



## ESM – Reschedule an appointment

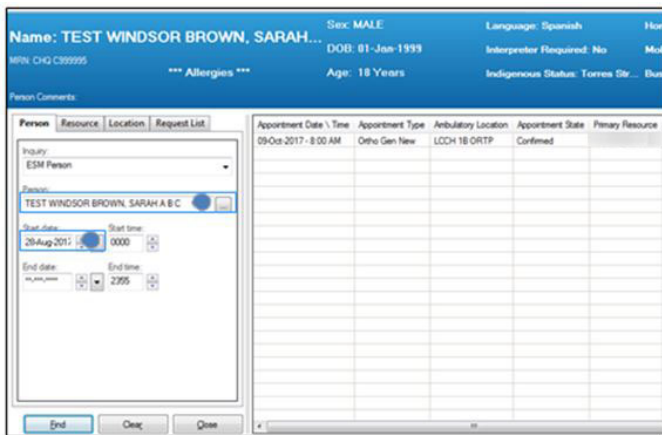


**Note:** Reschedules can be either patient-initiated or facility initiated.

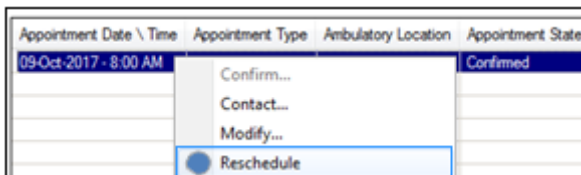
A new case facility-initiated reschedule cannot be marked as not ready for care (NRFC).

To reschedule an appointment, follow the below steps.

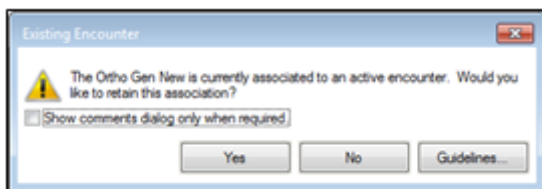
1. Locate the appointment by either searching through the *appointment grid* or the *appointment inquiry, person inquiry* searches. Enter the *start date* for the search as today (T).



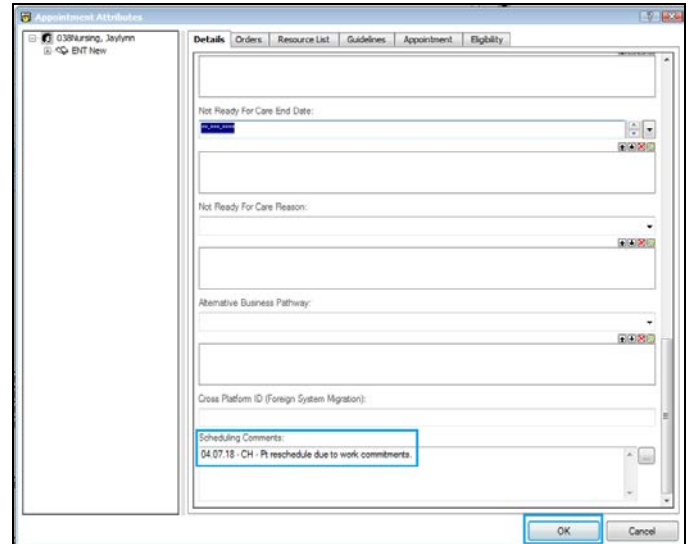
2. Locate the corresponding appointment either in the *appointment grid*, or through the *inquiry search*, right click, *reschedule*.



3. An existing encounter warning will appear. Retain the encounter by clicking *yes*.



4. The *appointment attributes* window appears. Scroll to the bottom of the window and enter *scheduling comments* related to the reschedule (e.g. 07/07/18 – CH – PT reschedule due to work commitments), *OK*.

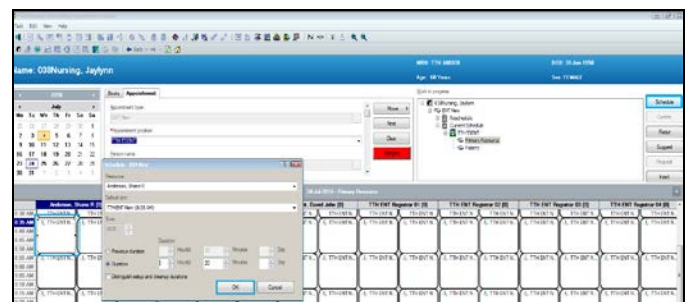


The appointment is now placed in the *WIP* ready for scheduling to the new appointment.

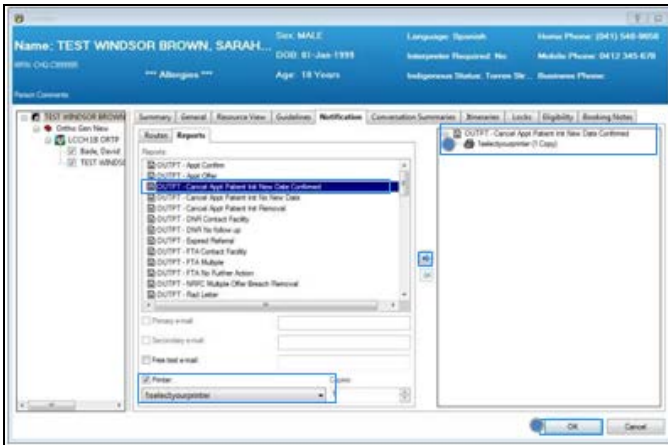
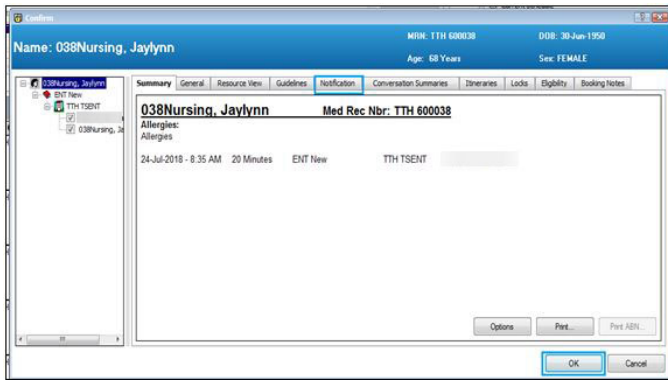
5. Locate the new *appointment date* for the *reschedule request*, based on clinic and patient/client availability. The calendar will display vacant appointments with **bold** dates.



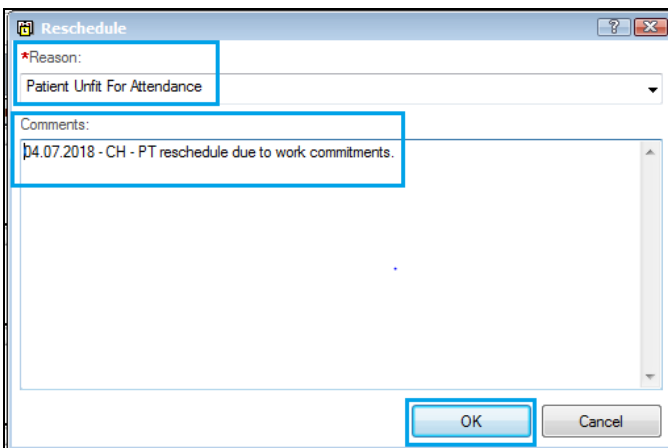
6. *Schedule* the appointment by selecting the appointment and clicking *schedule, OK*.



7. Click *confirm* to secure the appointment. Click *notifications* to print a letter.
8. Select the *reports* menu, the *corresponding letter*, your *printer* and the right arrow. *OK*.

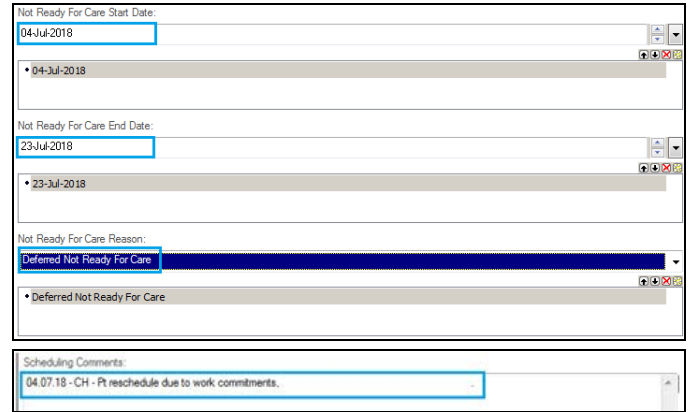


- A reschedule window will appear. You will need to select a reason from the drop down box and enter a comment. Click **OK**.



**Patient-initiated**

- New case appointments only:** Once you have a date selected, before scheduling the appointment, update the *not ready for care* (NRFC) *accept format* on the left of the *WIP*. The NRFC period should be added from the *date of the cancelled appointment* to the day before the new appointment date. Ensure *scheduling comments* are updated.

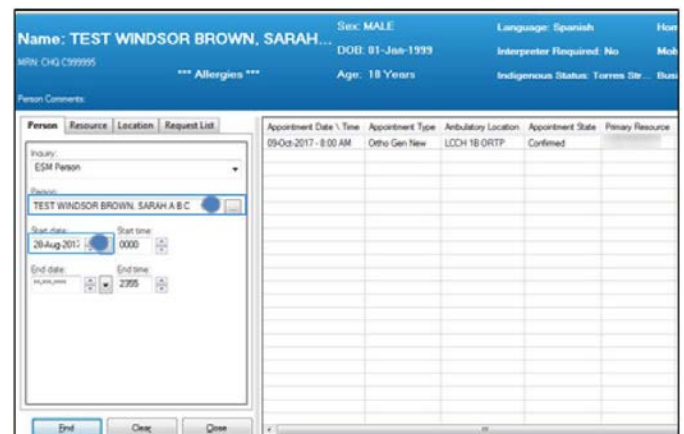


**ESM reschedule letters**

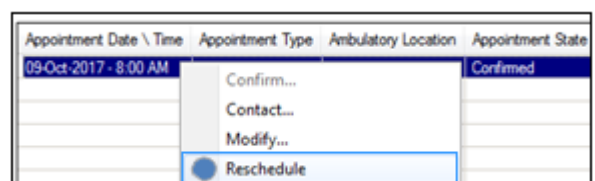
Letters	Description
<b>OUTPT – Reschedule Appt Hosp Init Confirm Appt Confirm</b>	Hospital initiated reschedule has been actioned by the facility with a new date and time allocated, requesting confirmation by the patient directly to the clinic (includes details of new appointment)
<b>OUTPT – Reschedule Appt Hosp Init No future Date</b>	Hospital initiated cancel has been actioned by the facility but not yet scheduled with a new appointment (back to wait list if New patient, or a 'review request list' speciality

**Reschedule cancelled appointment – not on a request list**

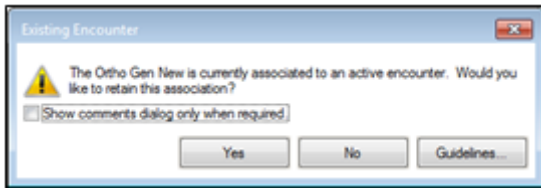
- Locate the appointment by either searching through the *appointment grid* or the *appointment inquiry, person inquiry* searches. Backdate the start date and click *find*.



- Locate the corresponding appointment either in the *appointment grid*, drag to the *WIP*, or through the *inquiry search*, right click, *reschedule*.

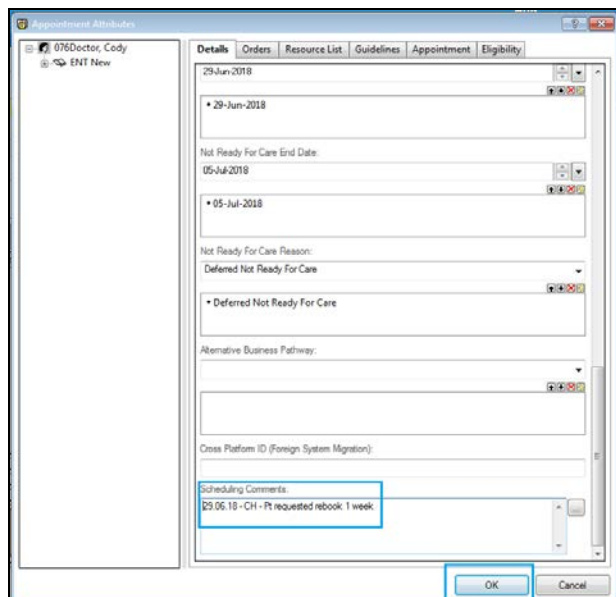


- An existing encounter warning will appear. Retain the encounter by clicking *yes*.



12. The *appointment attributes* window appears. Go to the details tab and if applicable (patient initiated, new appointment), check if the NRFC has been completed. If not, enter the date of the cancelled appointment as the *not ready for care start date* and the day prior to the rebooked appointment as the *not ready for care end date* and *Deferred Not Ready for Care* as the reason. If the NRFC was already entered, change the end date to the day prior to the rebooked appointment.

1. Scroll to the bottom of the window and enter *scheduling comments* (e.g. 29/06/18 – CH - PT request rebook 1 week) (above any previous comments). Click *OK*.

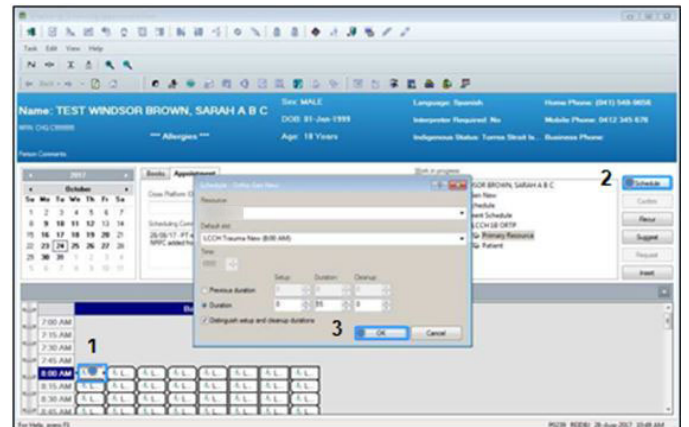


The appointment is now placed in the *WIP* ready for scheduling to the new appointment.

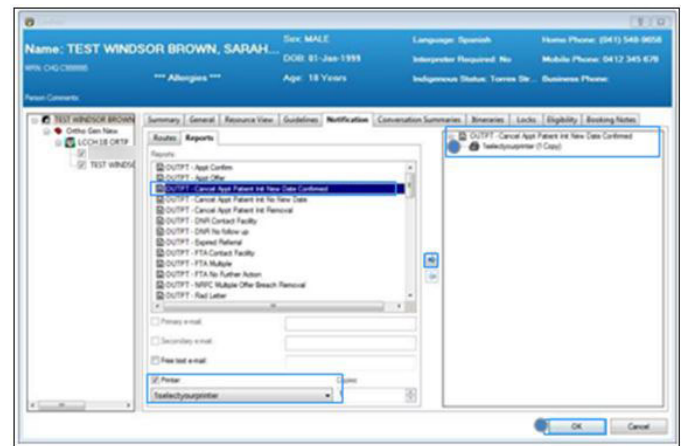
13. Locate the rebooked *appointment date* for the *reschedule request*, based on clinic and patient/client availability. The calendar will display vacant appointments with **bold** dates.



14. *Schedule* the appointment by selecting the appointment and clicking *schedule, OK*.



15. Click *confirm* to secure the appointment. If applicable, click *notifications* to print a letter. Select the *reports* menu, the *corresponding letter*, your *printer* and the right arrow. *OK*.



## ESM reschedule letters

Letters	Description
<b>OUTPT – Reschedule Appt Hosp Init Confirm Appt Confirm</b>	Hospital initiated reschedule has been actioned by the facility with a new date and time allocated, requesting confirmation by the patient directly to the clinic (includes details of new appointment)
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