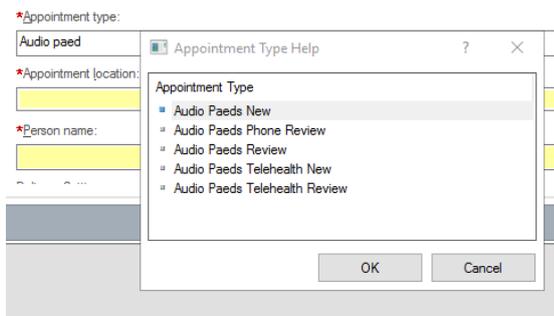


Audio Paeds Appointment with Order – Add to request list

Quick reference guide

Create a NEW request list item

1. Click on the [appointment inquiry](#) icon, perform an [ESM person search](#) for booked appointments
2. Perform an [ESM Request – Person](#) search to ensure this is not a [duplicate](#) referral.
3. Go back to the scheduling [appointment book window](#) and select the [appointment](#) tab.
4. Enter the first few letters of the [appointment type](#) name to help find the appropriate appointment type. You can also use the * to search for keywords.



5. Select the [appointment type](#) from the drop-down list e.g. Ortho Gen New (Orthopaedics General New).
6. Review the [appointment location](#) box. The location should reflect where the service will be delivered (note, this often defaults automatically but if there are multiple options the user will have to select one before proceeding).
7. Click the [person name ellipsis](#) button. The [person search](#) window will open.
8. Enter the patient details in the [search field](#) pane. Click [search](#).
9. Select the correct [patient](#) from the [patient search](#) results.
10. Click [add encounter](#).
11. The [encounter available conversations](#) window will display.
12. Select [pre-arrival add encounter](#) and click [Ok](#).

13. The [pre-arrival add encounter](#) window will display. The following [fields](#) must be checked and updated before clicking [Ok](#).
14. [Start date](#) and [start time](#).
15. [Building](#) and [patient location](#).
16. [Treating clinician](#) (use the search box or start typing the clinician's full name and it will populate).
17. [Chargeable status](#) (public).
18. [Payment class](#) (Medicare).
19. [Funding Source](#) (Hlth Serv Budget (Not covered E'where))
20. Click [Ok](#)
21. The [document selection](#) window will display. Ensure the [do not print documents](#) box is checked and click [Ok](#).
22. Copy [FIN number](#) from encounter to Smart Referrals Workflow Solution ieMR ID field.
23. The [pre-arrival add encounter](#) confirmation window will display. Click [Ok](#).
24. Complete the remaining [appointment fields](#) in the [appointment tab](#) as required;
 - a. [Primary resource](#) (if known, if not put the ~~director of specialty~~)
 - b. [Delivery Setting](#): On Campus
 - c. [Patient Type](#): Public (This is always left as 'public' at this point)
 - d. [CPC Status](#) should be entered according to the table below in relation to the CPC Review field in Smart Referrals Workflow.

CPC Review in Smart Referrals Workflow Solution	CPC Status in ESM
Recommended Category 1	Meets Criteria
Recommended Category 2	Meets Criteria
Recommended Category 3	Meets Criteria
Meets Criteria	Meets Criteria
Clinical Override	Clinical Override
Blank	CPC Not Applicable
CPC Not Applicable	CPC Not Applicable
Does Not Meet Criteria	Does Not Meet Criteria

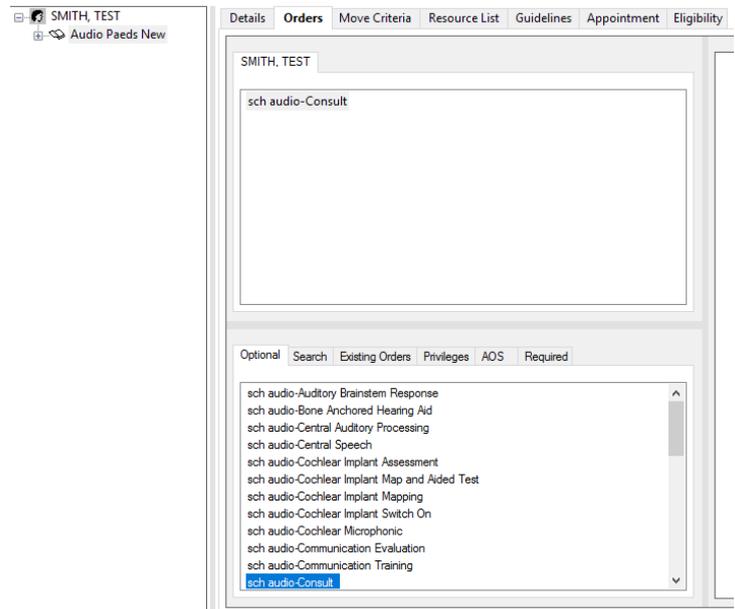
- e. [New case category](#) (Ensure this is changed from Uncategorized to the provided category)
- f. [Named Referral](#) ('Yes' if named 'no' if not named)
- g. [Length of referral](#)
- h. [Date referral received](#)



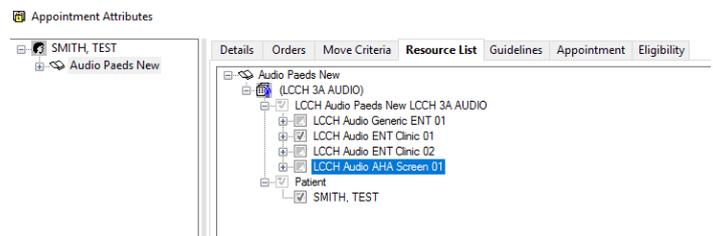
- i. [Date on referral](#) (also known as the 'Referral Written Date')
 - j. [Referral source](#)
 - k. [Referring clinician, address, Suburb](#) (note, these are free text fields and must be entered accurately. Information in this field will directly print on administrative referring doctor letters).
 - i. Please remember to include title e.g. [Dr](#) in referring clinician field.
 - ii. If the [postcode field](#) is left blank, no administrative letters will print to the referring practitioner, even if selected. For Internal referrals do not put the post code in.
 - l. [Provider number](#) is used for Winscribe. If no [provider number](#) is entered, dictation through Winscribe may not be possible.
 - m. If provided with Reasons for referral in Smart Referrals Workflow Solution copy this into the [reason for appointment](#) field in ESM.
 - n. Copy SSRID from Smart Referrals Workflow Solution into the [SSRID field](#) in ESM
 - o. Copy Referral ID from Smart Referrals Workflow Solution into [Cross platform ID](#).
 - p. Add [Scheduling comments](#)
25. Click [move](#) to transfer the referral information to [WIP](#).
26. The [appointment attributes](#) window will display.

New part of the process

27. On the [Orders](#) tab, select (double click) an order (sch audio-Consult).



28. You can select a resource on the [resource tab](#)



29. Click [Ok](#)
30. The new appointment details will display in the [WIP](#) window. Click [Request](#). Click [Ok](#).

