

PROMIS 4.18 Training

Dialysis Schedule & Schedule Reports

Background:

The Dialysis Schedule module is used to track dialysis appointments for patients receiving dialysis treatment in different units at a centre.

This module will be moved into PROMIS 4 in this upcoming release. The document includes information on:

- Permanent Schedule
- Actual Schedule
- Generate Actual Schedule
- Schedule Reports

Navigation:

For the Dialysis Schedule module: *PROMIS 4 > Dialysis Schedule*

For centre-based reports: *PROMIS 4 > Reports > Centre Reports > Dialysis Schedule*

For Patient Schedule report (for a worklist): *PROMIS 4 > Reports > Worklist Reports > Dialysis Schedule > Patient Schedule*

For Patient Schedule report (for a single patient): *PROMIS 4 > Patient Overview > Reports > Dialysis Schedule > Patient Schedule*

Functionality:

Permanent Schedule:

- The *Permanent Schedule* tab is used as a scheduling template for patients who are undergoing long term dialysis treatment.
- The *Manage* button is used to open the Permanent Schedule in edit mode.
- In edit mode, a new patient registered in the selected centre can be added to the permanent schedule by using the plus button.

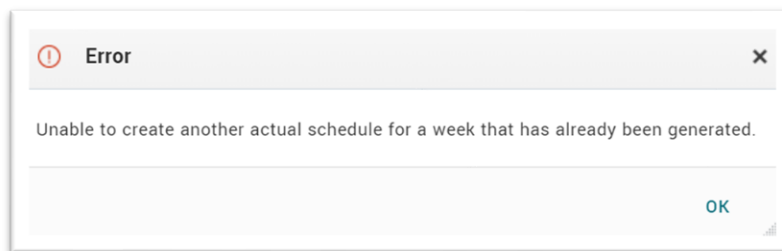
- The *Delete* icon is used to delete a patient from the permanent schedule (in cases where the patient is permanently inactive such as no longer at the centre or passed away).
- The *Reserve* button is used to reserve a spot for a patient in the *Permanent Schedule* without having to specify a patient's name.

Actual Schedule:

- The *Actual Schedule* reflects the expected appointments (at a centre) for a specified week and is used to make temporary changes to a permanent dialysis patient's schedule. It's also where temporary patients dialyzing at a centre are entered.
- To create an Actual Schedule, refer to the section 'Generating Actual Schedule'
- The *Manage* button allows you to add/edit an Actual Schedule.
- The *Copy Over Selected TM Patients* button allows you to copy selected temporary patient(s) into a schedule generated for another week. This alleviates having to add patient(s) individually to any future week's schedules.
- The *Summarize* button displays centers current availability for a centre/unit different shift times of a week. Note: Dialysis Location (in the schedule parameter) **cannot** be blank to calculate availability.
- The *View Capacity* button displays the total capacity for a centre/unit for each time slot. Note: Dialysis Location (in the schedule parameter) **cannot** be blank to view capacity.
- The *Weekly Total* field shows the total number of spots occupied at the centre/unit for the week.
- The *Reserve* button is used to reserve a spot for a patient in the *Actual Schedule* without having to specify a patient's name.

Generating an Actual Schedule:

- The *Generate Actual Schedule* button is used to create an Actual schedule through the Permanent Schedule (scheduling template).
- An error message will appear when trying to generate an actual schedule for a week for which an actual schedule has already been generated.



Schedule Reports:

- The following scheduling reports will now be available in PROMIS 4 and will be retired from Classic:
 - Patient Schedule
 - Daily Schedule
 - Weekly Schedule
 - Number of Runs
 - Billable Patients
- The Patient Schedule report can be generated for both a single patient and a worklist. The rest of the reports listed are centre based.