

eBase v8 Calendar management manual



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1. Set up calendar module

The calendar setup is defined from the admin menu. Employees who have their own calendar are defined by the administrator. Open the admin menu from the navigation menu.

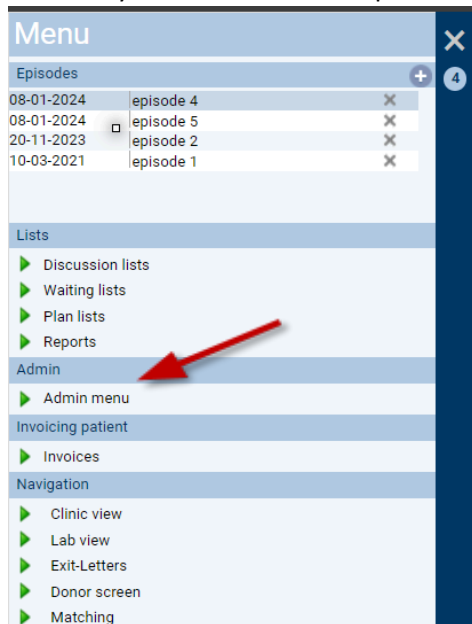


Figure 1: opening admin menu.

After opening the administration interface and selecting the calendar module, the calendar can be set up using four options: Agenda category, Category type, resource name and resource type.

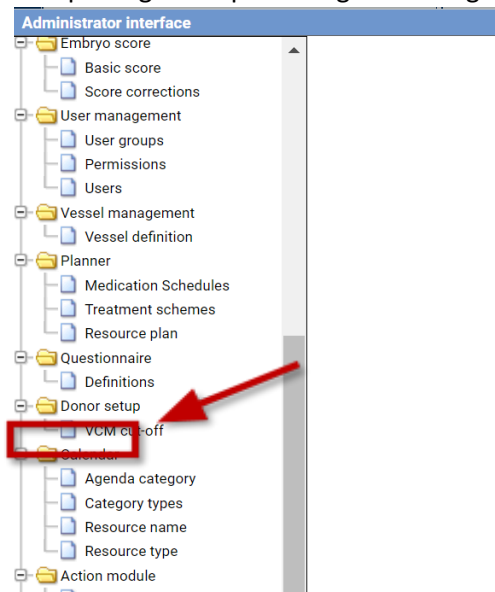
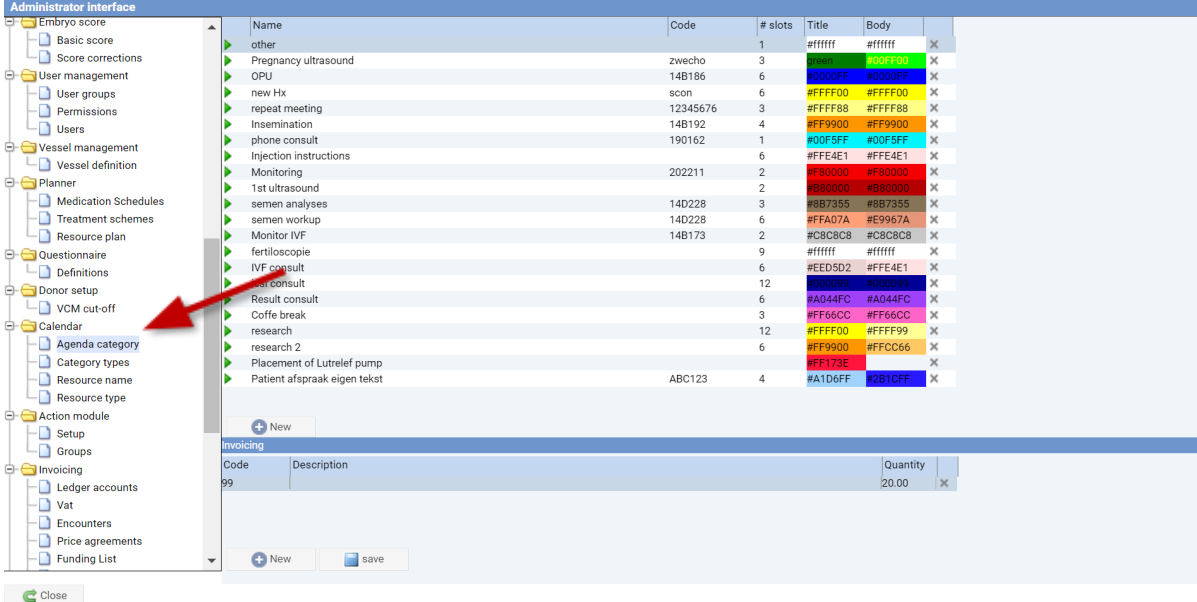


Figure 2: Opening calendar module.

1.1 Agenda category

Clicking on the Agenda category folder will open the following screen.



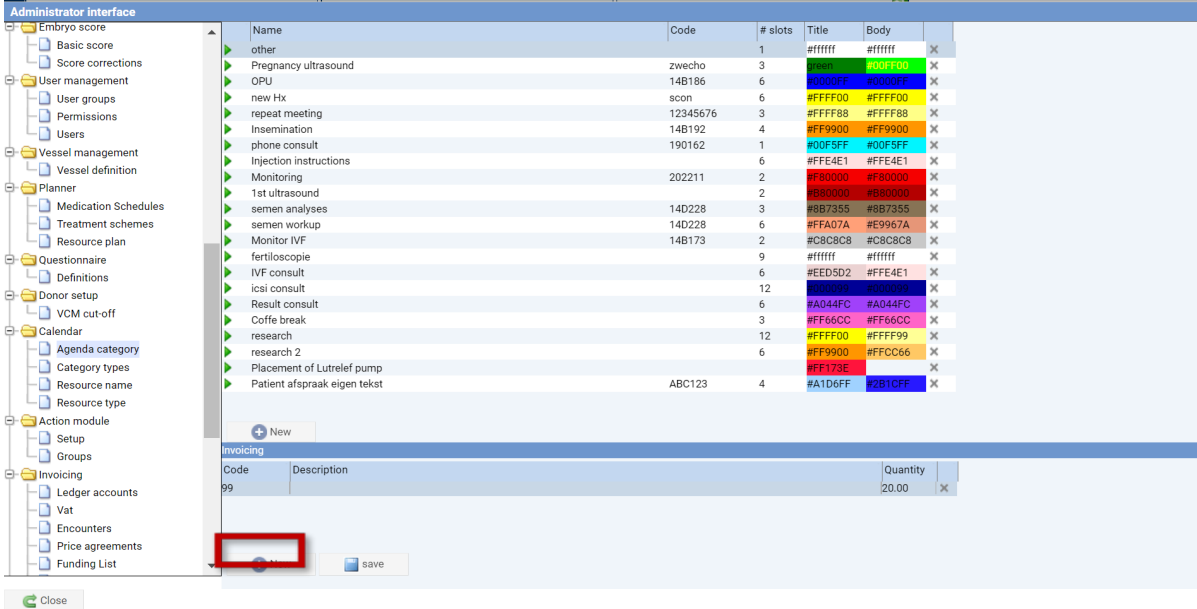
The screenshot shows the 'Administrator interface' with a sidebar on the left containing various folders. The 'Agenda category' folder is highlighted with a red arrow. The main area displays a table with columns: Name, Code, # slots, Title, and Body. Below the table is an 'Invoicing' section with a table for Code, Description, and Quantity. At the bottom, there are buttons for '+ New', 'save', and 'Close'.

Name	Code	# slots	Title	Body
other		1	#fffff	#fffff
Pregnancy ultrasound	zwecho	3	#00ff00	#00ff00
OPU	14B186	6	#0000ff	#0000ff
new Hx	scon	6	#ffff00	#ffff00
repeat meeting	12345676	3	#ffff88	#ffff88
Insemination	14B192	4	#ff9900	#ff9900
phone consult	190162	1	#00ff5f	#00ff5f
Injection instructions		6	#ffe4e1	#ffe4e1
Monitoring	202211	2	#f80000	#f80000
1st ultrasound		2	#800000	#800000
semen analyses	14D228	3	#8b7355	#8b7355
semen workup	14D228	6	#ffa07a	#e9967a
Monitor IVF	14B173	2	#c8c8c8	#c8c8c8
fertiloscopy		9	#ffffff	#ffffff
IVF consult		6	#eed5d2	#ffe4e1
icli consult		12	#000000	#000000
Result consult		6	#a044fc	#a044fc
Coffe break		3	#ff66cc	#ff66cc
research		12	#ffff00	#ffff99
research 2		6	#ff9900	#ffcc66
Placement of Lutrelief pump			#ff173e	
Patient afspraak eigen tekst	ABC123	4	#a1d6ff	#2b1c9f

Code	Description	Quantity
99		20.00

Figure 3: layout category.

This is where the differences in type of appointment options are defined. By clicking on 'new' a new appointment type can be created.



The screenshot is identical to Figure 3, but with a red box highlighting the '+ New' button located at the bottom of the table, indicating where to click to create a new appointment type.

Figure 4: Creating new appointment option.

The following screen appears.

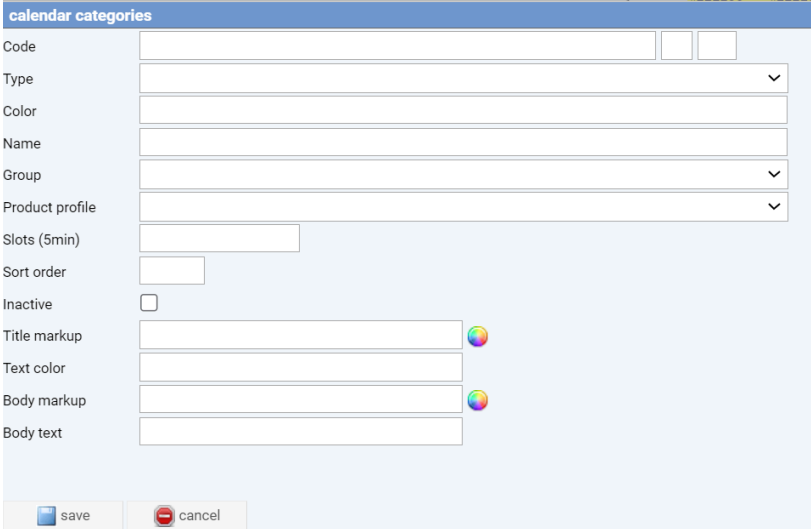


Figure 5: calendar category properties.

The text and color of the new appointment can be defined in this screen. It can also be specified that the item should be set to inactive. This makes this appointment unselect able for users, but the history is preserved.

1.2 Resource name

Here the name of the resource is defined. For example, this could be an examination room.

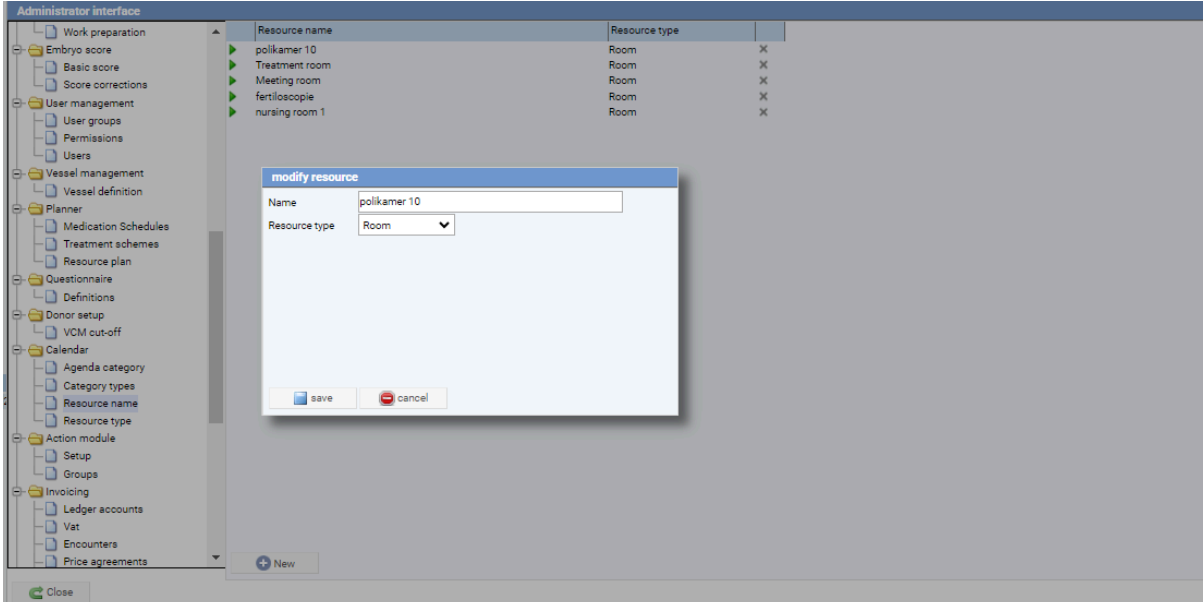


Figure 6: opening navigation menu, choose calendar.

2. Calendar menu

The calendar can be accessed from the navigation menu of the eBase application.

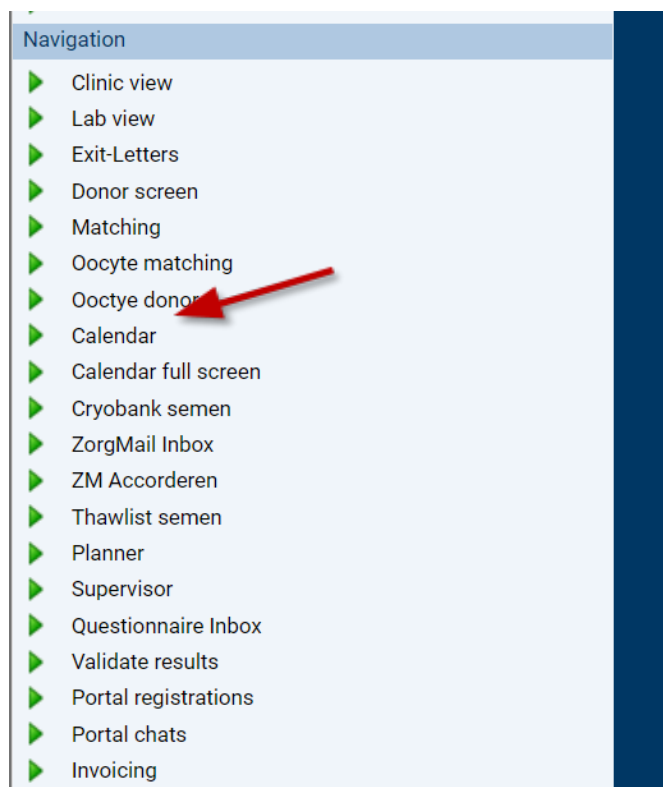


Figure 7: opening navigation menu, choose calendar.

The following screen opens. The calendar is made up of three columns.

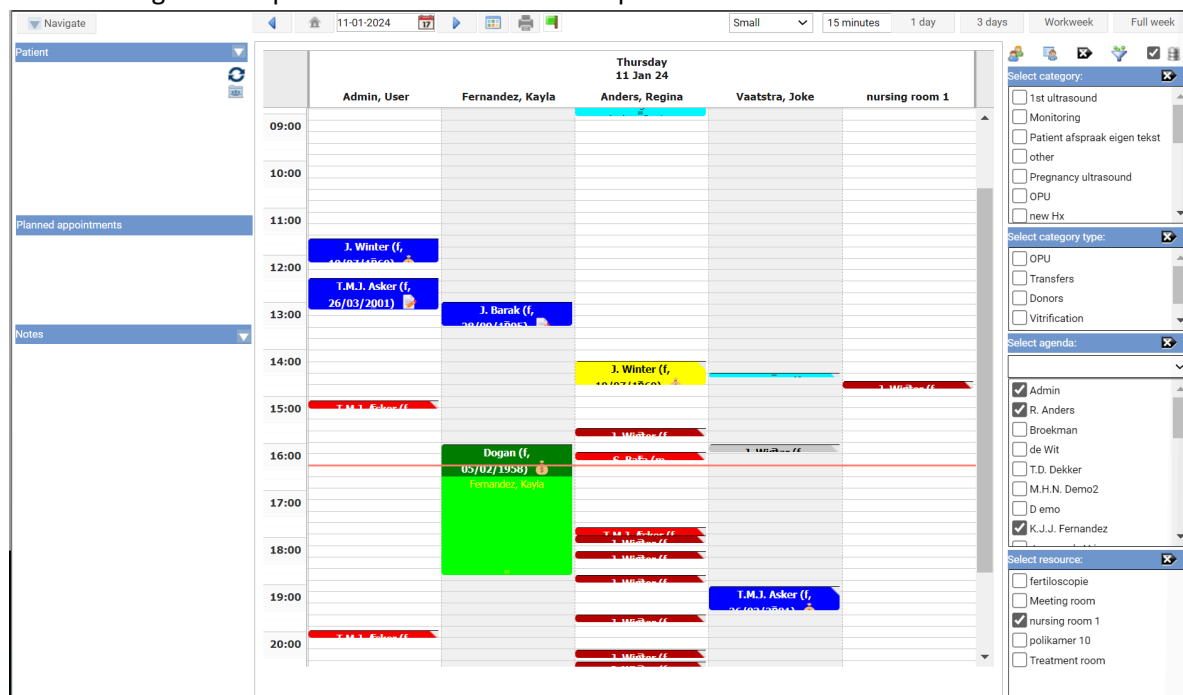


Figure 8: Calendar main screen.

2.1 Explanation of columns and selection fields

2.1.1 Top bar

In the top bar, the calendar view can be determined, and the date selected.



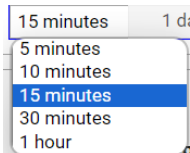
Week/day forward, arrow to the right means week/day forward.



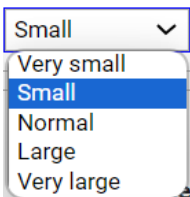
Back to current week/day



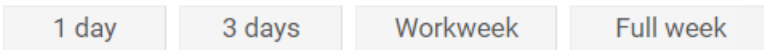
If this flag is green, there are no agenda changes. If the flag is orange in color, this is a sign that there are changed agenda items. Clicking on this flag refreshes the agenda.



Choice of the number of lines per hour shown on the calendar.



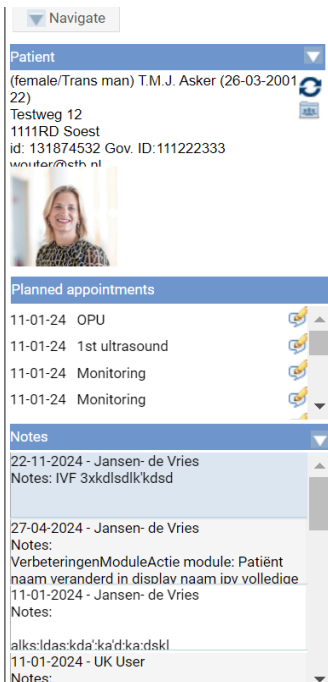
Choice of control height.



Display per day, per 3 days, per 5 working days, entire week.

2.1.2 Left column

The moment an appointment in the calendar is clicked, the left column shows the information surrounding the patient's appointments.



Navigate

Patient

(female/Trans man) T.M.J. Asker (26-03-2001 22)

Testweg 12
1111RD Soest
id: 131874532 Gov. ID: 111222333
w.m.f.a.s@eth.nl

Planned appointments

11-01-24	OPU	
11-01-24	1st ultrasound	
11-01-24	Monitoring	
11-01-24	Monitoring	

Notes

22-11-2024 - Jansen- de Vries
Notes: IVF 3xkdlsdlk'kdsd

27-04-2024 - Jansen- de Vries
Notes:
VerbeteringenModuleActie module: Patiënt naam veranderd in display naam iov volledige

11-01-2024 - Jansen- de Vries
Notes:
alks:ldas:kda':ka'd'ka:dskl

11-01-2024 - UK User
Notes:

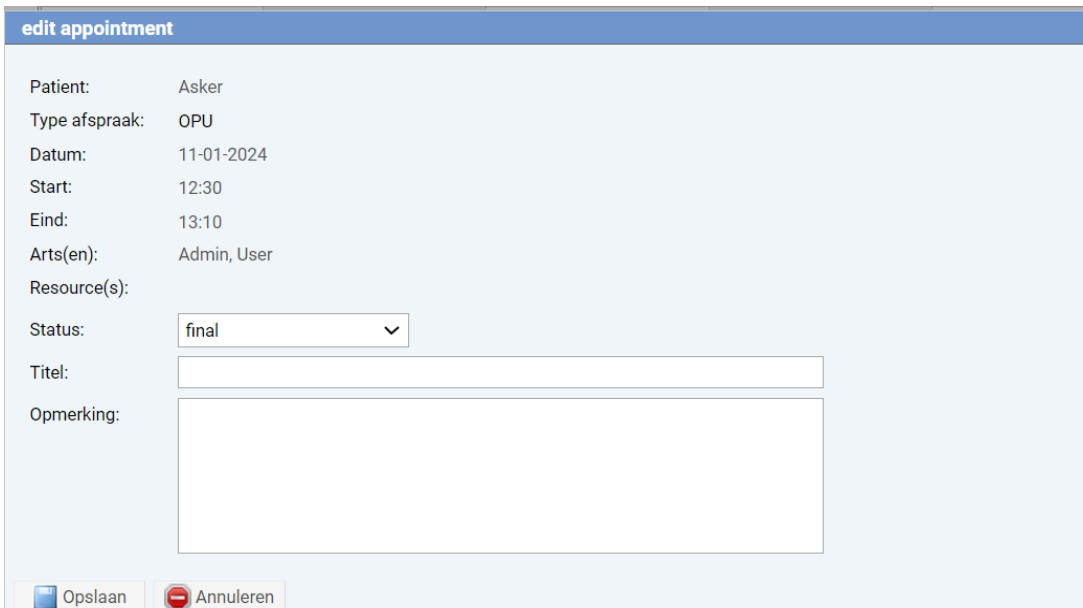
Figure 9: Patient information.

Displayed below one another:

- Patient, for whom the appointment is currently being made or whose agenda item is being viewed.
- The planned appointments that are on the calendar with the patient.
- The notes from the selected patient.

From the list of planned appointments, the corresponding appointment can be opened directly by choosing

Next screen becomes visible. Here the status of the appointment can be entered, and any additional comments can be added.



edit appointment

Patient: Asker

Type afspraak: OPU

Datum: 11-01-2024

Start: 12:30

Eind: 13:10

Arts(en): Admin, User

Resource(s):

Status:

Titel:

Opmerking:

Figure 10: Viewing and modifying appointment information.

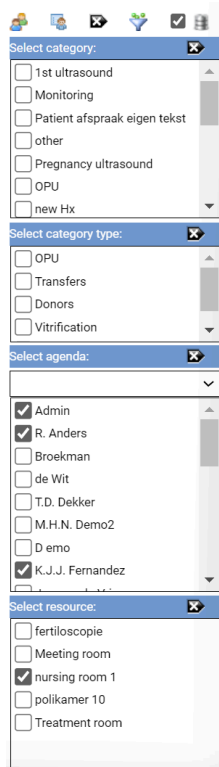
2.1.3 Middle column

This is where appointments are displayed.

2.1.4 Right column

The right column displays all selectable filter criteria. Filters can be set on calendar category, select category type, physicians, and resources. If multiple physicians and/or resources are selected, they will be displayed in separate calendar columns by default.

Note: If a filter is activated, only the appointments that meet the selected filters will be displayed.



Select category:

- ☐ 1st ultrasound
- ☐ Monitoring
- ☐ Patient afspraak eigen tekst
- ☐ other
- ☐ Pregnancy ultrasound
- ☐ OPU
- ☐ new Hx

Select category type:

- ☐ OPU
- ☐ Transfers
- ☐ Donors
- ☐ Vittrification

Select agenda:

- ☒ Admin
- ☒ R. Anders
- ☐ Broekman
- ☐ de Wit
- ☐ T.D. Dekker
- ☐ M.H.N. Demo2
- ☐ D emo
- ☒ K.J.J. Fernandez





Select resource:

- ☐ fertiloscopie
- ☐ Meeting room
- ☒ nursing room 1
- ☐ polikamer 10
- ☐ Treatment room

Figure 11: capture appointment information.

Select filters

By checking a box, a selection can be made in the three windows. Explanation of the symbols in the row above the 3 selection windows:

-  Put a filter on all doctors who have an appointment on the selected day.
-  Put a filter on the currently logged in physician
-  Confirm selection from all selection screens
-  Remove all selected filters.
- ☒ Display selected filters in separated columns (applies only to Calendar and Resource filters).

To remove the filters by block, click on the  icon in the title bar of the corresponding block.

3. Appointments

Appointments can be booked/linked in 2 different ways.

- Manually via the calendar
- Via reservations in clinic view

Both methods are explained in the following sections.

3.1 Manual appointment setting

Click the cursor on the desired time; the appointments screen opens.

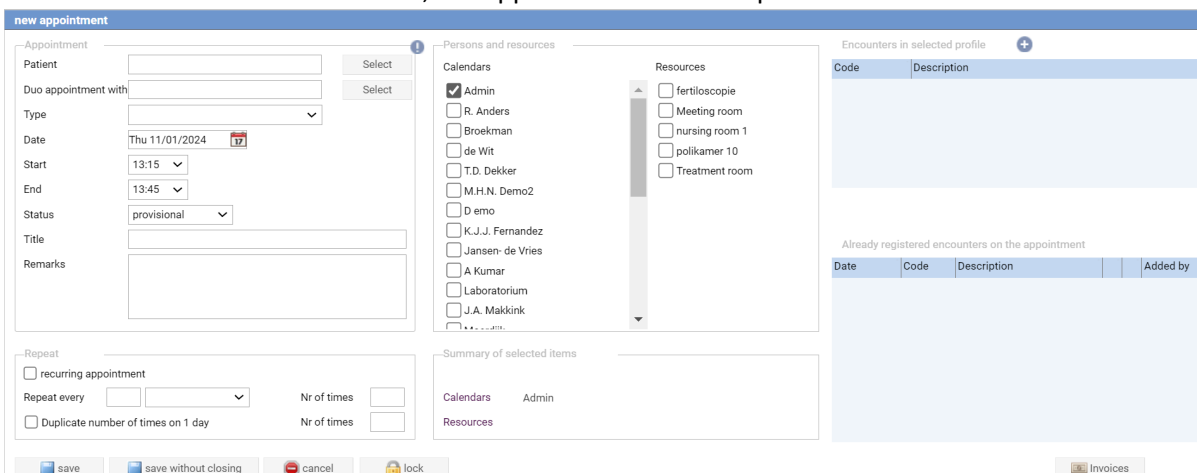


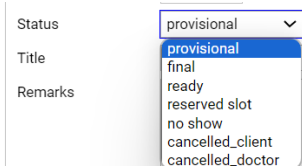


Figure 12: New appointments screen.

- Patient:** Using the 'Select' button, a patient can be selected.
- Type:** Select appointment type. Note that if you change the appointment type, the end time will be automatically adjusted.
- Date:** Change the date by clicking on the calendar icon: 
- Start time:** Select start time.
- End time:** By default, the number of minutes associated with the treatment is displayed. Through the lock  the time can be adjusted.

Status: Indicates status of the appointment. This is displayed in the calendar as follows.



- Has a tooltip that displays who created and changed the appointment.



Title: (different) Title appointment

Remarks: Comments on the appointment

Calendars: Select the physician(s)

) to be associated with the agenda item. The selected physician(s) are displayed in the *selected items summary* block.

Resources: Select the resource to be associated with the agenda item here. The selected resources are displayed in the *summary selected items* block.

Repeat: Select this checkbox if a repeat appointment is to be created. If repeat appointment is checked, the number of repetitions and interval must also be specified.

3.2 Opening of created appointment.

Double click on the appointment to open the contents of the appointment.

3.3 Display agenda item and 'Special attention' patient

When the mouse is hovered over an agenda item, information about the Special Attention noted in the file appears.

T.M.J. Asker (f. 26/03/2001)	OPU	
	131874532 - Asker (26/03/2001)	
Admin, User		J. Barak
	12:30-13:15	
	Admin, User	
	Special attention:	
	Allergies: plaster, test	
	Notes:	
	Watch out	
	this is extra important	
	Pay attention, HIV infection	
	Attention Code:	
	Cryo contract	
	100	
	Hep B	
	Cryo contract	

Figure 13: special points of interest for appointment.

3.4 Filters and new appointments

For example, if filters are activated, the top column of the calendar looks like this:

Thursday 11 Jan 24				
Admin, User	Fernandez, Kayla	Anders, Regina	Vaatstra, Joke	nursing room 1

Figure 14: image agenda.

For example, if 'Room 2' column is clicked to create a new appointment, 'Room 2' will already be selected as a resource in the new appointment dialog.

3.6 Linking patient to reserved appointment.

To link a patient to a reserved appointment from the clinic interface, select the context menu on *1st consult together* and choose **"Make appointment"**.

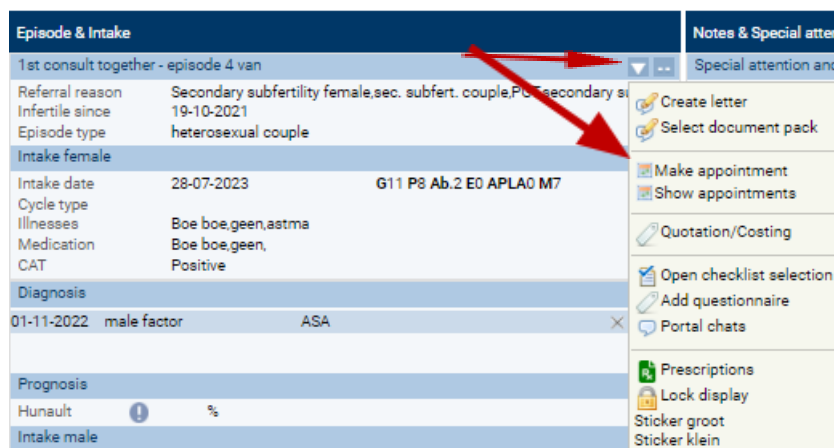


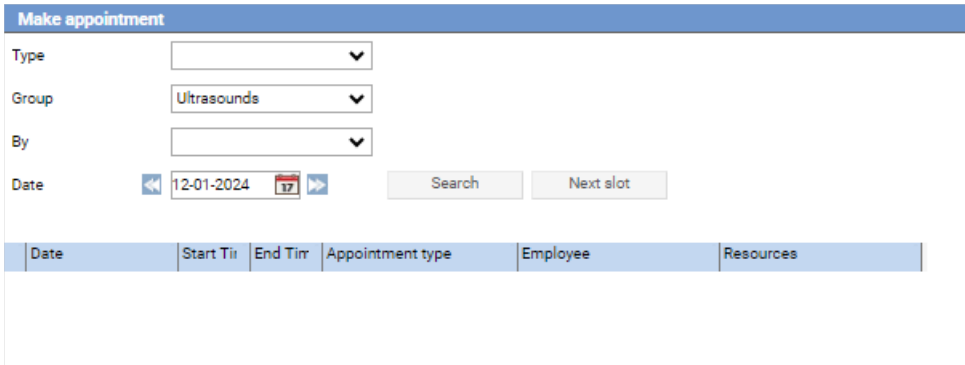
Figure 15: assign patient.

Now you can search for a free slot in two ways:

- On a specific date.
- Free slots.

Both options are discussed below.

3.6.1 Search by specific date



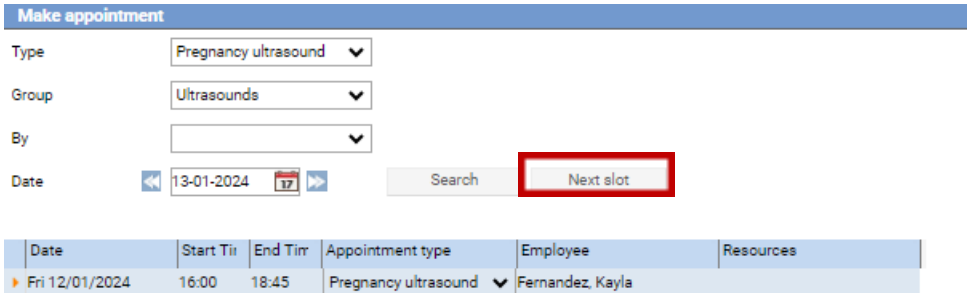
The screenshot shows the 'Make appointment' search interface. It includes dropdown menus for 'Type', 'Group' (set to 'Ultrasounds'), and 'By'. Below these is a 'Date' field with a calendar icon showing '12-01-2024'. There are 'Search' and 'Next slot' buttons. Below the search area is a table with columns: Date, Start Tm, End Tm, Appointment type, Employee, and Resources.

Figure 16: date appointment search.

- Select the type of appointment you want to schedule for.
- If necessary, select a physician. Note that when a physician is selected, the system only searches for reservations to which that physician is linked.
- Select the date you want to search for a free slot.
- Click on "search".

If no reservation slot can be found, the list will remain empty.

3.6.2 Search by next slot



Date	Start Tim	End Tim	Appointment type	Employee	Resources
Fri 12/01/2024	16:00	18:45	Pregnancy ultrasound	Fernandez, Kayla	

Figure 17: date appointment search.

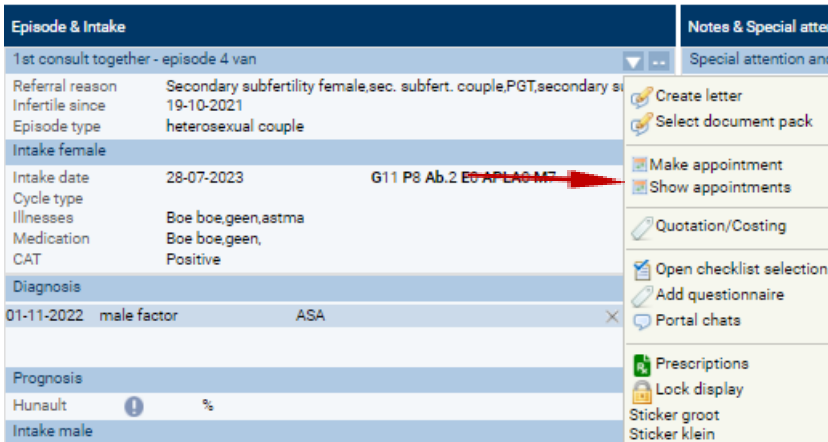
- Select the type of appointment you want to schedule for.
- If necessary, select a physician. Note that when a physician is selected, the system only searches for reservations to which that physician is linked.
- Select the date from when you want to search for a free slot.
- Click "next slot".

The system now looks for the next date when a free slot is available.

If you now want to link the patient to one of the free slots in the list, click on the green arrow in front of the free appointment slot. Now the reservation slot will be blocked.

3.7 Display list of future appointments with patient

Future appointments are displayed in the left column (see 1.2.1). They can also be displayed by clicking on *1st consult jointly* in the context menu and choosing 'Show appointments'.



Episode & Intake			Notes & Special atten
1st consult together - episode 4 van			Special attention and
Referral reason	Secondary subfertility female, sec. subfert. couple, PGT, secondary s		Create letter
Infertile since	19-10-2021		Select document pack
Episode type	heterosexual couple		Make appointment
Intake female			Show appointments
Intake date	28-07-2023	G11 P8 Ab.2 EC APLAS ME	Quotation/Costing
Cycle type			Open checklist selection
Illnesses	Boe boe, geen, astma		Add questionnaire
Medication	Boe boe, geen,		Portal chats
CAT	Positive		Prescriptions
Diagnosis			Lock display
01-11-2022	male factor	ASA	Sticker groot
Prognosis			Sticker klein
Hunault	!		
Intake male			

Figure 18: Show future appointments.

3.8 Canceling patient appointments.

Now the list of scheduled appointments for this patient is displayed. An appointment can be canceled by clicking on the red cross. The slot is now marked as reserved again, making it available to new patients.

Show appointments							
Date			Appointment type	Employee	Resources		
Mon 15/01/2024	11:10	11:20	Monitoring	Admin, User			✕
Tue 16/01/2024	13:20	13:50	OPU	Jansen- de Vries, UK User	polikamer 10		✕
Tue 23/01/2024	15:00	15:20	Monitoring	Jansen- de Vries			✕
Wed 24/01/2024	08:45	09:30	OPU	Anders, Regina	Treatment room		✕
Sat 27/01/2024	10:00	10:20	Injection instructions	Vaatstra, Joke			✕
Wed 31/01/2024	14:50	15:00	Monitoring	Jansen- de Vries			✕
Sat 03/02/2024	17:00	17:30	Monitoring	Jansen- de Vries			✕
Thu 08/02/2024	14:00	14:15	Pregnancy ultrasound	Strada, Karime			✕
Mon 25/03/2024	11:30	11:40	1st ultrasound	Fernandez, Kayla			✕
Thu 28/03/2024	19:50	20:20	Monitoring	Fernandez, Kayla	nursing room 1		✕
Sat 30/03/2024	11:10	12:30	Pregnancy ultrasound	Strada, Karime			✕
Sat 30/03/2024	17:40	18:10	OPU	Overbeek, Rik			✕
Tue 02/04/2024	20:00	20:30	OPU	Veenhuis, Aly			✕
Thu 04/04/2024	21:00	21:30	Injection instructions	Anders, Regina			✕

Figure 19: disconnecting patient from appointment.