

Creating/Editing a Research Appointment Request

All research appointments and CTRC services must be scheduled from an order or Appointment Request.

Research staff will enter research requests through an Appointment Request instead of through an In Basket message.

Complex appointment requests can easily be created from the patient's appointment desk and will appear on both the Active Requests tab of the Appointment Desk and the Appointment Requests workqueues for scheduling. Complex Appt Requests require more information entered in the Appointment Request activity than simple Appt Requests and will be used only by certain areas.



Refer to the **Revenue Cycle – Appointment Request Definitions – Complex Workflow** document in Altitude to learn more about specific definitions of the forms of the Appt Request, Orders, Referrals and Appt Request workqueues.



This workflow is dependent on an MRN in Epic. If a potential study participant does not have an MRN, send an IB message to the appropriate research scheduling pool using the .RSCHSCHEDULINGNP or .RSCHNCSCHEDULINGNP smartphrase.

Creating a Complex Appointment Request

- 1. Access the patient's Appointment Desk.
- 2. Enter Appts in the Epic Chart Search.
- 3. Click Appts in the Jump to menu.







- 4. Enter patient information in the patient lookup field.
- 5. Highlight the correct patient and click **Select**.
- 6. The patient's Appointment Desk will open.
- 7. Click the **Request** drop down menu from the Appointment Desk toolbar.
- 8. Select Appt Request.

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- 9. The request will open to the **Visits** form of the request.
- 10. Skip to the **Indications** form of the Appt Request
- 11. Enter "Research" in the indications field and choose an appropriate research indication.
 - An indication is the medical reason for the visit. The indication corresponds to an ICD-10 code. The information entered in the Indications field will prompt a decision tree to guide schedulers when scheduling the request.
- 12. You can add comments regarding the indication if you'd like and if there is more than one indication listed, you can mark one as primary by clicking the Primary checkbox next to the indication.



REVENUE CYCLE EPIC CADENCE

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Indications form of the Appt Request

13. Click the Next button to move on to the next section of the Appt. Request.

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14. You can enter Request Notes if needed.

• Request Notes pertain only to the Appt. Request and will show on the Appt. Desk under the Appt Request tab. They are different than Appt. Notes and will not be shown on the provider schedule.

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Request Notes form of the Appt Request

- 15. Skip to the Decision Tree from
- 16. The research indication will suggest an associated Decision Tree, click on the **Decision Tree hyperlink** in the Decision Tree section of the Appt. Request to access the tree.

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Decision Tree hyperlink

17. Complete the questions on the Decision Tree. Depending on the responses, the decision tree will give results for the Visit Type and Tasks to complete.

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Request for Encounter or Processing Room:	Encounter Processing Room	
	Encounter 🔎	
Desired Date of Clinic Appoint(s)		
Principal Investigator:	3RD FLR HP, AUTISM ROOM 11 💫	
Telehealth Appt:	No 🔎	
CTRC Nursing Services Requested:	Yes No	
	Yes 🔎	
Epic Appointment Department:	ADO FAMILY WHEATRIDGE	
Epic Appointment Location:	Anschutz Campus 🔎	
Enter Research Protocol #:	00-0000	
Example: If CRC, COMIRB # + CRC; ie, 00-084CRC		
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(3rd Floor Anschutz Campus Only)		
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Decision Tree Results - After Answering all Questions, you must click Apply

- 18. Click **Apply** to apply the results and click the **Next** button to move to the next section of the Appt Request.
 - Do Not click Save Results.
 - If you click **Save Results**, the Visit Type in the Results section **will not be applied**, and you must then click the **Pencil** icon next to the Decision Tree title to go back in and apply the results.



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Pencil icon of Decision Tree

Marking a Request as Urgent

By default, Appt Requests have a priority as Routine. You may change the priority if needed, in the Referral Info form of the request.

- 1. Navigate to Referral Info
- 2. Select the magnifying glass in the Priority field

Referral Info	Referral Information		† 4
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Tasks			I
Triage			
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Request Routing			
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3. Select Urgent

Tasks

Tasks are created from the answers in the Decision Tree. You can see the tasks and statuses in the Tasks form in the navigator.



REVENUE CYCLE EPIC CADENCE

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Triage Reminder	🔁 Tasks					† ‡
Request Routing	Request Tasks Add task			+		
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	triage .€					

Triage

Research requests can be triaged to the CTRC Nursing or Main Admissions pool. You can see which pool and the status of the triage in the Triage form in the navigator.

Requests are sent to Triage pools if:
CTRC nursing services are requested
An Inpatient Encounter is requested

MANAGE Tasks Triage	⊘ Triage		t t
Reminder Request Routing	Triage Status Waiting for Tasks	Triage Pool CTRC SCATTERBED RESOURCE REQUESTS	Q.
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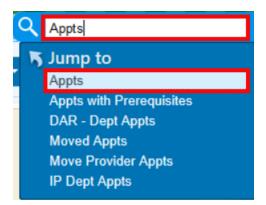
Editing a Complex Appointment Request



Decision trees can't be amended once submitted. The following workflow details how to enter notes in the request for schedulers to see and change the appointment details when scheduling.

- 1. Access the patient's Appointment Desk.
- 2. Enter Appts in the Epic Chart Search.
- 3. Click **Appts** in the **Jump to** menu.





- 4. Enter patient information in the patient lookup field.
- 5. Highlight the correct patient and click **Select**.
- 6. The patient's Appointment Desk will open.
- 7. Select the Active Requests tab.
 - Any requests that HAVE NOT been scheduled will be in this tab



8. Select Edit button.



- 9. The request will open to the **Visits** form of the request.
- 10. Skip to the Request Notes form of the Appt Request



REVENUE CYCLE EPIC CADENCE

Appointment Request (Needs Scheduling) [995	83418] ⑦
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VISITS Request Notes	† 1
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Source	
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Request Notes	
Referral Info	
DECISION	↑ Previous ↓ Next
Decision Tree	Flevious + Next

- 11. Enter your Appt Request revisions
- 12. Close out of the request.



If you're request has already been scheduled, then it will **NOT** be in the **Active Requests** tab, but the **Finalized Requests** tab. If so, you'll need to send your appointment edits via In Basket message to the RSCH SCHEDULING Pool.