

The main portion of the screen shows a calendar, in either month, week, or day view, in a tabbed interface. The tabs will either be doctors or locations.

The right-hand side of the screen contains the following items:

- **Date:** By default, the date will be "today's date". You can change this either by typing in the field, or clicking the drop-down arrow, which will show a little calendar where you can pick a date.
- **Calendar View:** Choose month, week, or day. Default is month.
- **Schedule View:** Choose doctor or location. Default is doctor.
- **Holidays:** Presented for information only. Lists commonly observed national and Jewish holidays.
- **W/E Sched:** This button brings up a screen to handle weekend surgeries. The main interface shows only Monday thru Friday in all calendar views; the screen launched by this button allows you to see any weekend surgeries that have been scheduled and allows you to edit them.
- **Exit:** Closes this app and returns you to the handboard.

You see no data in this screen-shot because an archive database was used during development, which contains data from roughly 1995 thru 2001.

The screenshot shows a software window titled "Surgery Calendar". The main area displays a monthly calendar for January 2007. The calendar is organized into a grid with columns for days of the week (Monday to Friday) and rows for dates. Each date cell contains a number representing the day, a large empty space for scheduling, and a yellow bar at the bottom indicating "480 Mins Remain".

On the right side of the window, there are several control panels:

- Date:** A dropdown menu showing "1 /18/2007".
- Calendar View:** Radio buttons for "Month" (selected), "Week", and "Day".
- Schedule View:** Radio buttons for "Doctor" (selected) and "Location".
- Holidays Jan 07:** A list of holidays: "1 - New Year's Day" and "15 - M. L. King Day".
- W/E Sched:** A button with a calendar icon and the text "W/E Sched".
- Exit:** A button with a green arrow icon and the text "Exit".

Monday	Tuesday	Wednesday	Thursday	Friday
1	2	3	4	5
480 Mins Remain				
8	9	10	11	12
480 Mins Remain				
15	16	17	18	19
480 Mins Remain				
22	23	24	25	26
480 Mins Remain				
29	30	31		
480 Mins Remain	480 Mins Remain	480 Mins Remain		

During testing, I worked with data mostly from 1999. Note that the date was changed accordingly. On this screen we can really see how data is displayed.

In each "day box", all the surgeries for the doctor (in doctor view) are displayed. In this view, each surgery item contains patient name, procedure, OR time, and location (if in doctor view), or doctor (if in location view). The full item can be seen if you hover the mouse over it, as shown in the screen shot.

Note that if a day is locked, the "day header" is shown in red, along with a lock icon and the lock reason in parentheses. A non-locked day has a blue header. A new type of item, a "time block", is shown in an aqua color (see the 20th in the screen shot below).

Underneath each day is a yellow strip that shows how many minutes are left in the day for scheduling (assuming 8 hours / 480 minutes). Note: If a day contains one or more items where the OR Time has not been given a value, the text "Mins Remain N/A" will appear in this area.

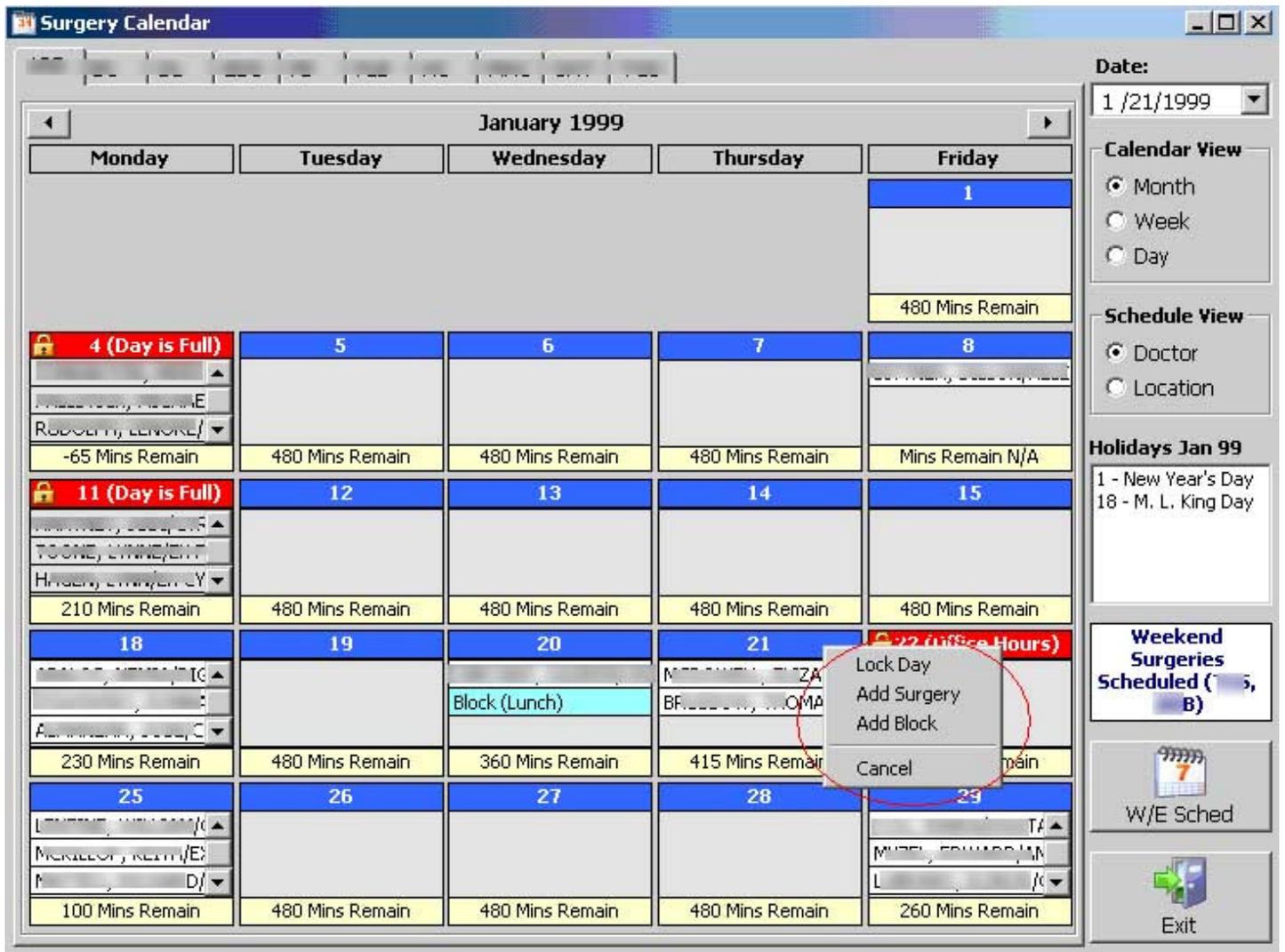
Note also that if the current month has weekend surgeries, a message will appear on the right-hand side of the screen as shown below.

The screenshot shows the 'Surgery Calendar' application window. The main area displays a calendar for January 1999. The current date is 1/18/1999. The calendar is organized into a grid of days. Days 4, 11, and 22 are marked as 'locked' (red headers) with reasons: '4 (Day is Full)', '11 (Day is Full)', and '22 (Office Hours)'. Days 5, 6, 7, 8, 12, 13, 14, 15, 18, 19, 20, 21, 25, 26, 27, 28, and 29 are available (blue headers). Day 20 has a 'Block (Lunch)' item highlighted in aqua. A tooltip for a surgery on day 20 is visible, showing patient name, procedure, and OR time. The right sidebar contains controls for 'Calendar View' (Month, Week, Day), 'Schedule View' (Doctor, Location), 'Holidays Jan 99' (1 - New Year's Day, 18 - M. L. King Day), and a 'Weekend Surgeries Scheduled (1, 5, 3)' indicator. An 'Exit' button is at the bottom right.

A note on terminology ("lock" vs. "block"). In the existing database, a day was "locked" for a doctor by clicking on a lock button. However, the related fields and tables behind the scenes used "block" in the names. For clarification, however, when we say "lock" we are speaking of a lock for the day for a doctor. A "block" is the new item that is part of this application, which allows you to "block out" a segment of time on a given day for a doctor.

Most operations for scheduling are accomplished by "context menus" (AKA "right-click" menus). Clicking on a day header (as opposed to an item in that day) causes the menu shown below to be displayed. The choices are:

- **Lock Day or Unlock Day** – locks a day if it is unlocked and vice-versa. If user does not have scheduling permission, this will be grayed out.
- **Add Surgery** – Brings up the "Add Surgery" dialog screen, where you choose "Pending Surgery" (default) or "New Record".  
 If you choose "Pending Surgery", you must select a patient and a pending surgery for that patient, which will come up on the dialog screen. Clicking OK on the dialog screen will then bring up the Surgery Scheduling screen in "edit" mode, where the details of the pending surgery can be filled in.  
 If you choose "New Record" from the Add Surgery dialog screen and click OK, this will bring up the Surgery Scheduling screen in "add" mode.  
 (enabled only if user has editing permission and day is not locked)
- **Add Block** – brings up a small pop-up screen for entering details about the time block (enabled only if user has editing permission and day is not locked)
- **Cancel** (closes the menu. Menu will also close when you click on a different item.)





Clicking on an item in a day (i.e. a surgery or time-block, as opposed to the day header) causes the menu shown below to be displayed. The choices are:

- **View Details** – brings up the Surgery Scheduling screen in "read-only" mode to show details about the surgery item. Accessible to all users.
- **Edit** – brings up the Surgery Scheduling screen (if a surgery item is clicked) or an edit screen for the time-block item if a block item is clicked) in "edit" mode. Enabled only if user has editing permission and day is not locked.
- **Delete** – Deletes the clicked-on surgery or time-block item. Will prompt you to confirm first. Enabled only if user has editing permission and day is not locked.
- **Cancel** (closes the menu. Menu will also close when you click on a different item.)

The screenshot shows the 'Surgery Calendar' application window. The main area displays a calendar for January 1999, organized by day (Monday to Friday). Each day has a header and a list of items below it. A context menu is open over the 'Block (Lunch)' item on January 21st. The menu options are: View Details, Edit, Delete, and Cancel. The 'Cancel' option is circled in red. On the right side of the window, there are several panels: 'Date' (set to 1/21/1999), 'Calendar View' (with radio buttons for Month, Week, and Day), 'Schedule View' (with radio buttons for Doctor and Location), 'Holidays Jan 99' (listing New Year's Day and M. L. King Day), 'Weekend Surgeries Scheduled' (with a count), 'W/E Sched' (with a calendar icon), and 'Exit' (with a green arrow icon).

Monday	Tuesday	Wednesday	Thursday	Friday
4 (Day is Full) -65 Mins Remain	5 480 Mins Remain	6 480 Mins Remain	7 480 Mins Remain	1 480 Mins Remain
11 (Day is Full) 210 Mins Remain	12 480 Mins Remain	13 480 Mins Remain	14 480 Mins Remain	8 Mins Remain N/A
18 230 Mins Remain	19 480 Mins Remain	20 Block (Lunch) 360 Mins Remain	21 Block (Lunch) 480 Mins Remain	22 (Office Hours) 480 Mins Remain
25 100 Mins Remain	26 480 Mins Remain	27 480 Mins Remain	28 480 Mins Remain	29 260 Mins Remain

Shown below is this application's version of the Surgery Scheduling screen (in "Add" mode), as described above. This screen contains all of the fields that were in the existing database application, with the addition of "OR Time", where you select or enter the estimated amount of time, in minutes, that the procedure will take.

Things to note:

- The patient field is a "search-as-you-type" drop-down box. When selecting a patient, type the first few letters of the patient's last name, and a list will drop down containing all the patient's whose last name starts with that letter.
- The following fields are required to save a record: Patient, OR Time, Est Proc, Doctor, and Hospital (facility).
- The Edit and Delete buttons are there because if you to choose to "View Details", then decide to edit or delete the record, you can do so from this screen. These buttons would only be enabled if you had edit permission and the day was not locked.

**Surgery Scheduling (Add Mode)**

Patient Name:  Patient ID:  Sched ID:

Insurer Type:  Insurer Name:

Surgery Date:   Start Time:  OR Time:

Est Proc:

Doctor:

Side:  Anatomy:

Equipment:

Implant:

Hospital:  Anesthesia:  Status:

OR:  Med Clear:

ADM:  PAT:

Comments:

Shown below is a screen shot of the Surgery Scheduling screen in Edit mode.

**Surgery Scheduling (Edit Mode)**

Patient Name: [ ] Patient ID: [ ] Sched ID: [ ]

Insurer Type: MC Insurer Name: ^HORIZON NJBLUE CROSS/ BLUE SHIELD

Surgery Date: 1 /21/1999  Start Time: 1 :00 PM OR Time: 30

---

Est Proc: TENOVAGINOTOMY

Doctor: [ ]

Side: Right Anatomy: Middle

Equipment: [ ]

Implant: (N/A)

---

Hospital: [ ] Anesthesia: Straight Local Status: SDS

OR: [ ] Med Clear: [ ]

ADM: [ ] PAT: [ ]

Comments: [ ]

---

Close Edit Delete Save Cancel

When you go to lock a day (off of the main calendar screen), you choose a lock reason from this screen:

**Lock Reason**

Please select the lock reason from the drop-down list below:

On Vacation

OK

Cancel

Shown below is the screen that comes up when you go to do a "block time" operation:



The screenshot shows a dialog box titled "Block Time (Edit)". It has a standard Windows-style title bar with a close button. The dialog contains three input fields: "Doctor:" with a dropdown menu, "Date:" with a date picker showing "1 /20/1999", and "Minutes:" with a text box containing "60". Below these is a "Reason:" field with a dropdown menu showing "Lunch". At the bottom right, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

### Dragging and Dropping

Another way to edit an item, if you want to change only the date (i.e. move a surgery from one day to another) is by dragging the item from the original day and dropping onto the new day. This can be done when either in monthly or weekly view. Available only if user has editing permission and the original day is not locked.

When you go to do the drag/drop operation, the mouse pointer will change, for a surgery or block item respectively, as follows:



surg\_Drag.ico



block\_Drag.ico

The weekly calendar view is shown below. The same context menu operations apply.

**Surgery Calendar** [ - ] [ □ ] [ X ]

Date: 1/18/1999

Monday, January 18, 1999 through Friday, January 22, 1999

Patient Name	Procedure	Mins	Location
[REDACTED]	DIGITAL NERVE REP	60	H-300
[REDACTED]	TENOVAGINOTOMY	35	H-300
[REDACTED]	CTR	120	H-300
[REDACTED]	TRIGGER RELEASES	35	H-300

230 Mins Remain

Patient Name	Procedure	Mins	Location

480 Mins Remain

Patient Name	Procedure	Mins	Location
[REDACTED]	ORIF 4TH MC, REP EXT TENDON	60	NON-
	Block (Lunch)	60	

360 Mins Remain

Patient Name	Procedure	Mins	Location
[REDACTED]	CTR	35	[REDACTED]
[REDACTED]	TENOVAGINOTOMY	30	[REDACTED]

415 Mins Remain

Patient Name	Procedure	Mins	Location

480 Mins Remain

**Fri Jan 22 Office Hours**

480 Mins Remain

**Calendar View**

Month

Week

Day

**Schedule View**

Doctor

Location

**Holidays Jan 99**

1 - New Year's Day  
18 - M. L. King Day

**Weekend Surgeries Schedule 1/1999**

 W/E Sched

 Exit

The daily calendar view is shown below. The same context menu operations apply.

The screenshot shows a software window titled "Surgery Calendar". At the top, there is a date selector set to "1 /18/1999" and a "Date:" label. Below this is a navigation bar for "Monday, January 18, 1999" with a "230 Mins Remain" indicator. The main area contains a table with the following data:

Patient Name	Procedure	Mins	Location
[REDACTED]	DIGITAL NERVE REP	60	[REDACTED]
[REDACTED]	TENOVAGINOTOMY	35	[REDACTED]
[REDACTED]	CTR	120	[REDACTED]
MANNING, KENNETH	TRIGGER RELEASES	35	[REDACTED]

On the right side of the window, there are several control panels:

- Calendar View:** Radio buttons for "Month", "Week", and "Day" (selected).
- Schedule View:** Radio buttons for "Doctor" (selected) and "Location".
- Holidays Jan 99:** A list showing "1 - New Year's Day" and "18 - M. L. King Day".
- Weekend Surgeries:** A button labeled "Weekend Surgeries Sched" with a blurred icon.
- W/E Sched:** A button with a calendar icon and the text "W/E Sched".
- Exit:** A button with a green plus icon and the text "Exit".

Shown below is the monthly calendar, in "location" view. All non-XXXX data will be grouped in the last tab. In the historical data, there was only one XXXX. Thus only XXXX and NON-XXXX tabs apply in the screen shot below.

With the new facility (with two ORs), there will be three tabs total: XXXX-1, XXXX-2, and NON-XXXX. (The exact names of 1 and 2 is up to you of course).

In this view (location), if you see a "little people" icon on the right in the day header, this means that two or more doctors have surgeries scheduled for the same day in the selected location. In this case, clicking on the day header will cause the system to "toggle" or "cycle through" each doctor's schedule in that day.

**Surgery Calendar** [NON-XXXX]

Date: 1 / 15 / 1999

January 1999

Monday	Tuesday	Wednesday	Thursday	Friday
				1 480 Mins Remain
4 (Day is Full) RODOLPHI, LENORE E -65 Mins Remain	5 BRANNON, WILLIAM 180 Mins Remain	6 (Day is Full) KENNEDY, KAREN J 133 Mins Remain	7 (Day is Full) RIDIVOKI, BARBARA -20 Mins Remain	8 ALLEN, CHRISTOPHER E 280 Mins Remain
11 (Day is Full) 210 Mins Remain	12 140 Mins Remain	13 (Day is Full) 94 Mins Remain	14 (Day is Full) 135 Mins Remain	15 Mins Remain N/A
18 230 Mins Remain	19 40 Mins Remain	20 (Day is Full) 137 Mins Remain	21 415 Mins Remain	22 (Day is Full) 80 Mins Remain
25 100 Mins Remain	26 170 Mins Remain	27 28 Mins Remain	28 (Day is Full) 165 Mins Remain	29 260 Mins Remain

**Calendar View**  
 Month  
 Week  
 Day

**Schedule View**  
 Doctor  
 Location

**Holidays Jan 99**  
 1 - New Year's Day  
 18 - M. L. King Day

**Weekend Surgeries**  
 Sched

W/E Sched

Exit

Location view, weekly:

**Surgery Calendar** [NON-] Date: 1/18/1999

Monday, January 18, 1999 through Friday, January 22, 1999

Day	Patient Name	Procedure	Mins	Doctor
<b>Mon</b> Jan 18 230 Mins Remain		DIGITAL NERVE REP	60	
		TENOVAGINOTOMY	35	
		CTR	120	
		TRIGGER RELEASES	35	
<b>Tue</b> Jan 19 40 Mins Remain		DEQ REL	30	
		TEV AMP W/ADV FLAP	50	
		TENOVAGINOTOMY	20	
		FLEXOR TENDON REP	70	
<b>Wed</b> Jan 20 Day is Full 137 Mins Remain		EX EPIDERMOID CYST	28	
		CTR, TRIGGER RELEASE	35	
		PIN REMOVAL	20	
		EX.MUCOID	60	
<b>Thu</b> Jan 21 415 Mins Remain		CTR	35	
		TENOVAGINOTOMY	30	
<b>Fri</b> Jan 22 Day is Full 80 Mins Remain		EX BX	50	
		INCISION & DRAINAGE	30	
		DIGITAL NERVE REP	30	
		INCISION & DRAINAGE	30	

**Calendar View**

Month

Week

Day

---

**Schedule View**

Doctor

Location

---

**Holidays Jan 99**

1 - New Year's Day  
18 - M. L. King Day

---

**Weekend Surgeries**

Sched

---

 W/E Sched

---

 Exit

Location view, daily:

**Surgery Calendar** [Window Title Bar]

NON-+

Thursday, January 21, 1999 Day is Full 140 Mins Remain

Patient Name	Procedure	Mins	Doctor
	CTR	45	
	CTR, TRIGGER RELEASE, NAIL PLATE	60	
	SUBTOTAL PALMAR FASC W/PIP	100	
	CTR	35	
	CTR	40	
	CTR, SUBTOTAL PALM FASC	60	

**Date:** 1 /21/1999

**Calendar View**

- Month
- Week
- Day

**Schedule View**

- Doctor
- Location

**Holidays Jan 99**

1 - New Year's Day  
18 - M. L. King Day

**Weekend Surgeries**  
Schedule

W/E Sched

Exit

