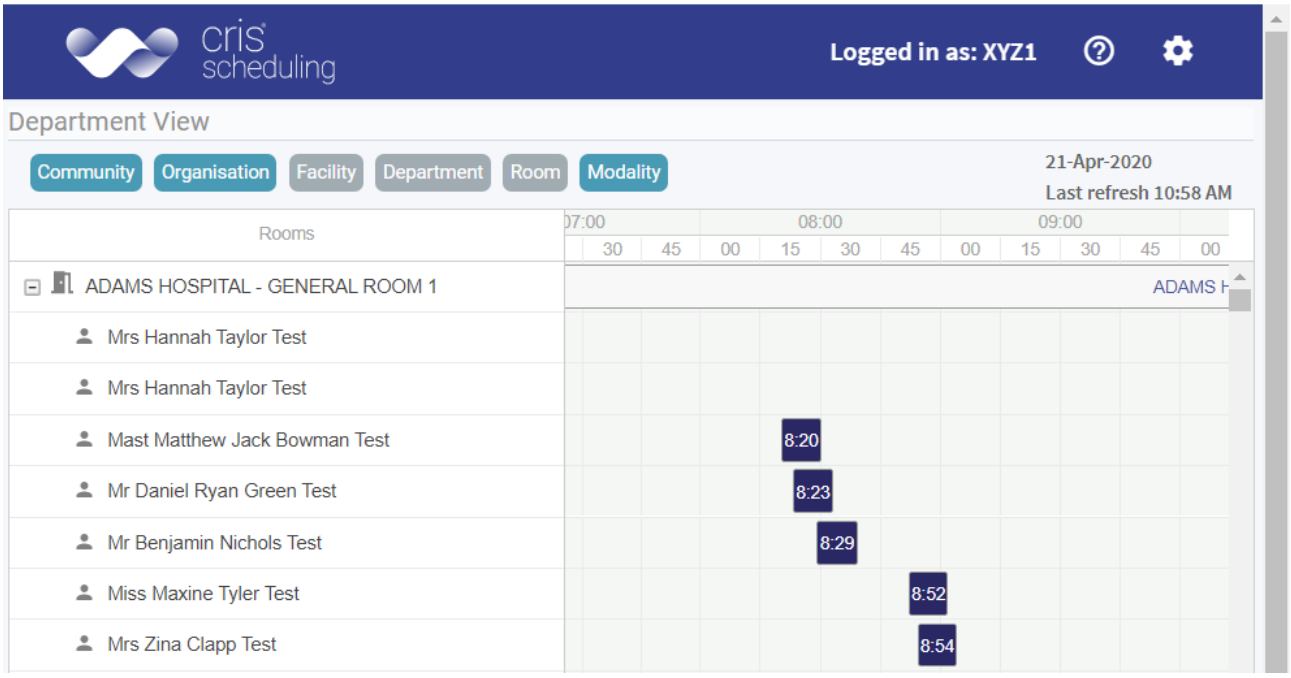
CRIS Scheduling – Department View

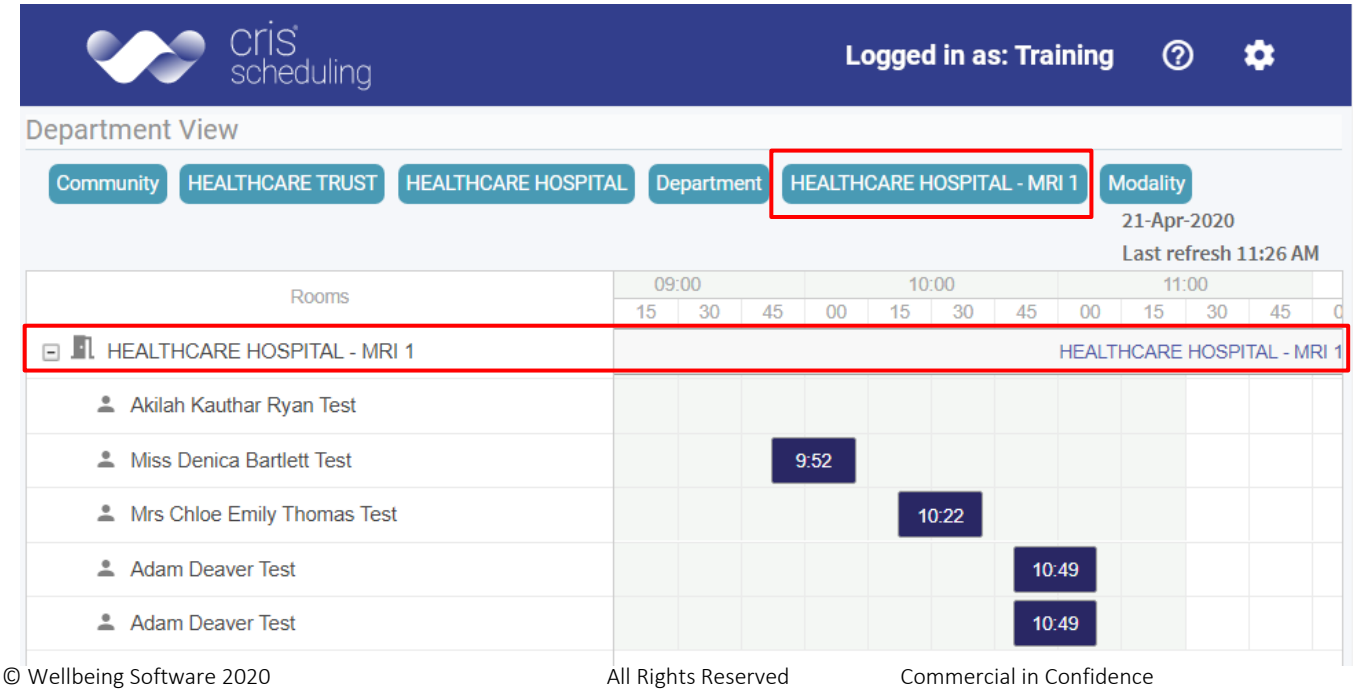
The first release of CRIS Scheduling is a Department View (i.e. Whiteboard) for tracking the progress of scheduled radiology appointments and attended events.



Find an appointment

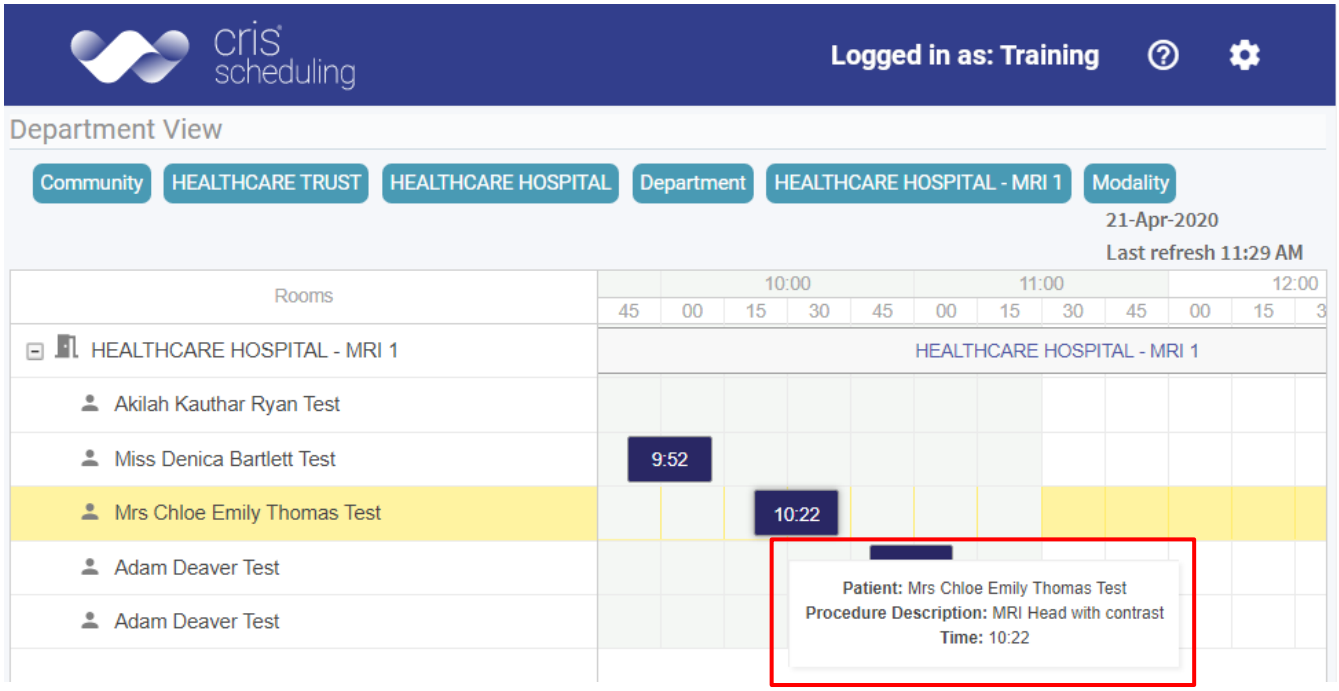
The whiteboard shows all appointments from six hours before until seven hours after the current hour. For example, at **10:00** you would be able to see all appointments between **04:00** and **19:00**. The current time is automatically centred on the screen.

- Find the appointment you want by selecting locations via the place buttons. This will filter the appointments list.

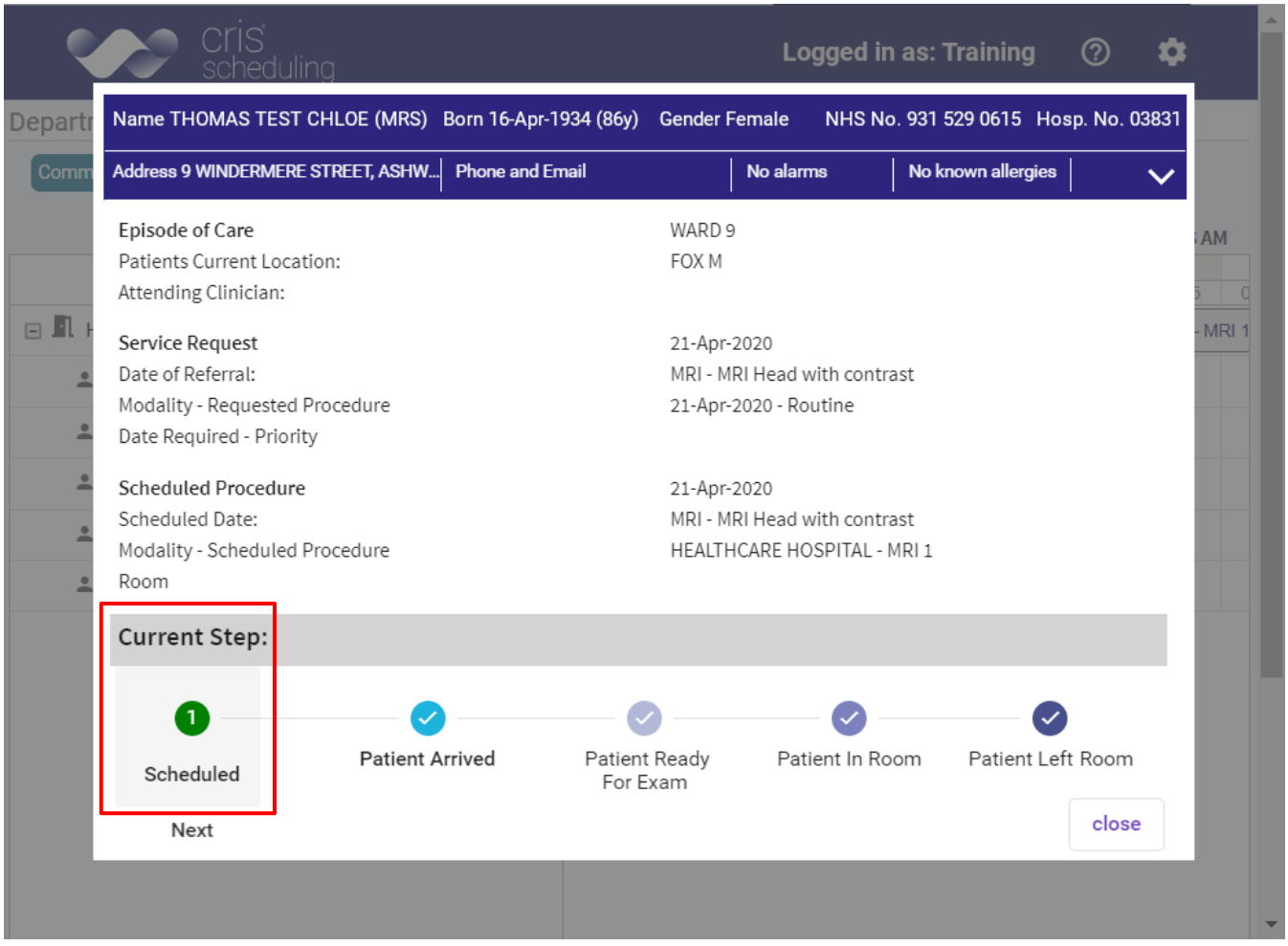


© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence

- Hover over an appointment tile to see more information.



- Double-click a tile to view appointment details and progression.



© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence

Locations

Role	Description
Community	A community (for example, a consortium) is a group of organisations (for example, trusts) ▪ Select a Community, Organisation, and Facility to filter by Department, Room, and Modality. ▪ If you select "All" you will only be able to filter by Organisation and Modality. An administrator can create a new community.
Organisation	An organisation (for example, a trust) is a group of facilities (for example, hospitals or clinics) ▪ Select an Organisation and Facility to filter by Department, Room, and Modality. ▪ If you select "All" you will only be able to filter by modality. The list of organisations comes from CRIS.
Facility	A facility (for example, a clinic) may contain multiple departments (for example, Ultrasound, Breast Screening). ▪ Select a facility to filter by department, room, and modality ▪ If you select "All" you will only be able to filter by modality The list of facilities comes from CRIS.
Department	A department (for example, Breast Screening) may contain multiple rooms and modalities. An administrator can combine rooms to create a new department.
Room	The list of rooms comes from CRIS.
Modality	The list of modalities comes from CRIS.

Administration

Scheduling will import the following places from CRIS:

- Organisations (Trusts)
- Facilities (Sites)
- Rooms

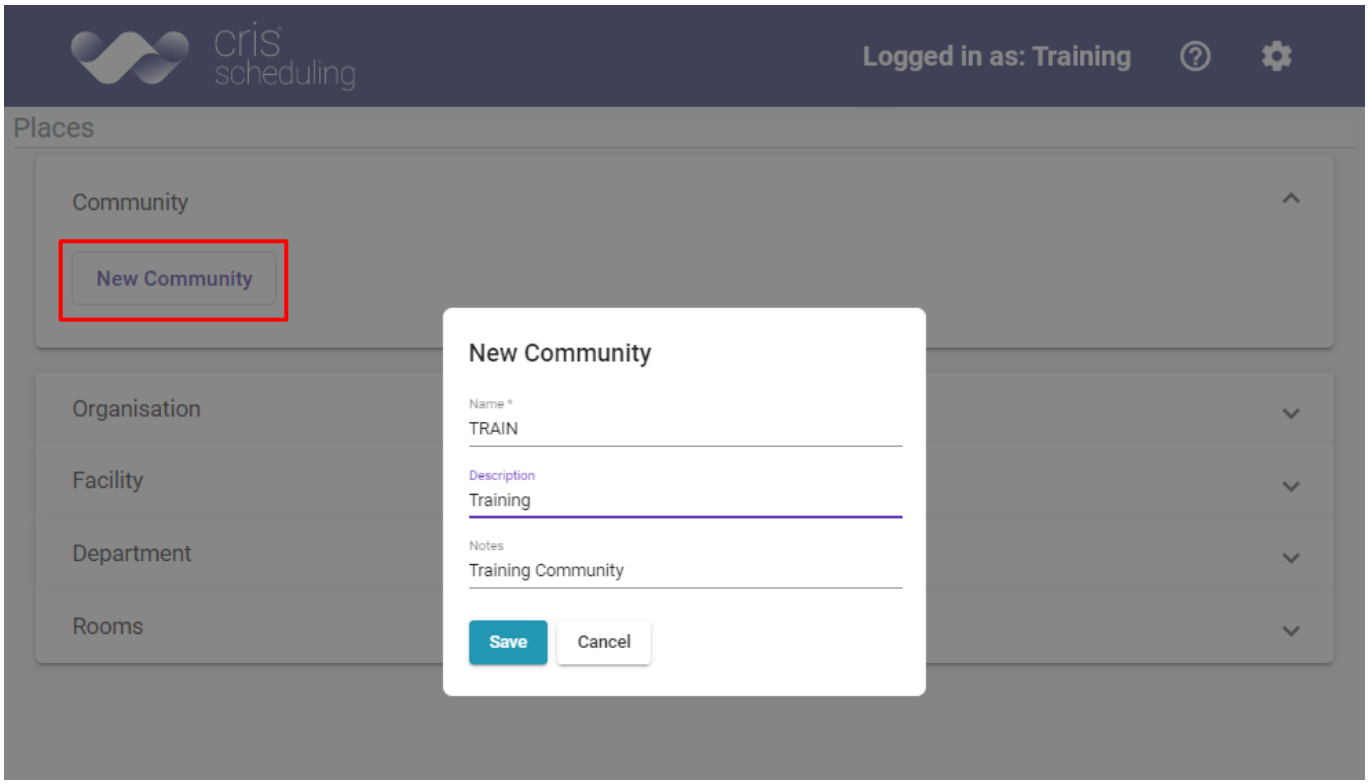
Using the above items, an administrator can create a new:

- Community - group of organisations
- Department - group of rooms

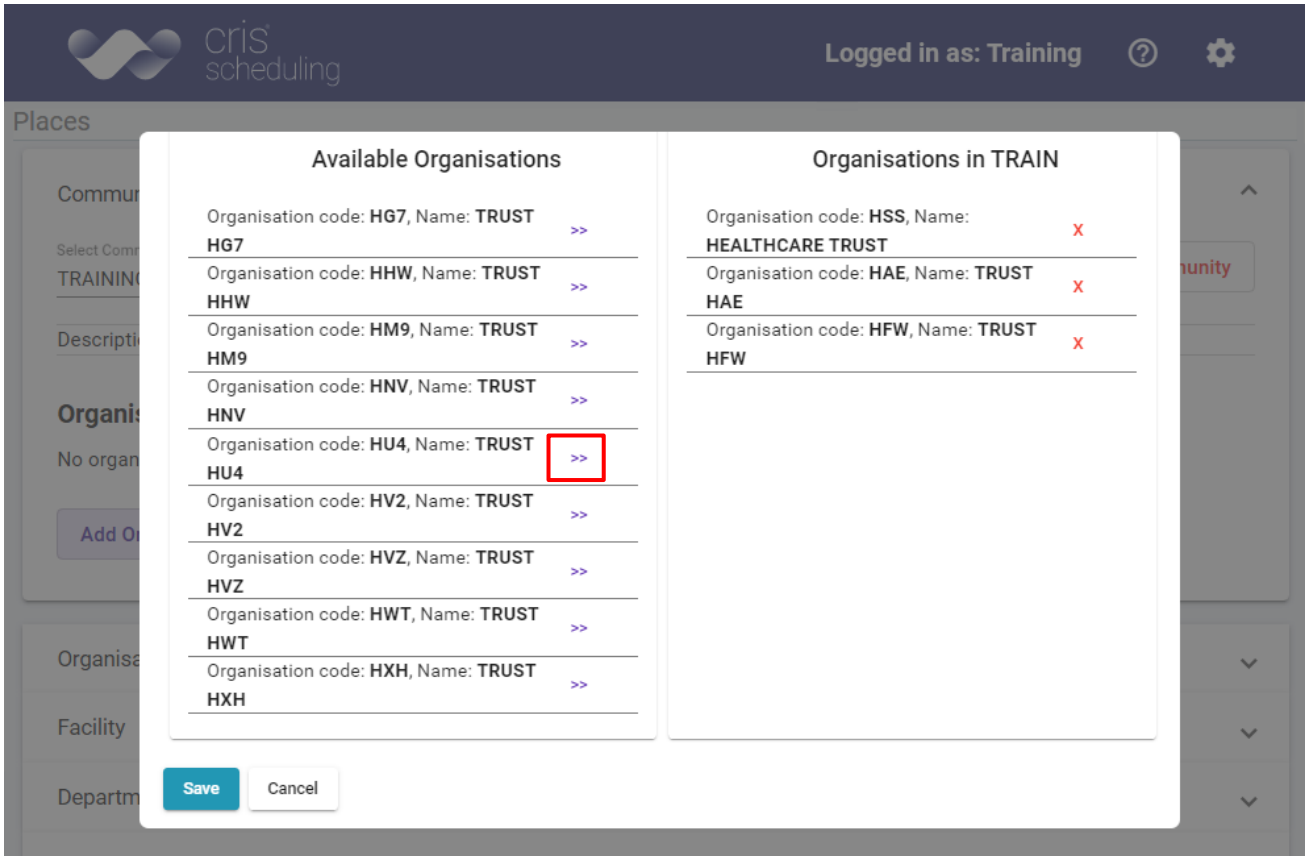
© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence

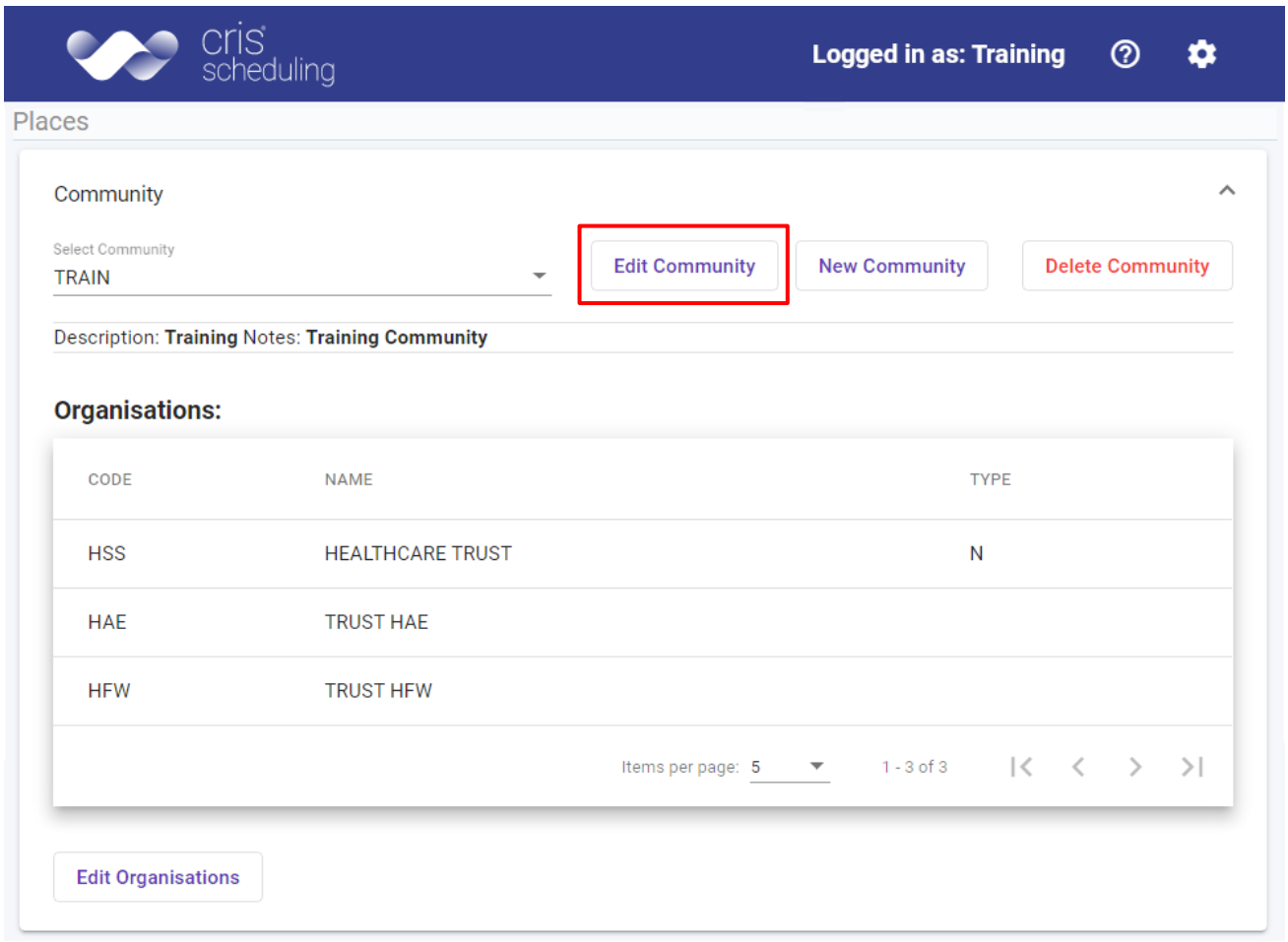
Create q New Community

1. Click to open the Scheduling Configuration Settings
2. Click to expand community
3. Click the [New Community] button
4. Enter a Name, Description, and Notes for the New Community
5. Click [Save]



6. Click Add Organisation
7. Click to select an organisation
8. Click to remove an organisation
9. Click [Save]
10. You now have the option to edit the name; description; and notes, or delete this community
11. You can also edit the organisations in this community as applicable

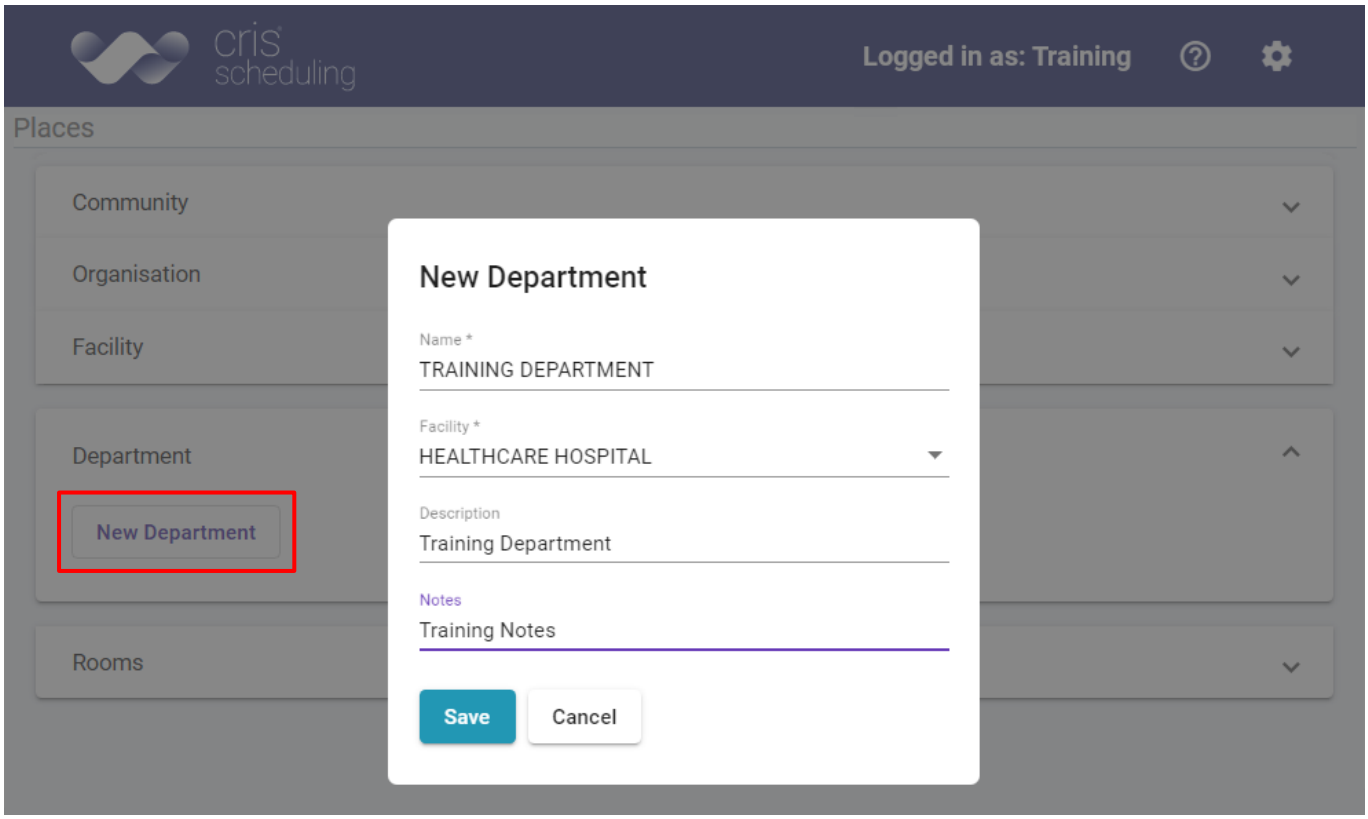




© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence

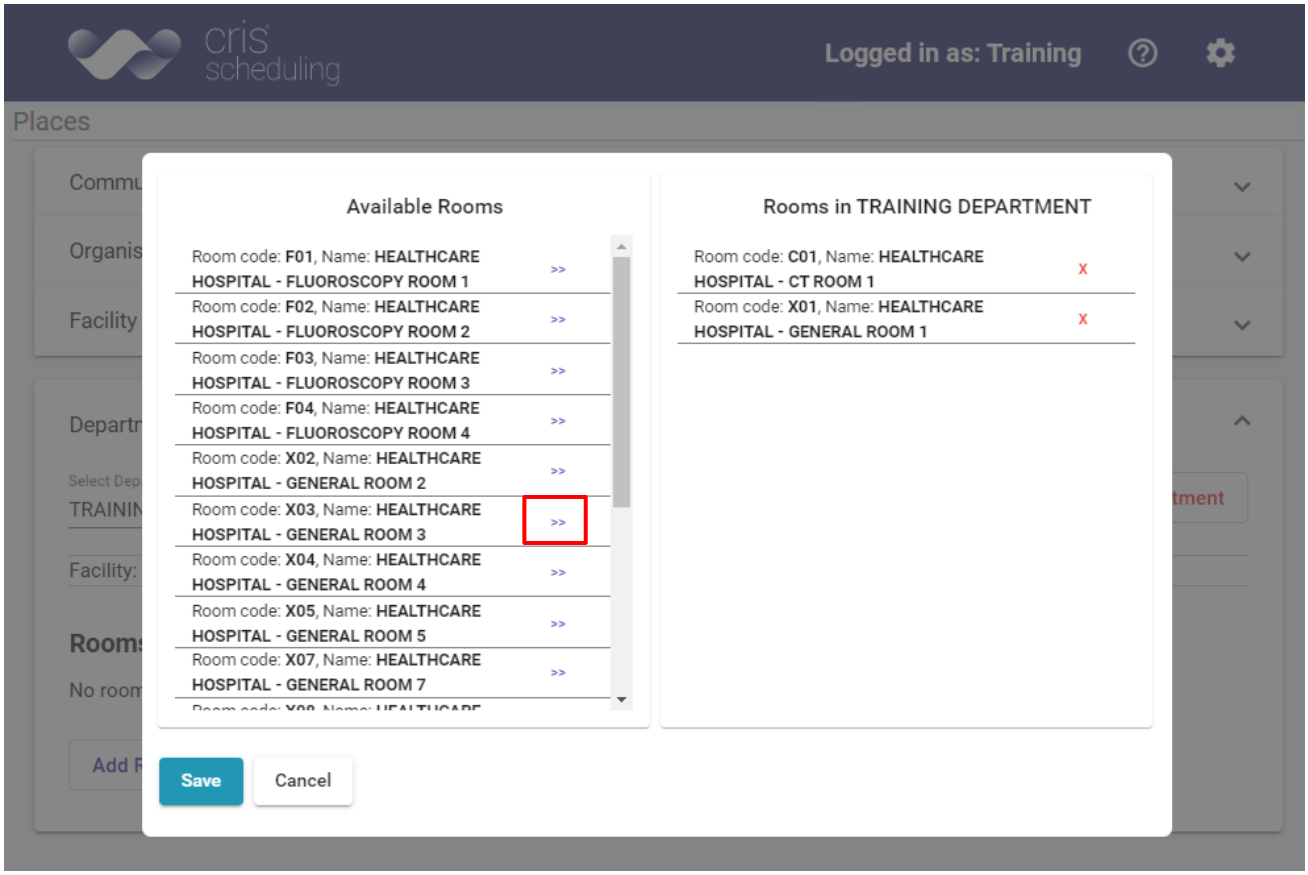
Create a New Department

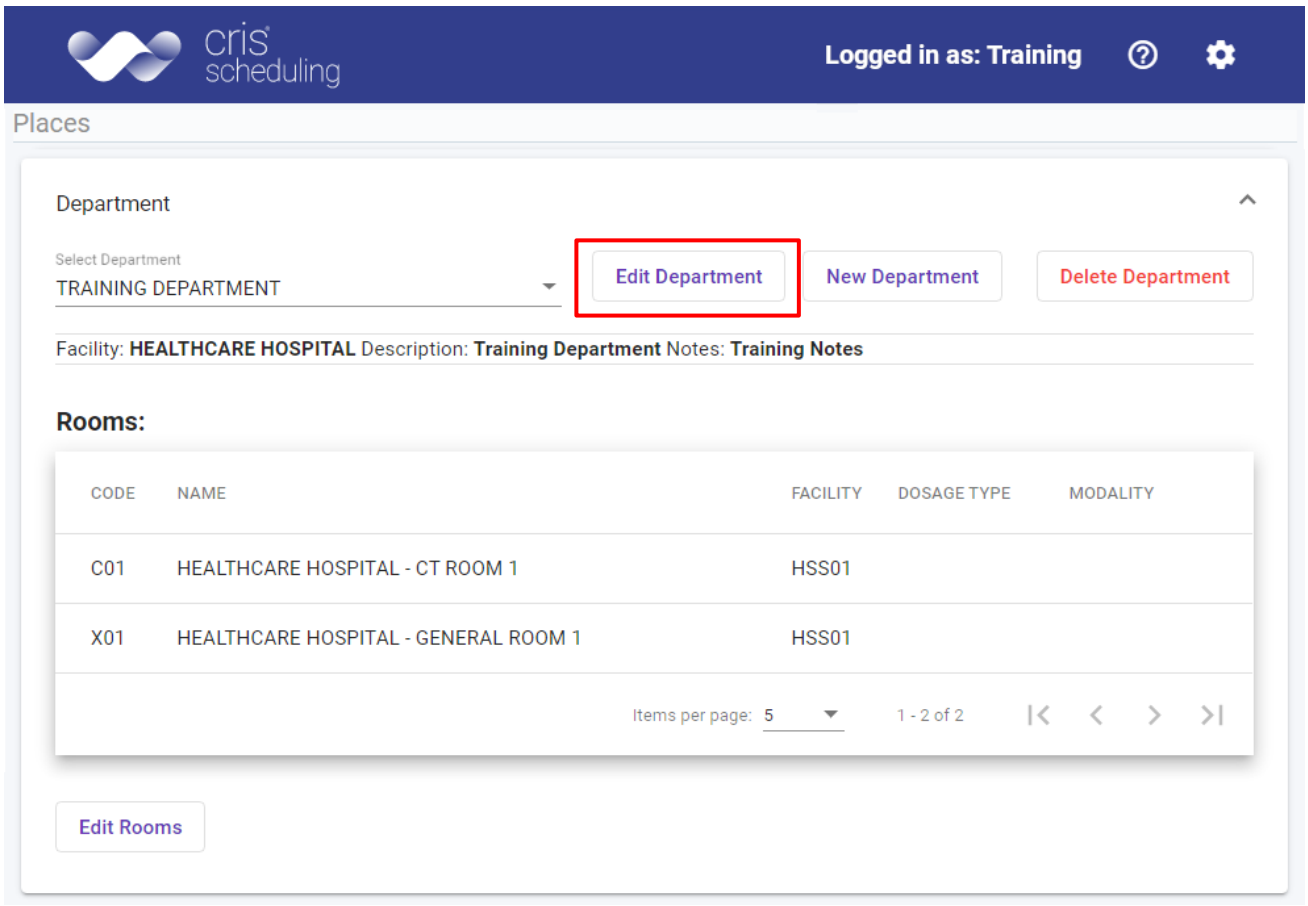
1. Click to open the Scheduling Configuration Settings
2. Click to expand department
3. Click [New Department]
4. Enter a name, facility, description, and notes
5. Click [Save]



6. Click Add Room
7. Click to select a room
8. Click to remove a room
9. Click [Save]
10. You now have the option to edit the name; description; and notes, or delete this department
11. You can also edit the rooms in this department

© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence





© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence

Frequently Asked Questions

How do I log in/out?

Your login details for Scheduling are the same as your core CRIS username and password.

Click **Logged in as:** to log out.

How do I change my password?

Your system administrator will assign your username and password, and reset it when required.

What are my user permissions?

Your permissions are determined by your CRIS User Role. There are three types of User in Scheduling:

User / Role	Description
Whiteboard	The Scheduling Whiteboard user is a generic user account created via CRIS, for use by multiple users logging in with the same generic username and password. This user is unable to see patient-identifiable data, or to make any changes to appointments.
CRIS Users	Any CRIS user logging in using their own individual CORE CRIS account can: - View the diary - Attend appointments - Progress a procedure up to Step 5 Patient Left Room - Access Scheduling Configuration Settings

What do the icons indicate?

Step	Description	Icon	Description
1	VISIT STATUS: Scheduled Appointment		Expand a location
2	VISIT STATUS: Patient Arrived		Add an organisation or room
3	VISIT STATUS: Patient Ready for Exam		Remove an organisation or room
4	VISIT STATUS: Patient in Room		Return to whiteboard (department view)
5	VISIT STATUS: Patient Left Room		Open online help in a new window
		Logged in as:	Log out

© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence

Which keyboard shortcuts can I use?

There are no application-specific shortcuts, but you can use conventional shortcuts. Some examples are:

Icon	Description
[CTRL + C]	Copy selected text
[CTRL + V]	Paste copied text
[F5]	Refresh the application
[Tab]	Move around the screen
[Space]	Press a button

Important – Please Note

Scheduling will import from CRIS configuration tables only upon initial deployment. Any changes thereafter in CRIS will not be reflected in Scheduling version 1.0 and will require assistance from Wellbeing Software. This means events booked into new rooms, sites, or trusts created on CRIS after deployment will not be displayed in Scheduling. Scheduling version 1.0 will only allow filtering on the modalities present upon initial deployment.

Please contact the Wellbeing Service Desk for assistance in the event any new CRIS configuration items.

© Wellbeing Software 2020 All Rights Reserved Commercial in Confidence

Document Control

Title	CRIS Scheduling – Department View		
Owner	Wellbeing Training Manager	Date Created	22/04/2020
File Ref.	CRIS_CRIB510_CRIS_Scheduling_Department_View_V1.0.docx		
CRIS Version	Scheduling v1.0		

Change History			
Issue	Date	Author / Editor	Details of Change
D1.0	22/04/2020	Emma Brown	Draft Issue.
D1.1	05/05/2020	Emma Brown	Amended paragraph about time window.
D1.2	06/05/2020	Emma Savage-Mady	Review, reformat and edits.
D1.3	06/05/2020	Emma Brown	Removed image captions.
V1.0	11/05/2020	Emma Savage-Mady	Final edits and first release.
Review Date		11/05/2022	