

## Adding a visit to a case in the Scheduling application

- 1. Within the Scheduling application of Healthbridge, Identify if a case is without a Visit
- 2. Click the Worksheet View tab
- 3. A blank cell in the Visit column means there is no Visit attached to this case

lters 📮	Calendar View	Worksheet View	2	Display By: Weel					<>
	Patient:		DOB:	Age:	Pt Insuran	:e:			
SMTWTFS			Drim or	-	Dt Delieu b				
30 31 1 2 3 4 5			Prime:		Pt Policy N	um:			
6 7 8 9 10 11 12			Sec:		Vt Insuran	ce:			
13 14 15 16 17 18 19	Notes:		PCP:		Vt Policy N	lum:			
27 28 1 2 3 4 5									
6 7 8 9 10 11 12	Appt Date	-¤ Appt Last Upd +	Dur	- Event Name	-⇔ Patient MRN ⊰	Visit	I Patient Name I + ■	Patient Age	⇔ Sta
sources	021722	Garcia, Shamaro	220	SRG SUNY	1133513		TEST, PHARMAC	41y	PD
	021622	Anderson, Tanish	30	SRG SUNY	1304443		3 RTIN	38y	PD
	021622	Anderson, Tanish	105	SRG SUNY	1258472		TESTSSC, MAINV	75y	PD
<ul> <li>Select All/Clear All</li> </ul>	021622	Garcia, Shamaro	220	SRG SUNY	1133513		TEST, PHARMAC	41y	PD
🖌 🚀 OR-1	021622	Dominguez, Fred	125	SRG SUNY	1304465	8912254	TEST, ORSPED3	1y 2m	CO
🖌 🚀 OR-10	021622	Dominguez, Fred	390	SRG SUNY	1304453	8912249	TEST, ORS1	22y	CO
🖌 🛹 OR-11	021622	Dominguez, Fred	290	SRG SUNY	1304455	8912250	TEST, ORS2	26y	CO
🖌 🛹 OR-12	021522	Dominguez Fred	30	SRG SUNY	1218145	3000136	TEST, ANDREW	28v	со
- <b>4</b> 00 0							,		1
ent									
jends	Clipboard (0)								
lehar 🔿			00:00:52	INSV2SSD005 IC	trivil CTXSCM17TST0	2 (8 3 782 11010)	scm17tsthrtlb.ub	h downstate org	INTTEST

- 4. Right click on the case with the blank visit
- 5. Select **Details**
- 6. Then click **Appt/Visit Link**

Filters	д	Calendar View	Worksheet View	[	Display By: Week	-					<	>
✓ February 2022 ► S M T W T F S		Patient: TEST, F	PHARMACYKBMA	DOB: 06-15-198	80 Age: 41	y Pt Insuran	ice:					
30 31 1 2 3 4 5		445 LENOX	N NV 11203	Prime:		Pt Policy 1	Num:					
6 7 8 9 10 11 12		NORD, DROOKET	N, N, N, N, 200,	Sec:		Vt Insurar	nce:					
13 14 15 16 17 18 19 20 21 22 23 24 25 26		Notes:		PCP:		Vt Policy I	Num:					
27 28 1 2 3 4 5					1				_			
6 7 8 9 10 11 12	_	Appt Date	🛱 Appt Last Upd 🛱	Dur ⊰⊨	Event Name ⊣⊧	Patient MRN	D Visit	Patient Name -	Pat	ient Age 👍 Resource	- S	stat
Resources	-	021722	Garcia, Shamar o	220	SRG SUNY	<sup>1133</sup> 4 >		Update Status	•	OR-8 +	PD	
		021622	Anderson, Tanish	30	SRG SUNY	130444-		Schedule		OR-3	PD	
		021622	Anderson, Tanish	105	SRG SUNY	1258472	5	Details	•	Appointment	PD	
<ul> <li>Select All/Clear All</li> </ul>		021622	Garcia, Shamar o	220	SRG SUNY	1133513	-	Tab Sequence		Patient/Visit	PD	
🖌 🚀 OR-1		021622	Dominguez, Fred	125	SRG SUNY	1304465	8912254	Move To C 6		Appt/Visit Link	CO	_
🖌 🛸 OR-10		021622	Dominguez, Fred	390	SRG SUNY	1304453	8912249	TEST, ORS1	22y	Appt/Orders Link	CO	
🖌 🐝 OR-11		021622	Dominguez Fred	290	SRG SUNY	1304455	8912250	TEST, ORS2	26v	More Information	co	
🕑 🚀 OR-12		021522	Dominguez Fred	30	SRG SUNY	1218145	3000136	TEST ANDREW	28v	OR-1	co	
	-1		o o ming dez, ri com						,			
Event		4										•
Legends		Clipboard (0)										×
Sidebar 🙆				00:00:52	INSV2SSD005 [Citri	ix] CTXSCM17TST	02 (8.3.782.11010)	scm17tsthrtlb.uk	b.dowr	nstate.org Garcia, Shamar	(I: INTTE	ST1

- 7. Select the check box for the visit that will be linked to this case
- 8. Then click **OK**

TEST, PHARM	ACYKBMA
<ul> <li>Appoint</li> </ul>	ment Visit
Appointment	
Date/Time	r 02-17-2022 10:00 Find Appointment
Event	: SRG SUNY
Status	a Pending
Resource(s)	: OR-8; Lee, Yi
Location	1: Operating Suite
Facility	: SUNY Downstate Medical Center
-Show Visits	
Search betw	veen: 02-07-2022 • and 02-27-2022 •
Pre-regi	stered Admit/Arrived Discharged Canceled Leave of Absence
Link 🕫	VisitDt/Tm ⊽ +> Visit # +> Visit Type +> Attending Prov +> Service +> Faciliity +> Visit Status 0-04-2021 07:50 829108 Inpatient SUNY Downstate AdmittedArriv



Adding the Visit and Patient Age column to the Worksheet view tab

- 1. Click Preferences
- 2. Then click Return to Default Roster by Location



Visits can also be linked in the Calendar view tab

- 1. Open the Calendar View tab
- 2. Right click the case
- 3. Select Details
- 4. Click Appt/Visit Link
- 5. Select the check box for the visit that will be linked to this case
- 6. Then click **OK**





## Adding a visit to a case in the Surgical Care application

- 1. Within the Surgical Care application of Healthbridge, Identify if a case is without a Visit
  - A. No patient visit selected will display in the Patient Header
  - B. In the Surgical Case Detail tab, there will be a Blue text: This case has no visit.
  - C. Case Validation Errors message will display: This case does not have a visit attached to it. Case cannot be close

No patient visit	selected. A					e
Surgery Case List Surger	ry Case Details Patient	List Orders	Results Patient Info Do	uments Flowsheets Clinical Summary	Timeline	
TEST, PHARMACYKBMA				1133513 / This case has	no visit. B	Female
Case ID: 492 In OR	OR-8 Lee, Yi	LAPAROSCOF	PIC ABDOMINAL HYSTERECTOMY	[Left] Actual: 02-17-2022 09:50	_	
Case Header Pre-op	Intra-op Case Us	🛞 Case Vali	dation Errors			R 🗐 🕲 🗄 🕹
Planned Procedures     rocedure Type Description     imary LAPAROSCO     Performed Procedures     Provider Proc     Lee, Yi MD AtteLAPA	PIC ABDOMINAL HY	Type Error	The case contains the following er Area Case Header - Case Information	rors. These errors must be resolved before you can Description This case does not have a visit attached to it. Co	n save the case. ase cannot be closed.	Planned D
Participants     Role	Name					
Anesthesiologist Anesthesia Assistant						
Surgeon, Primary	Lee, Yi (MD Attending	Need Help?			Close	
Surgeon, Secondary						

2. To add a visit to this case, click the Link icon from the Surgery Case Details tab



- 3. Select the check box for the visit that will be linked to this case
- 4. Then click **OK**

Case ID 492 In OR OR8 Lee, Yi LA Stast Header Pre-op Inta-op Case Usage Planed Procedures Planed Planed Pla	EST, PHARMACYKBMA		Sase/Visit Link							1
edure Type Description any LAPAROSCOPIC ABDOMINAL HY.	Case ID: 492 In OR ise Header   Pre-op   Planned Procedures	OR-8 Lee, Yi LA Intra-op Case Usage	Visit Date Between: 11-01-2 Visit Status: Pre-re	021 egistered 💽 Adm	And 02-1	7-2022	led 🗌 Leave o	of Absence		<b>R</b> (2)
3     11-23-2021 15:00     629140     Ambsurg     SUNY Downstate Medica.     Admitted/Arrived       Performed Procedures     11-24-2021 12:00     829139     Ambsurg     Lee, Yi     SUNY Downstate Medica.     Pre-registered       Anesthesia Assistant     Surgeoo, Primary     Lee, Yi (MD Attending)     Surgeoo, Primary     Lee, Yi (MD Attending)	cedure Type Description	Proc	Line Visit Date/Time	Visit ID 829135	Visit Type Ambsurg	Attending Provider Lee, Yi	Service	Facility SUNY Downstate Medica	Visit Status Pre-registered	
Performed Procedures         Image: Comparison of the comparison of th		3	11-23-2021 15:00 11-24-2021 12:00	829140 829139	Ambsurg Ambsurg	Lee, Yi		SUNY Downstate Medica SUNY Downstate Medica	Admitted/Arrived Pre-registered	
Surgeon, Secondary Need Help? 4 OK Cancel	Performed Procedures Anesthesia Assistant Surgeon, Primany Surgeon, Secondary	Lee, Yi (MD Attending)	Need Help?					4	OK	-