Scheduling and Referrals – Scheduling Actions

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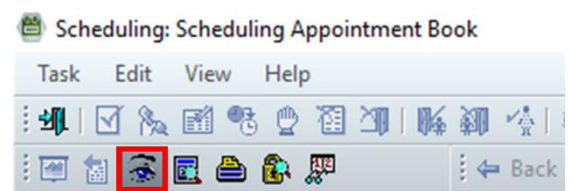**This Quick Reference Guide will explain how to:**

Action all scheduling components within Scheduling Appointment Book

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Contents

Method 1 – Scheduling Actions via the Person Inquiry

1. Open **Scheduling Appointment Book**

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

3. Click on **Person** tab
   - **Inquiry:** Select **Patient Schedule – All Appointments (history)** from the list
   - **Person:** Enter the patient's details

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

Rescheduling an Appointment

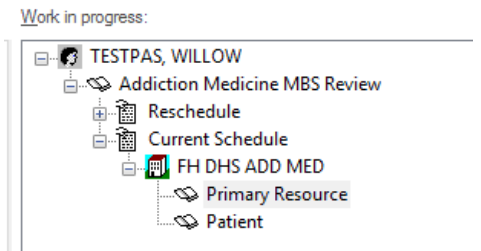1. Right click on appointment row and click **Reschedule**

2. **Existing Encounter** window will appear, select **Yes**
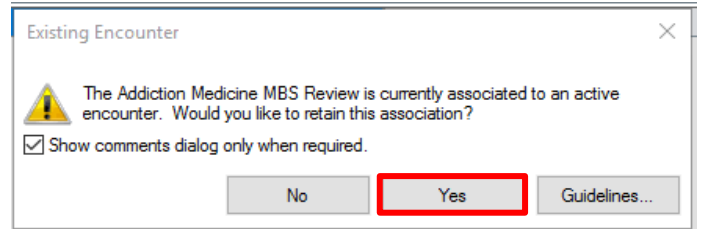
3. **Appointment Attributes** window will appear, select **OK**
   - Appointment details will populate in the **Work in progress** frame

4. To book and confirm the appointment, refer to QRG *SC – Scheduling – Walk in Clinic/Direct Scheduling*

5. Once the appointment is confirmed, **Reschedule** window will appear
   - Select the ***Reason**, add **Comments**, then click **OK**
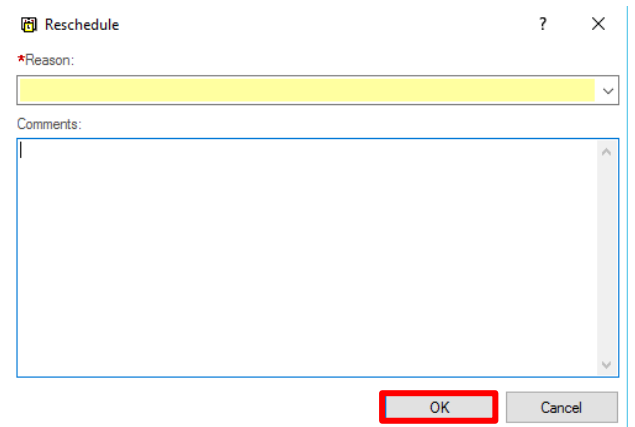
Cancelling an Appointment

1. Right click on appointment row and click **Cancel...**

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

3. Navigate to **Offer** tab, select a reason for ***Outcome of Attendance** and ***Reason for Cancel/Reschedule**
   • Click **OK**

4. If the **Outcome of Attendance** is **Discharged from consultant's care**, the below window will appear notifying the user that the action will mark the referral for closure
   • Select **Yes**

5. Appointment status will update to **Cancelled**

No Show an Appointment

1. Right click on appointment row and click **No Show…**

2. **Failed to Attend** window will appear
   - In the **General** tab, fill in ***DNA/Cancel Comments:**

3. Navigate to the **Offer** tab, select an ***Outcome of Attendance**, then select **OK**

5. Appointment status will update to **FTA(No Show)**

APPOINTMENT DATE	APPOINTMENT TYPE	DESCRIPTION	STATUS	RESOURCE
19/07/2023 - 4:30 AM	Gynaecology MBS New		FTA(No Show)	GYN SDH Registrar

Scheduling a Review Appointment

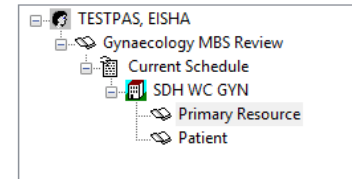1. Right click on appointment row and click **Sched Next OP Appt.**

2. Appointment details will populate into the **Appointment** tab
   - Fill in the mandatory fields and add **Scheduling Comments** if required, then click **Move**

3. **Appointment Attributes** window will appear, select **OK**
   - Appointment details will move to the **Work in Progress** frame

4. To book and confirm the appointment, refer to QRG *SC – Scheduling – Walk in Clinic/Direct Scheduling*

Undo a No Show Appointment

1. Right click on appointment row and click **Undo No Show**

2. Scheduling grid will open and an **Undo** window will appear
   - Click **OK**

3. In the next window, fill in the ***Reason**, add **Comments**, then select **OK**
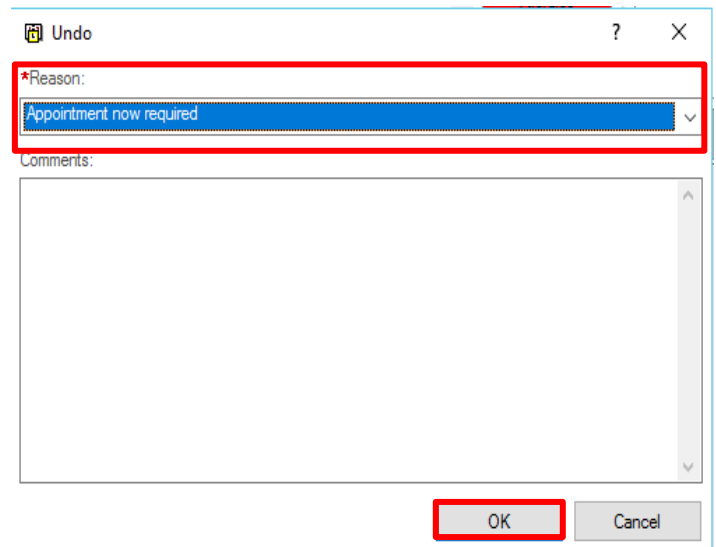
4. Appointment will be booked back to the original date and time, and the status will return to **Booked(Confirmed)**

Undo a Cancel Appointment

1. Right click on appointment row and click **Undo Cancel**

2. Scheduling grid will open and an **Undo** window will appear confirming the appointment will be back to confirm
   - Click **OK**

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

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

APPOINTMENT DATE	APPOINTMENT TYPE	DESCRIPTION	STATUS
01/02/2023 - 11:31 PM	Fracture New		Checked Out
06/03/2023 - 9:00 AM	Fracture Review		Booked(Confirmed)
27/02/2023 - 9:00 AM	Fracture Review		Booked(Confirmed)
20/02/2023 - 8:30 AM	Fracture Review		Booked(Confirmed)

Undo a Checked In Appointment

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

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

Undo Check In

2. Scheduling grid will open and an **Undo** window will appear confirming the appointment will be back to confirm
   - Click **OK**

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

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

Modifying Scheduling Details

1. Right click on appointment row and click **Modify…**

2. **Modify** window appears
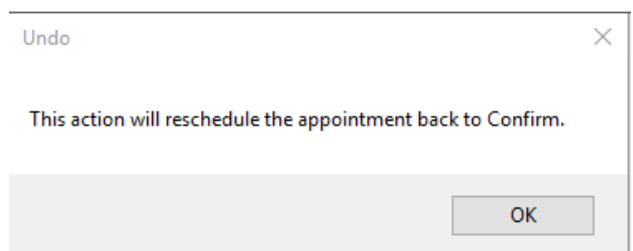   • Navigate to the **Details** taband modify the appointment details as necessary
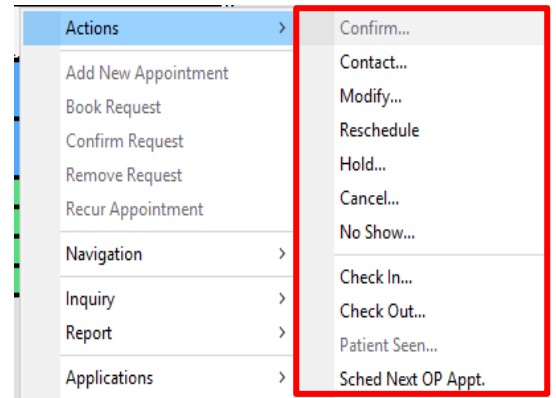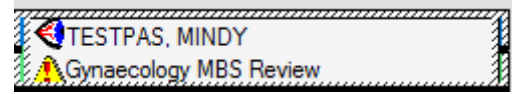

3. Once the appointment details have been updated, click **OK**
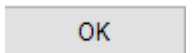
Method 2 – Scheduling Actions via Scheduling Grid

All scheduling actions can be completed from the Scheduling Grid. See below steps to locate appointment.

1. Navigate to the correct **Bookshelf** and locate the patient on the grid

   TESTPAS, MINDY
   Gynaecology MBS Review

2. Right click on patient, select **Actions >** and all actions will appear

Actions	>	Confirm...
Add New Appointment		Contact...
Book Request		Modify...
Confirm Request		Reschedule
Remove Request		Hold...
Recur Appointment		Cancel...
		No Show...
Navigation	>	Check In...
Inquiry	>	Check Out...
Report	>	Patient Seen...
Applications	>	Sched Next OP Appt.

Method 3 – Scheduling Actions: Suggest Functionality

1. Open **Scheduling Appointment Book**

2. Navigate to the **Appointment** tab and fill in the mandatory fields, then click **Move**

   Books | **Appointment**

   *Appointment type:
   Fracture New

   *Appointment location:
   FH ASC L1 ORTHO

   *Person name:
   TESTPAS, EISHA

   Move ▶
   Next
   Clear
   Allergies

3. **Appointment Attributes** window will appear, click **OK**, then the appointment details will move to the **Work in Progress** frame

   Work in progress:
   TESTPAS, EISHA
   Fracture New
   Current Schedule
   FH ASC L1 ORTHO
   Primary Resource
   Patient
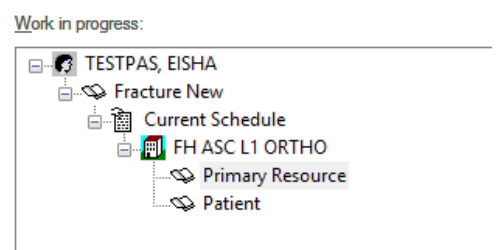
4. Click **Suggest,** on the right side of the application

   Suggest

5. **Suggested Schedules** window will appear
    - In the **Suggest Criteria** tab, the user can edit the **Date range** and **Time range**, then click **Suggest**

6. The next available appointment will appear on the right

7. To see the next suggested timeslot, click **Next**

8. Select the desired appointment by double clicking (this will tick the box), then click **OK**

9. The grid will be updated to the suggested date and the user can proceed with booking the appointment
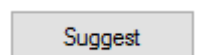   - Navigate to the suggested date to view the pending appointment

10. To book and confirm the appointment, refer to QRG *SC – Scheduling – Walk in Clinic/Direct Scheduling*
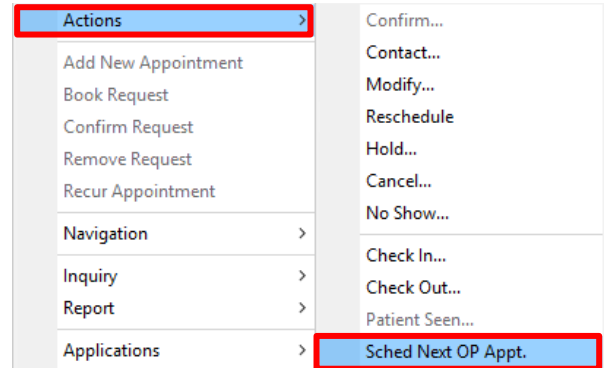
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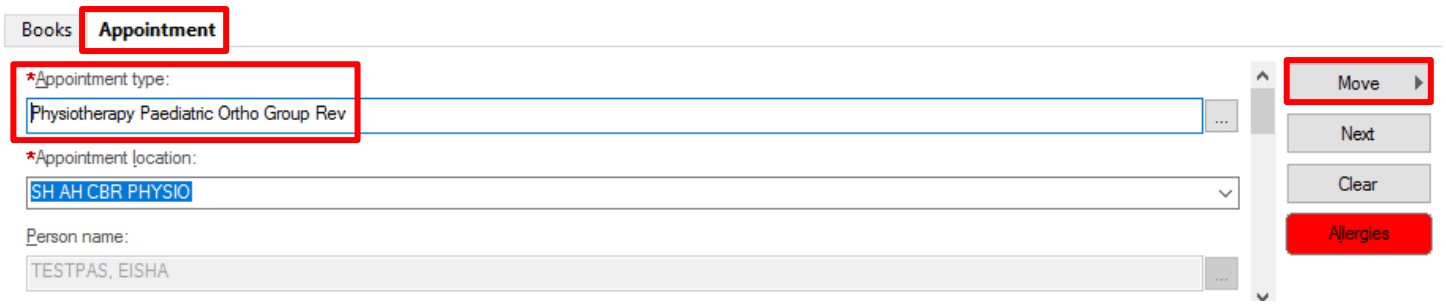CONNECTING BEST CARE

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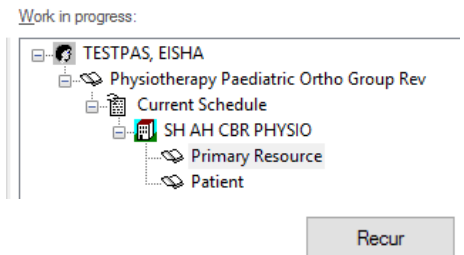
Method 4 – Scheduling Actions: Recur Functionality

1. Open **Scheduling Appointment Book**

2. Book the new appointment first, refer to QRG *SC – Scheduling – Walk in Clinic/Direct Scheduling*

3. Locate the new appointment booked in the scheduling grid, right click on appointment click **Actions** > **Sched Next OP Appt.**

Actions	►
Add New Appointment	
Book Request	
Confirm Request	
Remove Request	
Recur Appointment	
Navigation	►
Inquiry	►
Report	►
Applications	►

Confirm...
Contact...
Modify...
Reschedule
Hold...
Cancel...
No Show...
Check In...
Check Out...
Patient Seen...
Sched Next OP Appt.

4. Appointment details will populate into the **Appointment** tab, the ***Appointment Type** will default to review
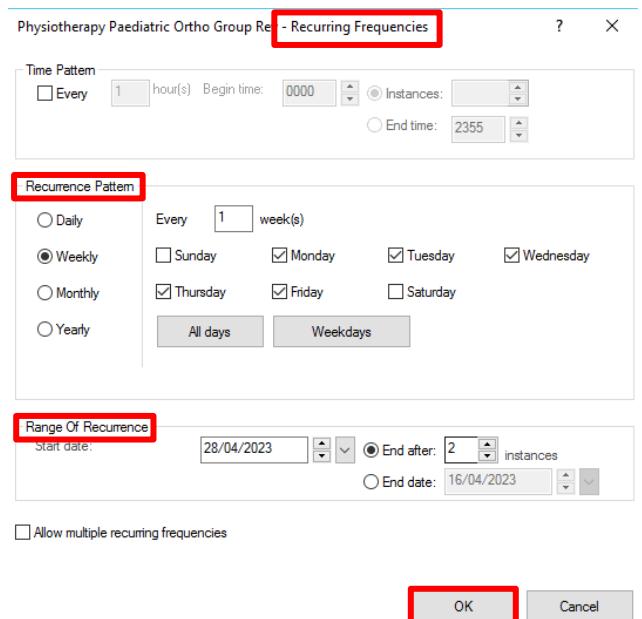   - Fill in the mandatory fields and add **Scheduling Comments** if required, then click **Move**

Books | **Appointment**

*Appointment type:
Physiotherapy Paediatric Ortho Group Rev

*Appointment location:
SH AH CBR PHYSIO

Person name:
TESTPAS, EISHA

Move ►
Next
Clear
Allergies

5. **Appointment Attributes** window will appear, select **OK**
   - Appointment details will move to the **Work in progress** frame

Work in progress:
- TESTPAS, EISHA
  - Physiotherapy Paediatric Ortho Group Rev
    - Current Schedule
      - SH AH CBR PHYSIO
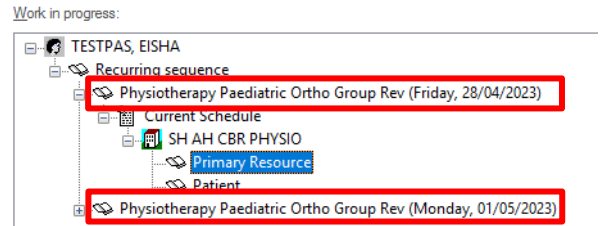   - Primary Resource
        - Patient

6. Click **Recur**, on the right of the **Work in Progress** frame

Recur

7. The **Recurring Frequencies** window will appear
   - In the **Recurrence Pattern** the user can edit the frequency and in the **Range of Recurrence** the **start date** and **instances** can be edited
   - Click **OK**

Physiotherapy Paediatric Ortho Group Re: - Recurring Frequencies   ?   ✕

Time Pattern
☐ Every 1 hour(s) Begin time: 0000   ⦿ Instances: _____
                                          ○ End time: 2355

Recurrence Pattern
○ Daily   Every 1 week(s)
⦿ Weekly   ☐ Sunday   ☑ Monday   ☑ Tuesday   ☑ Wednesday
○ Monthly   ☑ Thursday ☑ Friday   ☐ Saturday
○ Yearly   All days   Weekdays

Range Of Recurrence
Start date: 28/04/2023   ⦿ End after: 2 instances
                           ○ End date: 16/04/2023

☐ Allow multiple recurring frequencies

OK   Cancel

8. All recurring sequences will appear in the **Work in Progress** frame

9. Each individual appointment needs to be booked
   - Start by dragging and dropping the first **Primary Resource** into an appointment slot within the grid

10. Once the appointment has been added to an appointment slot
The **Primary Resource** and **Patient** book will be red
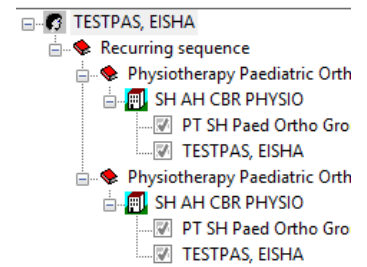The **appointment** will be orange indicting it's at a pending status
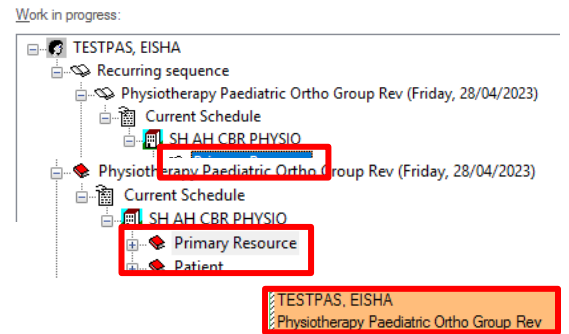
11. Repeat step 10 for all recurring appointments

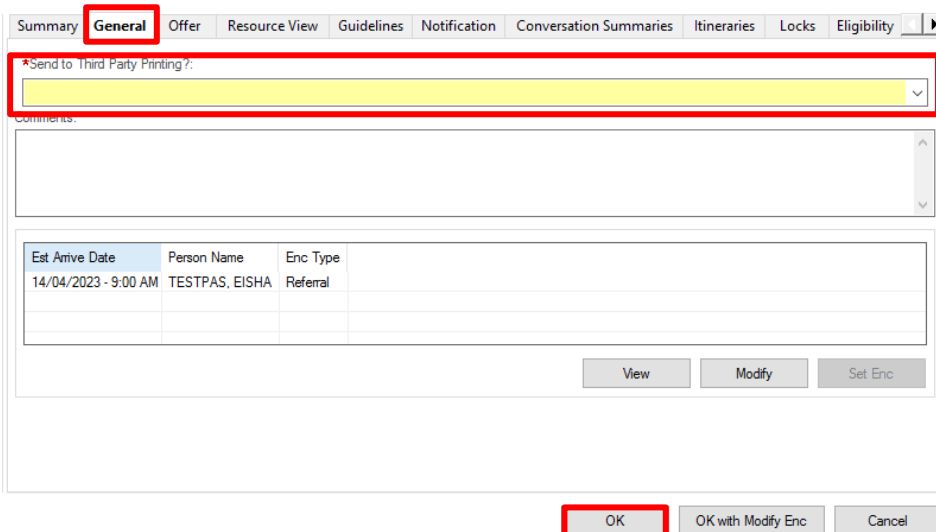12. Once all appointments are in a pending status, click **Confirm**
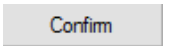
13. In the **Confirm** window, the recurring appointments will appear on the left side
   - Fill in the mandatory fields within the **General** tab
   - Click **OK**
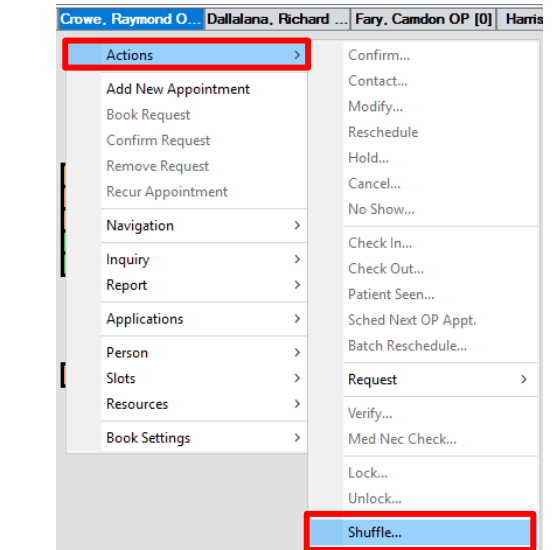   - Repeat this step for all appointments

   - After clicking **OK**, all appointments will be confirmed for the patient

## Method 5 – Scheduling Actions: Shuffle Functionality

1. Open **Scheduling Appointment Book**

2. Navigate to the correct **Bookshelf** and right click on the required **Resource**, in **Actions** > select **Shuffle…**
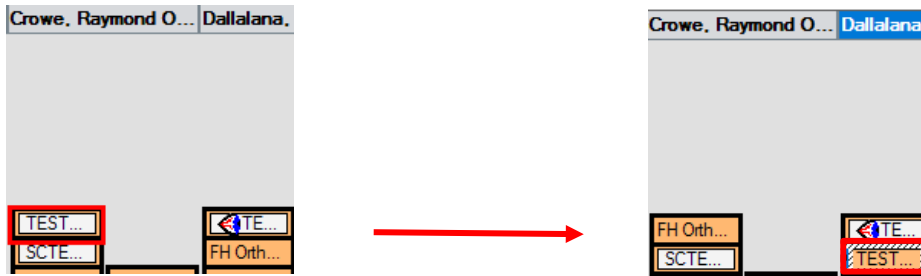

3. **Appointment Shuffle Criteria** window appears
   - The **Resources**, **Date** and **Begin Time** will populate
   - Click **OK**
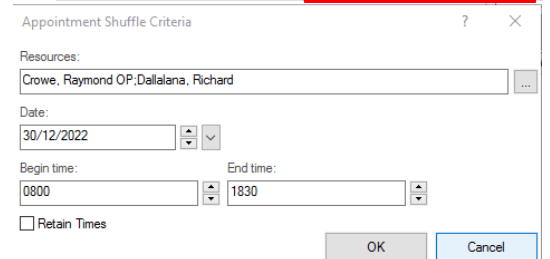
4. **Appointment Shuffle** window will appear with a view of the scheduling grid
   - In this shuffling view, the user can move the appointments to different resources and times as required
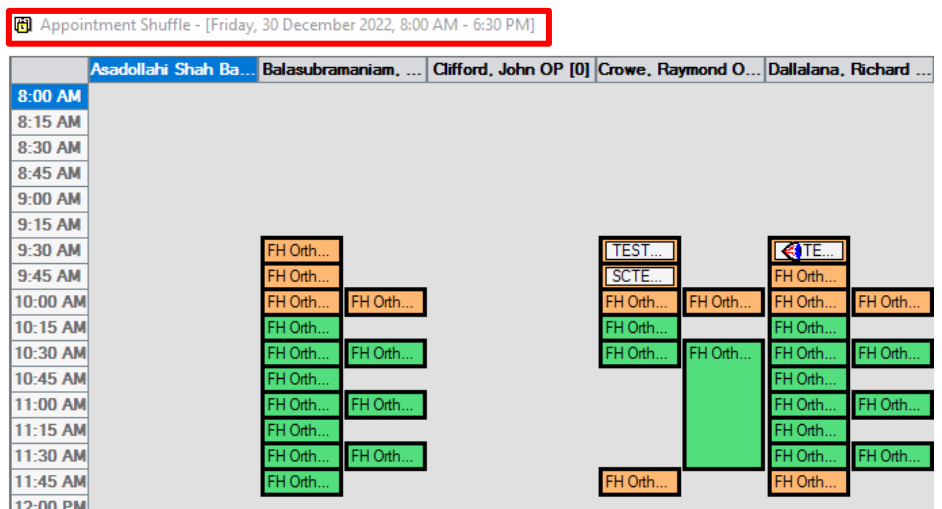
5. Highlight the patient's appointment, drag and drop into the new slot

6. Once all required appointments have been shuffled, click **Check** (this will check if there is any shuffling conflicts)
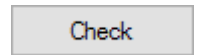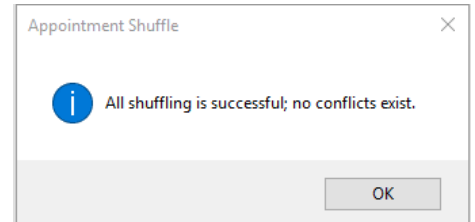

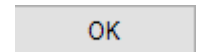- If there is a conflict, a notification will appear in the **Shuffling conflicts:**

- If there are no conflicts, a window will appear notifying the user **shuffling is successful**
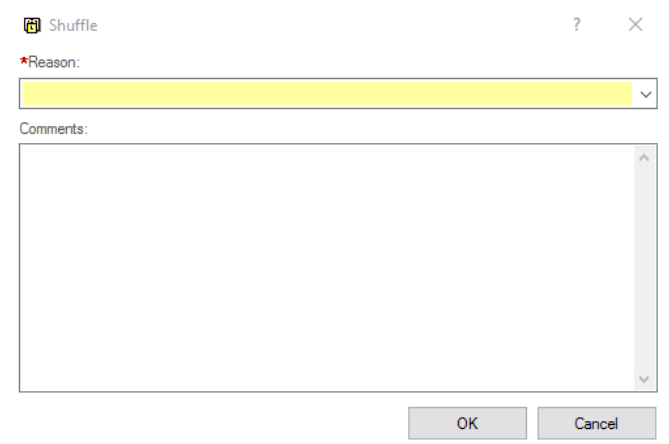

7. In the **Appointment Shuffle** window click **OK**

8. **Shuffle** window will appear, fill in the ***Reason** and **Comments** (this will be for all shuffled appointments)
   - Click **OK**

9. **Appointment Shuffle** window will close, all appointments will be shuffled and in a **Booked (Confirmed)** status