

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 E from the toolbar in **Schapptbook**.
- 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.



Con	versation
😰 A	dd/Modify Person
🚔 B	ed Transfer
XC	ancel Discharge
N 🔁	ancel Encounter
XC	ancel Pending Transfer
S 🖡	ischarge Encounter
🚔 Fa	acility Transfer
🤣 Li	eave of Absence
- Я М	odify Discharge
😁 M	odify Discharged Surgical Patient
🤣 P	ending Facility Transfer
QP	ending Transfer
🛉 P	re-Register Outpatient
😰 P	re-Register Patient To A Bed
🛉 B	eferral Management
📺 R	egister Outpatient
😰 B	egister Patient To A Bed
S 🚱	urgery Waitlist
0 📀	pdate Patient Information
44 V	iew Encounter
🖸 V	iew Person

- 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).

B	Organization	X
Please select the the new encount	e facility and/or client where you want to regist ter.	er
Facility Name	Facility Alias	_
SGH SQUAM	ISH	
SGH Squamis	h General Hospital	
Facility:		
SGH Squamish	General Hospital	
	OK Cancel	

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.

Appointment Type	
Surgery	
Surgery Anes Out of OR/Non-Surgical	
Surgery Endoscopy	
Surgery Minor Procedure	
Surgery PAC	
Surgery PAC Anesthesia Only	
Surgery PAC JRAC	
Surgery PAC Nurse and Anesthesia	
Surgery PAC Nurse Visit	
Surgery PAC OT Collar Fitting	
Surgery PAC Other	
Surgery PAC Phone Call	
IL COMPANY BAC BACC	~

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

*Appointment location:	
	~
LGH Main OR LGH Private Clinic SGH Main OR	

- 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.

*Patient Type:

	¥
SDC - Surgical Day Care	
DSS - Day Surgery Short Stay	
ADP - Admit Day(s) Prior	
SDA - Same Day Admit	
IP - Inpatient	
OP - Outpatient	
EO - Extended Observation	

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



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

*BC Diagnosis/PCATs Code:

Repair Hernia

- 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.