Scheduling – Direct to Scheduling / Scheduling a Walk-In Clinic Appointment

Digital Health
CONNECTING BEST CARE

Digital Health
Quick Reference Guide

This Quick Reference Guide will explain how to:

Book in a walk-in clinic appointment or directly schedule a patient into Scheduling Appointment Book

Please Note: This workflow is for Specialist Clinics only

Direct to Scheduling/ Walk-in Clinic using Request List

1. Open **Scheduling Appointment Book**

2. From the top tool bar, click on **Appointment Inquiry** button.
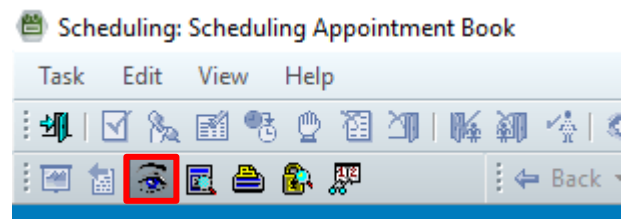
3. Click on **Request List** tab.

   Select Inquiry: **Referrals Add Encounter**

   Request List Queues: Select the appropriate list for the walk-in clinic

   Then click **Find**
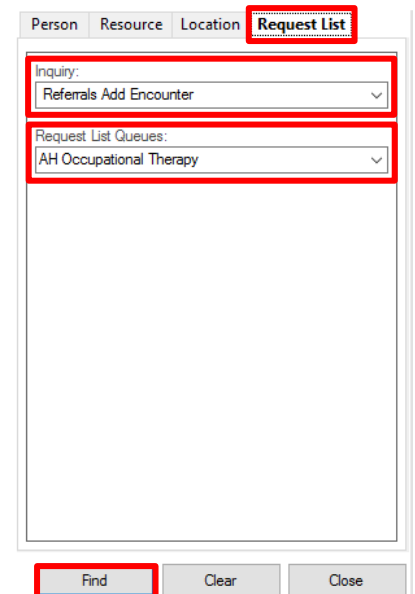
4. The **Request List** will load with list of patients who have had referral requests placed for the selected clinic

Action	MRN	Patient Name	Date of Birth	Date	Referring Clinician	Contact Details	Proposed Urgency	Referred To Facility	Referral To Clinician	Reason for Referral	Appt Type	Orders
Book	10023396	TESTPAS, EISHA	01/01/1990	17/05/2023 - 5:08 PM		911		Sunshine		Testing OEF Patient Facility	Hand Therapy New	Hand Therapy OP Referral
Book	2000716	Testingnew, Vpdcnew MS	12/12/1989	05/06/2023 - 9:28 AM		8675309		Sunshine		test again	Hand Therapy New	Hand Therapy OP Referral
Book	1828920	INTEGRATIONTESTTWOSC, SCENARIOTHREEREJECT MRS	30/03/1983	08/06/2023 - 3:41 PM		1234		Sunshine		Walk in clinic #4th & 5th MCPJ R hand	Hand Therapy New	Hand Therapy OP Referral

Please note: that all referrals that require an encounter to be added will be visible on this request list not just direct to scheduling appointments.

5. Locate the patient, **right click** and select **Schedule**

6. **Future Requests/Appointments** window will open, select the appropriate request, then click **OK**

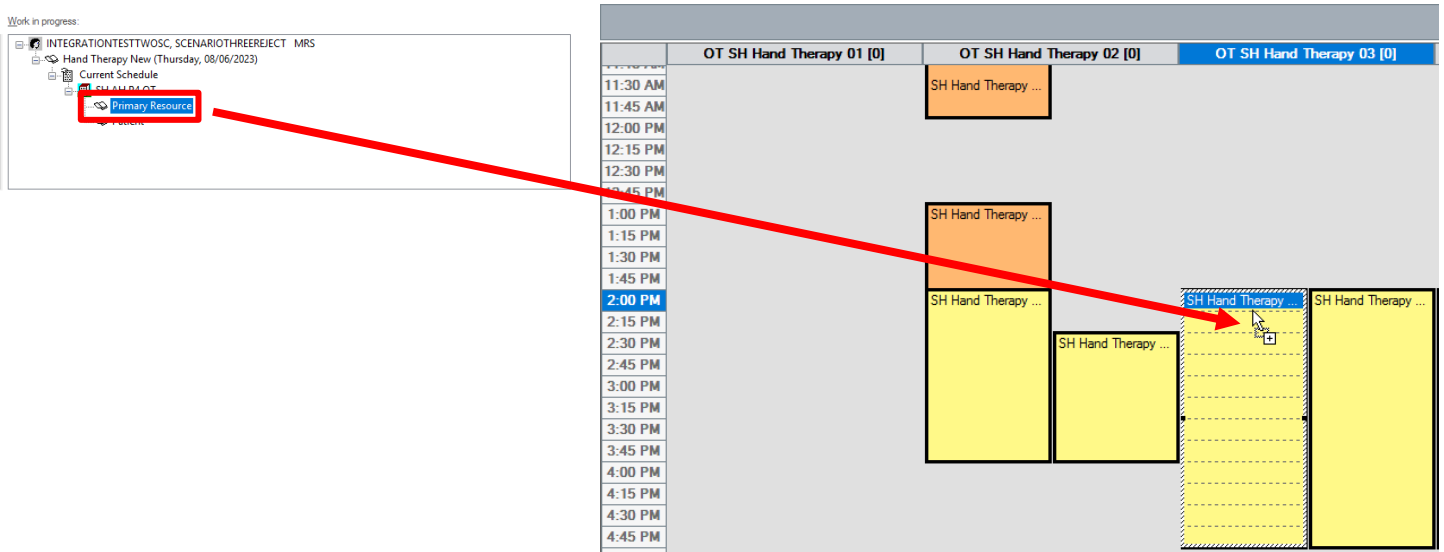7. Appointment Attributes window will open. Confirm details are correct, then click **OK**
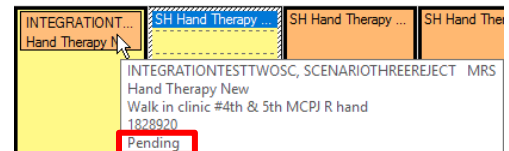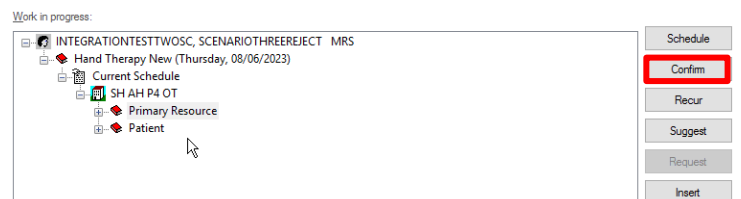
8. Patient will move into the Work in Progress window
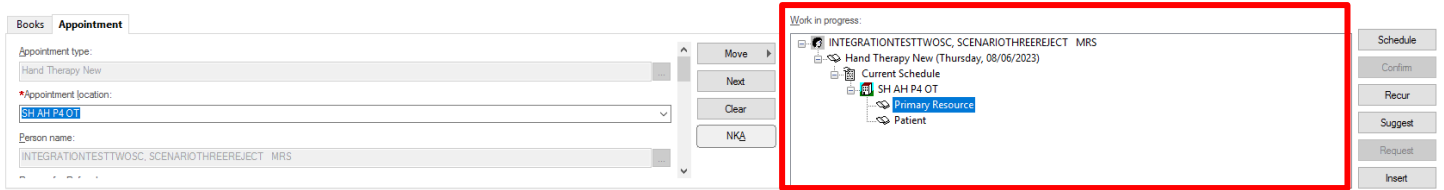
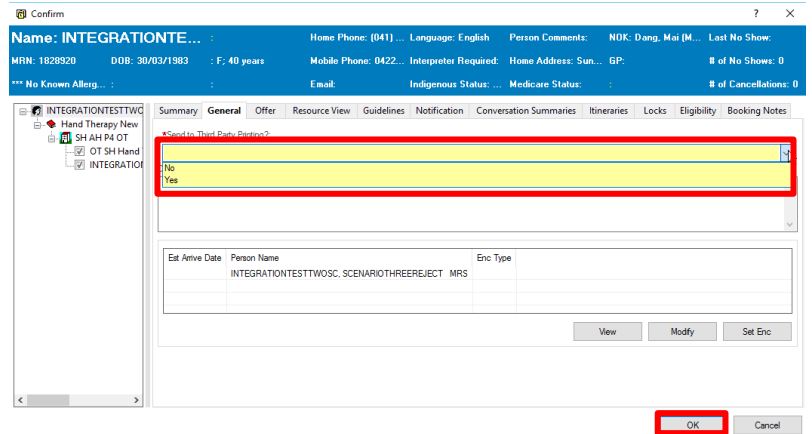9. Click on the Primary Resource and Drag and Drop into the required appointment slot

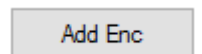10. Patient will now appear in the appointment slot in a **Pending** status
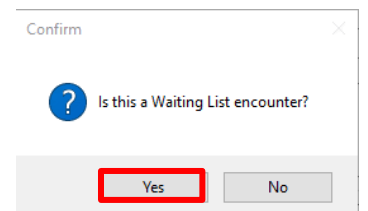

11. Click on Confirm

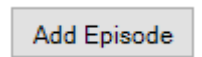12. The Confirm Window will open, complete the mandatory fields and click **OK**

13. **Encounter Selection** Window will open.
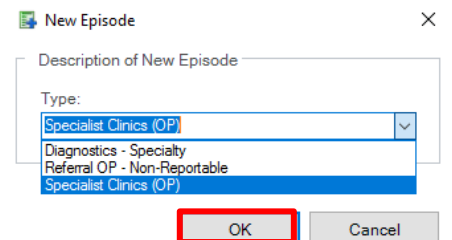   Select **Add Enc**

14. Confirm Window will open,
    Select **Yes**

15. **Select Episode** Window will open
    Select **Add Episode**

16. **New Episode** Window will open, select Specialist Clinics (OP)
    Click **OK**

17. Episode will be added under Episodes section,
    Select the Episode just created (use Created Date/Creator to confirm)
    Click **OK**

18. **Referral Add/Modify** Window will open

     Click on **Referral and Encounter Info**, complete Mandatory Fields

     Then Click **Complete**
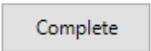
19. **Referral Add/Modify** window opens confirming FIN NBR has been created, Click **OK**

20. The patient will now appear in a **Booked(Confirmed)** Status on the grid

Direct to Scheduling/ Walk-in Clinic using Appointment Tab

1. Open **Scheduling Appointment Book**

2. Click on **Appointment** Tab
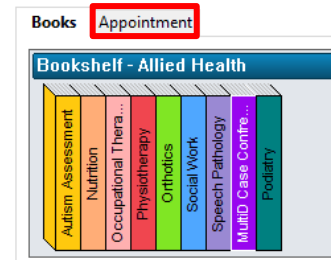
3. In **Appointment type**, enter the appointment type that you need to schedule
   e.g. Hand Therapy New

> ### Handy Hint
>
> Click on `...` to see a list of Appointment types

4. Complete **Appointment Location** and **Person Name** fields

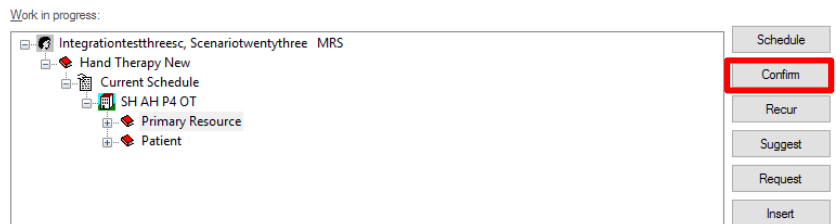5. Complete **Reason for Referral** and **Mode of Contact** fields

6. Click `Move ▶`, Appointment Attributes window will open, click OK

7. Patient will appear in Work in Progress section,

   Drag and drop Primary Resource to the appointment you want to schedule to, patient will appear in slot with a Pending status
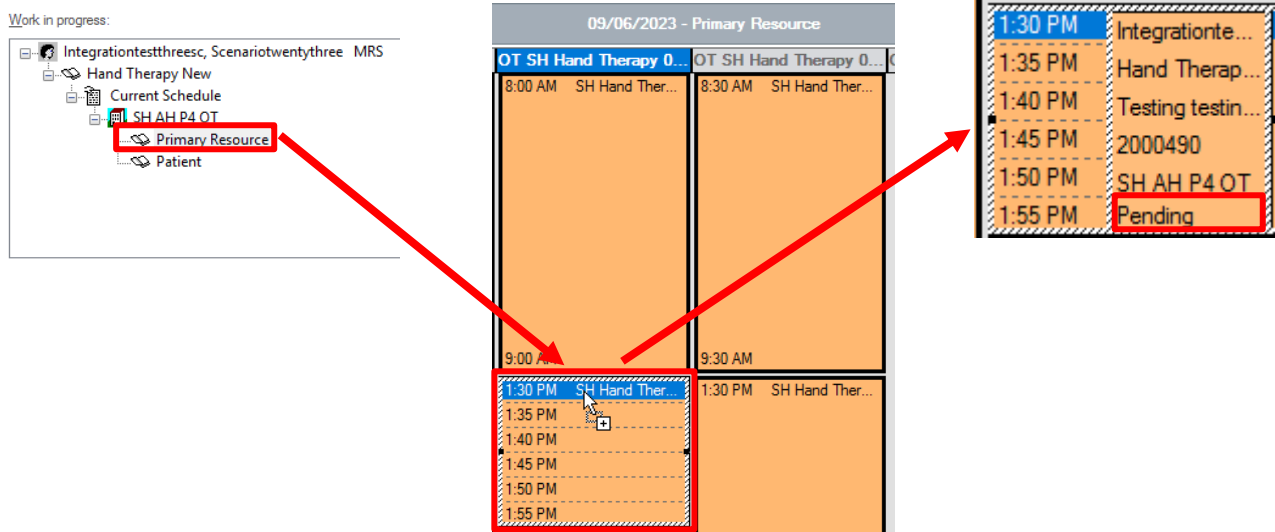
8. Click on Confirm

9. Complete Steps 12 – 20 from Direct to Scheduling using Request List

Please Note: With this method, additional information will need to be completed for Step 18 Referral Add/Modify Window