



View Schedule

Version 10

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Contact the ORCA Education team if you have any questions about this material by calling the Help Desk at 543-7012 or sending an e-mail to mcsos@u.washington.edu. Please specify which facility you are associated with.

To view the ORCA website click on www.orcaed.washington.edu.

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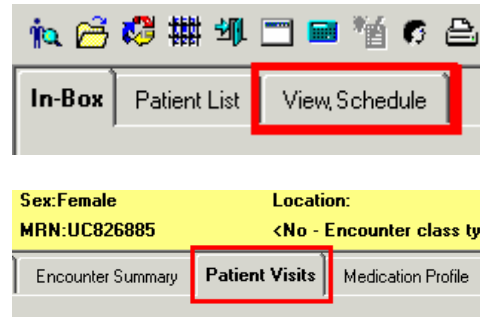
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1. View Schedule

Benefits

EPIC clinic appointment schedule information is viewable from two tabs in ORCA.

- The **View Schedule** tab, in the Organizer, displays *EPIC* provider, resource (room, equipment), or clinic appointment information.
- The **Patient Visits** tab, in the patient chart, displays either all appointments or future patient appointments.

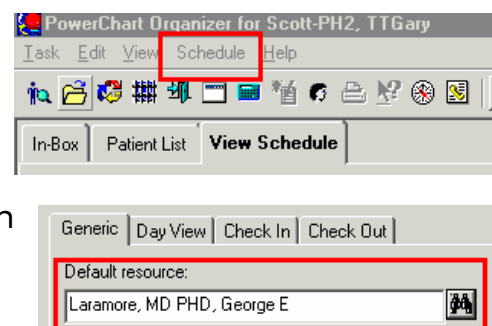


A patient's chart can be opened to the correct encounter automatically, simplifying clinical documentation.

View Schedule Tab

Set Provider, Clinic, or Resource Schedule Default

1. Click the **View Schedule** tab.
2. On the Menu Bar, click **Schedule**.
3. Select **Preferences**.
4. Select the **Generic** tab.
5. In the **Default Resource** field, search for your *EPIC* provider, clinic, or resource name.



Note: Provider/clinic/resource names are the same as in EPIC [ex.: U Emergency Department]. Enter full or use the "" wildcard [ex.: * emergency] and click the binoculars icon.*

6. Select desired name in **Find Resource** window.
7. Click **OK**.

Note: Resource default setting changes will not become effective until you have closed out of ORCA and logged back in.

Select Provider, Clinic, or Resource Schedule

1. Open PowerChart.
2. Click the **View Schedule** tab.
3. In the **Resource** field, search for your *EPIC* provider, clinic, or resource name, e.g. "U Emergency Department."
4. Use an asterisk ("*") as a wildcard, e.g. "*emergency" to find U Emergency Department.

Resource: 

5. Click the **binoculars** (Search) icon if you do not get a match.
6. Select provider/clinic name.
7. Click **OK**.

Selecting Clinic Schedule Date

1. Click the **View Schedule** tab.
2. Click the large button with the upside down triangle.
3. Select the month and year by using the arrows at the top of the calendar.

Date: 

4. Select desired date.
5. Click **OK**.

2004						
May						
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Viewing a Schedule

- Schedule default is **Day View**, which displays all appointments for a given day and will open to today's schedule, one hour prior to the current time. User will need to scroll up or down to see earlier and later portions of the schedule.

Note: Available appointment times will not be identified; only scheduled patients will be viewable.

- Arrived patients appear in **bold** type. All others are in normal type.
- Click the **As of...** button to see new appointments and newly arrived patients.
- Schedule information includes patient name, time and length of appointment, appointment type and status, appointment notes, and appointment clinic.

Time	Appointment Type	Name	Description	Duration	Location
20					
30	Ret 15	OSTON, LUCY	Test Case 16: this patient is very sick and ne	00:15	1-Rad Onc
40					
45	Ret 15	CLOVER, MINDY		00:15	1-Rad Onc

- Demographic information is viewed by moving cursor over patient name.

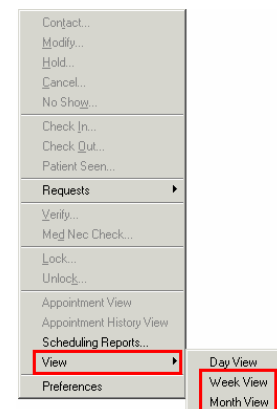
1100	Scheduled	UCC Return	ZZ, AIDA
15			
30			MRN: H5552222; Name: ZZ, AIDA;
45			Birth date: 8/24/1975; Gender: Female;
1200			Home phone: (253) 682-4326; Work
15			phone: (425) 785-1236

Appointment Notes

Appointment Notes from Epic are available in the **Description** column. The text cannot wrap, but complete appointment notes can be viewed by moving cursor over patient note.

To view Weekly or Monthly schedules

1. From the Organizer, click the **View Schedule** tab.
2. Click **Schedule** in the Menu Bar, or right click anywhere on the schedule.
3. Click **View**.
4. Select **Week View** or **Month View**.
5. To revert back to Day View, follow same process and select **Day View**.



Open Patient Chart

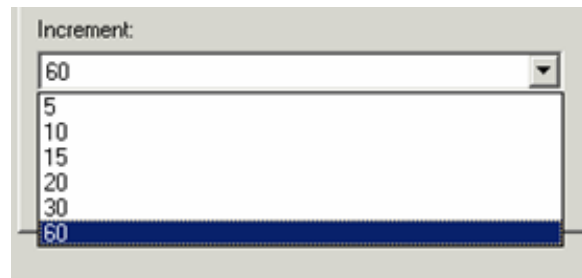
This is the most efficient way to open a patient chart when entering outpatient notes directly into the chart. No further encounter selection required if correct appointment is used to open the patient chart!

1. While in the **View Schedule** tab, set to desired view.
2. Double click the patient's name.
3. Patient chart will open in a new window with that appointment's encounter automatically selected.

Other Features

Change Schedule Increments

1. From the Organizer, click the **View Schedule** tab.
2. On the Menu Bar, click **Schedule**.
3. Select **Preferences**.
4. Click the **Day View** tab.
5. In **Increment** field, select desired appointment time increments.

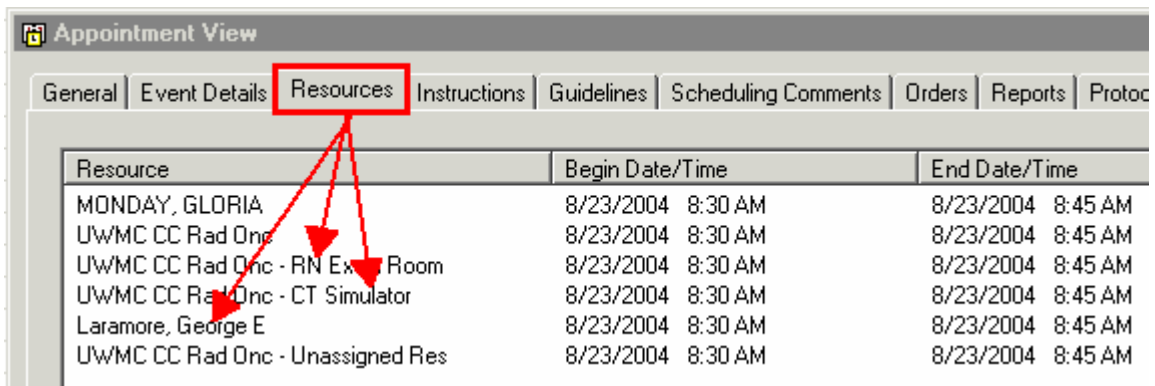


Note: Actual appointment times will override default increment setting.

Appointment Details

Appointments are often linked with specific resources, such as a procedure room or diagnostic device. These details can be viewed from the **View Schedule** tab.

1. Find desired appointment for viewing resource details.
2. Select the appointment by clicking on it.
3. Right-click and select **Appointment View**.
4. Select **Resources** tab.
5. Click **Close** when finished.



Resource	Begin Date/Time	End Date/Time
MONDAY, GLORIA	8/23/2004 8:30 AM	8/23/2004 8:45 AM
UWMC CC Rad Onc	8/23/2004 8:30 AM	8/23/2004 8:45 AM
UWMC CC Rad Onc - RN Exam Room	8/23/2004 8:30 AM	8/23/2004 8:45 AM
UWMC CC Rad Onc - CT Simulator	8/23/2004 8:30 AM	8/23/2004 8:45 AM
Laramore, George E	8/23/2004 8:30 AM	8/23/2004 8:45 AM
UWMC CC Rad Onc - Unassigned Res	8/23/2004 8:30 AM	8/23/2004 8:45 AM

Patient Visits Tab

1. Open patient chart.
2. Click **Patient Visits** tab.
3. The schedule defaults to all appointments (past and future).

Select query:

Schedule Inquiry - All Appointments

Schedule Date	Duration	Status	Appointment	Provider	Location
6/4/2004 - 10:30 ...	60	Rescheduled	UCC Return	Fristoe, ARNP, B...	UWMC CC Rad ...

To view only future appointments, select **Schedule inquiry – Future appointments** in the dropdown list above the schedule window.

Frequently Asked Questions

Q - *Are all the resources in ORCA?*

A - Yes, all provider, clinic, and resources are available.

Q - *How much history can I see? How far back does the data go?*

A - Schedules are viewable as far back as September 9, 2003.

Q - *How can I make a printout of my patient's future appointments? I clicked on the printer icon and nothing happened?*

A - The only way is to print screen. Go to **Task** on menu bar, select **Print Screen**.

Q - *Are there any providers, resources, or clinics that I cannot see?*

A - A few clinics are not viewable on the **View Schedule** tab, such as HMC Sexual Assault Center, for patient privacy. All scheduled appointments are viewable on the **Patient Visits** tab in their chart.

Q - *When I view the patient demographics on the **View Schedule** tab, why does the MRN begin with a "U" when looking at a Harborview appointment (or vice versa)?*

A - ORCA can only display the first MRN entered into the system. ORCA also does not associate MRN with Epic provider/resource/clinic names.

Q - *Why can't I find the schedule for a particular resource on the **View Schedule** tab?*

A - Resource, provider, and clinic names match Epic. Try searching using partial Epic names. For example, when looking for U BJC Spine Fellow, search for "u bjc" and then select from the list. You may also use wildcards. For example, when looking for a certain procedure room, search for "*procedure" and then select from the list.

Q - *We just added a new visit type to EPIC. Why don't I see that in ORCA?*

A - Newly added visit types will appear after they have been added to ORCA, they do not automatically update.