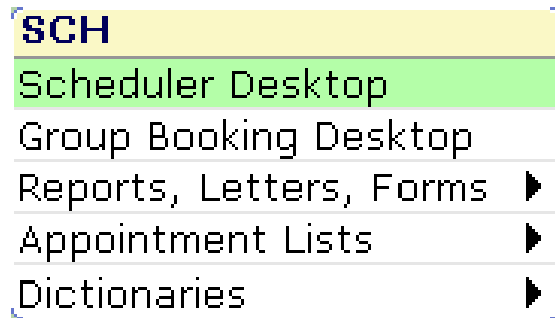


About this Manual

- This manual provides overviews and descriptions of the routines of Community-Wide Scheduling.
- We suggest that you use the online Help for information about responding to individual prompts, a glossary of terms, and to take advantage of the hypertext links that indicate related topics.
- This manual is current as of the date it was created. For the most up-to-date information about this application, consult the online Help.

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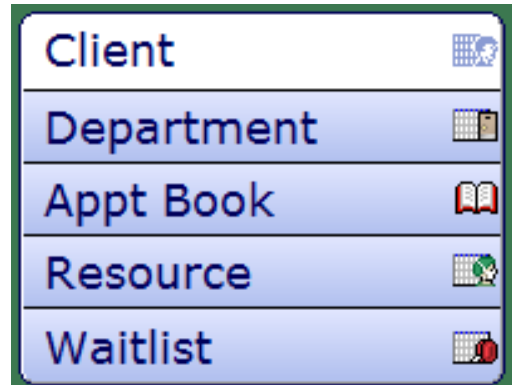
Main Desktop



Scheduler Desktop - Process routines which allow you to book appointments and meetings, manage the waitlist and control resources' schedules. This will be the main focus of this guide.

Group Booking – Routine that allows users to book Group Appointments.

Scheduler Desktop



Client Process Patient Appointments

Department Process Department Appointments

Appt. Book Process Appointment Book

Resource Process Resource Schedules

Waitlist Process Waitlist Appointments

Client Desktop



Udcmph Spottyscissors, Eddie Gi (403)309-8166 Med Rec Num: EH00058398
 1Y 09M/F 13/06/2013 Allergy/AdvRec: Betaxolol, Strawberry, ritonavir, [Tartan Scarf]

Client:

Day	Date *	Time	Dur	Type	Status	Account	CI Type	Location
<input checked="" type="checkbox"/>	Tue 31/03/15	1500	30	MHPHTR30	Booked	EH0010031/14	REG REF	LPHMMH
<input type="checkbox"/>	Wed 01/04/15	1000	30	MHPHTR30	Booked	EH0010031/14	REG REF	LPHMMH

Insurance	Policy Number
AHC	559093214

Additional Information	
Facility	LPHM
Prior Location	
Inpatient Room/Bed	
Provider	

Resource	Resource Name	Telephone
MHPHRM16	MEDICINE HAT ROOM G	

Client Desktop sidebar menu:

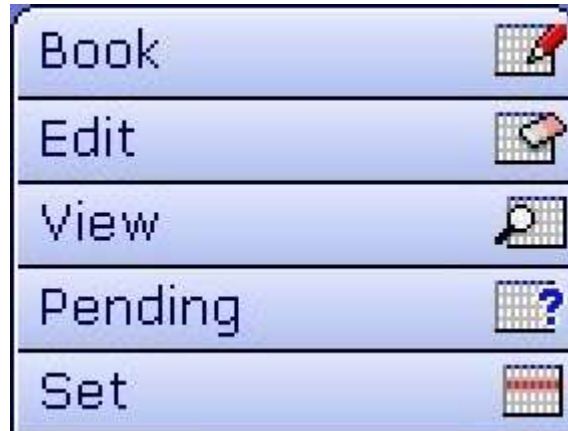
- Client
- Department
- Appt Book
- Resource
- Waitlist
- Book
- Edit
- View
- Pending
- Set
- Check In
- Search for Appt
- Group Desktop

Client Desktop footer buttons:

- Display
- Letters Forms
- Change Status
- Duplicate
- View Alerts

This routine is ideal for centralized schedulers which allow users to process appointments for a client. From this routine users are able to book, cancel, reschedule or edit, register or waitlist, while seeing the **client's appointment history**.

Function Buttons



Book Book a client appointment.

Edit Appointment – Make changes to the 'checked-off' appointment

Appointment Type – Change the type of appointment scheduled.

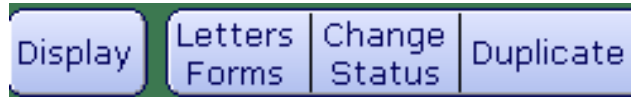
Client demographics can also be edited in either edit screen.

View Views appointment detail for the currently selected appointment

Pending Book a pending client appointment

Set Book a New or Pending Appointment Set

Footer Buttons



Display

Temporarily change your display settings to show or not show appointments of different types, through different dates, or of different statuses.

Letters/Forms Print a Letter or Form for the highlighted appointment(s).

Change Status Changes appointment status.

Duplicate Creates a duplicate appointment (on the same account).

Entering a Client

- Enter client ULI number. Ex: #XXXXXXXXXX

Alternate Ways of Finding a Client

Account Number: Enter capital 'A', the # key, followed by the client's account number.

Ex: A#EH0010031/14

Medical Record Number: Enter capital 'U', the # key, followed by the prefix letter and the client's medical record number.

Ex: U#EH00058398

Telephone Number: Enter capital 'T', the # key, followed by the client's telephone number.

Ex: T#4033098166 (may omit dashes)

Date of Birth: Enter capital 'B', the # key, followed by the client's date of birth.

Ex: B#130613 (may omit slashes)

Booking an Appointment



Udcmph Spottyscissors, Eddie Gi Facility: LPHM Acct Num: EH0010031/14
 1Y 09M/F 13/06/2013 Med Rec Num: EH00058398

*Appointment Appointment Notes

*Appt Type MHPHWCC13 MH WCC (5 yr booster)
 Visit Reason Public Health Services

Client Data		Address/Employer Data	
Birthdate	13/06/2013	Address	256 EVEREST AVE LETHBRIDGE AB T1K 7H8
*Age/*Sex	1Y 09M/F	Home Phone	(403)309-8166
HC Prv/ULI#	/559093214	Call Back	
PCP		Employer	
Diagnosis		Work Phone	

Insurance: Policy Number: AHC 559093214

Resource Group	Name	Start	Dur	Use Resource	I/E/G/L
MHPHROOM	MEDICINE HAT PH CLINIC ROOMS	0	40		INCLUDE

Scheduler Notes

*Date *Time Provider Priority

Book On *Duration 40 CI Type REF Reg Cat REF

Use Inp Loc Location LPHMMH Rsrc Group

Buttons: First Available, Search, Manual Search, Pending? No, Notes, Next Appts, E/E Alerts, Preferred Pharmacy, EMR, Cancel, Next, Save, ?

- Click on the **Book** button to book a new appointment for the client.
- From the Appointment Screen you can view the **client's** upcoming appointments, demographics and insurance information. You can also view their **compliance stats** by clicking on the blue "i" button in the top left hand corner.

Methods of Searching for an Appointment Date and Time

- **First Available:** The absolute earliest time an appointment can be done.
- **Search:** A list of available times from which a user can choose.
- **Manual Search:** Takes you to the appt book where if you double click on a time slot, an appointment can be booked.

Booking a Set



- Press the **Set (S)** button to get to the Schedule Appointment Set routine, where you can schedule a new appointment set (or a Pending Set).

On this screen you are able to enter/edit your appointment set.

Udcmph Quainthobbit, Facility: CPHM Acct Num: CV0010068/14
Bethany Gi Med Rec Num: CV00078473
 39/F 10/05/1975

*Appointment Set More Info SCH-PATIENT LOCATION *Search

Set Type: PHLBIMTB PH LB TB IMMUNIZATION (15 MIN)
 *Visit Reason: PUBLIC HEALTH SERVICES

Appt Type	Name	Durat...	Facility	Early Start	Late Start
PHLBIMTB1	PH LB TB1 IMMUNIZATION 15	15	CPHM		
PHLBIMTB2	PH LB TB2 IMMUNIZATION 15	15	CPHM	2865	56H

Client Data Address/Employer Data

Birthdate	10/05/1975	Address	35 RESIN BLVD LETHBRIDGE AB T1K 7H9
*Age/*Sex	39/F	Home Phone	(403)310-1858
HC Prv/ULI#	/251183214	Call Back	
PCP		Employer	
Diagnosis		Work Phone	

Insurance Policy Number
 AHC 251183214

Scheduler Notes

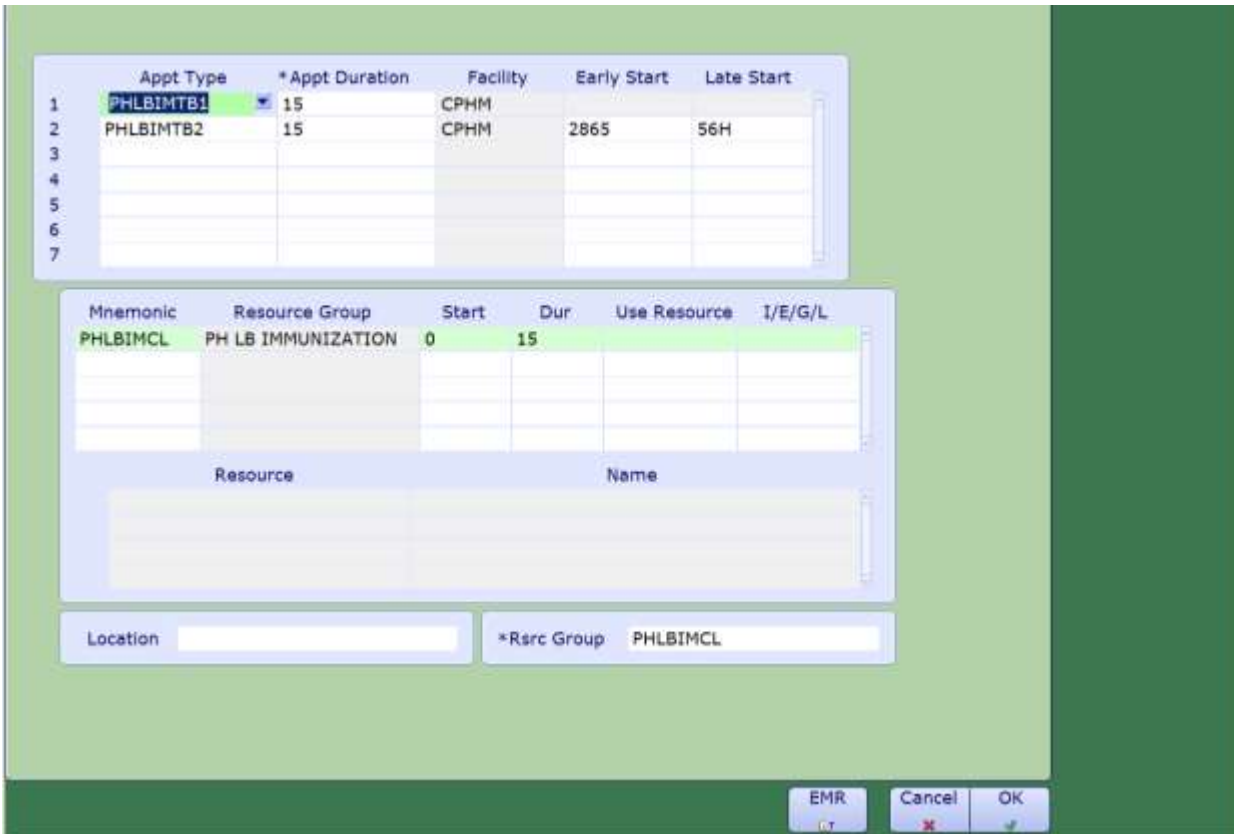
Minimum Gap
 Maximum Duration
 *Sequential
 Priority

CI Type REF
 *Provider
 Reg Cat?

Notes Critical Care Indicators E/E Alerts Preferred Pharmacy EMR Cancel Next Save ?

Client Department Appt Book Resource Waitlist Book Edit View Pending Set EMR Search for Appt Group Desktop

When you click on the EDIT button to change the appointment type details for the appointments in your set, you are brought to the Enter/Edit Appt Information screen.



The screenshot shows the 'Enter/Edit Appt Information' screen. It features two main tables and several input fields.

Table 1: Appointment Details

	Appt Type	*Appt Duration	Facility	Early Start	Late Start
1	PHLBIMTB1	15	CPHM		
2	PHLBIMTB2	15	CPHM	2865	56H
3					
4					
5					
6					
7					

Table 2: Resource Details

Mnemonic	Resource Group	Start	Dur	Use Resource	I/E/G/L
PHLBIMCL	PH LB IMMUNIZATION	0	15		

Resource List

Resource	Name

Input Fields:

- Location:
- *Rsrc Group:

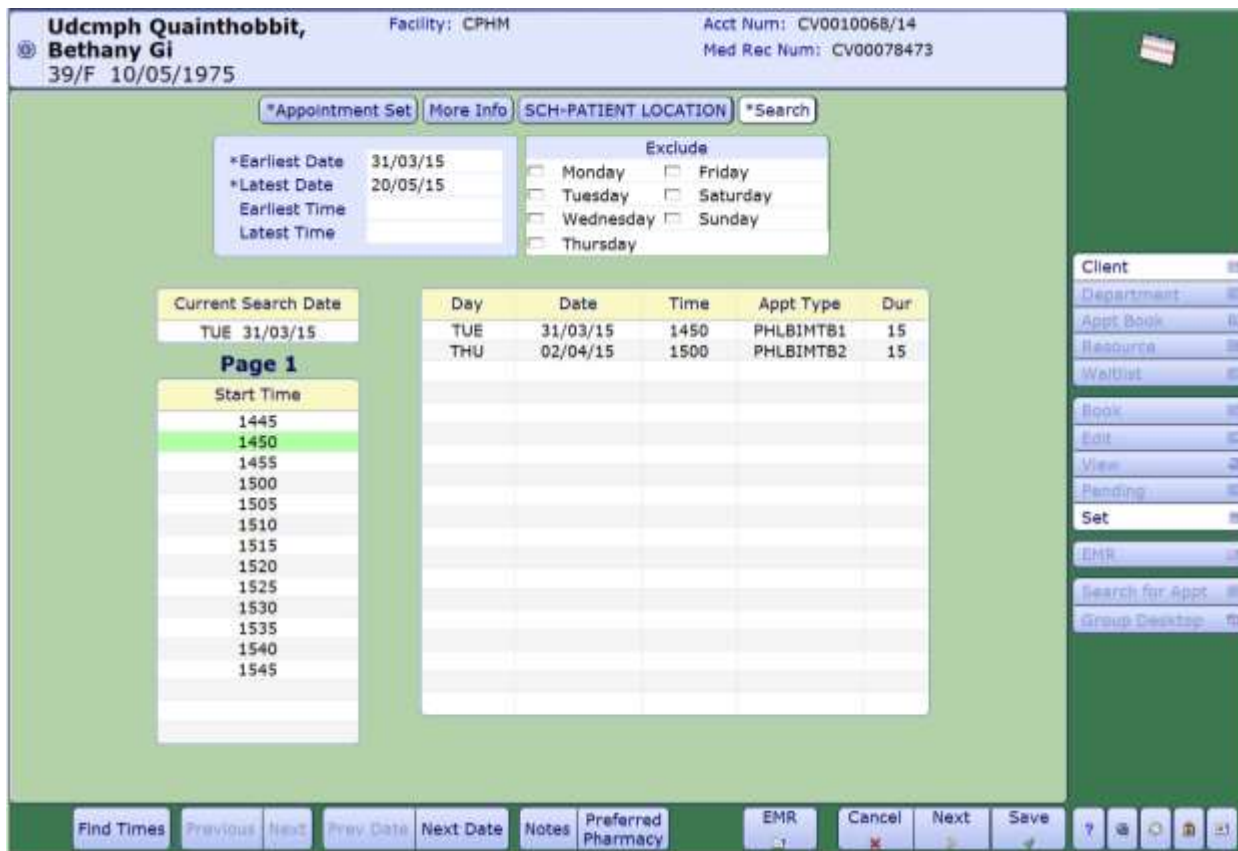
Buttons: EMR, Cancel, OK

This screen allows you to change:

- Appointment Types and Durations
- Appointment Early and Late Start Times
- Resources for each Appointment in the Set

**When booking appointment sets – always keep in mind what your individual appointment types have their 'book minutes' set to. As well as any start time restrictions for the appointments, or the resources associated to them (especially if the associated resources have Appointment Profiles attached to them). Set Availability will greatly depend on these factors.*

After choosing the details about your appointment set, you'll click on the **SEARCH** button at the top of your screen:



The screenshot shows the 'Udcmph Quainthobbit, Bethany Gi' scheduler interface. At the top, it displays patient information: '39/F 10/05/1975', 'Facility: CPHM', 'Acct Num: CV0010068/14', and 'Med Rec Num: CV00078473'. Below this are buttons for '*Appointment Set', 'More Info', 'SCH-PATIENT LOCATION', and '*Search'. The search criteria section includes fields for 'Earliest Date' (31/03/15), 'Latest Date' (20/05/15), 'Earliest Time', and 'Latest Time'. An 'Exclude' section has checkboxes for days of the week: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. The results section shows a table with columns: Day, Date, Time, Appt Type, and Dur. The table contains two rows: TUE 31/03/15 at 1450 (PHLBIMTB1, 15) and THU 02/04/15 at 1500 (PHLBIMTB2, 15). To the left of the table is a 'Start Time' list with values from 1445 to 1545 in 5-minute increments, with 1450 highlighted. On the right side, there is a 'Client' sidebar with various options like 'Department', 'Appt Book', 'Resource', 'Waitlist', 'Book', 'Edit', 'View', 'Pending', 'Set', 'EMR', 'Search for Appt', and 'Group Desktop'. At the bottom, there is a navigation bar with buttons: 'Find Times', 'Previous', 'Next', 'Prev Date', 'Next Date', 'Notes', 'Preferred Pharmacy', 'EMR', 'Cancel', 'Next', 'Save', and a help icon.

- Enter your search criteria and click **FIND TIMES** to get a list of available times to choose for your set. Notice on the bottom right hand side of the screen is where the details about the timeslot you selected will be displayed.
- Use the **Prev Day**, **Next Day**, **Go To Day** buttons to navigate the DAY in which you want to search for available times for your set.

Editing/Rescheduling an Appointment



- From Scheduler Desktop, select the appointment to edit or reschedule, then hit the **Edit** button to access the Edit Appointment routine.

- Edit Appointment
- Edit Appt Type



Udcmph Spottyscissors, Eddie Gi
1Y 09M/F 13/06/2013

Facility: LPHM Acct Num: EH0010031/14
Med Rec Num: EH00058398

*Appointment Appointment Notes

Visit Reason: Public Health Services

Client Data		Address/Employer Data	
Birthdate	13/06/2013	Address	256 EVEREST AVE LETHBRIDGE AB T1K 7H8
*Age/**Sex	1Y 09M/F	Home Phone	(403)309-8166
HC Prv/ULI#	/559093214	Cell Back	
PCP		Employer	
Diagnosis		Work Phone	
Insurance Policy Number			
AHC	559093214		

Resource Group	Name	Start	Dur	Use Resource	I/E/G/L
MHPHROOM	MEDICINE HAT PH CLINIC ROOMS		0	30 MHPHRM16	INCLUDE

Scheduler Notes

Date: 31/03/15 Appt Type: MHPHTR30
Time: 1500 Name: MH TRAVEL RESORT (1 CLIENT)

New Date		Book On		Rschd Reason	
New Time		*Duration	30	Location	LPHMMH
Provider		CI Type	REF	Rsrc Group	
Priority		Reg Cat	REF		

Client: 80
Department: 85
Appt Book: 83
Resource: 86
Waitlist: 85
Book: 87
Edit: 85
View: 88
Pending: 89
Set: 86
Check In: 89
Search for Appt: 80
Group Desktop: 89

First Available Search Manual Search Notes Next Appts CCI E/E Alerts Preferred Pharmacy EMR Cancel Next Save

CMPH – SCHEDULER DESKTOP TOOL

- This screen will allow you to edit any of the existing information about the scheduled appointment, resources, or queries – as well as an added section at the bottom to place a NEW date and time to the appointment (which will reschedule it) and to capture a Reschedule Reason.
- From Scheduler Desktop, select the appointment that needs the appointment type changed, then hit the **Edit** button to access the Edit Appointment Type routine

Edit Appointment
 Edit Appt Type

Udcmph Spottyscissors, Eddie Gi Facility: LPHM Acct Num: EH0010031/14
 1Y 09M/F 13/06/2013 Med Rec Num: EH00058398

Date: 31/03/15
 Time: 1500
 Status: BOOKED
 Provider:

Current Appointment Information

Appt Type: MHPHTR30 MH TRAVEL RESORT (1 CLIENT)

Resource Group	Name	Start	Duration	Resource
1 MHPHROOM	MEDICINE HAT PH CLINIC ROOMS	0	30	MHPHRM16
2				
3				

Duration: 30 Location: LPHMMH
 Priority: Based on:

New Appointment Information

*Appt Type:

Resource Group	Name	Start	Dur	Use Resource	I/E/G/L
MHPHROOM	MEDICINE HAT PH CLINIC ROOMS	0	30	MHPHRM16	INCLUDE

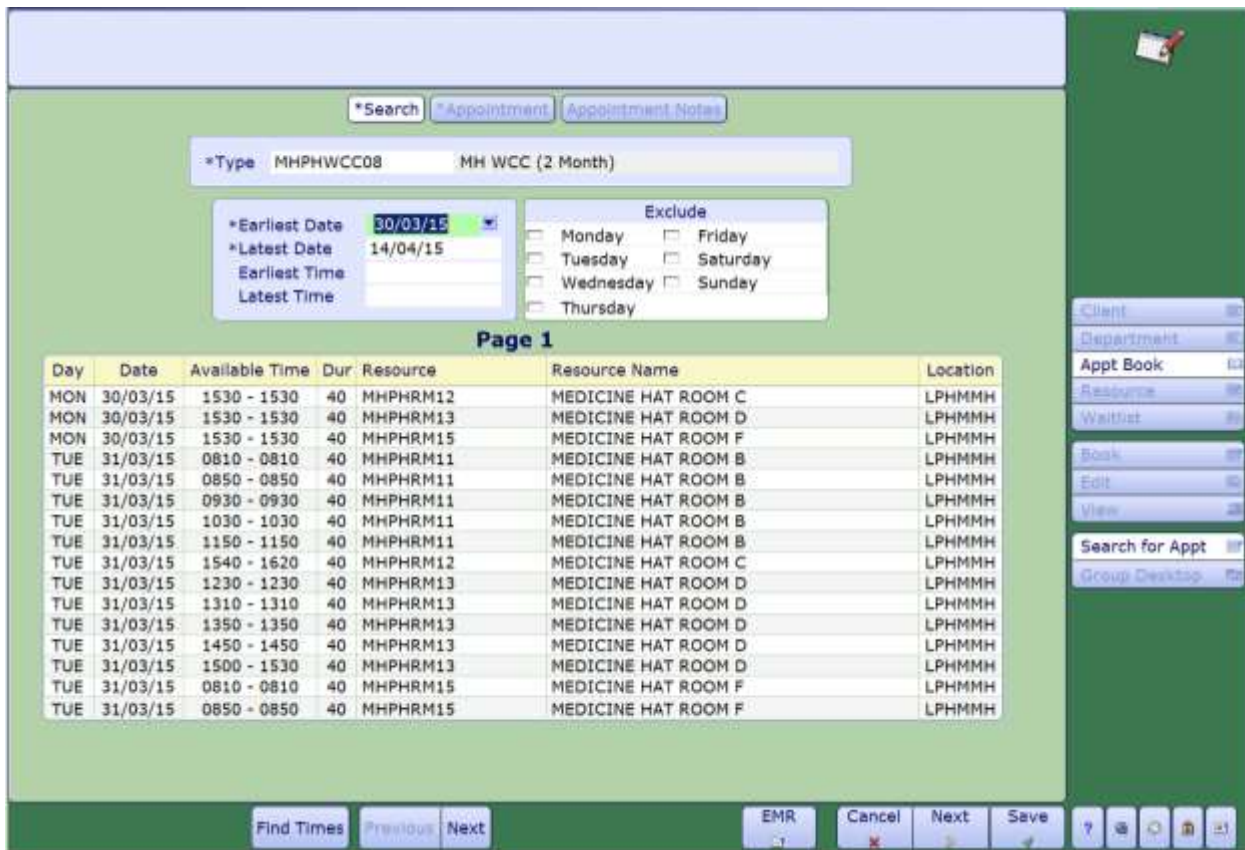
*Duration: 30 Location: LPHMMH
 *Edit Reason: Based On:

- This screen will allow you to edit the appointment type or any of the existing information about the scheduled appointment, resources, or queries and will capture the Edit Reason.

Search for Appointment



Use this routine to search for an appointment time without entering client info.



*Search *Appointment Appointment Notes

*Type MHPHWCC08 MH WCC (2 Month)

*Earliest Date 30/03/15
*Latest Date 14/04/15
Earliest Time
Latest Time

Exclude
 Monday Friday
 Tuesday Saturday
 Wednesday Sunday
 Thursday

Page 1

Day	Date	Available Time	Dur	Resource	Resource Name	Location
MON	30/03/15	1530 - 1530	40	MHPHRM12	MEDICINE HAT ROOM C	LPHMMH
MON	30/03/15	1530 - 1530	40	MHPHRM13	MEDICINE HAT ROOM D	LPHMMH
MON	30/03/15	1530 - 1530	40	MHPHRM15	MEDICINE HAT ROOM F	LPHMMH
TUE	31/03/15	0810 - 0810	40	MHPHRM11	MEDICINE HAT ROOM B	LPHMMH
TUE	31/03/15	0850 - 0850	40	MHPHRM11	MEDICINE HAT ROOM B	LPHMMH
TUE	31/03/15	0930 - 0930	40	MHPHRM11	MEDICINE HAT ROOM B	LPHMMH
TUE	31/03/15	1030 - 1030	40	MHPHRM11	MEDICINE HAT ROOM B	LPHMMH
TUE	31/03/15	1150 - 1150	40	MHPHRM11	MEDICINE HAT ROOM B	LPHMMH
TUE	31/03/15	1540 - 1620	40	MHPHRM12	MEDICINE HAT ROOM C	LPHMMH
TUE	31/03/15	1230 - 1230	40	MHPHRM13	MEDICINE HAT ROOM D	LPHMMH
TUE	31/03/15	1310 - 1310	40	MHPHRM13	MEDICINE HAT ROOM D	LPHMMH
TUE	31/03/15	1350 - 1350	40	MHPHRM13	MEDICINE HAT ROOM D	LPHMMH
TUE	31/03/15	1450 - 1450	40	MHPHRM13	MEDICINE HAT ROOM D	LPHMMH
TUE	31/03/15	1500 - 1530	40	MHPHRM13	MEDICINE HAT ROOM D	LPHMMH
TUE	31/03/15	0810 - 0810	40	MHPHRM15	MEDICINE HAT ROOM F	LPHMMH
TUE	31/03/15	0850 - 0850	40	MHPHRM15	MEDICINE HAT ROOM F	LPHMMH

Find Times Previous Next EMR Cancel Next Save

Enter the appointment type in the 'Type' field, or do an **F9** lookup to find it. Enter any day or time restrictions and click on **FIND TIMES**.

The list will display with available appointment times. To book one, click on the slot you want and then either on NEXT on the bottom, or APPOINTMENT on the top of the screen to be brought into the Appointment Booking Screen.

Department Desktop



Use this routine to see appointments in a particular department. You can change the display to include only certain appointments or appointment statuses.

This routine is ideal for departmental staff to use as a work list or for a department head to keep track of what is going on in the department.



MEDICINE HAT PUBLIC HEALTH (403)502-8200 Med Rec Num: EH00058604
 Udcmph Aniston, Jennifer 2Y 03M/F 03/12/2012 Allergy/AdvReac: Peanuts

+Department

Day	Date	Time	Dur	Type	Status	Account	CI Type	Client
Wed	01/04/15	1030	80	MHPHWC...	Booked	EH0000005/15	REG REF	Udcmph Aniston, Jennifer
Wed	01/04/15	1150	40	MHPHWC...	Booked	EH0010031/14	REG REF	Udcmph Spottyscissors, Ed...

Insurance: ALBERTA HEALTH CARE PLAN Policy Number: [blank]

Additional Information:
 Facility: LPHM
 Location: LPHMMH
 Prior Location: LPHMMH (BOOKED)
 Inpatient Room/Bed: [blank]
 Provider: [blank]

Resource: MHPHRM10 Resource Name: MEDICINE HAT ROOM A Telephone: [blank]

Footer buttons: Display, Letters Forms, Change Status, Transfer, Duplicate, View Alerts

The footer buttons on this screen are the same as the Client Booking screen, with one addition:

Transfer: Enables you to transfer an appointment from one resource to another.

Resource Desktop



Use this routine to view or edit an individual resource's schedule. You can also book appointments from this routine.

MEDICINE HAT ROOM A Resource Group: MEDICINE HAT PH CLINIC ROOMS
Count/% Booked: [1] 17%

Resource

March 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
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	6	7	8	9	10	11

Thursday March 26, 2015			
0810	0850	Available - MHPHROOM	WC
0850	0930	Available - MHPHROOM	WC
0930	1010	Available - MHPHROOM	WC
1010	1030	BRK - COFFEE	
1030	1110	Udcmph Spottyscissors,Eddi...	WC F
1110	1150	Available - MHPHROOM	WC
1150	1230	Available - MHPHROOM	WC
1230	1300	<Unavailable>	
1300	1630	OFFBOOK - INTAKE	

Client Information		Appointment Information	
Birthdate		Appt Type	
Age/Sex		Appt Duration	
Home Phone		Facility	
ULI Prv/Num		Provider	
Account Num		Appt Status	
Med Rec Num		Client Type	
Insurance		Reason For Visit	

Client Department Appt Book Resource Waitlist Book Edit View Search for Appt Group Desktop

Prev Month Next Month Go To Day Cut Copy Paste

This routine is ideal for staff who wish to view their own schedule or book for themselves, as well as for schedulers who wish to process the appointments of a single resource.

CMPH – SCHEDULER DESKTOP TOOL

In the calendar portion of this routine, a gauge tracks how much time the resource is booked for per day.



If this gauge is **blue**, it indicates that there are appointments booked into the day's schedule



Thursday March 26, 2015			
0815	0845	Available - MHPHROOM	TR
0845	0915	Available - MHPHROOM	TR
0915	0945	Udcmph Spottyscissors,Eddi...	TR
		Udcmph Badberry,Ivy	TR
0945	1015	Available - MHPHROOM	TR
1015	1030	BRK - COFFEE BREAK	
1030	1100	Udcmph Spottyscissors,Eddi...	TR
1100	1130	Available - MHPHROOM	TR
1130	1145	Available - MHPHROOM	TR

A **white** line indicates that the time slot is available.

A **blue** line indicates that the resource is booked for an appointment at that time. The Appointment Type and client name displays in the line. A **red** line indicates

overbooked time. Each client that is booked in this time slot will have an individual line. When a user clicks on a line, additional client and appointment information is displayed on the bottom of the screen. A **green** line is the appointment that you have clicked on.

Editing a Resource's Schedule



- With the desired day selected, hit the **Edit (E)** button. You will be brought to the Edit Resource Schedule screen.

MEDICINE HAT ROOM D Count/% Booked: [0] 0%

Resource: MHPHRM13 MEDICINE HAT ROOM D
 for Date: Thursday March 26, 2015

Day Edit Reason: [] Edited By: []
Last Edit: []

From	Thru	Cap	Rsrc Grp	Release Within	Inc/Exc	Profile Monogram	Time Edit Reason	Comment
0800	1230	0					OFFBOOK	CDC/TB
1230	1310	1	MHPHROOM		INCLUDE	WC		
1310	1350	1	MHPHROOM		INCLUDE	WC		
1350	1430	1	MHPHROOM		INCLUDE	WC		
1430	1450	0					BRK	COFFEE BREAK

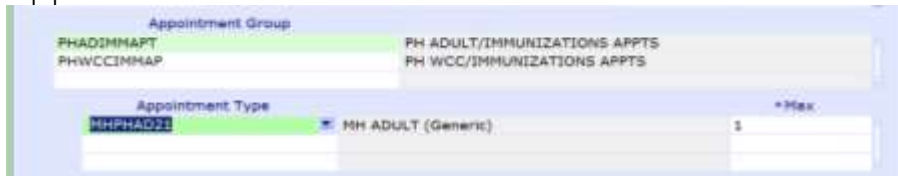
Appointment Group: []

Appointment Type: [] Max

Client Types: []

- Client []
- Department []
- Appt Book []
- Resource []
- Waitlist []
- Book []
- Edit []
- View []
- Search for Appt []
- Group Desktop []

- To make a resource unavailable for all or part of the day, change the capacity in the available timeslots to 0 – or simply delete the timeslots from the day.
- The bottom portion of the screen can also be used to place temporary Appointment Profiles on selected time slots for a Resource.



The screenshot shows a software interface for scheduling appointments. It features two main sections: "Appointment Group" and "Appointment Type".

Appointment Group: This section contains two columns of options. The left column lists "PHADIMHAPT" and "PHWCCIMHAP". The right column lists "PH ADULT/IMMUNIZATIONS APPTS" and "PH WCC/IMMUNIZATIONS APPTS".

Appointment Type: This section includes a dropdown menu currently set to "MHPHAD02", a text input field containing "MH ADULT (Generic)", and a numeric input field with the value "1". A "+Max" label is positioned to the right of the numeric field.

Appointment Book Desktop



Use this routine to view the schedules for an entire resource group at once. You can also view one resource's schedule for the week.



MEDICINE HAT ROOM D
Time Slot: 1000-1100 Capacity: 0 Offbooked: Cdc/Tb
Profile: N/A

Resource Group: MPHROOM MEDICINE HAT PH CLINIC ROOMS

Wednesday April 01, 2015

Time Slot	MHPHOFSSI...	MHPHRM10	MHPHRM11	MHPHRM12	MHPHRM13	MHPHRM14	MHPHRM15	MHPHRM16
8:00 am	[0] 0%	WC	<Unavailab... MHPHWCC08 Udcmph Ani...	FF	OFFBOOK	OFFBOOK	<No Sch>	
9:00 am		HV	MHPHWCC08 Udcmph Ani... <Available>					TR
10:00 am		<Available> MHPHWCC08 Udcmph Ani...	<Available> <Multiple>	FF				MHPHT830 Udcmph Sp... <Available>
11:00 am		MHPHWCC08 Udcmph Ani... MHPHWCC13 Udcmph Sp...	<Multiple>					TR

Client Department Appt Book Resource Waitlist Book Edit View Search for Appt Group Desktop

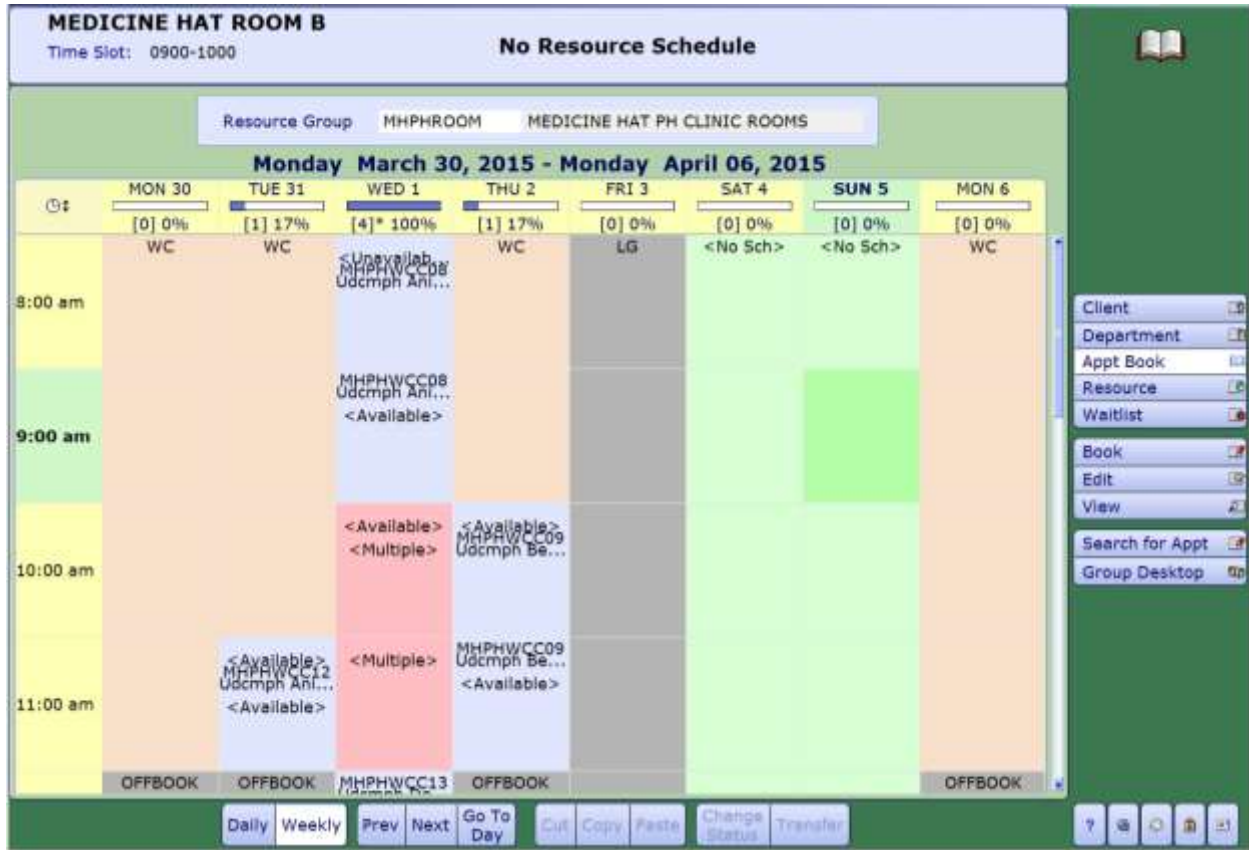
Daily Weekly Prev Next Go To Day Cut Copy Paste Change Status Transfer

Appointments can be booked from this screen, as well as easily transferred between times and/or resources via a cut and paste function.

A **peach** block indicates that the time slot is available. A **blue** block indicates that the resource is booked for an appointment at that time. The Appointment Type and patient name displays in the block. A **red** block indicates overbooked time or an appointment booked at an unavailable time. **<Multiple>** indicates that there are two or more patients booked at the same time. Additional patient information is displayed in the top bar when a user clicks on a time block. A **grey** block indicates that there is no schedule defined for the resource at that time. Finally, a **green** block of time indicates no schedule for that time.

By clicking on the clock in the left corner of the Appointment Book, you may change the time display. For example, you may choose to view thirty minute time increments instead of sixty.

Views can be changed from **Daily** to **Weekly** views. **Daily** shows you all the resources in the group for the day you've selected. **Weekly** will show you the weekly schedule for whatever resource you've highlighted.



This routine is ideal for centralized schedulers who need to view the schedules of all resources in a group simultaneously.

Waitlist Desktop



This is used for clients that need an appointment, but one is not available, or for clients that have an appointment booked, but are hoping to come in sooner than the booked appointment. When there are cancellations, the staff would check the Waitlist to see if there are clients to fill the open appointment.



The screenshot shows the "Waitlist Desktop" interface for a client named "PH LB IMMUNIZATION". The interface includes a header with client information, a table of waitlist items, and several data panels.

Client Information:
 PH LB IMMUNIZATION (403)308-0368 Med Rec Num: CV00078450
 Udcmph Quietscissors, Gilbert 2Y 01M/M 22/02/2013 Allergy/AdvRec: Strawberry, fluoxymesterone, [Tartan Scarf]

Waitlist Table:

Type	Pri*	SN	WL Date	Time	Status	Category	Latest Date	Client
<input checked="" type="checkbox"/> PHLBWCC40	1		11/12/14	1439	Pending			Udcmph Quietscissors, G...
<input type="checkbox"/> PHLBIMTR90	1	Y	12/03/15	1120	Pending	MED		Udcmph Cane, Candy

Insurance: ALBERTA HEALTH CARE PLAN Policy Number: 641173214

Appointment Data: Facility: CPHM, Status: PENDING, Waiting: 110 days

Client Data: Account Number: CV0010062/14, Client Type: REG REF, Reason For Visit: PUBLIC HEALTH SERVICES

More Client Data: Provider: Public Health, Call Back Phone, Other Phone

Waitlist Comments:

Navigation Buttons: Display, Letters Forms, Change Status, E/E Alerts

Right Panel: Client, Department, Appt Book, Resource, Waitlist, Book, Edit, View, Set, EMR, Search for Appt, Group Desktop

To put a client on your waitlist, you have to book a pending appointment. This can be done by choosing Pending from your function buttons or it can also be done in the booking screen by changing Pending?No to Pending? Yes.