

- 9) Switch account (side button) if that is currently part of your role. First look for an existing account but if there is not one, switch to new one, then switch it back to the ADM IN and cancel the SCH status account when it prompts you
- 10) Refresh the grid by hitting the picture of the clock in upper left side (notice it changes time intervals from 15-30-60 mins)
- 11) Note the cases and percentage displayed in the room header. Click View Day (side button) and see how it shows used/available minutes
- 12) Click on a patient on the grid, then click Scheduling (footer button). You opened patient appointments
- 13) Click anywhere but on a patient then click Scheduling (footer button) and notice you may have 4 options to pick (Patient, Waitlist, Resource, Book)
- 14) Click Registration (side button) and if you are supposed to be able to Preregister or Register patients confirm this option appears
- 15) Explore and see what other options are available in ORM.

Scheduling Appointment:

- OR comments are a footer button you can access within the appointment
- Scheduler notes can be entered via the Patient Data header button within the appointment (click **Edit**, select **Patient Data** button at the top, select the little blue **Edit** button, then enter the **Scheduler Note**)
- Edit text box automatically appears immediately upon picking the procedure to provide more information, as needed
- Proc and Sched average can be viewed in the appointment via the footer button, as long as the information is on the procedure line of the appointment
- More Info header button in the appointment will display the scheduling CDS, if you need to edit things like Decision to Treat

Scheduling Grid:

- Cases booked and percentage displays on each room or via View Day side button
- You can move to next/prev day or week with the footer buttons
- Scheduling footer button will automatically go to Process Patient Appointments if you have a patient selected/highlighted
- Scheduling footer button may give you 4 options (Patient, Waitlist, Resource, Book), if you do not have a patient selected/highlighted
- The Scheduling footer button will display BOOK to access CWS module to book PAC or other outpatient appointments. Only applicable if this is currently part of your process/role
- Purple color means multiple appointments and is not a conflict. Simply means one case starts and another finishes within the 15 minute increment
- Reorder cases uses numbering, instead of dragging cases up and you cannot edit the set up/clean up here anymore (must edit within the appointment only)