Scheduling and Referrals – Scheduling Inquiries

Digital Health
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Quick Reference Guide

**This Quick Reference Guide will explain how to:**

Use Scheduling Inquiries and provides descriptions for a few commonly used inquiries.

Inquiries are lists which help easily view information such as patient appointments, check in patients, clinicians etc.

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1. Open **Scheduling Appointment Book.**

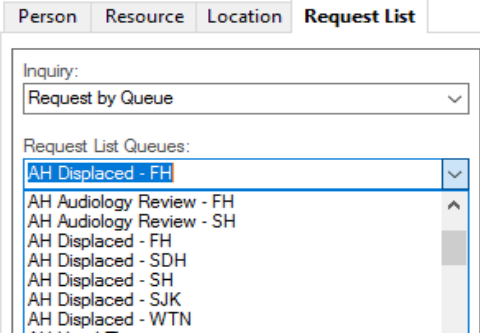2. From the top tool bar, click on **Appointment Inquiry** button.
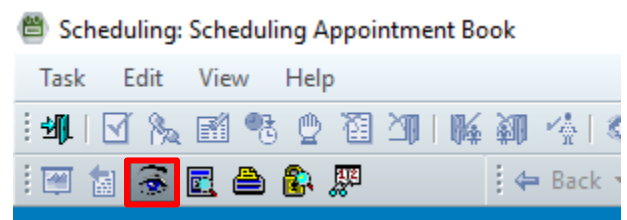
3. Various scheduling inquiries can be opened via the four tabs at the top – Person, Resource, Location and Request List.
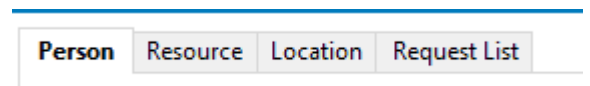
4. Listed below are some helpful inquiries and their descriptions -

Tab	Inquiry	Description/Use Case
Person	Patient Schedule - All Appointments (history)	List of all appointments for that particular patient. Handy Hint: Can be used when patient calls and inquiries about their appointment date, time, location etc.
Resource	Resource Group Open Slots	To look at all the free time slots available for a group of resources.
Location	Appointment Check in by Location Group	To check in patients on clinic lists grouped by location.
	Clinic Sign off by Location Group	To view patients grouped by location for whom clinician has placed a referral/review order, but forgot to check them out/put an outcome.
	Clinic patients missing follow ups	To view patients who have an outcome of 'Another appointment to be made at a later date' but no review order was placed by clinician.
	Cancel/DNA appt not rescheduled Location Group	List of DNA patients grouped by location whose appointments need to be rescheduled. Also – patients

		whose appointments have been cancelled and need to be rescheduled.
Request List	Referrals Add Encounter	List of all referral orders placed by clinician.
	Request by Queue	List of all review orders placed by clinician. Handy Hint: 'Displaced' Queues bring up all appointments that have been booked but their templates have been removed. Those appointments will appear on this list to be rebooked into another template.
	Request by Person	List of all requests (referral/review orders) for that particular patient. Handy Hint: Can be used when patient calls and inquiries if their referral has been received, status etc.