009799479
03.  THOMAS, BOB            * M W          09/10/1970      345-87-2390
      SALVA,                    KY  070209796
04.  THOMAS, BOB B.        M W          09/10/1970      345-87-2390
      SALVA,                    KY  070209796
05.  THOMAS, BOBBY         M W          11/18/1950      125-55-5552
      ADAMS,                    KY  012584264
06.  THOMAS, BOY           M W          03/12/1996      009-69-8408G
      KY  009698408
07.  THOMAS, BRENDA        F          12/22/1979      009-55-0674G
      KY  009550674

PF8-FWD           PF9-ADD CPI
AS46NZ           User Id,SZELUGA  Termid  Function CPIU
  
```

4. If the correct patient is found in the PM system, choose that line number and press <ENTER>. If the correct patient is **not** found, refer to the *New Patient (not in RSS or PM)* instructions that follow.

New Patient (not in RSS or PM)

1. If the patient is not found on the CPI PERSON SELECTION screen, press the <F9 - BOOK> key on that screen.

```
YAS46NZ                                PF9-BOOK
User Id ICTMAS                          Termid 4FLB  Function CPIU
```

2. The **BOOKING LOG** screen will be displayed.

```
BOOKING                                UNIVERSITY HOSPITAL                                12/13/04  13:32
THOMAS
----- BOOKING LOG -----
CONTACT NAME..                          Phone.                               Ext....
PATIENT NAME..                          Name Title.                          Suffix.
ADMT..                                   SCHED DATE.                          TIME...
CHIEF COMPLAINT..
DOB...      SEX...      Social Security #.                    Race...
Patient Phone....      Vip....      Smoker...      Print Pkt...
Adr1..
Zip...      State...      City...      Bad Adr.
Country.      County.
Attend.Phys..      Name.
Ref.      Name.
Patient Type.....      Adm/Reg Type.....      Expect.Delivery..
Location.....      Medical Priority.
Isolation Type...      Diet Code.....      Hospital Service.
Teaching.....      Accom Requested....      Workers Comp.....
Foreign ID #.....      Private Reason...
Comment.....      Foreign System...

YA010NZ                                User Id ICTMAS                          Termid 4FLB  Function BKKG
```

3. Press the <TAB> key to move to the **Patient Name:** field and enter the patient's **LAST NAME, FIRST NAME** using the proper naming convention (the suffix is part of the person's first name field as William Jr or William III) and complete the **Sched Date:** field (as a rule of thumb, enter a date approximately six months from today or further out depending on your clinic). By pressing the <TAB> key to move between the fields, complete the following fields: race, sex, date of birth, social security number, phone number, and address. When completing the address field, use the **Adr1:** field before completing the **Adr2:** field. If the patient lives in Kentucky, Ohio, Tennessee, or West Virginia you will only need to type the zip code in the **Zip:** field. The system will default the city, state, country, and county in the appropriate fields.
4. Press <ENTER>.
5. You will be taken back to RSS and the **SCHEDULE APPOINTMENT** screen will be displayed.

NOTE: If you are taken back to the Appointment Scheduling Menu in RSS and receive an error message: 'Patient Number Already on File,' re-inquire on the patient in RSS to find the patient. The patient should now have a Temporary MRN#.

6. Continue scheduling the appointment for the patient.

New Patient (already in PM)

1. If your patient appears on the **CPI PERSON SELECTION** screen, type the line number and press <ENTER>.
2. The **PERSONAL INFO I** screen will be displayed. Verify and **update** the patient's address, telephone number, etc. on this screen. Press <ENTER>.
3. The **PERSONAL INFO II** screen will be displayed. Review the Employer information on this screen and make corrections if necessary. Press <ENTER> to return to RSS.

NOTE: If the patient is unemployed, type "N/A" in the employer id number field. If this information is already entered in the system, type "N" in the Status field. The system will not let you go on to the next screen if this field is blank. If the employment information is unknown, type "N/A" in the employer id number field and "U" for unobtainable in the Status field.

NOTE: You must make a change to bring across the Permanent Appointment Case. If both screens for the patient are accurate and complete, type "**RSS UPDATE**" under the comments on the **PERSONAL INFO II** screen.

4. Continue scheduling the appointment for the patient.

Updating Patient Demographic Information

All patient information must be updated in the Patient Management (PM) system. This information is automatically transferred to the Resource Scheduling System. Please refer to the *Netview Access* instructions for assistance on **logging on to both RSS and PM simultaneously.**

NOTE: Check the Medical Record Number and follow the directions below for either a valid UK Medical Record Number **or** a Temporary Medical Record Number.

Patient Has a Valid Permanent UK Medical Record Number

(Remember Guarantor MRNs beginning with either a 7 or a 9 and are valid)

1. From the **PATIENT VERIFICATION** screen, press the **<PF18>** key.
2. The **PERSONAL INFO I** screen will be displayed. Make the appropriate corrections and press **<ENTER>**. Be sure to **use F13** to make address and phone number changes.
3. The **PERSONAL INFO-II** screen will be displayed. Make the appropriate corrections and press **<ENTER>**.
4. You will be returned to the **SCHEDULE APPOINTMENT** screen in RSS. Schedule the appointment.

Patient Has a UK Temporary Medical Record Number

1. You must be logged onto the Patient Management system. Press the **<Field Mark/PA2>** key (for CRTs) or the **<Gray Page Down>** key (for PCs) to toggle over to the PM system.
2. In the PM system, select the **BKKU** function.
3. The **PATIENT SELECTION PARAMETERS** screen will be displayed. Type the patient's last name and press **<ENTER>**.
4. The **BOOKING SELECTION** screen will be displayed. Select the appropriate line number and press **<ENTER>**.
5. The **BOOKING LOG** screen will be displayed. Make the appropriate corrections and press **<ENTER>**.
6. The system will display the message **"PROCESSING COMPLETE."**
7. Press the **<Field Mark/PA2>** key or the **<Gray Page Down>** key to return to RSS.

NOTE: The transfer of information may take longer due to the backup on the lines. Do not repeat this procedure again if you do not see changes immediately.

Revise/Review Appointment

1. From the **DISPLAY PATIENT SCHEDULE** screen or the **DISPLAY RESOURCE SCHEDULE** screen, select the line number of the appointment to revise or to review and press the **<PF1>** key.
2. The **REVISE/REVIEW APPOINTMENT** screen is displayed.

```
REVISE/REVIEW APPOINTMENT                                12/13/04  1334
PATIENT NAME: SZELUGA                                WILMA JEAN      MED REC NO: T04348133251
DOB: 12/12/1953  SEX: F TELEPHONE: 859-223-5689  WORK PHONE:
INS:                                                  FC: F SPEC HDL:
-----
                        APPOINTMENT INFORMATION
PRI RES CODE: KBAKER          DAY/DATE: MON 12/13/04      TIME: 1120
DURATION: 20                 ACTV TYPE: NP          STATUS: ATTENDED
CREATE DATE: 12/13/04      CREATE TIME: 1334      CREATE USER: ICTMAS
LAST CHG DATE: 12/13/04   LAST CHG TIME: 1334   LAST CHG USER: ICTMAS

DESCRIPTION: NEW PATIENT VISIT                      CLINIC/LOC: OPH
PT STS: 1 WAIT LIST IND: N  PCP/REF DR: jennings md, connie
AUTH#/VISITS: _____ FOR UKHMO LSA P=$0
BILL DET PV: 888883  CASE: 43481332518  PASSWORD: _____  GU PV: _____
CNG REASON CD: ___  ACTUAL START/STOP TIME: ___ / ___
ENC ID: 131276  ENC STS CD: 0  ENC STS DESC CD: ___
ENC RES CD: KBAKER  CREATE ENC IND: Y RADIOLOGY OUTGUIDE IND: N
PT CMNTS: _____ * PF24
-----
PF1 COMPLETE/RETURN TO MENU      PF15 CANCEL/RETURN      PF18 EDUCATION
PF6 DISPLAY PARTICIPANTS         PF16 RETURN TO MENU    PF12 RAD OUTGUIDE
PF10 PRINT 0 TREATMENT LABEL(S)  PRESS ENTER TO COMPLETE/DISPLAY APPTS
NPRSMA10
```

3. To make revisions **<TAB>** to the appropriate field and enter the new data. Be careful not to change information that should not be changed. To view the allowable codes in a particular field, press **<PF24>** to access the **Help Screen**.
4. After reviewing or making changes, press one of the following to continue:
 - a. Press **<PF1>** to save revisions and return to the **APPOINTMENT SCHEDULING MENU** screen.
 - b. Press **<PF6>** to display the participants of the appointment.
 - c. Press **<PF15>** to cancel any revisions and return to the previous screen.
 - d. Press **<PF16>** to cancel any revisions and return to the **APPOINTMENT SCHEDULING MENU** screen.

- e. Press <ENTER> to save revisions/update screen and return to the **DISPLAY PATIENT SCHEDULE** screen or the **DISPLAY RESOURCE SCHEDULE** screen.

Reschedule Appointment

1. From the **DISPLAY PATIENT SCHEDULE** screen or the **DISPLAY RESOURCE SCHEDULE** screen, select the line number of the appointment to reschedule and press the <PF2> key.
2. The **RESCHEDULE APPOINTMENT** screen will be displayed. *Old appointment information* will be shown above the new appointment information.

```

RESCHEDULE APPOINTMENT                                12/13/04 1340
PATIENT NAME: SZELUGA                                WILMA JEAN      MED REC NO: T04348133251
DOB: 12/12/1953  SEX: F HOME PHONE: 859-223-5689 WORK PHONE:
INS: _____ FC: F SPEC HDL: _____
OLD APPOINTMENT INFORMATION: -----
DT: MON 12/13/04 TM: 11:20 DUR: 20 CREATE DT/TM/USER 12/13/04 1334 ICTMAS
LAST CHG DT: 12/13/04 LAST CHG TM: 1340 LAST CHG USER: ICTMAS
NEW APPOINTMENT INFORMATION:
RES CODE: BAKER ACTV TYPE: NP DATE: _____ TIME: _____ DUR: 20
DESC: NEW PATIENT VISIT DAYS: _____ WKS: _____ MTHS: _____
CLINIC/LOC: OPH PT STS: 1 WAIT LIST: N RES GRP/TYPE: KOPHPED _____
REF DR NAME: JENNINGS MD, CONNIE CNG REASON CD: ___ RAD OUTGUIDE: N
AUTH#/VISITS: _____ FOR UKHMO LSA P=$0
ENC ID: _____ CREATE ENC IND: Y BDP: _____ GU PV: _____ C: 43481332518
PT COMMENTS: _____
INSTRUCTIONS * PF24 FOR PHYS/CLINIC CMNTS

-----
PF1 COMPLETE/RETURN TO MENU PF2 PT SCHEDULE: N PF15 CANCEL/RETURN
PF3 RES NEXT AVAIL: N PF5 RES SCHEDULE: N PF16 RETURN TO MENU
PF4 GRP NEXT AVAIL: N PF12 RAD OUTGUIDE PRESS ENTER TO COMPLETE/DISPLAY APPTS
NPRSMR20

```

3. Refer to the appropriate instructions for scheduling any of the following:
 - **RESOURCE NEXT AVAILABLE TIME SLOTS (RNAT)** – Searching by Activity Types
 - **RESOURCE NEXT AVAILABLE TIME SLOTS (RNAT)** – Searching by Duration
 - **GROUP NEXT AVAILABLE TIME SLOTS (GNAT)**
 - **SPECIFIC DATE REQUESTED**
4. Press one of the following to continue:

- a. Press <PF1> to save revisions and return to the **APPOINTMENT SCHEDULING MENU** screen.
 - b. Press <PF6> to display the participants of the appointment.
 - c. Press <PF15> to cancel any revisions and return to the previous screen.
 - d. Press <PF16> to cancel any revisions and return to the **APPOINTMENT SCHEDULING MENU** screen.
 - e. Press <ENTER> to save revisions/update screen and return to the **DISPLAY PATIENT SCHEDULE** screen or the **DISPLAY RESOURCE SCHEDULE** screen.
5. The old appointment will now have a status of 'RESCHED' (rescheduled) and the new appointment will have a status of 'ATTENDED.'

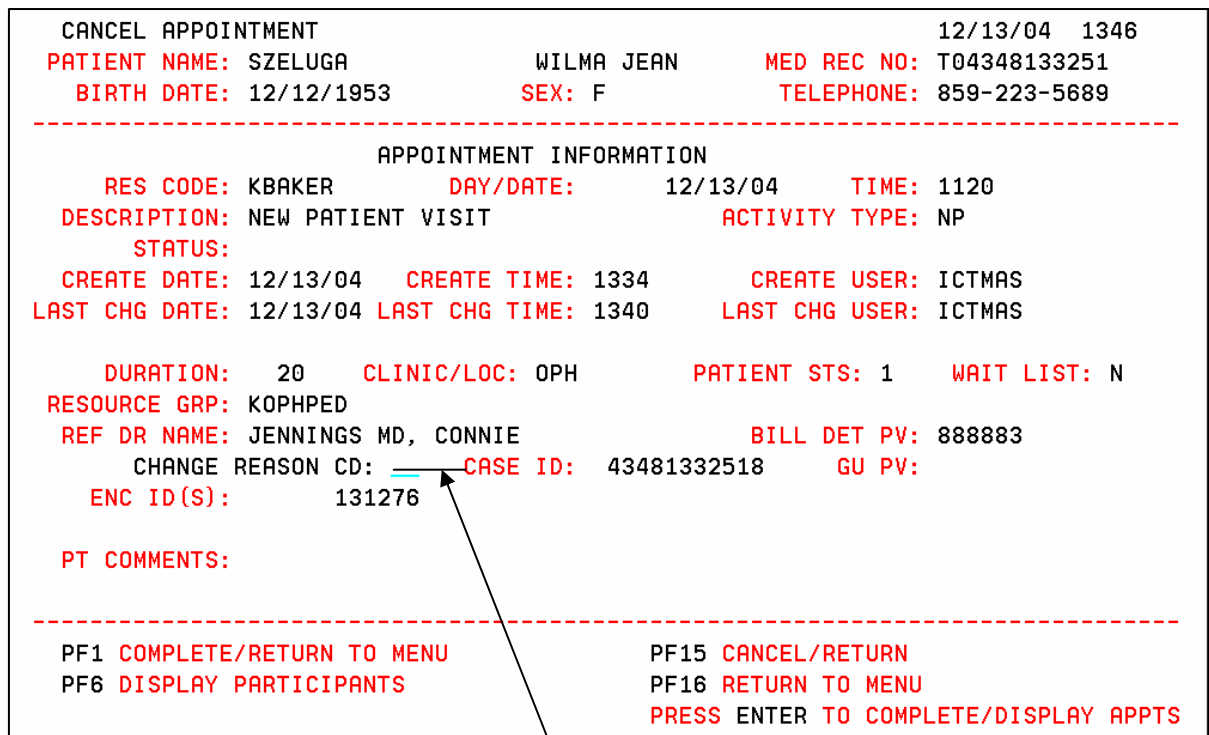
NOTE: If the patient is being rescheduled as a result of leaving without being seen, reschedule the appointment as normal. However, upon returning to the DISPLAY PATIENT SCHEDULE screen, you will need to select the old appointment (status=RESCHED) and revise the appointment by changing the change reason code to LP (left without being seen, patient reason) or LR (left without being seen, resource reason). See Revise/Review instructions.

Cancel Appointment

1. From the **DISPLAY PATIENT SCHEDULE** screen or the **DISPLAY RESOURCE SCHEDULE** screen, select the line number of the appointment to cancel and press the **<PF3>** key.
2. The **CANCEL APPOINTMENT** screen will be displayed.

```
CANCEL APPOINTMENT                                12/13/04  1346
PATIENT NAME: SZELUGA                            WILMA JEAN    MED REC NO: T04348133251
BIRTH DATE: 12/12/1953                          SEX: F        TELEPHONE: 859-223-5689
-----
                        APPOINTMENT INFORMATION
RES CODE: KBAKER      DAY/DATE: 12/13/04    TIME: 1120
DESCRIPTION: NEW PATIENT VISIT                ACTIVITY TYPE: NP
STATUS:
CREATE DATE: 12/13/04  CREATE TIME: 1334    CREATE USER: ICTMAS
LAST CHG DATE: 12/13/04 LAST CHG TIME: 1340  LAST CHG USER: ICTMAS

DURATION: 20    CLINIC/LOC: OPH            PATIENT STS: 1    WAIT LIST: N
RESOURCE GRP: KOPHPED
REF DR NAME: JENNINGS MD, CONNIE             BILL DET PV: 888883
CHANGE REASON CD:        CASE ID: 43481332518  GU PV:
ENC ID(S): 131276
PT COMMENTS:
-----
PF1 COMPLETE/RETURN TO MENU                    PF15 CANCEL/RETURN
PF6 DISPLAY PARTICIPANTS                      PF16 RETURN TO MENU
PRESS ENTER TO COMPLETE/DISPLAY APPTS
```



3. The cursor rests in the **Change Reason Cd:** field. Enter the appropriate code for canceling the appointment. To view the allowable codes in this field, press **<PF24>** to access the Help Screen. Choose the code and press the **<ENTER>** key. The cursor will again be resting at the **Change Reason Cd:** field
4. Press one of the following to continue:
 - a. Press **<PF1>** to save revisions and return to the **APPOINTMENT SCHEDULING MENU** screen.
 - b. Press **<PF6>** to display the participants of the appointment.
 - c. Press **<PF15>** to cancel any revisions and return to the previous screen.
 - d. Press **<PF16>** to cancel any revisions and return to the **APPOINTMENT SCHEDULING MENU** screen.

- e. Press <ENTER> to **save revisions/update screen** and return to the **DISPLAY PATIENT SCHEDULE** screen or the **DISPLAY RESOURCE SCHEDULE** screen.

Entering Attendance

No Show / Left Without Being Seen Guidelines (Cancel or Reschedule)

***** Left Without Being Seen - Patient comes to the appointment but leaves before being seen either due to a patient reason (LP) or a resource reason (LR). *****

If the patient left without being seen, cancel the appointment with a change reason of LP or LR (*refer to Cancellation instructions*). **OR... Reschedule** and revise the original appointment (status=RESCHED) to enter a change reason code of LP (patient reason) or LR (resource reason). *Refer to Reschedule instructions and Revise/Review instructions.*

Scenario 1 - The patient does not show to the appointment and calls in after the appointment time to reschedule.

In order to capture 'No Show' statistics, you need to book the patient's new appointment from scratch. *This appointment should be checked as a No Show through Entering Attendance.* If you "reschedule" the appointment, you lose the ability to 'No Show' the appointment through attendance.

Scenario 2 - The patient calls in before the appointment time to reschedule.

You should reschedule the appointment like normal using the <PF2> (Reschedule Appointment) key. *Please do not enter a reason why the patient rescheduled. This is not a No Show patient.*

***** No Show - Patient does not show up for the appointment *****

Instructions for Entering Attendance

1. From the **APPOINTMENT SCHEDULING MENU** screen, enter the appropriate code in the **Res Code:** field.
2. <TAB> to the **Date:** field and enter the clinic date for which you wish to enter attendance.
3. Press the <PF7> key.

- The **DISPLAY RESOURCE SCHEDULE - ENTER ATTENDANCE** screen will be displayed. It allows you to identify all patients who did not show for the appointment.

DISPLAY RESOURCE SCHEDULE - ENTER ATTENDANCE							12/13/04	1348
RESOURCE: KBAKER					%BOOKED	Q	0	T
DATE: TUE 12/14/04					DAY :	24	27	27
							PAGE	1 OF 2
SEL	START	DUR	PRIMARY PARTICIPANT	DESCRIPTION	ACTV TYPE	OVB	BLK	STATUS
					REPORT TO	LOC/SPECIALTY		
-	11:00	20	SZELUGA	ABBY	EP			ATTENDED
			ESTABLISHED PATIENT		3N	OPH		
X	11:00	20	WHITE	SNOW	FU			ATTENDED
			FOLLOW-UP VISIT		3N	OPH		
-	11:20	20	MOUSE	BUZZY JR	FU			ATTENDED
			FOLLOW-UP VISIT		3N	OPH		
-	11:40	20	MONROE	MARILYN	NP			ATTENDED
			NEW PATIENT VISIT		1N	OPH		
-	13:00	20	DUCK	DAISY	FU			ATTENDED
			FOLLOW-UP VISIT		3N	OPH		
X	16:40	20	WOODS	IKKY	FU			ATTENDED
			FOLLOW-UP VISIT		3N	OPH		

PF 1 CONTINUE PF 3 LAST PAGE PF14 PAGE BACK
PF 2 FIRST PAGE PF 5 SAVE ONLY PF15 CANCEL/RETURN

LINES SELECTED: 0 PRESS ENTER TO PAGE FWRD
NPRSEA00

- RSS assumes that all patients will attend the appointment; therefore, the status of the appointment automatically defaults to ATTENDED.
- Select the patients who did not show for the appointment by placing an "X" in the **SEL:** field (far column on the left). Press the **<ENTER>** key to page forward to select patients on other pages of the resource listing. You may select up to 12 patients at one time. The system will give a signal when 12 patients have been selected.
- Press **<PF1>** to continue.
- The **ENTER ATTENDANCE** screen will be displayed.

9. The cursor will be resting at the **Atn Status:** field. To view allowable values, press <PF24> to access the Help Screen. Type “40” for No Show and press the <ENTER> key.

10. <TAB> to the **Atn Change Reason:** field. To view allowable values, press <PF24> to access the Help Screen. Type “NS” for No Show.

```

ENTER ATTENDANCE                                     12/13/04  1403
RESOURCE: KBAKER                                     SCHED DATE: 12/14/04
-----
ENTER ATN STATUS: 40 AND ATN CHANGE REASON: NS FOR THE FOLLOWING APPOINTMENTS:
SCHEDULED   ACTUAL   TIMES   PRIMARY PARTICIPANT   ATN STATUS CHANGE
START TIME  START   STOP
1 11:00      _____  _____  WHITE                SNOW                50 40  NS
2 16:40      _____  _____  WOODS                 IKKY                 50 40  NS
3
4
5
6
7
8
9
10
11
12
-----
PF 1 COMPLETE/CONT: 1640   PF15 CANCEL/RETURN   PRESS ENTER TO COMPLETE/END
I0102* IF DEFAULTS ARE CORRECT - PRESS ENTER
  
```

11. The listing of patients selected will be displayed along with the status of the old appointment. Press <ENTER> to default the new status that was entered in the **Atn Status:** field above.

12. Press <ENTER> to complete the scheduling function.

NOTE: Attendance is entered by resource and date. Therefore, you will need to follow the above steps for each resource who saw patients.

You CANNOT “No Show” a Walk- in appointment.

Problem Scenarios and Resolutions

Creating a Permanent Appointment Case

At times the Permanent Appointment Case will not appear on the **REVIEW CASES** screen. If the Permanent Appointment Case cannot be found, follow the directions below.

1. Write down the medical record number of the patient and toggle over to Patient Management session (if on a CRT, press the <**Field Mark/PA2**> key; if on a PC, press the gray <**Page Down key**>).
2. Choose the CPIU function (you can type **CPIU** in the **Function:** field which is in the bottom right corner of screen).
3. Enter the CPI number (medical record number) and press <**ENTER**>
4. You will be at the **PATIENT INFORMATION I** screen. Make any needed demographic changes and press <**ENTER**>
5. You will be at the **PATIENT INFORMATION II** screen. If no demographic changes were made on the previous screen, <**TAB**> down to the first **Comment:** field and type “**RSS Update**”
6. Press <**ENTER**>

NOTE: If the Employer fields are blank, key in ‘N/A’ at the ID #1: field and key ‘U’ at the Status: field.

7. Toggle back to RSS (if on a CRT, press the <**Field Mark/PA2**> key; if on a PC, press the gray <**Page Down key**>) and re-inquire on the same patient. The Permanent Appointment Case should be there.

8. If the Medical Record Number ends in a “9” the Permanent Appointment case will NEVER come across, so you need to call the RSS Office. See the note below.

NOTE: Due to the interface (between Patient Management and RSS) delay, it could take up to fifteen minutes for this information to appear in RSS. If after fifteen minutes the Permanent Appointment Case is not on the account, call the RSS Office at 323-6860. If no answer, call the RSS Emergency Pager (UK pager #2727).

Patient is in the “Re-registration file” in RSS

How do you know the patient is in the re-registration file?

Answer: There are two possible ways to know:

- a. After entering patient information on the first screen in RSS, you are sent to a screen that says **Mini-Registration** at the top. (The “all red” screen.)
- b. You are at the Multiple Match Screen and the patient has an “R” under their line number on the left side of the screen.

This happens because the patient has been purged from the active RSS database. You will need to reactivate them by performing a CPIU on the MRN in Patient management. They are **NEVER** purged from Patient Management.

1. First, you need to insure that this account is an actual UK account (**NOT OUTSIDE CLINIC ACCOUNT** i.e., Medical Record number does not start with Alpha characters, Patient ID number is not 8 characters starting with a number other than “1” or “7”.)
2. Follow instructions for *Creating a Permanent Appointment Case (steps 1-7)*.

Error Message: “This Patient is a Duplicate...”

This error message is telling you that this patient has multiple medical record numbers and the patient you selected is the duplicate account.

1. Press <PF15> to return to the **PATIENT VERIFICATION** screen.
2. View the comment listed in the **Comment:** field of this screen to determine the correct medical record number.
3. Re-inquire on the patient using the correct medical record number.

Not Having the Option to Select the “Permanent Appointment Case”

There are times when the RSS system will “skip” the **REVIEW CASES** screen and will go directly to the **PATIENT VERIFICATION** screen. This means that this account only has one case. You need to make sure before you leave **the PATIENT VERIFICATION** screen that the case is the Permanent Appointment Case.

From the **PATIENT VERIFICATION** screen, review the case in the **Case Description:** field (three lines above the **Comment:** field). If it says “Permanent Appointment Case,” you can press <ENTER> to continue to the **SCHEDULE APPOINTMENT** screen.

NOTE: If the case description field is blank, you will need to add a Permanent Appointment Case. See instructions for Creating a Permanent Appointment Case.

Patient was registered before coming to your clinic – no appointment.

A patient was registered before they came to your clinic and they did not have their appointment for that same day scheduled, yet. (They could be a walk-in or a call-in.)

Solution: On the **Review Cases** screen, instead of choosing the permanent appointment case, you must now choose the line number of the registration case for that day. Continue on to book the appointment.