



Adding Patient Appointments to a Clinic



Adding Patient Appointments

Table of Contents

Introduction	Slides 3 & 4
Create Associated Clinical Events	Slide 5
Associated Clinical Event	Slides 6 & 9
Who Contacts the Patient?	Slide 10
Event Log	Slide 11
Appointment Scheduled	Slide 12
Reminder Feature	Slide 13
Ncompass Terminology	Slides 14 & 15

Adding patient appointments to your clinic is an easy and secure way to share information about patients participating in the clinic as well as tracking when they are scheduled to see the consultant.

For reporting purposes, Ncompass uses the number of patients indicated within the clinic frame rather than counting individual patient appointments.

You can create appointments for all, some or none of your patients. However, please note that the total number of patients you indicate in the clinic frame must not be lower than the number of appointments you have scheduled in the clinic itself.

You will not be able to create patient appointments if your clinic is a multipoint event.

If you need to schedule a multipoint clinic and wish to add patient information, then it is best to first schedule the clinic as a point-to-point event, add the patient appointments, and then ask OTN Scheduling to add additional systems.

Please remember that all sites will be able to see the patients included in the event.

Create Associated Clinical Events

[1] Once you have scheduled a point-to-point clinical, the "Create Associated Clinical Event" button will appear in a new section called "Associated Clinical Events". Clicking on the "Create Associated Clinical Event" button opens a panel which allows you to schedule patients within the point-to-point clinical event.

Participant Systems [Click here for help with](#)

Consultant System

Site Name	System Name	Contact Info
Dr Ian Clinic	TOR_ICC_0434_EXE_01 ⓘ	Larry Learner ⓘ llearner@aps.ca 416-826-5555x4191

Patient System(s)

Site Name	System Name	Contact Info	Pat
Dr Kate Medicine - Family Clinic	NBY_KMC_0898_MST_01 ⓘ	Lucy Administrator ⓘ lucya@pop.ca 705-233-7059	<input type="text" value="2"/>

Associated Clinical Events [Click here for help with](#)

1 0 clinical events are currently associated

Room for 2 more clinical events

Associated Clinical Event

Scheduled Event:

0700 24 Hour Format, HHMM 0730

Start Time*:

Patient* :

Gender* : Male Female

Address:

Home Phone:

Work Phone:

Date of Birth: e.g.: 18-01-1973

OHIP Number:

Appointment Type* : Initial Follow-Up

Priority* : Elective Urgent/Emergent Need help selecting the appropriate priority

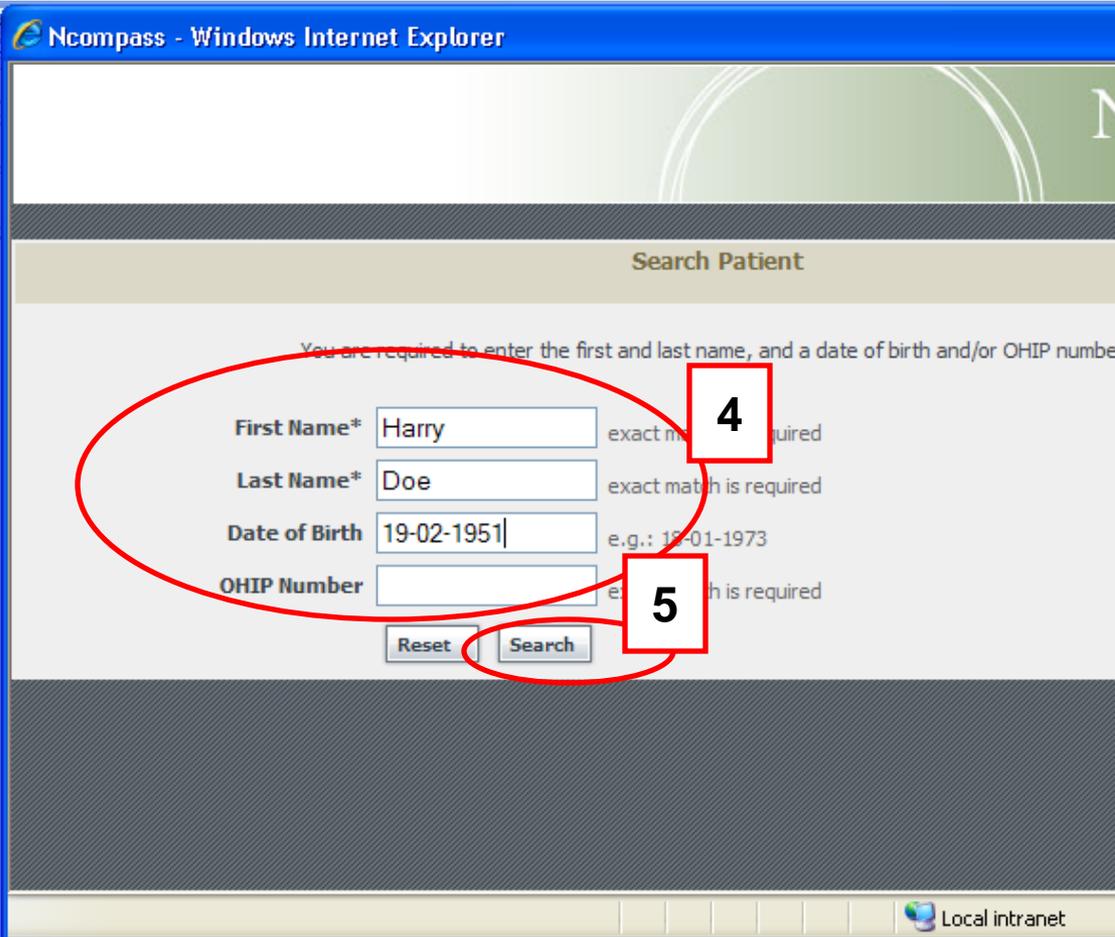
[2] The “Associated Clinical Events’ panel includes the "Start Time" and "End Time" fields only if the event is a serial clinic. Input a start time and end time for the patient’s appointment.

[3] The patient’s details can be entered in one of two ways - from a registry of patients, or typed manually in the fields provided. The patient name is an encrypted field that only clinical schedulers and individuals involved in the event will be able to view. Click the ‘Select Patient’ button to retrieve patient information from the registry.

Associated Clinical Event

[4] A small pop-up window with four search fields - first name, last name, date of birth and OHIP number – will appear. In order to successfully locate and select a patient, you must match a patient in the registry with three search fields - first and last name and either date of birth or OHIP number. Unlike previous search fields, you cannot initiate partial name or data searches. The information that is typed in the fields must be precise otherwise a match will not be made.

[5] Click the “Search” button to initiate the search.



Date of Birth: e.g.: 18-01-1973
 OHIP Number:

[6] Select the patient's name from the search results and the patient's details will automatically populate the patient information fields. If you have trouble locating a patient you know is in the registry, make sure that the patient is not listed under a short form of the name, or a likely alternate spelling.

Ncompass - Windows Internet Explorer

Search Patient

You are required to enter the first and last name, and a date of birth and/or OHIP number.

First Name* exact match is required
 Last Name* exact match is required
 Date of Birth e.g.: 18-01-1973
 OHIP Number exact match is required

Please click on patient name to select a patient.

#	Name	City	Province	Postal Code	Phone
1.	Doe, Harry	-	Ontario	-	705-454-44

Done Local intranet

6

1. [Doe, Harry](#)

Associated Clinical Event

Time*:

Patient* :

Gender* : Male Female

Address:

Home Phone:

Work Phone:

Date of Birth: e.g.: 18-01-

OHIP Number:

7

Appointment Type* : Initial Follow-Up

8

Priority* : Elective Urgent/Emerg

[7] The “Appointment Type” provides the option of choosing either “Initial” or “Follow-up”. If this is the first time the patient is seeing the consultant or allied health professional, please select “Initial”. If the patient has had previous visits with the consultant or allied health professional, click on the “Follow-up” button.

[8] As previously described, the “Priority Code” field is used to indicate the urgency of the clinical event. The “Priority Code” will default to what was selected in the Clinical Frame. However, these codes can be adjusted individually on the patient level.

Who Contacts the Patient?

Who Will Contact The Patient?*

Patient Coordinator
 Consultant Coordinator
 Other (Specify)

Other Coordinator:

Please note that this person will not automatically be notified about contacting the

Appointment Log

9

10

[9] The "Who Will Contact the Patient" section removes the confusion over who is responsible for notifying the patient of their impending appointment. This should be negotiated between both sites when the appointment is being arranged. **Remember that your selection here does not automatically notify the person that you select.**

[10] If "Other" is selected, please indicate who that person is by typing their name in the box labeled "Other Coordinator" or by selecting them from a list of contacts in the registry with the "Select Requestor" button.

Who Will Contact The Patient?*

Patient Coordinator Consultant Coord

Other
Coordinator:

Please note that this person will not automati

Event Log

This patient has been confirmed.

Create Appointment

Cancel Creation

[11] The "Event Log" is similar to an event's "bulletin board" in which you are able to leave and read messages regarding the appointment.

[12] Click on the "Create Appointment" button to save the patient information. When you create your new appointment, Ncompass adds the appointment to the "Associated Clinical Events" section.

11

12

Appointment Scheduled

13

A clinical event has been associated successfully to the clinic frame. Please confirm availability once this information has been secured.

<< Back to Last Calendar View | Refresh This Page

Clinic Event #8525617

14

Start Time	End Time	Patient Name	Event ID	Status	Patient Confirmation
0700	0730	Harry Doe	8525641	Pending	<input type="checkbox"/>

0 hrs 30 mins of UNSCHEDULED TIME

Create Associated Clinical Event >>
Room for 1 more clinical events

Update Associated Clinical Event

[13] When you create your new appointment, Ncompass adds the appointment to the “Associated Clinical Events” section.

[14] Notice that each patient appointment is assigned its own unique Event ID. If you click on the ID, you will be taken to the event detail page for that patient's appointment. From this page you will be able to view the patient information you have inputted as well as the systems involved in the event.



Reminder Feature

Calendar

- Today
- This Week
- View My Events** 2
- View My Marked Times

15

Non-Clinical Events

- Create Multipoint
- Create Point-to-Point

Clinical Events

3 am
4 am
5 am
6 am
7 am
8 am
9 am
10 am
11 am
12 pm
1 pm
2 pm
3 pm

[15] The reminder feature is going to help you keep track of events that haven't been approved. If a patient appointment hasn't been confirmed, you'll see a marker next to the View My Events link as reminder. The marker provides the specific number of patient appointments or events that have not been Approved or Scheduled in Ncompass. Click the View My Events link to view outstanding events. [16] The unapproved events are marked with a red dot and contain buttons that will enable you to more easily approve and confirm an event or appointment. Clicking each specific button confirms a step in the approval process.

Clinical Event (Clinic Id: 24496915) Pending - Patient availability

EVENT DATE: Wed, Mar 25 10:30-11:00 EVENT #: 24497065

PATIENT: Bill Jones EVENT CATEGORY: CLINICAL (Clinic Id: 24496915)

EVENT TYPE: Dermatology (includes wound care) CONSULTANT: Ms. OTN Tester

EVENT TITLE: Test Follow-up ALL SYSTEM(S): OTT_OTN_0272_OTN_05, TOR_OTN_0099_SD_07

PATIENT SYSTEM APPROVAL CONSULTANT SYSTEM APPROVAL PATIENT APPROVAL

Clinical Event Tentative

EVENT DATE: Wed, Mar 25 10:30-11:00 EVENT #: 24731995

PATIENT: Bill Jones EVENT CATEGORY: CLINICAL

EVENT TYPE: Dermatology (includes wound care) CONSULTANT: Ms. OTN Tester

EVENT TITLE: Test Follow-up ALL SYSTEM(S): OTT_OTN_0272_OTN_05, TOR_OTN_0099_SD_07

PATIENT SYSTEM APPROVAL CONSULTANT SYSTEM APPROVAL PATIENT APPROVAL

16

Auto Initiate	An Ncompass feature that enables events to start and end automatically without manual intervention. This means that if you schedule an event to start at 8:00 AM, the systems involved will automatically connect at that time, provided the videoconferencing systems have been turned on.
Clinical Event	An event that directly or indirectly discloses patient information.
Clinic Frame	The actual scheduled videoconference event which contains all the details regarding the video call and includes the: date, start and end times as well as the systems involved.
Multipoint	An event that involves more than three sites in the videoconferencing. Any multipoint event requires a bridge. A bridge acts like the hub of a wheel, bringing together the spokes or in this case the individual sites, in a videoconference. All multipoints have a clearly defined start and end time and must be scheduled at least 30 minutes before they are to occur.



Ncompass Terminology

Ncompass	Ncompass is an online scheduling tool designed for OTN Members to schedule and manage videoconferencing events. It's simple to use, secure and gives OTN Members access to the same scheduling information as OTN Scheduling.
Patient Appointment	An optional component which allows the clinical scheduler to add details such as the start and end time of an patient's appointment, the patient name, contact information as well as any particulars regarding the appointment. Please note, you will not be able to add patient appointment information if your clinic is a multipoint event. To do this you will need to contact OTN Scheduling.
Point-to-point	An event that takes place between two videoconference systems and do not require the involvement of a bridge. Consequently, point-to-point calls can be scheduled at any time. Futhermore, point-to-point events provide users with portal calling features.