

# Research – Scheduling Appointments



## 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)

Books Appointment

\*Appointment type: Research

\*Appointment location: [Highlighted]

\*Person name: [...]

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.

Person Search [Person Results: 43]

Recent Persons

Name	URN	Sex	DOB	Age	Address
Testwhs_Regression, 2018Codeup51 Registrationcbb MR	1667593	Male	04/05/1995	28 Years	160 Gordon St
Testwhs, William_Medorder MR	1613161	Male	15/06/1980	43 Years	160 Gordon St
TestWHS, Testing	9999999	Male	02/04/1980	43 Years	
TestWHS, Test	1079536	Female	01/01/1980	43 Years	Test
Testwhs, test	W102544	Male	01/01/1990	33 Years	
TESTWHS, TDRS4	9000018	Female	11/12/1980	42 Years	
TESTWHS, TDRS3	9000017	Female	10/11/1979	43 Years	
TestWHS, TDRS2	9000016	Female	11/12/1979	43 Years	
Testwhs, TDRS1	9000015	Female	11/10/1978	44 Years	
TESTWHS, TDRF9	9000014	Male	02/08/1991	31 Years	
TESTWHS, TDRF8	9000013	Male	03/03/1991	32 Years	
TESTWHS, TDRF7	9000012	Male	08/08/1992	30 Years	

FIN	Referral ID	Pt Type	Location/Ward	Specialty	Treating Clinician	Visit Reason
30000116		PreReg	SH Research Obstetrics	Research	WHSTEST, Medical Officer - Obstetrics P2 1 - CLINAO	PVT Testing

Search Quality: [Progress bar]  Assume Wildcards

OK Cancel Preview Add Person Add Encounter Modify

### ! 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

The screenshot shows the 'Appointment' form with the following fields:
 

- \*Appointment location: SH Research Allied Health
- \*Person name: TESTWHS, PATRICKDOCUMENTATION MRS
- \*Reason for Referral: Pre-Screening

 On the right side, there are three buttons: 'Move' (highlighted with a red box), 'Next', and 'Clear'.

8. Click on Move

9. The Appointment Attribute window will appear, Select OK

The screenshot shows the 'Appointment Attribute' window. On the left, there is a tree view under 'Work in progress:' containing:
 

- TESTWHS, PATRICKDOCUMENTATION MRS
  - Research
    - Current Schedule
      - SH Research Allied Health
        - Primary Resource (highlighted with a red box)
        - Patient

 On the right side, there are several buttons: 'Schedule', 'Confirm', 'Recur', 'Suggest', 'Request', and 'Insert'.

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.

The screenshot shows the 'Encounter Information' tab with the following fields:
 

- Current Encounter Information
  - Visit Type: PreReg
  - \*Reason for Visit: Pre-Screening
  - \*Account Class: Public: Eligible
- Location
  - \*Building: SH
  - \*Location/Ward: S 1E CDU
  - \*Specialty: Research
- Additional Data Set Fields
- Refer to:
  - \*Referred to: Cernertest, Medical Officer P2 1
- Refer from:
  - \*Referring Clinician: Cernertest, Medical Officer P2 10
  - Referring Facility:
  - Reason for No Referring Clin:
- Additional Information

17. Select Complete when finished.