

Scheduling and Referrals – Allied Health Modify Treating Clinician for ABC



This Quick Reference Guide will explain how to:

Modify and update the treating clinician in Scheduling Appointment Book so that this corresponds to the relevant clinician in ABC. The default will be that admin will use the Senior Therapist for each service (unless clinician is specified during triage).

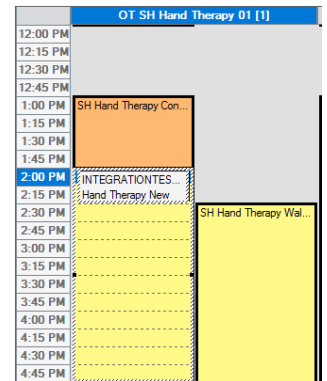


Important

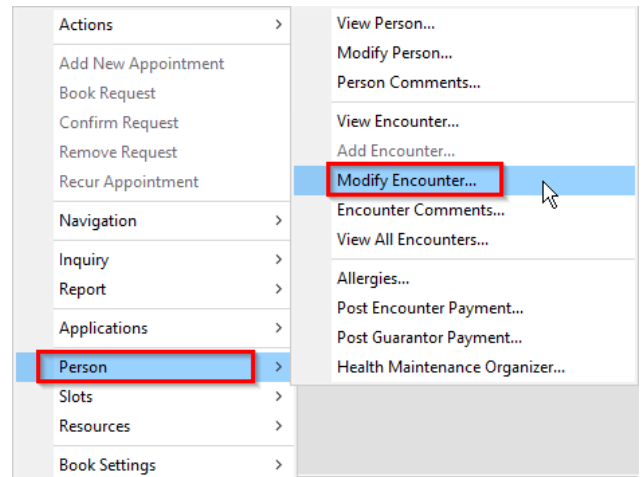
For this to transfer to ABC, this process must be completed within 72 hours of the patient being Checked Out. The recommendation is to complete this at the end of each clinic session / day to avoid this being missed.

Modify Treating Clinician in Scheduling Appointment Book

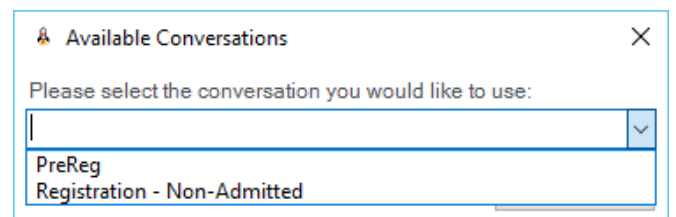
1. In Scheduling Appointment Book, go to the resource you need to
2. update and right click on the patient



3. Hover over **Person**
 - Select **Modify Encounter**

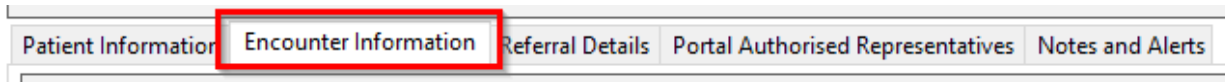


4. Available Conversations window will appear, select the conversation to open the encounter with
 - **PreReg**: If the patient has *not* been checked in/out yet.
 - **Registration – Non-Admitted**: If the patient has been checked in/out.

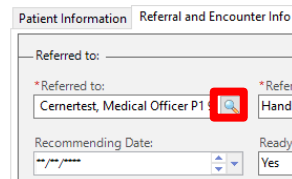




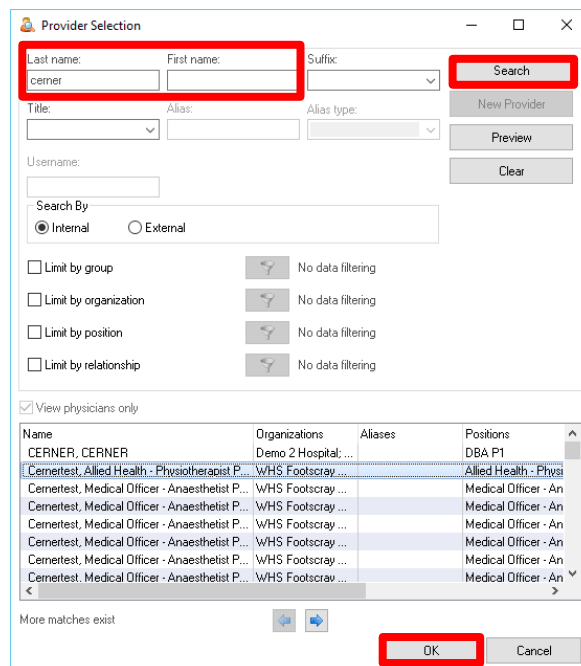
5. Once the conversation window opens, click on the **Encounter Information** tab



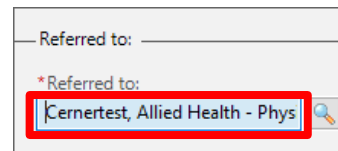
6. Scroll down to the section **Referred to:**
Click on the magnifying glass next to **Referred to:**



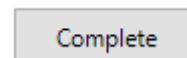
7. In the Provider Selection window, **search for your name**, select it and then click OK



8. **Referred to:** will be updated to your name



9. Click **Complete**



The Treating Clinician has now been updated