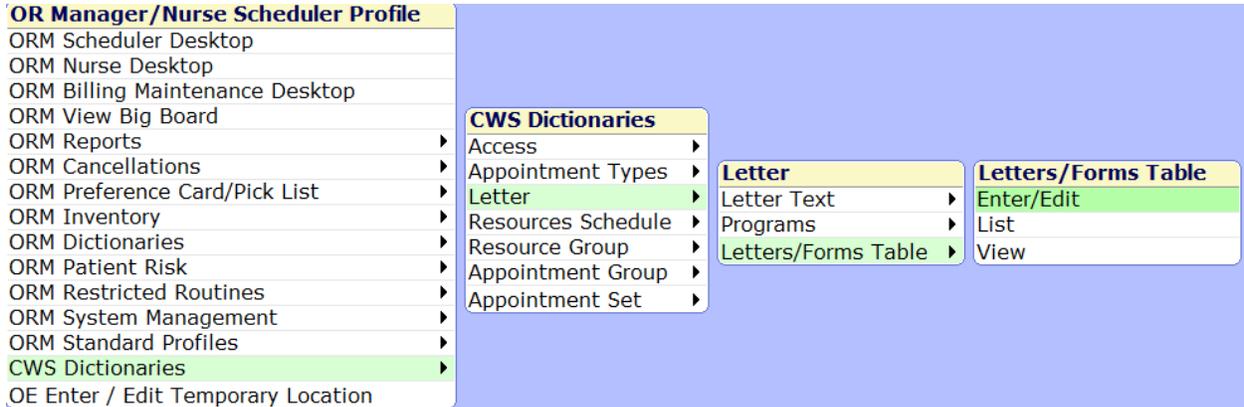


MANAGING MESSAGES (Letter/Forms Tables) FOR ORM PROCEDURES

CWS Dictionaries – Letter – Letter/Forms Table – Enter Edit



The screenshot shows the 'OR Manager/Nurse Scheduler Profile' menu on the left. The 'CWS Dictionaries' option is highlighted. A sub-menu is open for 'CWS Dictionaries', showing options like 'Access', 'Appointment Types', 'Letter', 'Resources Schedule', 'Resource Group', 'Appointment Group', and 'Appointment Set'. The 'Letter' option is highlighted, and a further sub-menu is open for 'Letter', showing 'Letter Text', 'Programs', and 'Letters/Forms Table'. The 'Letters/Forms Table' option is highlighted, and a final sub-menu is open for 'Letters/Forms Table', showing 'Enter/Edit', 'List', and 'View'.

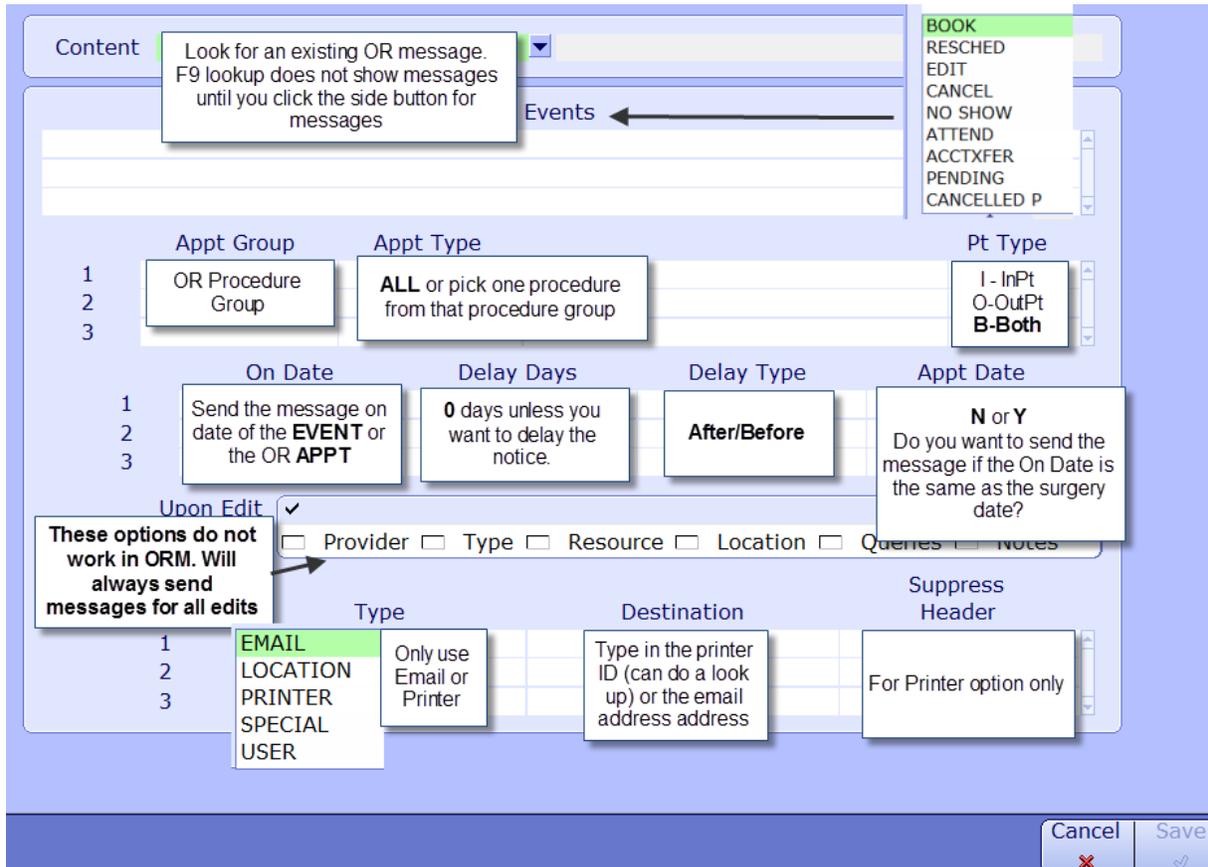
Access is currently limited to users in an OR Manager profile (NURMGR).

Even if your access is not restricted, do not edit the messages (Letter Text) themselves and only edit the events/recipients in the Letter/Forms Tables, if you are sure that is your department's appointments.

Adding a new event to an existing message (book, reschedule, cancel)

- 1) **Enter/Edit** – Type in ORM then F9, then click MESSAGES side button. Pick the applicable message that you will use. If there is no message it may be under another name or you may need to make a formal request for a new one.
- 2) **Content** – that ORM message name appears
- 3) **Events** – Book, Reschedule or Cancel. Do not use EDIT for OR appointments; it will send a new message for every single OR edit. For CWS appointments, you can restrict the edit messages, but that does not work on OR appointments.
- 4) **Appt Group** – OR procedure specialty e.g. DRDORPL– Red Deer OR Plastics
- 5) **Appt Type** – ALL (for all procedures in that specialty) or pick one specific procedure
- 6) **Pt Type** – Pick Both
- 7) **On Date** – Pick EVENT to send the message as soon as the event in #3 happens. Rarely would you pick APPT as this will only send the message on the actual date of surgery.
- 8) **Delay Days** – enter 0. There may be scenarios you want to enter a delay but that is very rare.
- 9) **Delay Type** – leave it blank. Only required if you pick a delay.
- 10) **Appt Date** – No is the typical response. Only enter Yes if you want the message to go when both the event and surgery are the same date. You can repeat this and enter the same event, one with appt date N and one with appt date Y, if that is necessary.

- 11) **Type** – Only use Printer (AHS printer) or Email (MUST be an AHS email). The other options don't consistently work. You can enter multiple users or printers but do note that an error of an email to one user will prevent all the other email recipients in that list, from receiving their notification. An error of a printer just skips that printer.
- 12) Save or go back to the top and repeat the process for another appointment or event.



The screenshot shows the 'Managing Messages' interface in the ORM system. It includes several sections with callouts:

- Content:** A dropdown menu with a callout: "Look for an existing OR message. F9 lookup does not show messages until you click the side button for messages".
- Events:** A button with an arrow pointing left.
- Appt Group:** A dropdown menu with a callout: "OR Procedure Group".
- Appt Type:** A dropdown menu with a callout: "ALL or pick one procedure from that procedure group".
- Pt Type:** A dropdown menu with options: "I - InPt", "O-OutPt", "B-Both".
- On Date:** A dropdown menu with a callout: "Send the message on date of the EVENT or the OR APPT".
- Delay Days:** A dropdown menu with a callout: "0 days unless you want to delay the notice.".
- Delay Type:** A dropdown menu with a callout: "After/Before".
- Appt Date:** A dropdown menu with a callout: "N or Y Do you want to send the message if the On Date is the same as the surgery date?".
- Upon Edit:** A dropdown menu with options: "Provider", "Type", "Resource", "Location", "Queues", "Notes". A callout points to it: "These options do not work in ORM. Will always send messages for all edits".
- Type:** A dropdown menu with options: "EMAIL", "LOCATION", "PRINTER", "SPECIAL", "USER". A callout points to it: "Only use Email or Printer".
- Destination:** A text input field with a callout: "Type in the printer ID (can do a look up) or the email address address".
- Suppress Header:** A checkbox with a callout: "For Printer option only".

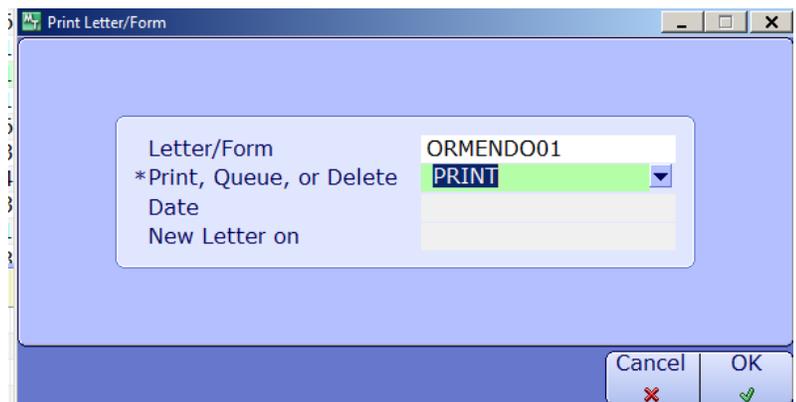
At the bottom right, there are "Cancel" and "Save" buttons.

Edit an existing message table or the recipients

- 1) Follow the first two steps above and simply find the message, the event and search all the items until you find the applicable appointment to edit.
- 2) There is no shortcut so you just have to scroll through and find the information you need to edit.

Printing a new message manually

- 1) Go to the OR appointment on the scheduling grid in the **ORM Schedule Desktop**
- 2) Highlight that appointment and click the footer button called **Schedule**
- 3) The patient appointment desktop will open.
- 4) Find that same OR appointment on this desktop and highlight it.
- 5) Click the footer button called **Letters Forms**
- 6) Enter ORM (or leave blank) then F9, and pick the applicable message
- 7) Print a copy



Requesting a new message or editing an existing message

This refers to the actual letter itself and not to setting up an event or recipient. Try to avail of existing messages first. If no message exists, you need to submit and Intake Request form that is approved by the OR manager.