Research – Scheduling Appointments

Digital Health
Quick Reference Guide

This Quick Reference Guide will explain how to:

Schedule in Non-Reportable research appointments (e.g. Pre-Screening appointments) within the organisation.

This guide should only be used when the 'Research' appointment type is used.

1. Within Scheduling Appointment Book, Click on the Appointment Tab

2. Select the date using the calendar if it requires to be adjusted

3. Populate Appointment type 'Research' or 'Oncology Research' (For Cancer Services)

4. Populate Appointment location e.g. SH Research Allied Health
5. Populate Person name by clicking on (…) to bring up the person search window
6. Find the patient required to be scheduled and click OK.

> ❗ **Important – Do not select an encounter**
>
> Research appointments will require a new encounter so there will be no need to select a previous encounter.

7. Populate Reason for Visit e.g. Pre-Screening

8. Click on Move

9. The Appointment Attribute window will appear, Select OK

10. Click on Primary Resource

11. Drag and Drop to appropriate date and time

12. Right click on the pending tile and select Confirm Request, The confirmation window will appear.

13. Select OK on the confirmation window.

14. From the Select Enc Window. Select 'Add Encounter'.

15. 'Is this a Waiting Encounter' pop-up will appear. Select 'No'. Select Episode window will appear. This is not required for research appointments so select 'Cancel'

16. Review information under the 'Encounter Information' tab and complete the mandatory fields.

17. Select Complete when finished.