Scheduling and Referrals – Referral Renewal

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Digital Health Quick Reference Guide

This Quick Reference Guide will explain how to:

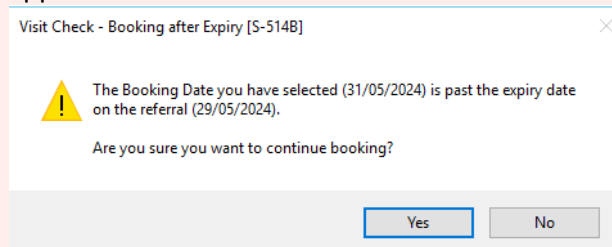Renew referrals of patients in following scenarios –

1. Review Appointment Already Booked – Page 1
2. Review Appointment Requested – Page 6
3. Patient Appointment Checked In – Page 14

Scenario 1: Review Appointment Already Booked

> 💡 **Handy Hint**
>
> While scheduling an appointment against a referral which is about to expire, a 'Booking after Expiry' box appears.
>
> **Visit Check - Booking after Expiry [S-514B]**
>
> ⚠ The Booking Date you have selected (31/05/2024) is past the expiry date on the referral (29/05/2024).
>
> Are you sure you want to continue booking?
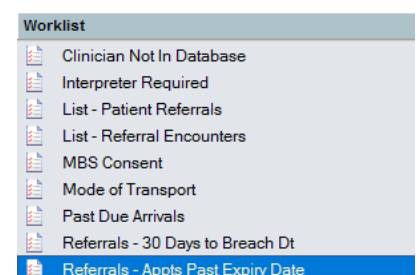>
> [Yes]   [No]
>
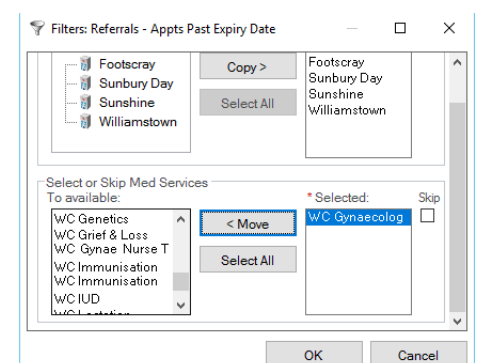> Able to click 'Yes' and schedule appointment after expiry date.
>
> This appointment now falls onto the PMoffice 'Referrals - Appointments Past Expiry Date' worklist if the appointment is 5 days in the past or 30 days into future from current date or if has already been discharged.

'Reschedule' Review Appointment + Add New Referral

1. Login to **PMoffice**
2. From left hand side **Worklist** section, double click on **Referrals - Appointments Past Expiry Date**

Worklist
- Clinician Not In Database
- Interpreter Required
- List - Patient Referrals
- List - Referral Encounters
- MBS Consent
- Mode of Transport
- Past Due Arrivals
- Referrals - 30 Days to Breach Dt
- **Referrals - Appts Past Expiry Date**

3. Select appropriate Medical Service and click **OK**

Filters: Referrals - Appts Past Expiry Date

- Footscray
- Sunbury Day
- Sunshine
- Williamstown

[Copy >] [Select All]

Footscray
Sunbury Day
Sunshine
Williamstown

Select or Skip Med Services

To available:
- WC Genetics
- WC Grief & Loss
- WC Gynae Nurse T
- WC Immunisation
- WC Immunisation
- WC IUD
- WC Lactation

[< Move] [Select All]

*Selected:
WC Gynaecolog

Skip ☐

[OK]   [Cancel]

4. **Locate patient** on the list whose appointment is past the referral expiry date

	UR	Patient Name	DOB	Sex	Age	Referral ID	Disch Date/Time	Reg Date/Time	Est Arrive Date/Time	Appt Date/Time	Appt Type	Last Appt Date/Time	Expiry Date/Time	Encntr Type	Specialty
	2001387	TESTPAS, DEZ MRS	01/01/1986	Female	37 Years	VSPEC92983			03/07/2023 09:00	03/07/2023 09:00	Gynaecology MBS Review	03/07/2023 09:00	27/06/2023 23:59	PreReg	WC Gynaecology

5. Login to **Schapptbook**

6. Click on **Appointment Inquiry** button from the top toolbar

7. From **Person** tab, select Inquiry: Patient Schedule - All Appointments (history), search for patient, select appropriate dates and click **Find**

8. Locate patient appointment based on the appointment that is on the Referrals - Appointments Past Expiry Date worklist.

   Right click on appointment, select **Reschedule**

9. Select **No** (as we don't want to retain the association to the old expired referral)

10. Click **OK**

11. From the Work in progress window, click on Primary Resource, **drag and drop** it into the same date, time and resource slot that the appointment was originally scheduled for. Click **Confirm**

12. Select 'No' to Send to Third Party Printing? Click **OK**

13. Select **Add Enc**

14. Select **Yes**

15. Click **Add Episode.** Select Episode Type: **Specialist Clinics (OP).** Click **OK**

16. Click on episode just created (can be confirmed using the Created date/time column and Creator column), and click **OK**

17. Navigate to **Referral and Encounter Info** tab, complete all mandatory fields as per new referral that has been received. Click **Complete**.

18. Click Reschedule **Reason**: Referral Renewed and click **OK**

Modify Outcome of previous appointment

19. Click on the **Appointment Inquiry** button from the top toolbar

20. From **Person** tab, select Inquiry: Patient Schedule - All Appointments (history), search for patient, and click **Find**

21. Locate the previous appointment that has occurred on the old referral and has been checked out, right click and select **Modify**

22. Navigate to Offer tab, change Outcome of Attendance from Appointment to be made at a later date to **Referral Renewal.** Click **OK**

23. Click **Yes**

This old referral now falls onto the Referral – Closure worklist in PMoffice (refer to QRG 'Scheduling and Referrals – Closing Referrals' for this process).

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Scenario 2: Review Appointment Requested

Add Renewed Referral

1. Open **PMOffice**
    - Conversation > **Referral Add/Modify**
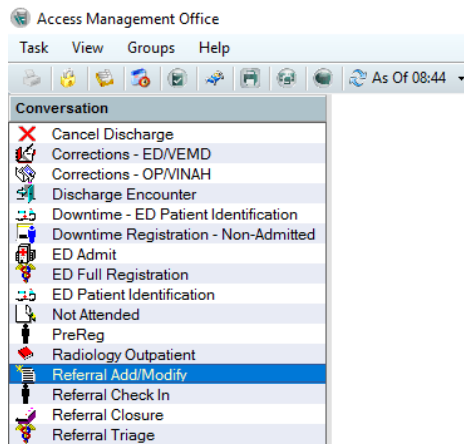
2. **Search** for the patient using appropriate identifiers
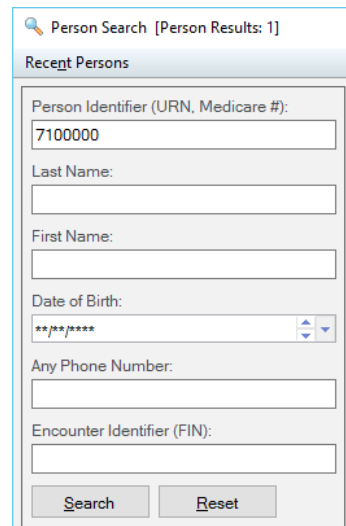
    - Click **Add Encounter** in the bottom right

3. Click **Add Episode**
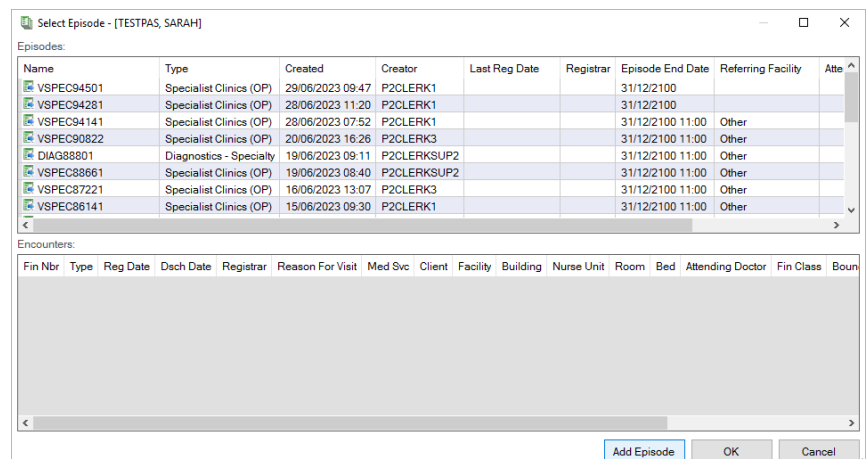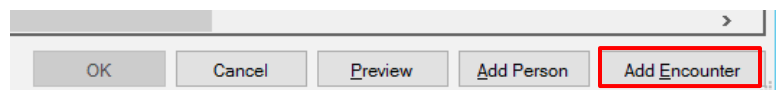
- Select **Specialist Clinics (OP)** from the list, then click **OK**

- Select the created episode, see the **Created** time and **Creator** to ensure the correct one is selected
- Click **OK**

4. Select the relevant clinic campus
   - Enter "WHS"
   - Click the **magnifying glass**
   - Select the campus
   - Click **OK**

5. **Referral Add/Modify** window opens, select the **Referral and Encounter Info** tab
   - Select Referral Add Type: **Referral Renewal**

6. Select '**Yes**' to 'Would you like to pull select details from the previous referral?'

7. If patient has more than one active referrals, gives the option to select appropriate previous referral. Enter the relevant **number** and click **OK**

8. Details from previous referral are pulled through (Referral Status/Priority is auto-completed as 'Renewal').
Enter all other fields as required and click **Complete** –

9. Click **OK**

> ⚠️ **Important**
>
> This 'Renewed Referral' now appears as a New Request on the appropriate **Request by Queue** list in Scheduling Appointment Book, which can be scheduled for the **same appointment date/time** as the patient's old appointment. Steps outlined below.

Associate New Request to Old Request

1. Open **Scheduling Appointment Book**

2. From the top tool bar, click on **Appointment Inquiry** button
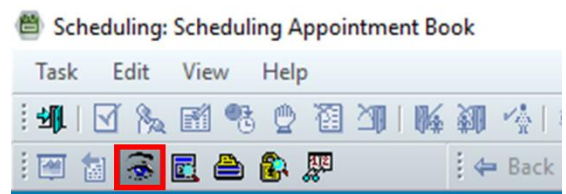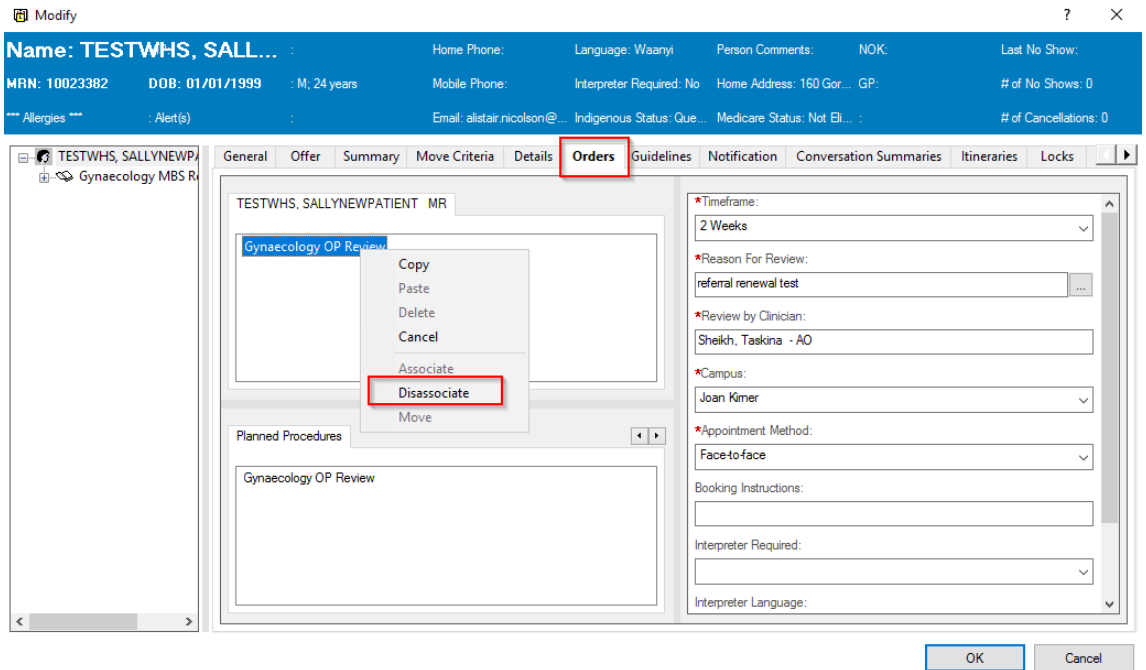

3. Click on **Person** tab / **Request List** tab > Request by Queue and go to appropriate request list

4. Click **Find** and the list of patient appointments will appear
   - Locate the appointment to be actioned

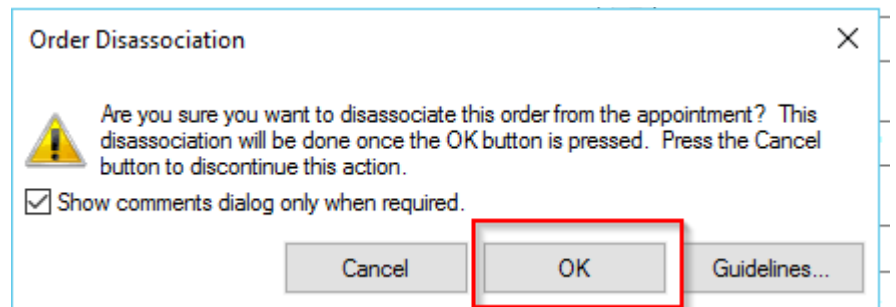5. Right click on appointment with the order attached and click **Modify**

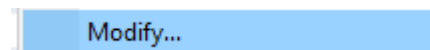6. Click on Orders tab, and right click on the order and select **disassociate**

7. Click Ok to confirm

8. Locate the appointment that requires the order to be attached

9. Right click on appointment with the order
   attached and click **Modify**

10. Click on **Orders** tab, and then click on **Existing Orders** tab

11. Double click on the appropriate previous **order** to link to this appointment

12. All information from old request is now associated to the new request. Click **OK**

Patient's new appointment request will remain on the Request List until ready to be scheduled as per normal.

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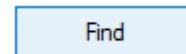**Quick Reference Guide**

Cancel Old Request

1. Open **Scheduling Appointment Book**
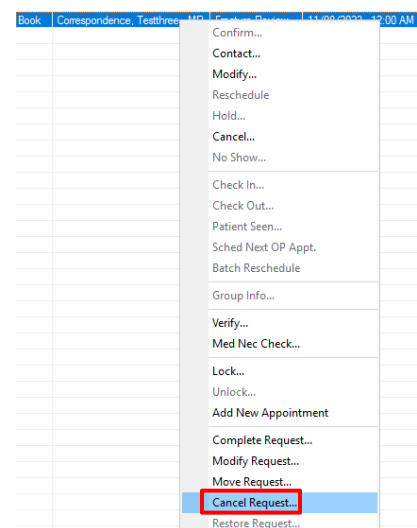2. From the top tool bar, click on **Appointment Inquiry** button
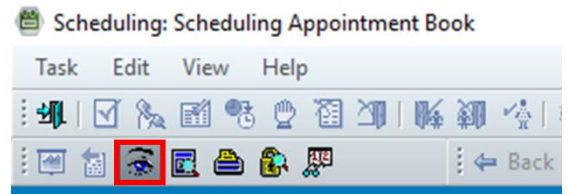
3. Click on **Person** tab / **Request List** tab > Request by Queue and go to appropriate request list

4. Click **Find** and the list of patient appointments will appear
   a. Locate the appointment to be actioned

5. Right click on appointment row and click **Cancel Request**

6. **Cancel** window will appear
   a. In the **General** tab, fill in ***DNA/Cancel Comments:** and select No for **Send to Third Party Printing**

7. Navigate to **Offer** tab, select **Outcome of Attendance** as **Referral Renewed**.

Click **OK**

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Scenario 3: Patient Appointment Checked In

Undo Check In

1. Right click on appointment row and click **Undo Check In**

| 01/05/2023 - 9:00 AM | Gynaecology MBS New | | Attended(Ch | | Undo Check In |
| 24/04/2023 - 1:45 PM | Gynaecology MBS Review | | Attended(Ch | | |

2. Scheduling grid will open and an **Undo** window will appear, click **OK**

Undo   ✕

This action will reschedule the appointment back to Confirm.

                                                           OK

3. In the next window, fill in the ***Reason**, add **Comments**, then select **OK**

Undo   ?   ✕

*Reason:
Left without being seen   ⌄

Comments:

                                          OK   Cancel

4. Appointment will be booked back to the original date and time, and the status will return to **Booked(Confirmed)**

| 01/05/2023 - 9:00 AM | Gynaecology MBS New | | Booked(Confirmed) |

5. Now follow **Scenario 1: Review Appointment Already Booked** steps for renewing referral.