

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).



()	Organization	×	
Please select the facility and/or client where you want to register the new encounter.			
Facility Na	ame Facility Alias		
SGH SQUAMISH			
SGH Squ	amish General Hospital		
Facility:			
SGH Squa	mish General Hospital		
	OK Cano	el	

- 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:



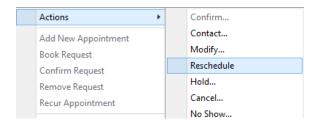
- Referral Date = Date
- First Consult Date = Date
- Ready to Treat Date = Date
- Booking Package Rec'd Date = Date
- Admit Day Prior = 0
- Cancer? = Not Suspected

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**.



@	Linked Appointments		? ×
This is a linked appointment. D occurrences?	o you want to open this occurrence	, multiple occurrenc	es, or all
Open one or more occurrent	ces		
Open all occurrences			
Surgery (Wednesday,	31-Jan-2018, CONFIRMED)		
		OK	Cancel

The Existing Encounter box appears.

10. Click **No**.

Existing Encounter ×				
The Surgery is currently associated to an active encounter. Would you like to retain this association?				
	No	Yes	Guidelines	

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.

8	Reschedule	? ×
*Reason:		
		~
_Auto Discharge		^
_Cancellation List Booking		
_Care Transfer		
_Consent not Received		
_Delay Treatment		
_Exam Replaced		
Incomplete Prep		
Incomplete Requisition		
_Job Action		
_Leave of Absence		
_No Show		
_Order Contraindicated		
Order Modification		
Patient Admitted to Hospital		
_Patient Discharged		

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**.





Books Appointment Bookshelf - LGH Depar	Check In Check Out Patient Seen Batch Reschedule	es	
13	ITR and I pscop of OF sthes	Request +	Contact
20 27	LGH Man OR LGH MTR LGH MTR LGH Labor and De LGH Endoscopy LGH PreAnesthesia	Verify	Modify
3	<u> </u>	Med Nec Check	Reschedule Hold
10		Lock Unlock	Cancel No Show
LGHOR NEW LY SN - EMERGENCY ONLY SN Neurosurgey - Mutat,		Shuffle Swap Resources Reorder	Check In Check Out
		Group Session +	Verify Med Nec Check
	ctions	Link Vnlink	Lock
A B C R	dd New Appointment ook Request onfirm Request emove Request ecur Appointment	Uniink	Unlock LGH Main OR Checked In <u>U Houris) 15 M</u>

11. Select facility B's **Request List** and click the right side arrow to Move Request into **Selected Request Lists**.

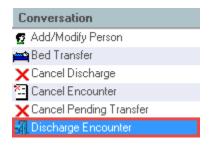
cheduling Criteria Summary Action Details	General Guidelines	Notification	Conversation Summaries	Eligibility Bo	oking Notes
Appointment Date	15-Feb-2018		A 44 444 444		
Thequested date range.	10-Feb-2018		÷ • • • • • • • • • • • • • • • • • • •		 ▲ ✓
◯ Request in:	1 🔷 Da	ays 🗸	From: 28-Feb-20	18	× V
Mon Tue	Wed	Thu	Fri	Sat	Sun
Appointment Time	0000		A 0000		
Time range:	0000		▲ 0000		▲ ▼
◯ Time restrictions:	AM Only				~
Request List All request lists:			Selected request lists:		
Appointment Reviews Cancellation List Future Requests Reschedule Requests Triage List Waitlist MI BD Initial Queue MI CT Initial Queue MI CT P1 MI CT P2 MI CT P3 MI CT P4 MI EC Initial Queue MI EC P1 MI EC P2 MI FC P3 ▼ Show all		Set Default	SN - SGH Surgery Waitlist		

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.