



## ESM – Modify request or appointment details

**Note:** The Appointment Type and Location cannot be modified following this process (see QRG modify appointment type or location on referral).

1. Click on the *appointment inquiry* button from the banner bar.



### Modify request (pending)

- Click on the *request list* tab. Select *inquiry* to *ESM – request – person* and search for the correct patient. Click *find*.

### Modify appointment (confirmed, checked in or checked out)

- If *confirmed, checked in* or *checked out* (booked, arrived or seen) – Click on the *person* tab and select *ESM person* in the *inquiry* menu. Search for the correct patient backdate the start date. Click *find*.

2. Right click on the correct request/appointment and select *modify*.
3. Go to the *general* tab, select a *modify reason* and enter comments.

4. Go to the *details* tab and amend the required accept format field/s. (eg. Change patient type from private bulk billed to public). Click *OK*.

### Categorising from uncategoryed

1. Right click on the record, *modify*.
2. Click on the *details* tab, and update the following fields:
  - new case category*: this should be the treating clinician’s categorisation (1 to 3)
  - reason for appointment*: Diagnosis of the referral based on clinical content (e.g. severe tonsillitis). Click *OK*.

3. The referral has now been categorised and the *reason for appointment* has been added.

### Adding comments to a referral entry

1. Right click on the corresponding record, *modify*.
2. Click on the *details* tab and scroll to the bottom field *scheduling comments* to record your relevant comment (e.g. 04/09/17 – RB – Mother will bring pathology results to appointment – BR).

3. Click *OK*.
4. *Scheduling comments* have now been added to the record.

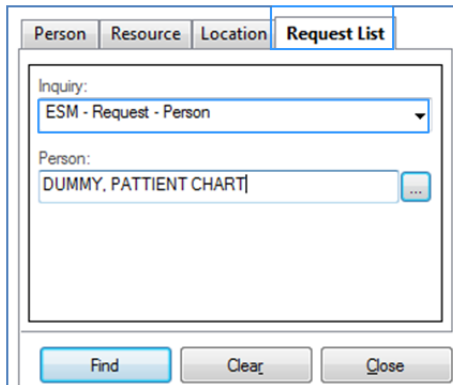


### Modify Request List

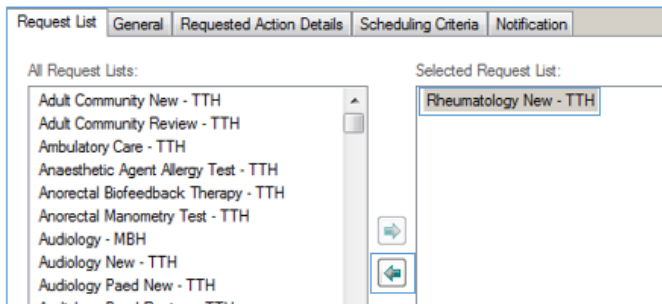
1. Click on the *appointment inquiry* button from the banner bar.



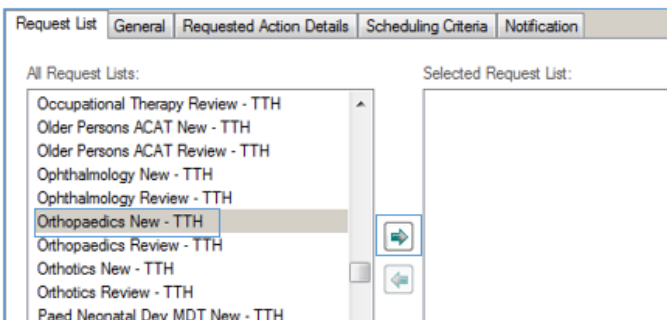
2. Click on the *request list* tab. Select *inquiry to ESM – request – person* and search for the correct patient. Click *find*.



3. Right click on the correct request/appointment and select *modify request*.



4. Highlight the incorrect request list in the *selected request list*. Click the arrow bottom arrow to send the it back to *all request lists*.
5. Search within *all request lists* to find the correct request list. Highlight the correct list and click the top arrow to send it to the *selected request list*.



6. Click *OK*. The request will now appear on the correct request list.