



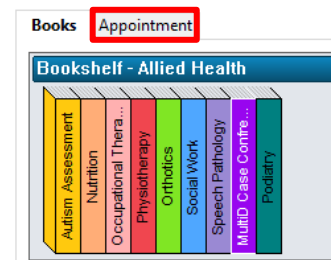
Scheduling – Data Migration

This Quick Reference Guide will explain how to:

Data migrate an iPM appointment to EMR

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

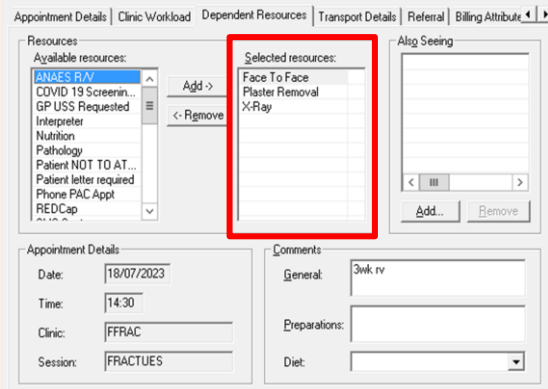
4. Complete **Appointment Location** and **Person Name** fields

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



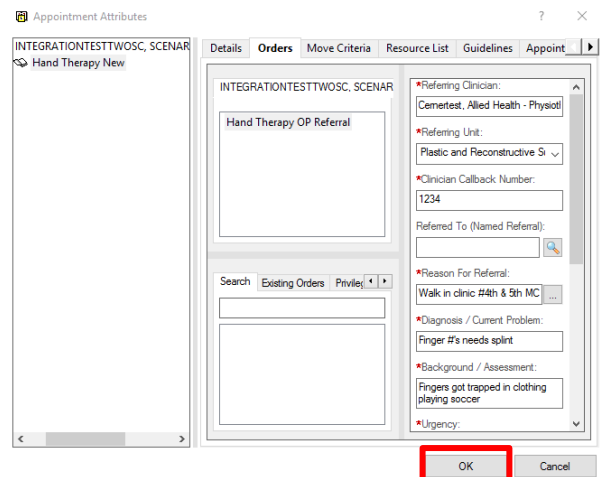
Handy Hint

If there is any **Resources** in **iPM** that are not an accept format in **EMR Appointment** tab, these can be added into the **Scheduling Comments**

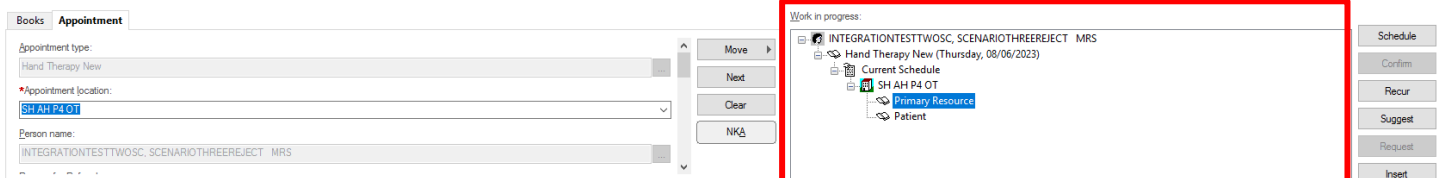


6. Once all mandatory fields are filled in, click **Move**

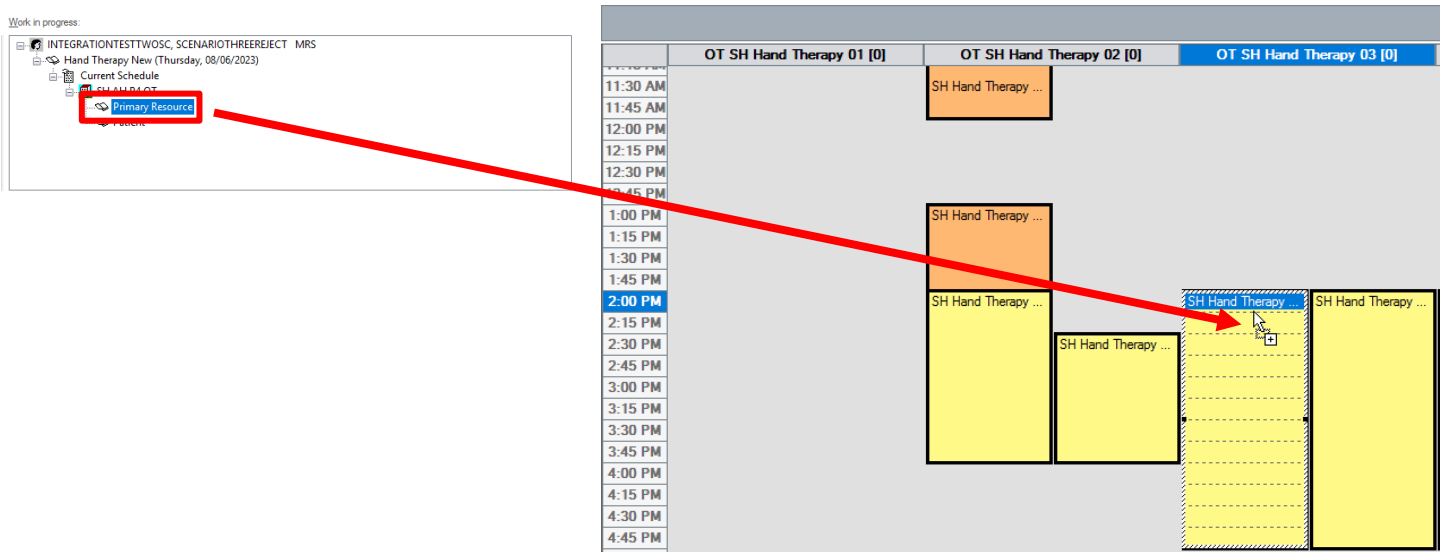
7. Appointment Attributes window will open.
Confirm details are correct, then click **OK**



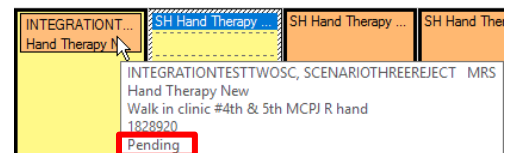
8. Patient will move into the Work in Progress window



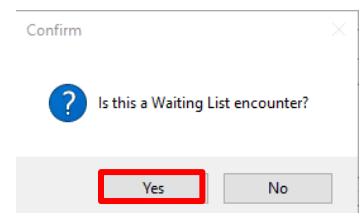
9. Click on the Primary Resource and Drag and Drop into the required appointment slot



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

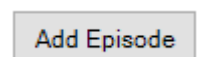


11. Confirm Window will open,
Select **Yes**

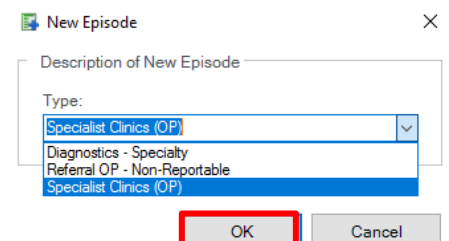


12. **Available Conversations** window appear, select **Data Migration** and click **Ok**

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



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



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

Select Episode - [INTEGRATIONTESTTWOSC, SCENARIOTHREEREJECT MRS]

Name	Type	Created	Creator	Last Reg Date	Registrar	Episode End Date	Referring Facility	Attending Physician	Service Category
V-SPEC83921	Specialist Clinics (OP)	08/06/2023 16:39	P2CLERK2			31/12/2100			
V-SPEC71321	Specialist Clinics (OP)	23/03/2023 14:30	P2CLERK1	24/03/2023 15:11	P2CLERK1	31/12/2100 11:00	*Sunshine Hosp		
(Unattached encounters)				27/01/2023 13:45					



16. Data Migration Window will open.

iPM Referral ID: Add the date the referral has been migrated on

17. In the Referral and Encounter Info tab, fill in the mandatory fields and click **Complete**

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

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

INTEGRATION... Hand Therapy	SH Hand Therapy	SH Hand Therapy	SH Hand Th
INTEGRATIONTESTTWOSC, SCENARIOTHREEREJECT MRS Hand Therapy New Walk in clinic #4th & 5th MCPJ R hand 1828920 Booked(Confirmed) Referral			