

Waitlist to Waitlist Inter-Facility Transfer

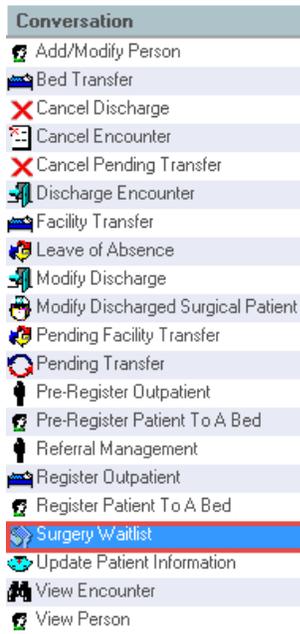
The patient in this scenario will be transferred from a waitlist in facility A to a waitlist in B.

Clerk Retrieves the Scheduling Event ID for Facility A

1. Select the **Request List Inquiry** icon  from the toolbar in **Schappbook**.
2. Select **Surgery Case Request by Person** in the **Inquiry** Field.
3. Click the Ellipses  in the **Person** field.
4. Enter **Last Name, First Name**.
5. Click the **Search** button.
6. Click on the corresponding patient.
7. Click **OK**.
8. Click **Find**.
9. Verify and note the **Scheduling Event ID**.
10. Click **Close**.

Clerk Creates a New Waitlist 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
- Click **OK**.

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

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

10. 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

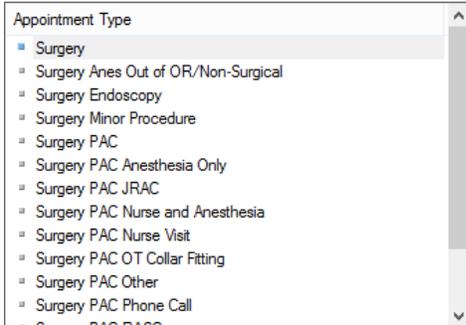
11. Click **Complete**.

- Encounter Number and Visit ID are displayed.
- Click **OK**.

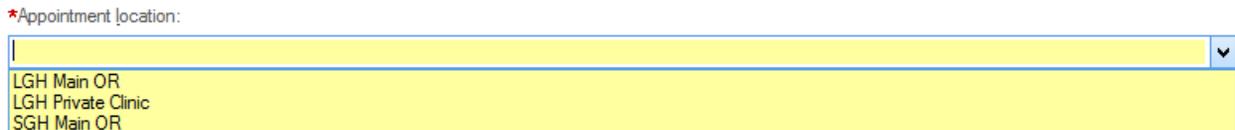
Clerk Puts the Case in Facility B's Request List

1. Select the **Appointment** tab in Schapptbook.

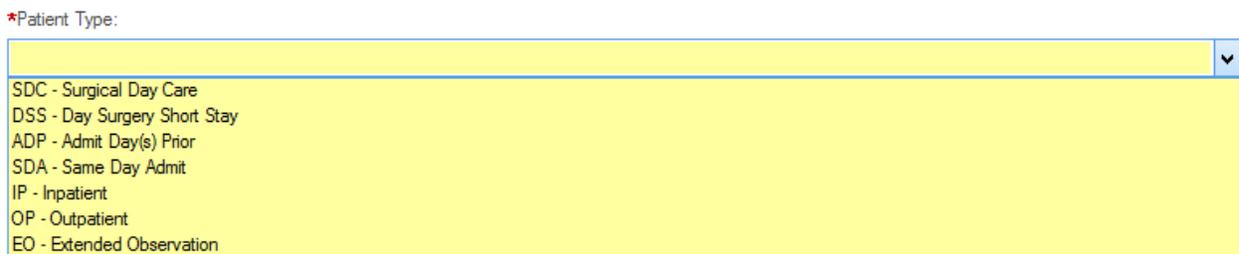
2. Click the Ellipsis  beside **Appointment Type** field.
3. Select an option and click **OK** button.



4. Select Facility B's location from the **Appointment Location** drop-down field.



5. Click the Ellipsis  beside the **Person name** field.
6. Search for the patient using the CIS and EMPI search criteria.
7. Select the patient and double-click the patient's encounter in Facility B.
8. Click the **Looking Glass** icon beside the **Primary Surgeon** field.
9. Enter the provider's name in the **Last Name's** field and click the **Search** button or press enter.
10. Select the appropriate provider and click **OK**.
11. Select an option from the **Patient Type** drop-down list.



12. Select an option for **Priority** field drop-down list.
13. Select an option for **PAC Required?**

14. Enter Procedure on the second BC Diagnosis/PCATs Code field and click the Ellipsis .

*BC Diagnosis/PCATs Code:

	Repair Hernia	
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15. Select the procedure from the list and click the **OK** button.

16. Enter the **Scheduling Event ID** (noted from the step above).

17. Click the **Move >** button.

18. Enter Procedure in the **Search** field under the Orders tab and press **Enter**.

19. Double-click the chosen Procedure.

20. Enter Required fields within the **Appointment Attributes** Window and click the **OK** button.

21. Click **Request**.

22. Verify the Selected Request List for facility B is in the box to the right (Selected Request Lists Window).

23. Click **OK**.

24. Click the **Request List Inquiry** from the toolbar.

25. Select **Surgery Case Request by Person** in the **Inquiry**.

26. Click the Ellipsis  beside the **Person name** field.

27. Enter patient's name in the Person's Name fields and then click the **Search** button (or press enter).

28. Double-click the Patient Name.

29. Click **Find**.

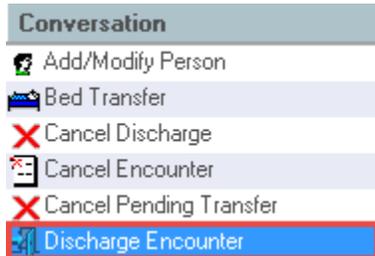
30. Right-click the Patient's Request from Facility A (located on the right-hand section of the screen) and click **Cancel Request**.

31. Select **Cancel Reason** from drop-down.

32. Click **OK**.

Discharge Encounter

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**.