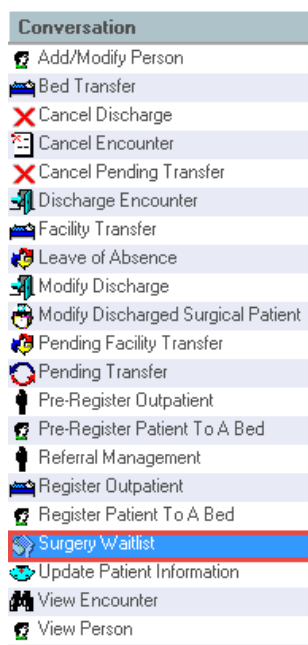# Confirmed to Waitlist Inter-Facility Transfer
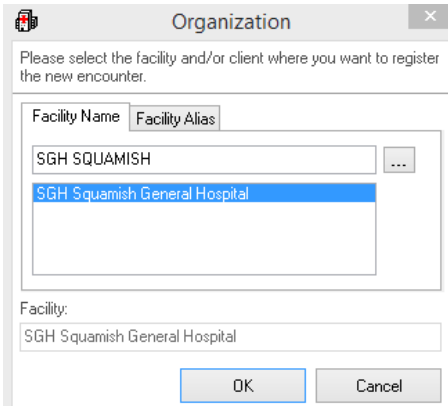
The patient in this scenario has a confirmed appointment at facility A and then receives a waitlisted request for facility B.

Clerk Creates a New Encounter for Facility B

1. Launch **PMOFFICE**.

2. Double-click **Surgery Waitlist** under the Conversation window.

3. Search for the patient using the CIS and EMPI search criteria.

4. Select the corresponding patient from the **Person Search** window.

5. Click **Add Encounter**.

6. Enter the corresponding facility (example **SGH Squamish General Hospital**).

7. Click **OK**. Surgery Waitlist window displays.

8. Use the sample information below to complete the necessary fields in the **Encounter Information** tab:

   - **Encounter Type** = Pre-Day Surgery
   - **Medical Service** = General Surgery
   - **Reason for Visit** = Surgery
   - **Building** = SGH Squamish
   - **Unit/Clinic** = SGH SurgWaitLst
   - **Referring Provider** = Plisvcx, Stuart
   - **Attending Provider** = Plisvcw, Tyler
   - **Estimated Arrival Date** = Enter T
   - **Estimated Arrival Time** = Enter N

9. Click the **Insurance** tab and use the information below to complete the necessary fields:

   - Click **Search for Health Plan**.
   - **Search for Health Plan** = BC
   - Select **BC Resident MSP PHN – MSP** from the result list
   - Select **SEE CARD, British Columbia** from the **BC Resident MSP PHN Contact Information**

10. Click **OK**.

If the **Status In Canada** drop-down is Mandatory, Select:

   - Residency > 6 Months? = Yes
   - Document Type = Birth Certificate
   - Document Number = XX00001-10

11. Click the **Waitlist Info** tab and use the information below to complete the necessary fields:

- **Referral Date** = Date
- **First Consult Date** = Date
- **Ready to Treat Date** = Date
- **Booking Package Rec'd Date** = Date
- **Admit Day Prior** = 0
- **Cancer?** = Not Suspected

12. Click **Complete**.

- Encounter Number and Visit ID are displayed

13. Click **OK**.

Reschedule the Confirmed Appointment from Facility A to Facility B

1. Click the **Books** tab in **Schapptbook**.

2. Click the **Bookshelf** needed and select Facility A's location.

3. Click **OK**.

4. Double-click the appropriate book that the patient is scheduled into.

5. Select the date on the calendar then locate the patient.

6. Right-click on the confirmed appointment.

7. Mouse-over **Actions** and click **Reschedule**.
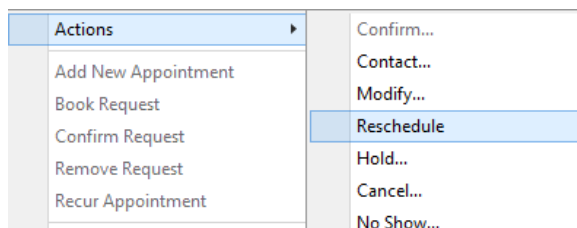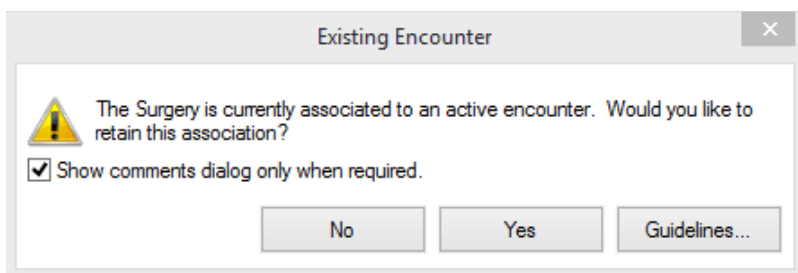

8. Click **OK**.

The **Linked Appointment** window opens and defaults to **Open one or more occurrences**.

9. Click **OK**.
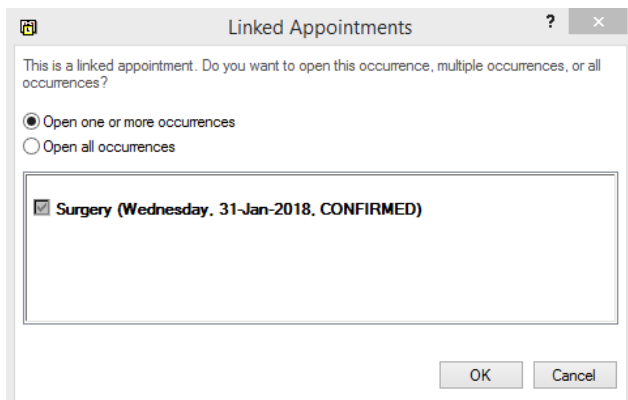
The **Existing Encounter** box appears.

10. Click **No**.

The **Appointment Attributes** window is displayed.

11. Verify that the appointment's attributes and orders are correct.

12. Click **OK**.

The appointment moves to the work in progress window.

13. Select the location for Facility B from the **Appointment Location** drop-down.

14. Click **Move**.

15. Repeat steps 13-14.

16. Select a new date on the calendar widget which will then be highlighted in blue. The new date should be the date the appointment is scheduled for in Facility B.

17. Drag and drop the appointment into a slot in the calendar.
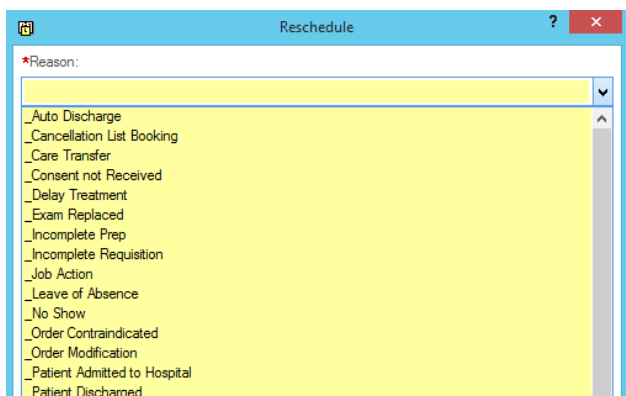
18. Click **Confirm** then **OK**.

19. Select Facility B's encounter.

20. Click **OK**.

The **Reschedule** window is displayed.

21. Select the **Reason** from the **Reason** drop-down.

22. Click **OK**.

Postpone the Appointment at Facility B by placing it onto the Waitlist

1. Click the **Books** tab in **Schapptbook**.

2. Click the **Bookshelf** needed and select Facility B's location.

3. Click **OK**.

4. Double-click the appropriate book that the patient is scheduled into.

5. Select the date on the calendar then locate the patient.

6. Right-click on the appointment, mouse-over **Actions** and click **Cancel**.

7. Click **OK**.

The **Linked Appointment** window opens and defaults to **Open one or more occurrences**.

8. Click **OK**.

9. Select the cancellation reason from the dropdown and click **OK**.

10. Right-click on the appointment, mouse-over **Actions,** mouse-over **Request** and click **Reschedule**.
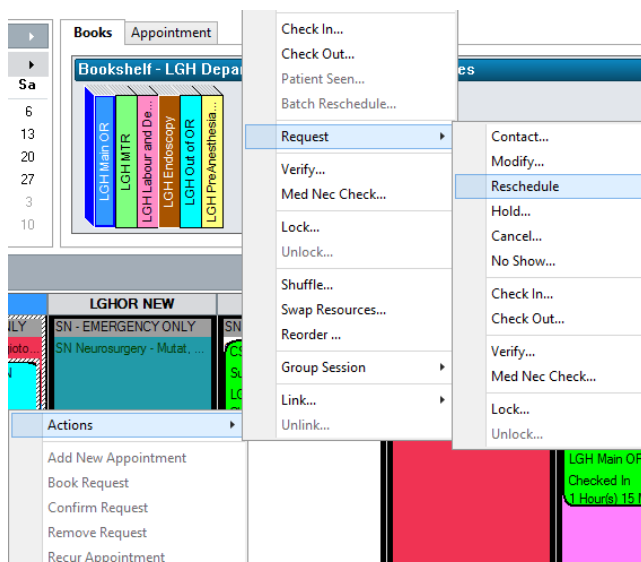
11. Select facility B's **Request List** and click the right side arrow to Move Request into **Selected Request Lists**.
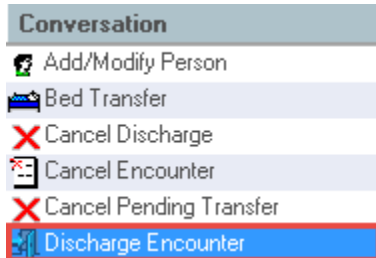

12. Click **OK**.

Discharge Encounter from Facility A

1. Launch **PMOFFICE** (if not already open).

2. Double-click **Discharge Encounter**.

3. Enter the **Last Name, First Name** and click **Search**.

4. Click on patient's encounter from Facility A.

5. Click **OK**.

6. Enter the following mandatory Discharge Encounter Information:

   - Discharge Disposition
   - Discharge Date
   - Discharge Time

7. Click **Complete**.