PM Scheduling – Request Lists

Request Lists are used to manage requests for appointments that cannot be booked immediately. They are a place to hold an appointment, until it can be scheduled in the Appointment Book. Requests for appointments may be placed on the Request List by two methods:

- An electronic Order for a future appointment placed from within PowerChart.
- Routed to the Request List directly from the Appointment Book Work in Progress pane.

It is possible to send requests for different types of appointments to a single Request List, where they can be prioritised and managed. It is also possible to send the same appointment type to different lists if they are to be managed differently (e.g. based on priority or which clinician will see the patient).

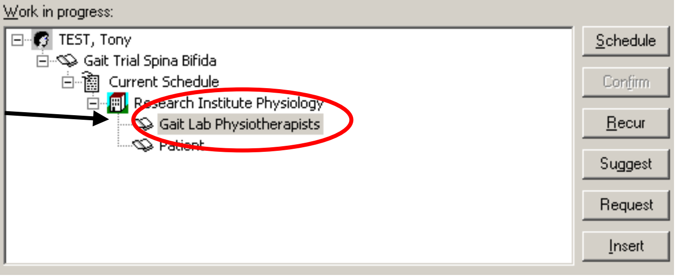
Information:	Request lists are not set up for all appointment types – contact Clinical Applications Support Unit if you require this ability for any of your appointment types.

Warning:	If a request is placed incorrectly for a particular appointment type, the appointment type cannot be changed within that request. The request (and Order, if applicable) must be cancelled and a new request placed.

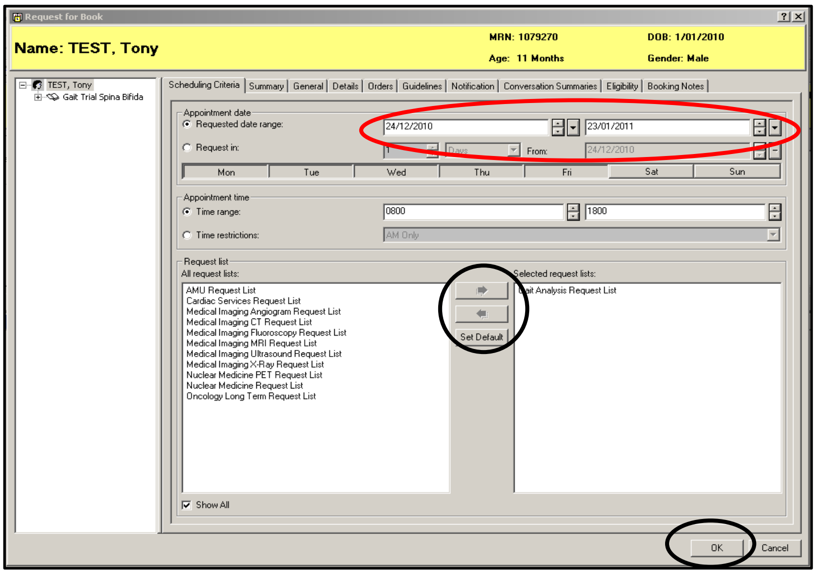
Adding an Appointment to the Request List from Scheduling

- Within the **Work in progress** pane, ensure that the **appointment resource type** is highlighted (this should be highlighted by default).

Appointment resource type



- Click on the **Request** button. The **Request for Book** window appears.



- Ensure all details are correct, including the **Requested date range** for the appointment (by default, the system is set up to a standard 30 day range). You can also set a requested appointment time, for example, if the patient is only available in afternoons, set Time Restrictions to PM Only.
- If your specific Request list is not shown in the right pane, you may need to select the **Show All** checkbox at the bottom, and move your list from the left pane into the right pane. Use the same method to switch the list to a different list if the default list is not the one currently required.

Tip:	If you know the earliest date an appointment or assessment can be performed, adjust the start date of the Requested date range (**this will help sort priorities on the Request Queue later**).

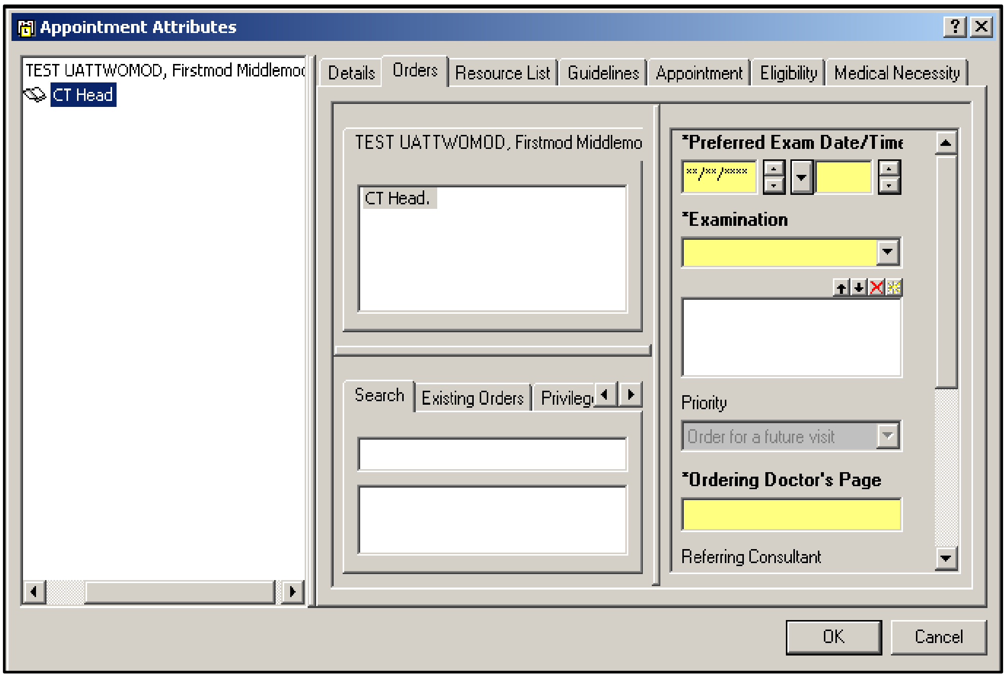
Tip:	The **Referral** and **Order** details can also be modified on the **Details** and **Order**s tabs of this window

- Click on OK to send the appointment to the Request List.

Completing Associated Electronic Orders from within Scheduling

Some appointment types have associated electronic orders, which may contain items that need to be completed before the appointment can be placed on the Request List.

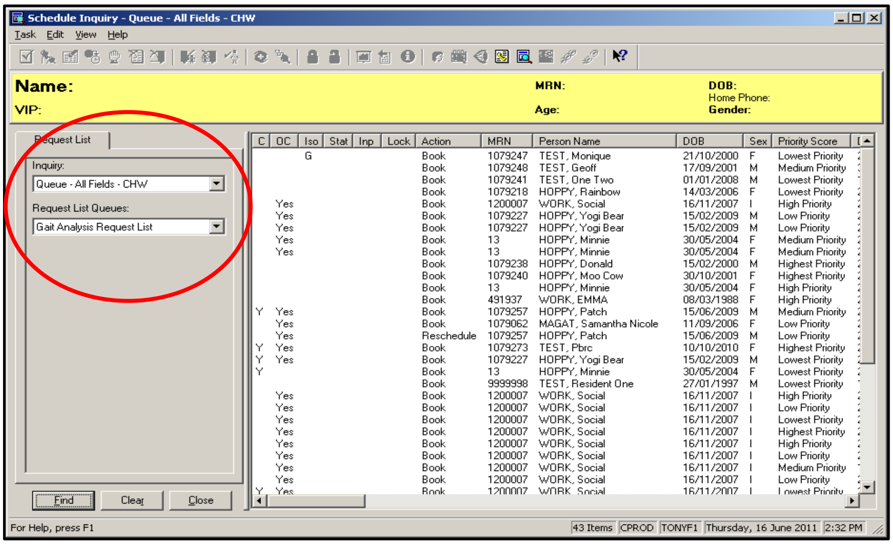
- Click on the **Move** button. The **Appointment Attributes** window appears, displaying the **Orders** tab.



- Complete the fields listed. Yellow fields are mandatory fields and must have information completed in them.
- Click on **OK**. The Appointment Attributes window closes and you are returned to the **Appointment** tab displaying the **Work in progress** pane, which has been populated with the appointment details.
- Click on the **Request** button, and follow the instructions above to move the appointment to your Request List.

View an appointment on the Request List

- Click on the **Request List Inquiry** button on the toolbar. The **Schedule Inquiry** window appears.



- Click on the drop-down arrow in the **Inquiry** field and select the appropriate Inquiry.

Tip:	Inquiries are built to different specifications. Please consult with the **Clinical Application Support Unit** over which Inquiry will best display your information.

- Click on the **Find** button. A list of the appointments will appear on the Request List, each with the Action status of Book.

C	OC	Iso	Stat	Inp	Action	Person Name	Appointment Type	Earliest Date
Y	Yes				Book	TEST, Joseph	CT Head	2/09/2005
Y					Book	TEST, Joseph	CT Pelvis	2/09/2005
Y					Book	TEST, Joseph	CT Neck	31/12/2005
Y					Book	TEST, Josephfour	CT Pelvis	2/09/2005
Y					Book	TEST, Joseph	CT Abdomen	5/09/2005
Y					Book	TEST, Joseph	CT Chest	5/09/2005
Y					Book	TEST, Joseph	CT Head	5/09/2005
Y					Book	TEST, Joseph	CT Neck	5/09/2005
Y					Book	TEST, Joseph	CT Pelvis	5/09/2005
					Book	MEDICAL IMAGING, Ct	CT Head	6/09/2005
Y					Book	TEST, Joseph	CT Abdomen	8/09/2005
Y					Book	TEST, Joseph	CT Chest	8/09/2005
Y					Book	TEST, Joseph	CT Head	8/09/2005
Y					Book	TEST, Joseph	CT Neck	8/09/2005
Y					Book	WILSON, Bonnie-marie	CT Head	9/09/2005
Y					Book	ASHWINITA, Asheetal	CT Abdomen	9/09/2005
Y					Book	MOUAWAD, Joe	CT Head	9/09/2005
Y					Book	D'ONOFRIO, Mariano	CT Head	9/09/2005
Y					Book	TEST, Joseph	CT Head	13/09/2005
Y					Book	TEST, Joseph	CT Head	14/09/2005
					Book	TEST UATTWOMOD, Firstmod Middlemod	CT Head	14/09/2005
					Book	TEST UATTWOMOD, Firstmod Middlemod	CT Head	14/09/2005

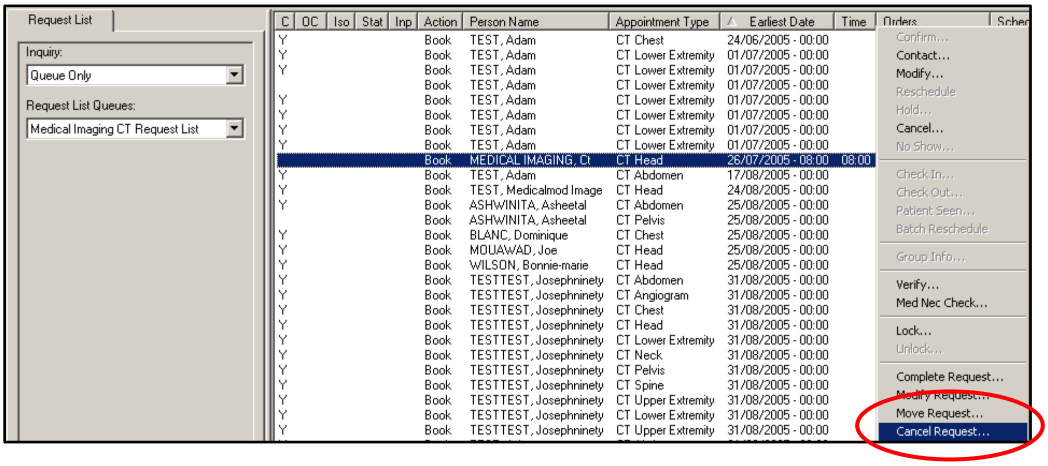
Schedule a Patient from the Request List

- Right click the patient on the Request List, and select **Complete Request**.
- You will be taken to the Appointment Book, with the patient appointment details in the Work in Progress. Schedule the patient as usual.

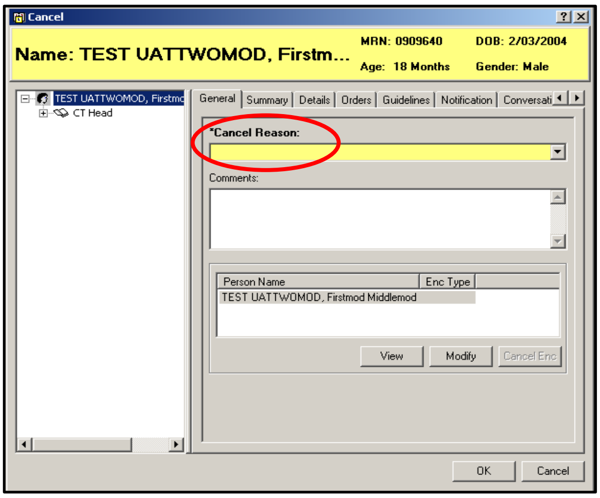
Tip:	If you completed the Earliest Date / Time fields when placing the patient on the Request List, the system will default to the earliest date when the Appointment Book opens.

Cancel the Scheduling Request

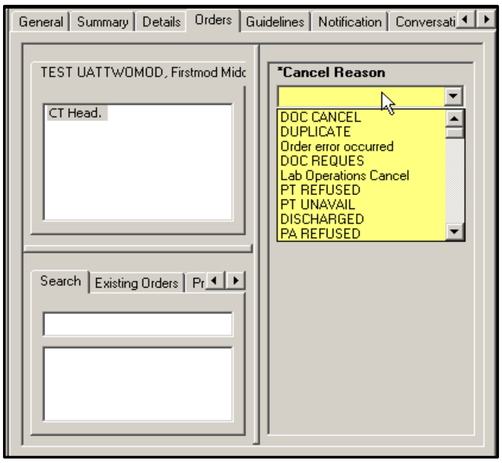
- To cancel the request, right-click on the request in the Request List and select **Cancel Request**



- The **Cancel** dialogue box appears.



- On the General tab, Click in the **Cancel Reason** field and select a reason from the drop-down list.
- If your appointment type has associated electronic Orders, you will have to cancel the Order so as to cancel the Request. Click on the **Orders** tab and in the **Cancel Reason** field select a reason from the drop-down list.



- Click on **OK**. The Scheduling Request will be removed from the queue and any associated orders will be cancelled with the status updated in PowerChart.