

Customising AppBar/ESM

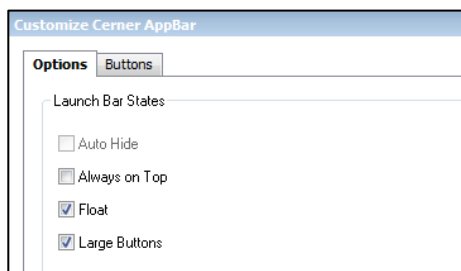
SurgiNet

Quick reference guide

The first time you log in, you will be required to customise your AppBar in order to access the applications required.

Note: All user preferences only need to be set once.

1. Click on the *AppBar* icon and select *Customise*
2. On the *Options* tab:
 - a. Untick *Always on Top*
 - b. Tick *Float* and *Large Buttons*



3. On the *Buttons* tab, tick:
 - a. *Scheduling Appointment Book* (ESM)
 - b. *PowerChart*
 - c. *Explorer Menu*

Application	Product
<input checked="" type="checkbox"/> Scheduling Appointment Book	Scheduling
<input checked="" type="checkbox"/> Powerchart	HNA
<input checked="" type="checkbox"/> Explorer Menu	Discern Explorer
<input type="checkbox"/> Access Management Office	ERM
<input type="checkbox"/> Anesthesia	SurgiNet
<input type="checkbox"/> Anesthesia DB Build Tool	SurgiNet

Note: If you have frequently use other applications, you can tick them as well at this stage. Clicking the arrows to move your chosen buttons in the preferred order on the *AppBar* display.

The *AppBar* will now display with the applications you have selected.



When you click on any of the icons, you will be taken to that part of ieMR. For example, Click on the *Scheduling Appointment Book* icon to launch ESM.

Preferences inside the Appointment Book

Within ESM, many view preferences can be customised to suit the user. The following preferences are heavily recommended for new users, but for highly experienced users they are intended as a guide only.

4. Open *Scheduling Appointment Book* (ESM) by clicking on the correct *AppBar* icon.
5. (Recommended) Rearrange the taskbars by clicking and dragging the dots to a single (or double) line. This will save screen space.

Before:



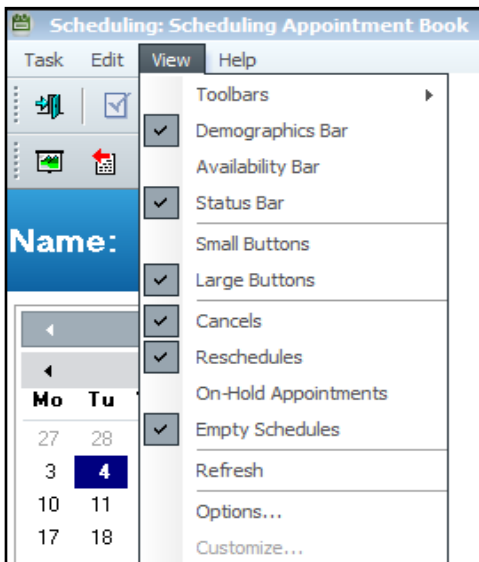
After:



- Click *View* from the task bar, and select the items you wish to have displayed by default. It is recommended to see the *Demographics Bar*, *Status Bar*, and *Large Buttons*.

Note: It is recommended that Elective Procedure Bookings Officers do **NOT** have the *Cancels* and *Reschedules* buttons ticked by default.

Surgical Booking workflows cause these options to display a large amount of screen clutter. Select them if/when needed and remove when no longer needed.



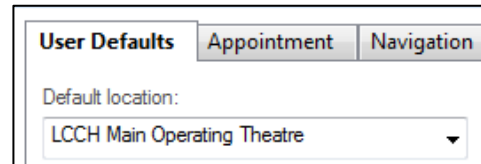
View Options

To open the *Options* window, use the toolbar at the very top of the ESM screen.

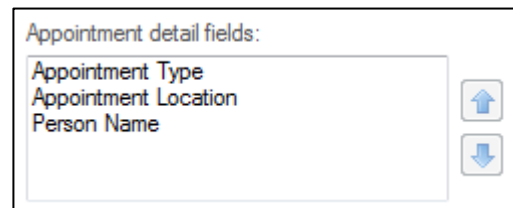
- Open the *Options* window by clicking the *View* toolbar, and select *Options* near the bottom.

On the **User Defaults** tab:

- Select your default location:
Recommended: *LCCH Main Operating Theatre*



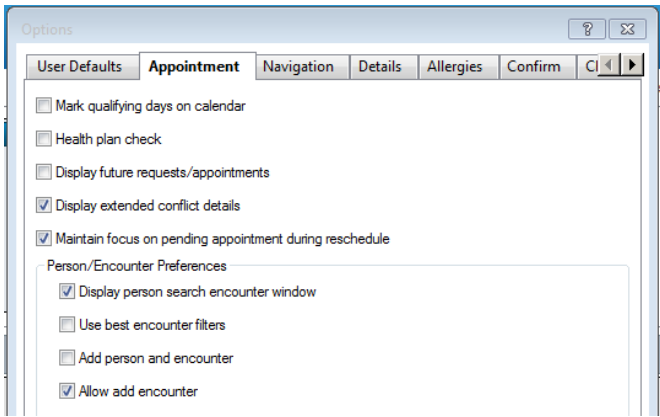
- Reorder your *Appointment detail fields* to be in order: Appointment Type / Location / Person.



On the **Appointment** tab:

- Tick the following options:
 - Display extended conflict details*
 - Maintain focus on pending appointment during reschedule*
 - Display person search encounter window*
 - Allow add encounter*



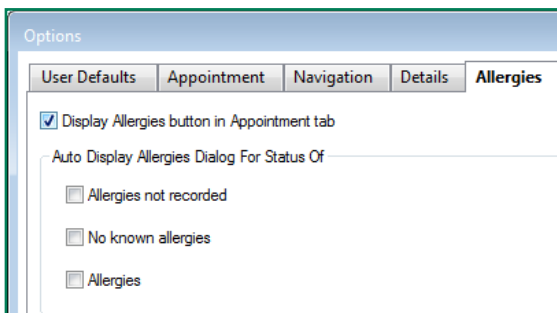


On the **Navigation** tab:

11. Select your default bookshelf:
Recommended: *Procedure Suites - LCCH*
12. (Optional) Select your default book.

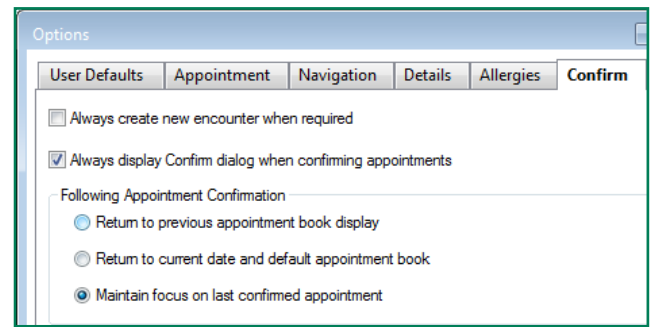
On the **Allergies** tab:

13. Ensure *Display Allergies button in Appointment tab* is ticked.



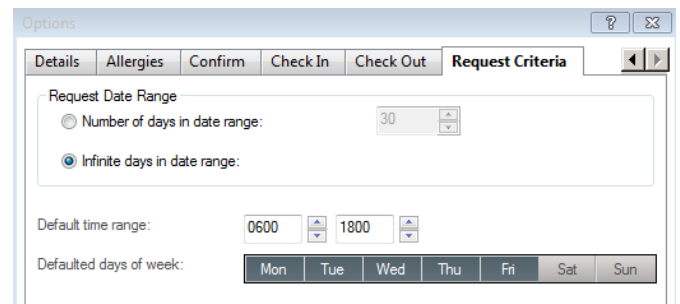
On the **Confirm** tab:

14. Ensure the following are selected:
 - a. *Always display Confirm dialog when confirming appointments*
 - b. *Maintain focus on last confirmed appointment*



On the **Request Criteria** tab: (at far right – use arrows)

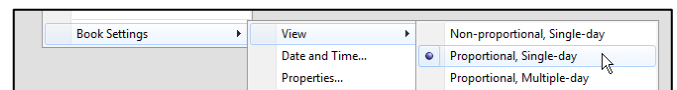
15. Select *Infinite days in date range*.
16. Change the *Default time range* to business hours (recommended: 0600 – 1800).
17. Change the *Default days of week* to Mon-Fri.



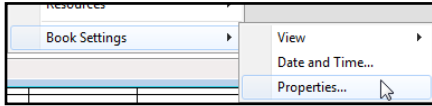
ESM Appointment Book Properties

Changing your *Book Settings* will enable you to have a better view of your book / clinic / theatre list.

18. Right-click anywhere in the lower portion of the screen (the *appointment grid*).
19. **FIRST**, select *Book Settings > View > Proportional, Single-day*.

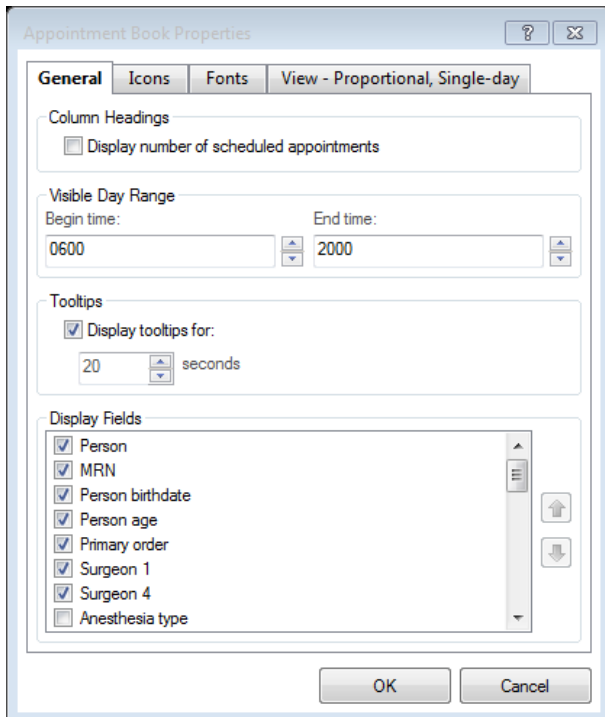


20. **THEN**, to open the Appointment Book properties, select *Book Settings* > *Properties*.



On the **General** tab:

21. Select an appropriate Visible Day Range
Recommended: 0600 – 2000.
22. In the Display Fields section, select the below list with the following display order.
 - a. Person
 - b. MRN
 - c. Person Birthdate / Person Age
(User preference)
 - d. Primary Order
 - e. Surgeon 1
 - f. Surgeon 4
(this is Surg Scheduling Details)

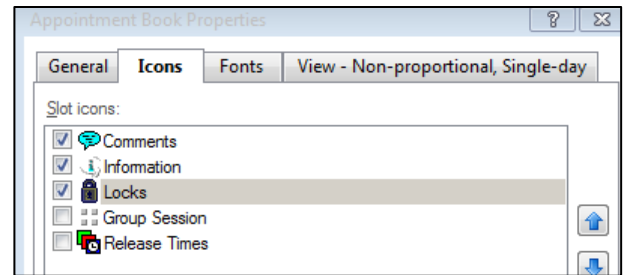


Note: You may need to select them once, then close and reopen this options window to reorder them using the arrows. Ask for help if you can't get the display right.

On the **Icons** tab:

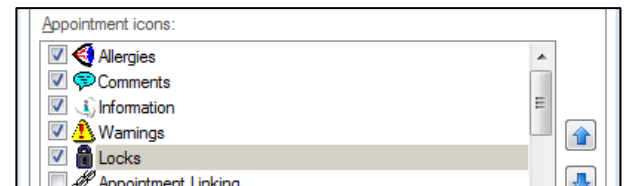
23. Select the following Slot Icons

- a. *Comments*
- b. *Information*
- c. (User preference) *Locks*



24. Select the following Appointment Icons

- a. *Allergies*
- b. *Comments*
- c. *Information*
- d. (User preference) *Warnings*
- e. (User preference) *Locks*

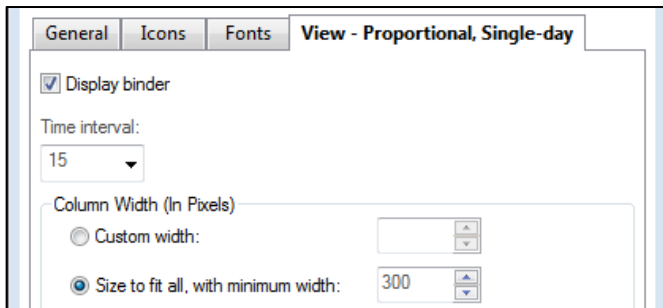


On the **View – Proportional, Single Day** tab:

25. Ensure *Display Binder* is ticked.
26. Select a *Time interval* of 5 or 10 minutes
(User Preference).
27. Select *Size to fit all, with minimum width*.



Note: It is recommended to have a minimum width between 220 and 300, at each user's discretion.



28. Click OK to save your preferences.

Note: To finalise your settings and ensure they are saved, close ESM **now** using the Exit Door. 