Scheduling and Referrals – Defaulting Specialties and Filtering by Urgency



Digital Health Quick Reference Guide

This Quick Reference Guide will explain how to:

Default Specialties for Custom Wait Lists and filtering by Referral Urgency



Defaulting Specialties

- 1. Open PM Office
- 2. Open Custom Tab

Conversation
Worklist
Request List
Inquiries
Referral Wait Lists
Patient Letters
Custom
s.
Custom: Referrals - Schedule Immediately
V9
Custom: Referrals - Awaiting Triage
Ê
Custom: Referrals - Waiting: Not Scheduled

- Right click on 1 of the 3 Custom Lists eg. Custom: Referrals – Schedule Immediately
 - Select Work Items
 - Select Edit Work Item





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4. In the Work Item Setup window Right Click on Medical Service Select Set Default Value -

Medical sen	vice	Set D	efault Value	
		Mod	ify Label	
				-
<			>	

5. Move all the values you require to be defaulted from the Pick new value List to the Current values List Eg. I have selected all of Adult Specialist Clinics - Select OK

-1

S Eilter

ter Value Type				
Range				
ter Values				
Pick new value:	~	Copy >	Current values: ASC Acute Neurology ASC Asthma ASC Breast Oncology ASC Breast Surgery ASC Cardiology ASC Chronic Kidney Disease ASC Colorectal General Surgery ASC Colorectal Oncology ASC Dermatology ASC Dermatology ASC Diabetes ASC Ear Nose & Throat ASC Electrophysiology	*
Prompt me when running?				

- 6. In the **Work Item Setup**, select OK
 - This has now Defaulted your Custom List

🔀 Work Item Setup				×
Work item type:	Navigation Bar	If you do not select a primary filter, the system a	assumes that the Person ID is the p	rimary filter. When you open the 🛛 ^
Waiting List 🗸	Primary Filter	Waiting List work item, the Person Search dialo primary filter, you can right-click and select a de	og box is displayed. If you select Se efault value for the filter	ervice Category Code as the
Work item label:	Secondary Filter	·······		
Custom: Referrals - Schedule Immediately	Demographic Bar Columns			~
Work item icon:	Waiting List Columns	Fields		
F	Available Conversations	Available Options:	Selected Optic	ons:
		Service category code Person search Attending physician Provisional admit date	Medical sen	vice Specially
			<	>
				OK Cancel

7. Double Click on the Custom: Referrals - Schedule Immediately Icon



8. Your List should now be defaulted to the values you selected above

Primary Filters		×
Filter Name: Specially Filter Value Type Individual values Range		
- Filter Values		
Pick new value:	Current values: Copy> ASC Actit Neurology ASC Breast Oncology ASC Breast Oncology ASC Cardiology ASC Cardiology ASC Colorectal General Surgery ASC Colorectal Oncology ASC Colorectal Oncology ASC Diabetes ASC Electrophysiology ASC Electrophysiology ASC Electrophysiology ASC Endoscopy General	* *
		ОК





If you wor	Id like to remove specific value/s highlight/multiselect the required and select	t remove
	Primary Filters X Filter Name: Specially Filter Values Type Individual values Range Filter Values Current values: ASC Acade Neurology ASC Acade Neurology Select All Select All Select All Select All	

9. Select OK



10. Remove any Priority Statuses you don't require - Eg. I only want to see Cat 1 appointments

Current values: Schedule Appt - Routine < 365 Days Schedule Appt - Routine < 90 Days		Current values: Schedule Appt - Urgent < 30 Days
Select All]	
ОК		







11. Select OK



12. Schedule Immediately list will load based on your selections

×		UR :		Home Phone :					GP :			
2		Patient Name :		Address :				Medicare # :				
stor		DOB :	Suburb :				Language :					
n: Re	Wait list reco	rds : 22 Results										
ferral	UR	Patient Name	DOB	Sex	WL Status	Urgency Code	Specialty	acility	Breach Date	Waiting Time	ADJ Waiting Time	Reason for Visit
0	9999999	TESTWHS, TESTING	02/04/1980 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Injury	Sunshine		140 d	140 d	test
Sch	9999999	TESTWHS, TESTING	02/04/1980 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Injury	Sunshine		140 d	140 d	test
edu	1828475	PRO, ZACH MR	01/01/1967 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Orthopaedic	Sunshine		330 d	330 d	L)t TKR
le	1828830	INTEGRATIONTESTTWOEMA, SCENARIOELEVEN MR	11/10/1992 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Surgery	Sunshine		294 d	294 d	test
3	10023396	TESTPAS, EISHA	01/01/1990 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Cardiology	Footscray		355 d	355 d	wf testing
edi	2000416	TEST, TEST_SIR	15/01/2000 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Lung Respiratory	Sunshine		233 d	233 d	test report
atel	2000422	CANCERSERVICES, PATIENTTWO MR	15/12/1992 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Breast Oncology	Sunshine		330 d	330 d	MDM
<	2000698	TESTING, REVENUECYCLE MRS	01/01/2000 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Urology A	Footscray		394 d	394 d	worklist test
	2000156	KAREV, ALEX	07/07/1985 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Surgery	Sunshine		210 d	210 d	test
	7100054	TESTPAS, DATAMIGRATION	28/05/1993 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Injury	Sunshine		202 d	202 d	TESTING with Ka
	7100057	TESTPAS, MONICA	12/07/1970 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Cardiology	Footscray		236 d	236 d	Test
	2001039	Supertraining, Clerical MRS	10/10/1988 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Emergency	Sunshine		215 d	215 d	chin lac
	7100070	TESTPAS, WILLOW	01/03/1990 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Dressings	Sunshine		219 d	219 d	Hand injury
	7100071	TESTPAS, BRENDA	15/09/1990 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Surgery	Sunshine		239 d	239 d	egg
	2001323	SPECIALISTCLINICS, SHREK MS	01/01/1990 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Surgery	Sunshine		230 d	230 d	L thumb #
	2001386	TESTTAC, LINCOLN MR	25/03/1985 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Dressings	Sunshine		222 d	222 d	Leg Injury
	2001387	TESTPAS, DEZ MRS	01/01/1986 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Fracture	Footscray		219 d	219 d	Fractured leg
	2001387	TESTPAS, DEZ MRS	01/01/1986 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Fracture	Footscray		41 d	41 d	test request lists
	2001387	TESTPAS, DEZ MRS	01/01/1986 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Fracture	Footscray		41 d	41 d	Test Request Lis
	2001395	Correspondence, Testthree MR	04/06/2016 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Plastics Emergency	Sunshine		203 d	203 d	111
	1895633	Testbmm, Daniel	04/04/1974 00:00:00	Male	Waiting	Schedule Appt - Urgent < 30 Days	ASC Fracture	Sunshine		48 d	48 d	test
	5002715	TESTTAS, DESAI	28/05/1990 00:00:00	Female	Waiting	Schedule Appt - Urgent < 30 Days	ASC Orthopaedic	Footscray		12 d	12 d	wounded leg

Handy Hint

• If you have removed any values when opening the list, the next time you load it the original defaulted values will appear

