QUICKSTART

A series of helpful guides provided by the Information Technology Department

PM Scheduling – Inquiries and Reports

Appointment Inquiries and Scheduling Reports are available within the Scheduling Application to assist with reviewing schedules and auditing appointment data.

Information:	A detailed Reports Guide can be found on the following link:

The Appointment Inquiry Icon can be selected from the Scheduling Application Toolbar
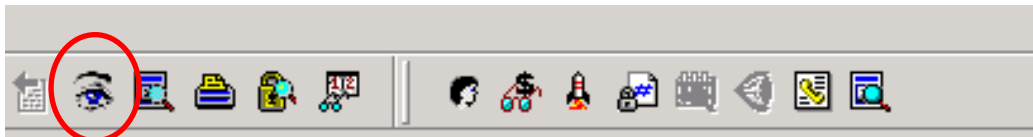
Appointment Inquiries

The Appointment Inquiry Icon opens the Schedule Inquiry window to allow the user to launch a person, resource, location or request list inquiry.

- **Person Inquiries**

- **Appointment Standard Schedule** - This report lists the history of an individual patient's appointments.

- **Appointment and Item Number History** - This inquiry lists the appointment item number history for the selected patient.

- **Resource Inquiries**

- **Resource Appointment Detail (CHW)** - This inquiry lists the details of all the patients seen by the selected resource during the specified date range. It contains the appointment, referral and billing details.

- **Resource Appointment Schedule Inquiry (standard)** - This report lists the basic scheduled appointment details for the selected resource for the specified date range.

- **Resource Reschedule and Cancel (individual)** - This report lists the appointments that have been
- rescheduled and cancelled for the selected resource for the specified date range.

- **Location Inquiries**

- **Appointment Inquiry (CHW)** - This report lists the basic scheduled appointment details for the selected location for the specified date range.

- **Appointment Inquiry PBRC (CHW)** - This inquiry lists the details of all the patients seen in the selected location during the specified date range. It contains the appointment, referral and billing details.

- **Group Session Standard Inquiry** – This inquiry is for group appointment types only. It lists the group dates and patients in the group for the selected location and date range.

- **Location Reschedule and Cancel (Individual)** - This inquiry lists the appointments that have been rescheduled and cancelled for the selected location for the specified date range.

- **Location Standard Inquiry with Group Session Patients** - This inquiry will list all appointment types for the selected location and date range, including standard and group appointment types

- **Request Lists -** Request lists are work queues that hold requests for a scheduling action to occur. The request lists queues are associated to the appointment type and the location.

- **MI Queue -** This inquiry was built for Medical Imaging, as it has a column which reports information captured in Medical Imaging electronic orders from PowerChart.

- **Queue All fields CHW -** This inquiry was built for all departments using Request Lists. It includes information collected from Scheduling Appointments, and electronic orders generated from PowerChart. Note that not all departments have electronic orders linked to the Request Lists.

- **Queue with comments CHW-** This inquiry contains the standard Request List inquiry information, with the Scheduling Comments column added. It does not have as much detail as the 'All Fields' inquiry, but may load faster.

- **Request by Appointment Type -** This inquiry will report on outstanding requests for a particular Appointment Type, regardless of which Request List it is on. It is useful for departments who may have the same Appointment Type placed on different Request Lists.

- **Request by Person -** This inquiry will allow determination if a person is on a Request List, waiting for a particular appointment type. It reports across all Request Lists.

- **Request Cancelled by Queue-** This inquiry lists patients who had their request for an appointment cancelled. Once a request is cancelled, the person is no longer visible on the standard inquiries. This inquiry allows departments to track those cancelled requests.
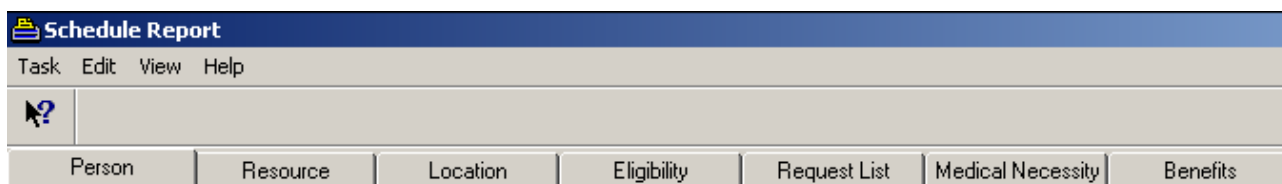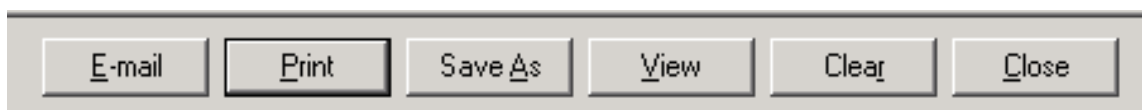
Appointment Report

The Appointment Report Icon opens the Schedule Inquiry window to allow the user to launch a person, resource, location or request list inquiry.
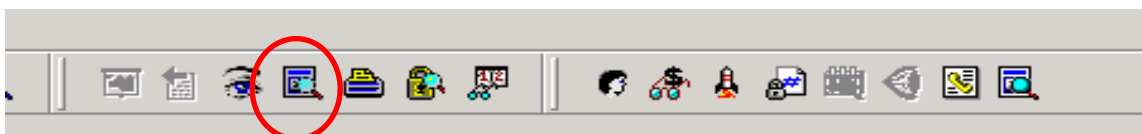
The Appointment report Icon opens the Schedule report window to allow the user to launch a person, resource, location or request list report. (Whilst there are buttons for 'Eligibility', 'Medical Necessity' and 'Benefits', there are no reports in these categories.)

Reports can be viewed to the screen, or printed, as per the buttons on the bottom of the screen.

a) Person Reports

- **Person Appointment Summary –** This report lists the history of an individual patient's appointments.

b) Resource Reports

- **OPD Daily Appointment Summary by Resource (Postscript)** - This report lists the history of all appointments for the selected Resource.

- **OPD Daily Appointment Summary by Resource BB Locations (Postscript)** - This report lists the history of all appointments for the selected Resource for Bandaged Bear locations only.

- **Standard Resource appointment List (Postscript) –** This report lists all appointments for the selected Resource.

- **Standard Resource Appointment List With patient Schedule (Postscript) -** This report lists all appointments for the selected Resource, as per the Standard Resource Appointment List (Postscript) report, including referral details and item numbers billed. In addition, other appointments for the patient on the selected date are listed.

- **Standard Resource Daily Chart (Postscript) -** This report lists: Appointment Name, Appointment Location and Patient Name in the daily calendar view for the selected Resource.

- **Standard Resource Monthly Chart (Postscript) -** This report lists: Appointment Time and Patient Name in the monthly calendar view for the selected Resource.

- **Standard Resource Weekly Chart (Postscript) -** This report lists: Appointment begin and end time, and patient name in the weekly calendar view for the selected Resource.

c) Location Reports

- **Location Standard Report (Group Session) -** This report provides a listing of all group appointment sessions and patients within the group. Note that cancelled patients are not listed. Also, not all resources running the group are listed

- **Standard Appointment List -** This report provides a list of appointments by selected location.

- **Standard Appointment List by Appointment Type -** This report provides a list of appointments by selected location and appointment type.

- **Standard Appointment Location List -** This report provides a list of appointments by location including scheduling and resource comments.

- **Standard Appointment No Show List -** This report provides a list of patients with 'no-show' status by location.

- **Standard Daily Appointments Totals by Person -** This report provides a total count by scheduling status for each scheduling user for the selected location.

- **Standard Daily Appointments Totals by Resource -** This report provides a total count by scheduling status under each resource for the selected location.

Note:	Select 'Ambulatory' as Location Type in the prompt when running the report