Scheduling and Referrals – Defaulting Specialties and Filtering by Urgency
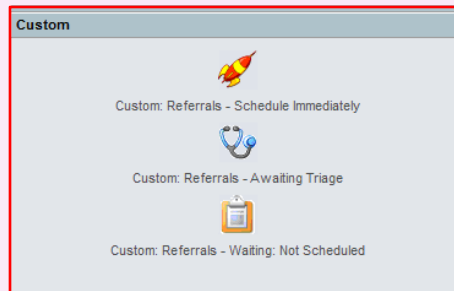
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Quick Reference Guide

This Quick Reference Guide will explain how to:

Default Specialties for Custom Wait Lists and filtering by Referral Urgency
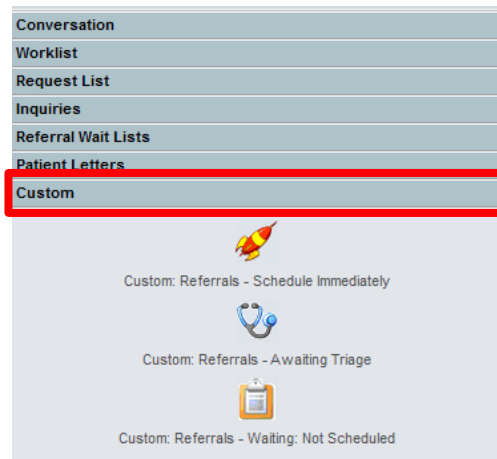

! Important

This is a duplication of the Schedule Immediately List. Only make the below changes to this Duplicate Lists.
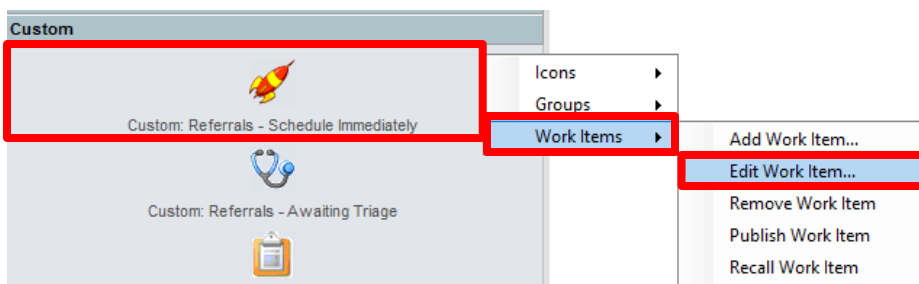

Defaulting Specialties
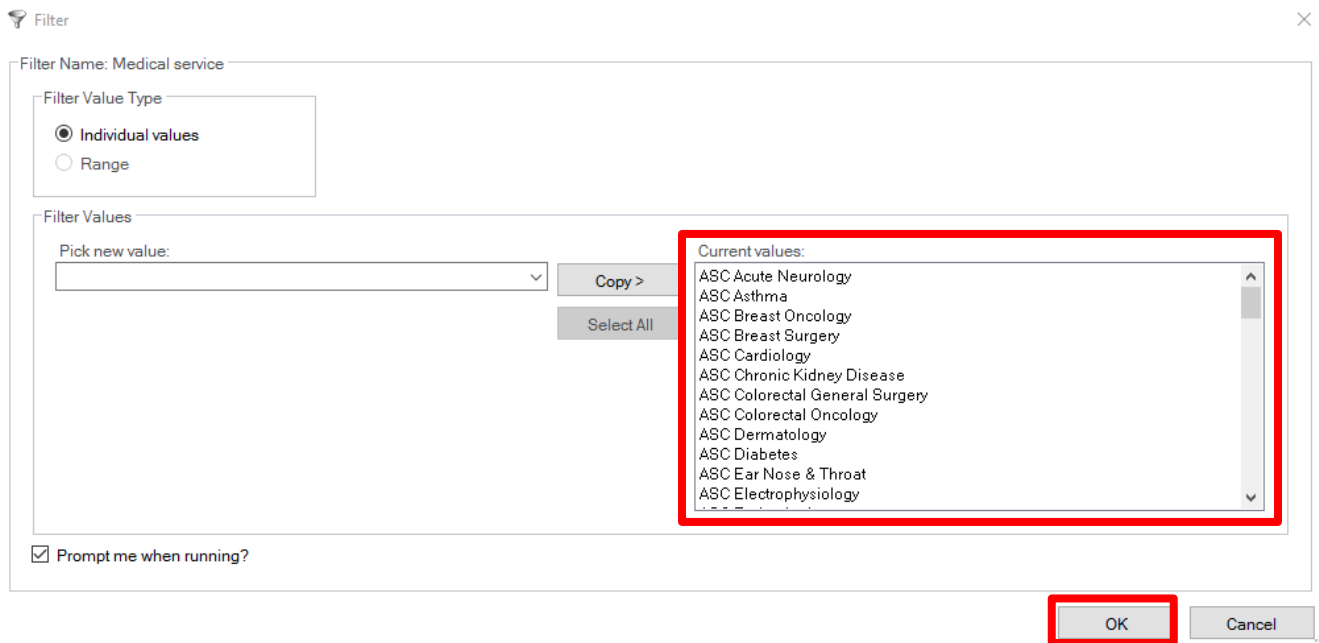
1. Open PM Office
2. Open Custom Tab

3. 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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Rrals-

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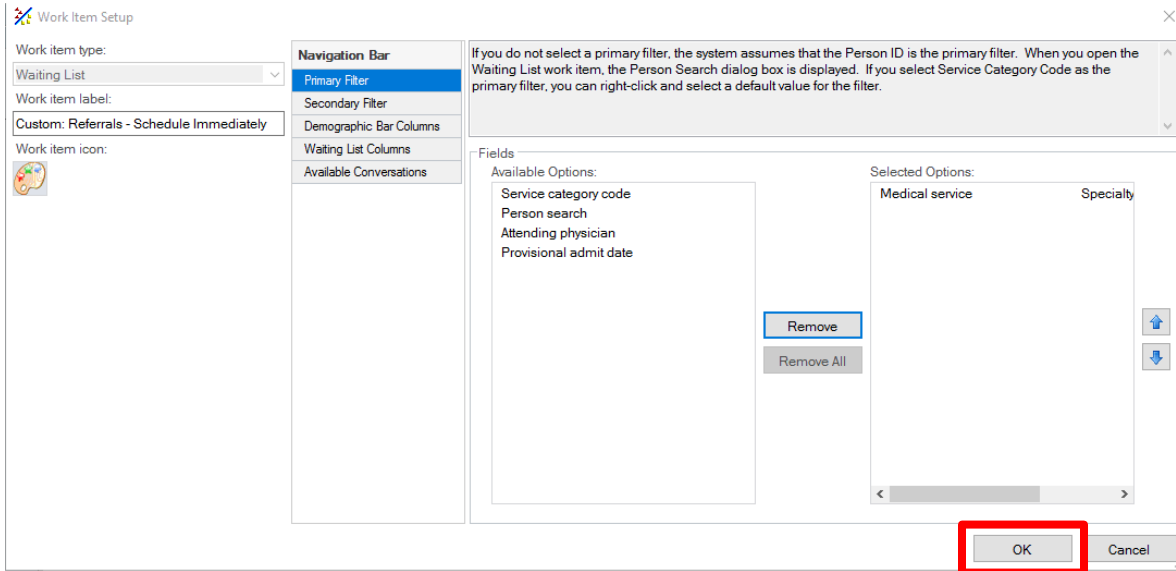CONNECTING BEST CARE

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4. In the Work Item Setup window Right Click on Medical Service
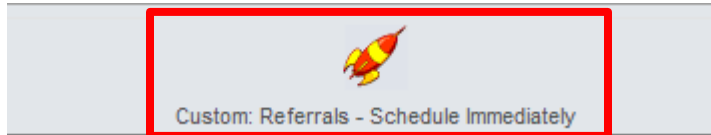   - Select Set Default Value
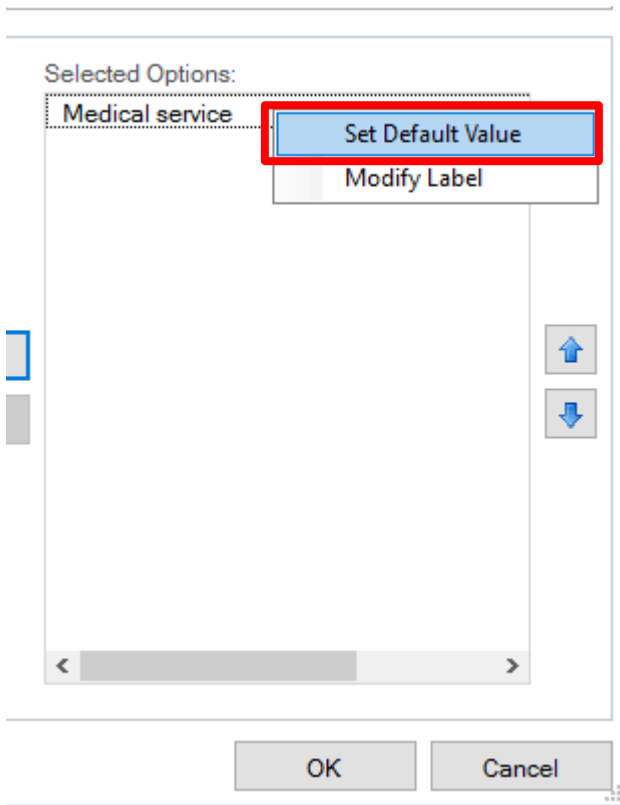
5. Move all the values you require to be defaulted from the **Pick new value** List to the **Current values** List
   Eg. I have selected all of Adult Specialist Clinics
   - Select OK

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Rrals

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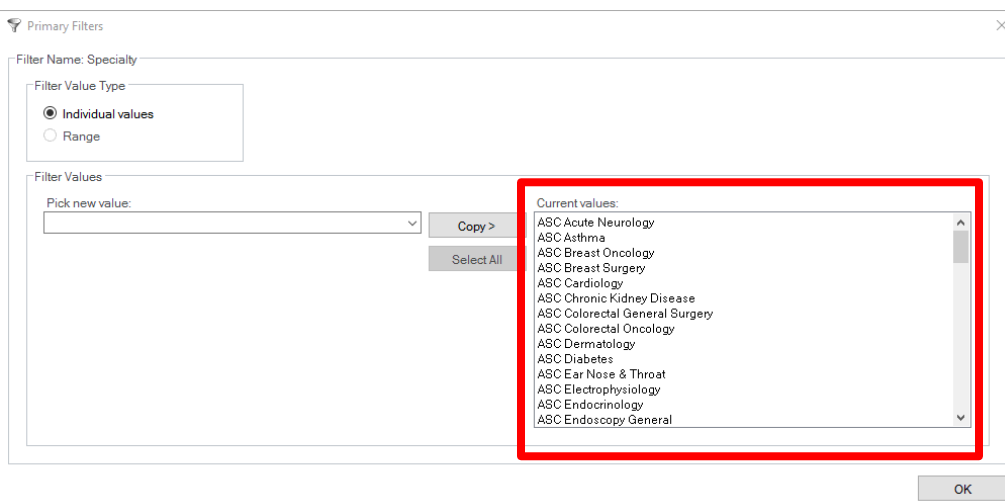
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6. In the **Work Item Setup,** select OK
   - This has now Defaulted your Custom List

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

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

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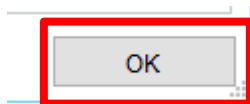
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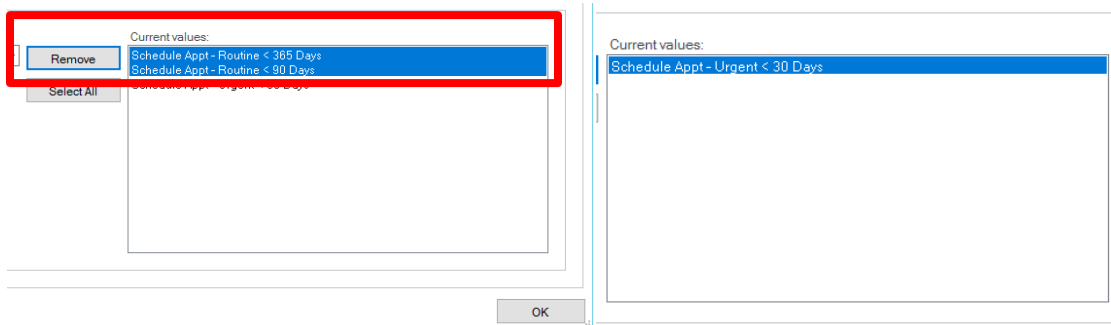**Quick Reference Guide**

Handy Hint

- If you would like to remove specific value/s highlight/multiselect the required and select remove
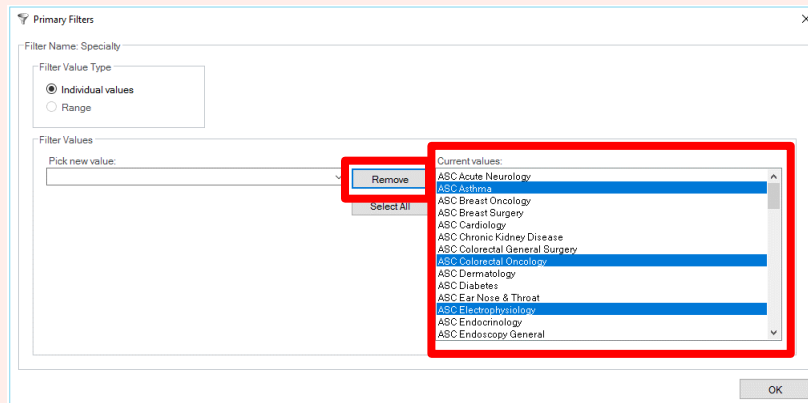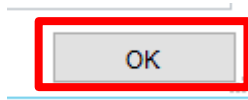

9. Select OK

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

11. Select OK

OK

12. Schedule Immediately list will load based on your selections

UR	Patient Name	DOB	Sex	WL Status	Urgency Code	Specialty	Facility	Breach Date	Waiting Time	ADJ Waiting Time	Reason for Visit
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
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
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
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
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
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
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 K
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