MEDILOGIK
ems™
ENDOSCOPY MANAGEMENT SYSTEM

OVERVIEW

The scheduling element of MEDILOGIK EMS™ is designed to allow users to create a calendar of procedure lists so that bookings can be made through the system correctly. Users with appropriate access will be able to set up the elements necessary to create the schedule. Users should ensure that details of sites, rooms and staff have been recorded correctly at this stage. This includes the Endoscopist's Technical Ability.
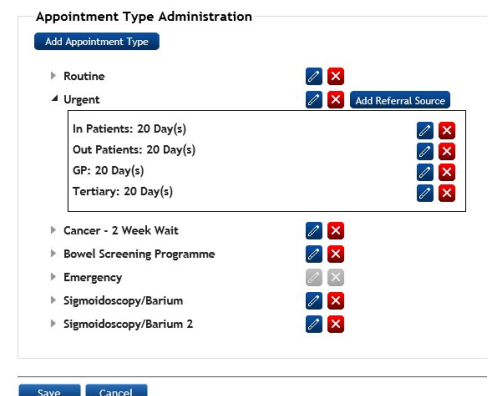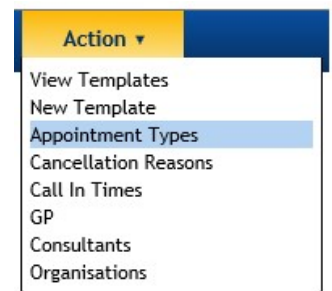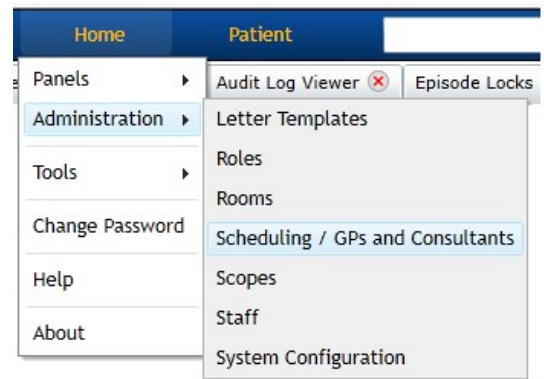
ACCESS SCHEDULING

1. Log in to EMS.

2. Select **HOME / ADMINISTRATION / SCHEDULING / GPS and CONSULTANTS** to access the scheduling module. You will see a calendar grid showing the current week.

APPOINTMENT TYPES

1. Appointment types are used to record the number of days associated with calculating breach dates.

2. Select **ACTION / APPOINTMENT TYPES** to view the Appointment Type Administration screen.

3. Any existing appointment type entries may be viewed by clicking the grey triangle to the left of the title in the Appointment Type Administration screen.

4. Further navigation within the Appointment Administration screen:

    a) The pencil icon allows users to edit an entry.

    b) The white cross in the red square allows users to delete an entry.

CREATE A NEW APPOINTMENT TYPE

1. Click **[Add Appointment Type]**.

2. Provide a title for the entry.

3. Click **[Add Referral Source]** to record the name and type of referral and the breach date value in days.

4. Repeat as necessary for each referral source.

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Further information about these features can be found by accessing the help files within the EMS software

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CALL IN TIME ADMINISTRATION

The call in times identify how long before each procedure type a patient is required to arrive. For example 30 minutes prior to a colonoscopy scheduled start time.

1. Log in to EMS.
2. Select **HOME / ADMINISTRATION / SCHEDULING / GPS and CONSULTANTS**.
3. Choose **ACTION / CALL IN TIMES**.
4. Click **[ADD]** to create a new entry.
5. Create a name for the entry. Select the procedure type and the number of minutes for call in and repeat for all required procedures.
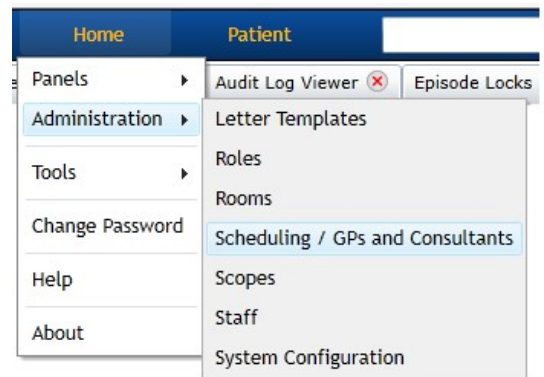6. Click **[Save]** .

CREATING A NEW LIST TEMPLATE

List Templates are used to define what activity can be performed within each list. Most sites will rely on a matrix that identifies the Endoscopist's and their sessions, the days of the week they work and the case type mix. Sites may have a recurring schedule of six to eight weeks. This must all be captured and taken into account when creating a list.

In addition, each type of case has a point value (of time) associated with it. The points will vary depending on the procedure. One point equals 15 minutes.

1. To create a new template, log on to EMS.
2. Choose **HOME / ADMINISTRATION / SCHEDULING / GPs and CONSULTANTS**.
3. Choose **ACTION / VIEW TEMPLATES** to view an existing templates.
4. Choose **ACTION / NEW TEMPLATE** to create a new list template.
5. Enter a name for the template and select the Endoscopist from the list.
6. Click **[Create]**.

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ADDING ITEMS TO A LIST TEMPLATE

1. Having completed the previous steps, click **[New Item]** to add procedures to the list.

2. Observe the new window showing the procedure options available for the Endoscopist. This is based on their "Technical Ability" as recorded in the staff screen.

3. Enter a point value for the procedure as per the JAG standard and then select the procedure.

4. Ensure that you record the appointment types that can be booked into these slots.

5. Click **[Save]** to complete the entry.

6. Continue to add items to the template up to the total value of the points available for the list.

7. You will build up a list of procedures. These can be arranged and ordered by using the up and down arrows to organise the sequence of the list.

8. Repeat for each consultants list.

9. Click **[Calendar]** to return to the calendar.

CREATING SESSIONS ON THE CALENDAR

With the lists created users are now able to add these to the calendar and make them available for booking.

1. In the calendar view you will see the main screen showing the week split into morning (AM), afternoon (PM) and evening (Eve).

2. On the right you will see the templates and a key to the colours used on the calendar.

3. Locate the list on the right and drag the relevant session title onto the calendar. The cells in the calendar will turn green if they available to use.

4. When you let the mouse go you will see the "Add New Schedule" screen with options relating to the recurring nature of the list and the room that will be used.

5. Complete the values for the schedule and click **[Add]** to complete.

6. The list will now appear on the calendar for the duration you entered.

7. Once all sessions are added to the calendar bookings may be added.

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OTHER SCHEDULING FUNCTIONALITY

LOCKING A LIST

It is possible to lock a list so that no more patients can be added to it. Any existing patients will remain booked.

1. Log in to EMS.
2. Select **HOME / ADMINISTRATION / SCHEDULING / GPS and CONSULTANTS**.
3. Observe the calendar. Locate the date and list that you wish to lock.
4. Right click your mouse over the session to be locked.
5. Click **[Lock]**.
6. Select a reason for locking the list.
7. Enter any additional reason text if necessary.
8. Enter your password.
9. Click **[Confirm]**.
10. Observe the padlock that appears next to the list to indicate that it has been locked.
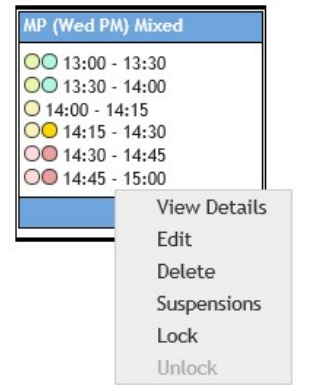
SUSPENDING A LIST

It is possible to suspend a list to make it unavailable. Lists cannot be suspended if patients are already booked onto the list.

1. Log in to EMS.
2. Select **HOME / ADMINISTRATION / SCHEDULING / GPS and CONSULTANTS**.
3. Observe the calendar. Locate the date and list that you wish to suspend.
4. Right click your mouse over the session to be suspended.
5. Click **[Suspensions]**.
6. Observe the suspensions screen. Identify if it is just one list or a range of lists being suspended.
7. Click **[Add]**.
8. Select a reason for suspending the list.
9. Enter additional reason details if necessary.
10. Enter your password.
11. Click **[Add]**.
12. The calendar will now only show the title of the list but it will not be possible to make bookings.

Further information about these features can be found by accessing the help files within the EMS software