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.

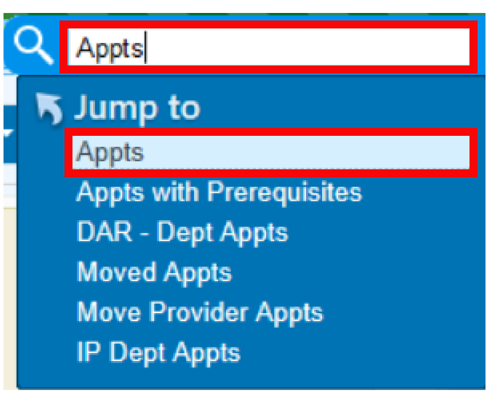
Complex appointment requests can easily be created from the patient's appointment desk and will appear on both the Active Requests tab of the Appointment Desk and the Appointment Requests workqueues for scheduling. Complex Appt Requests require more information entered in the Appointment Request activity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

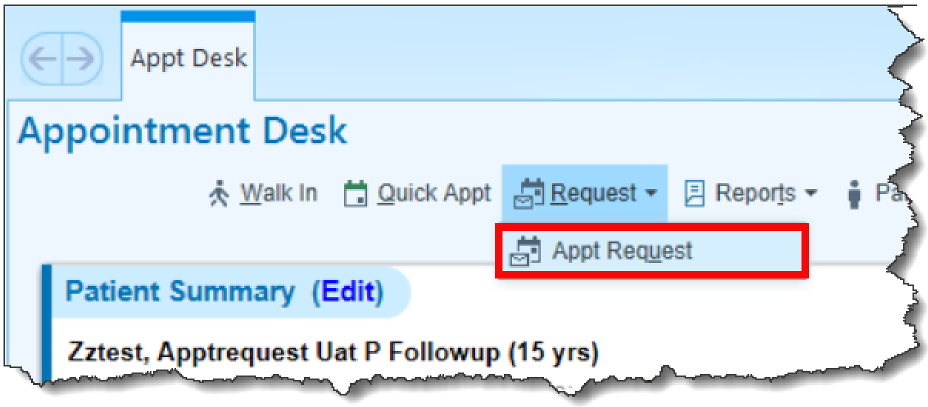
This workflow is dependent on an MRN in Epic. If a potential study participant does not have an MRN, send an IB message to the appropriate research scheduling pool using the .RSCHSCHEDULINGNP or .RSCHNCSCHEDULINGNP smartphrase.

Creating a Complex Appointment Request

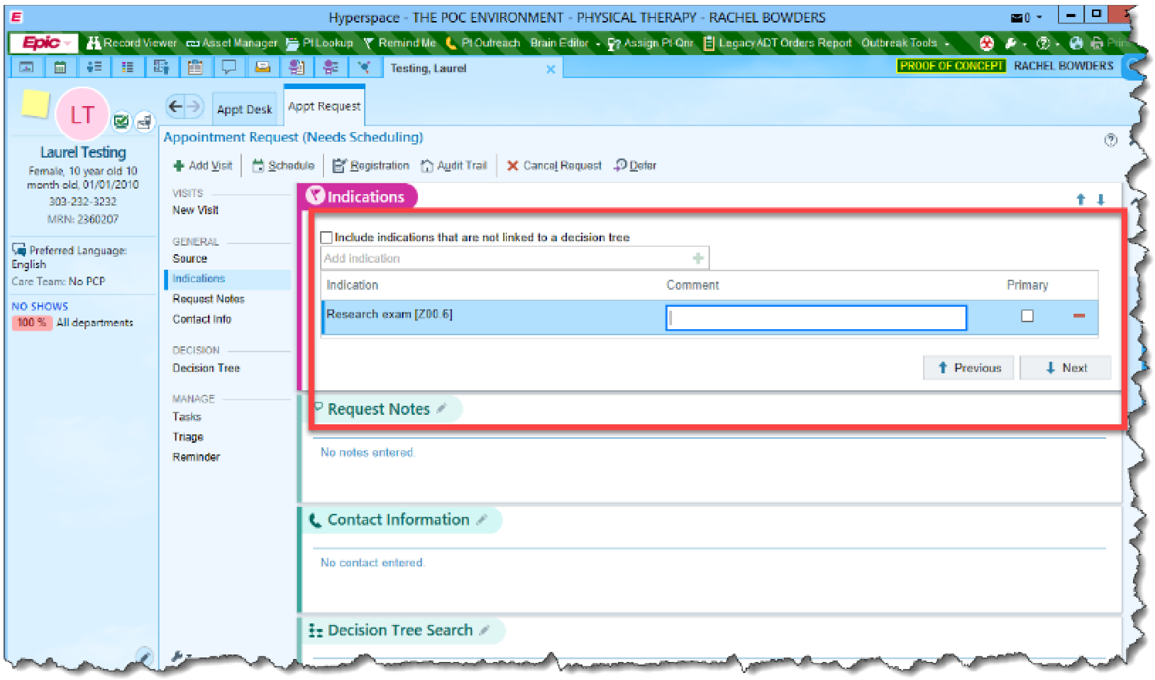
1. Access the patient's Appointment Desk.
2. Enter **Appts** in the **Epic Chart Search**.
3. Click **Appts** in the **Jump to** menu.



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**.

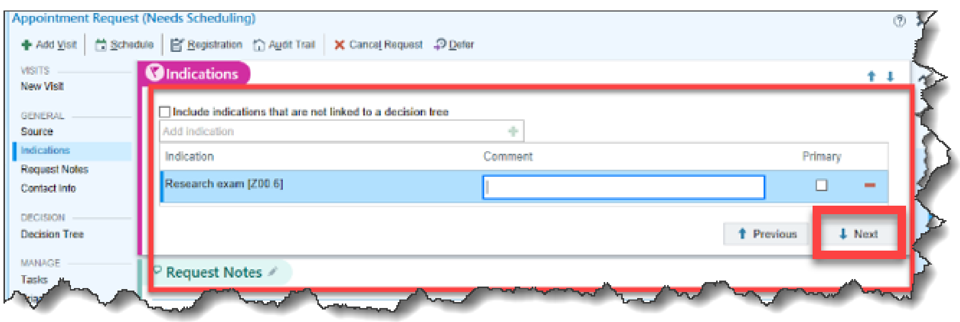


9. The request will open to the **Visits** form of the request.
10. Skip to the **Indications** form of the Appt Request
11. Enter "Research" in the indications field and choose an appropriate **research indication**.
    - An indication is the medical reason for the visit. The indication corresponds 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.



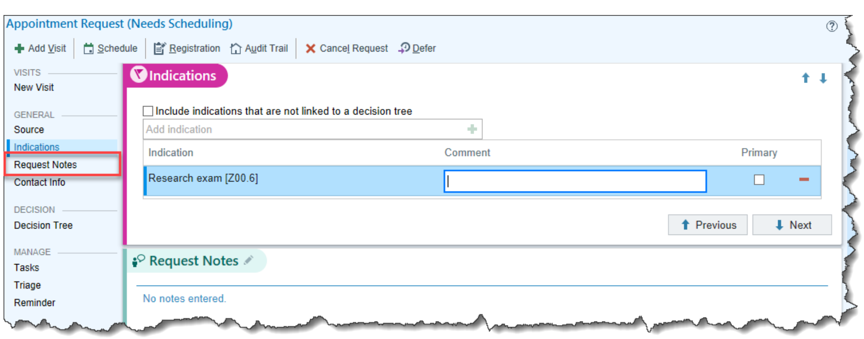
Indications form of the Appt Request

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



14. You can enter Request Notes if needed.

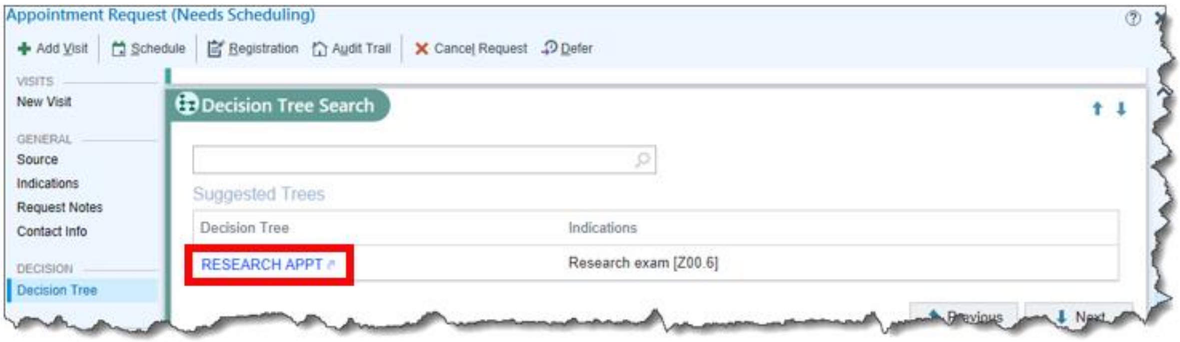
- Request Notes pertain only to the Appt. Request and will show on the Appt. Desk under the Appt Request tab. They are different than Appt. Notes and will not be shown on the provider schedule.



Request Notes form of the Appt Request

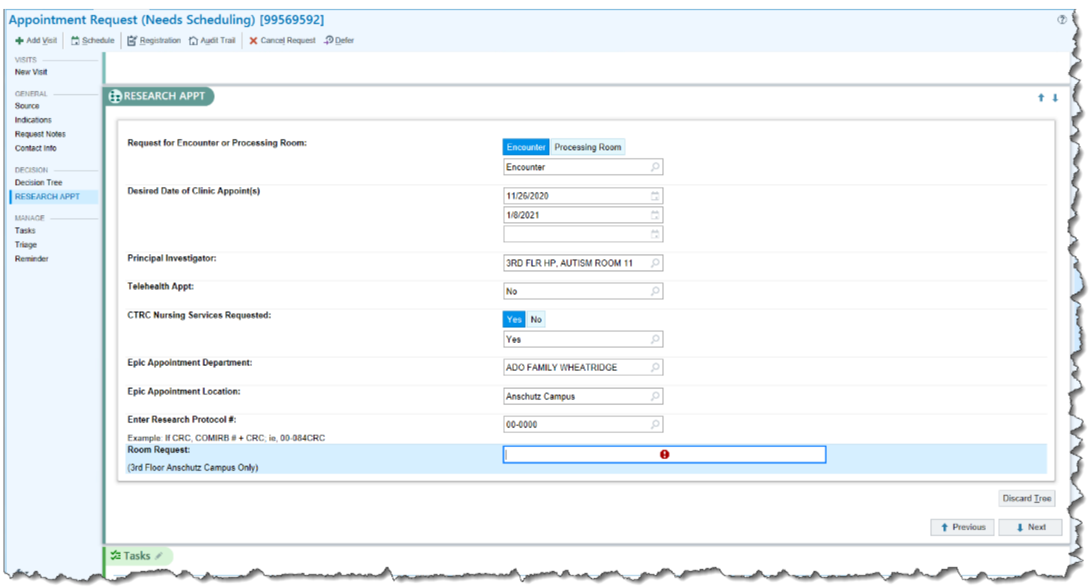
15. Skip to the Decision Tree from

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.



Decision Tree hyperlink

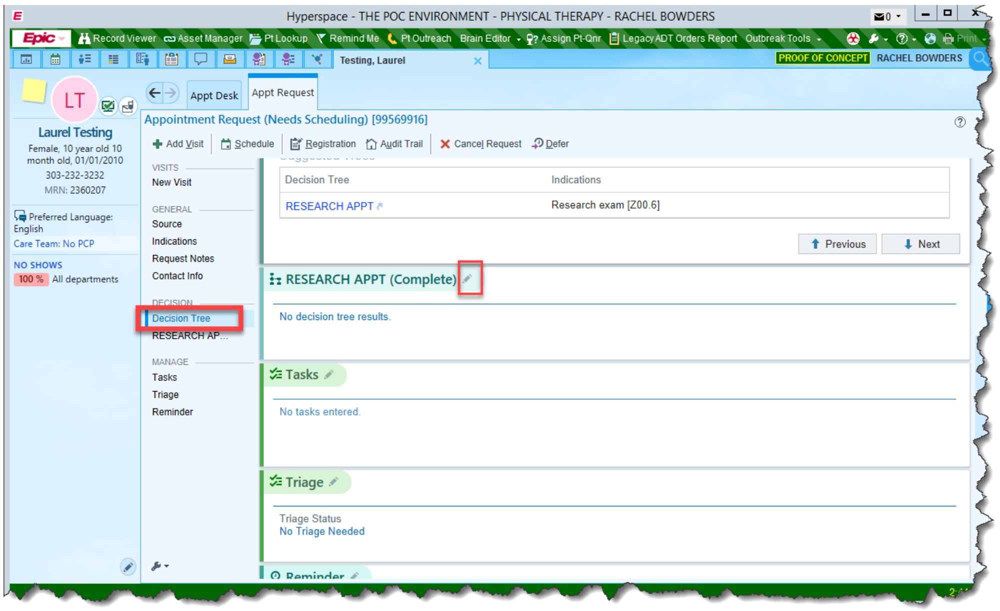
17. Complete the questions on the Decision Tree. Depending on the responses, the decision tree will give results for the Visit Type and Tasks to complete.



*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.

- **<u>Do Not click Save Results.</u>**
- 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.

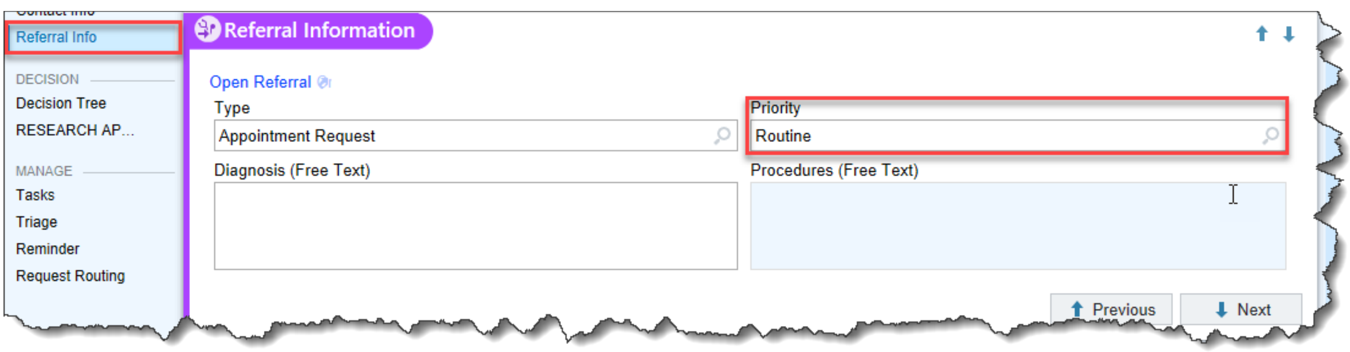


Pencil icon of Decision Tree

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.

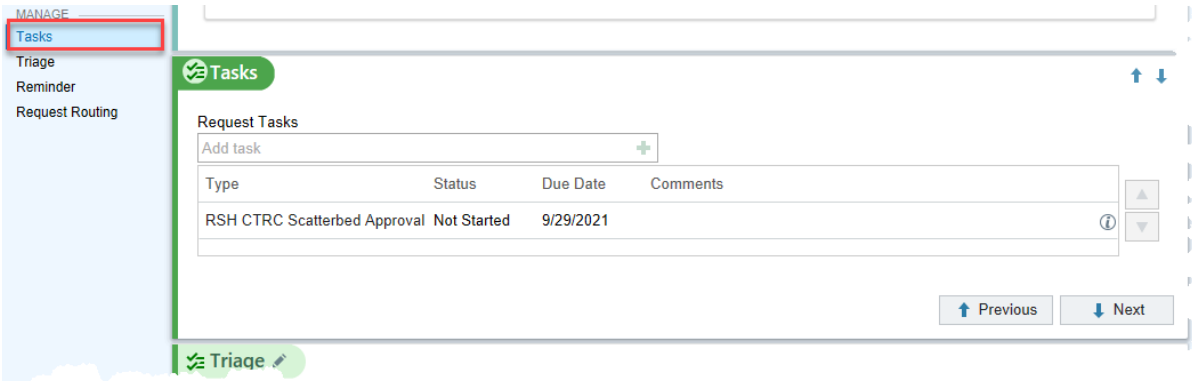
1. Navigate to Referral Info
2. Select the magnifying glass in the Priority field



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.

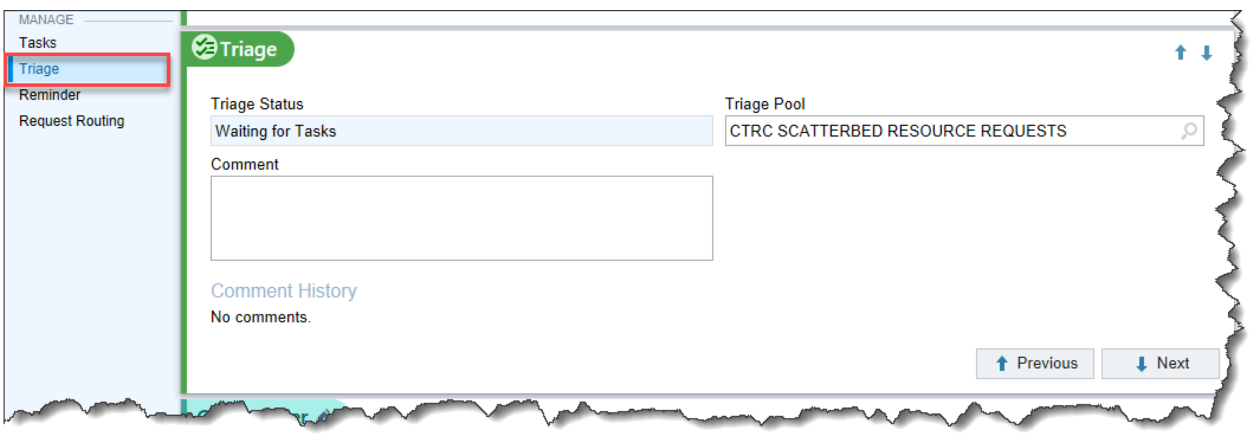


Triage

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:

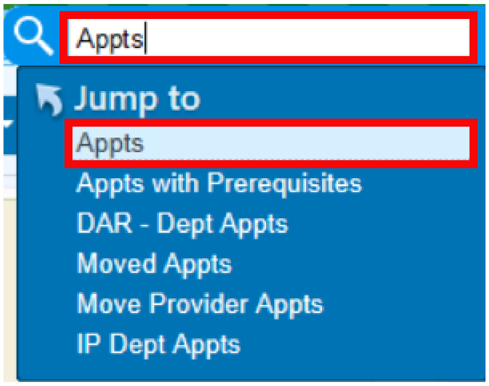
- CTRC nursing services are requested
- An Inpatient Encounter is requested



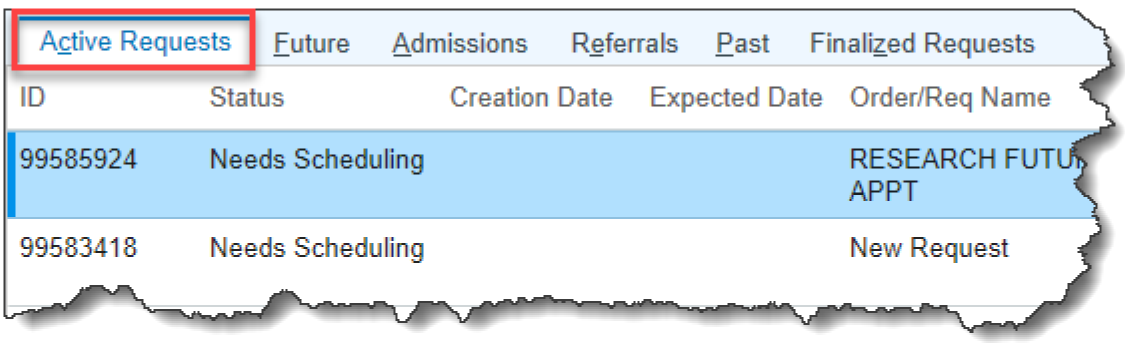
Editing a Complex Appointment Request

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.

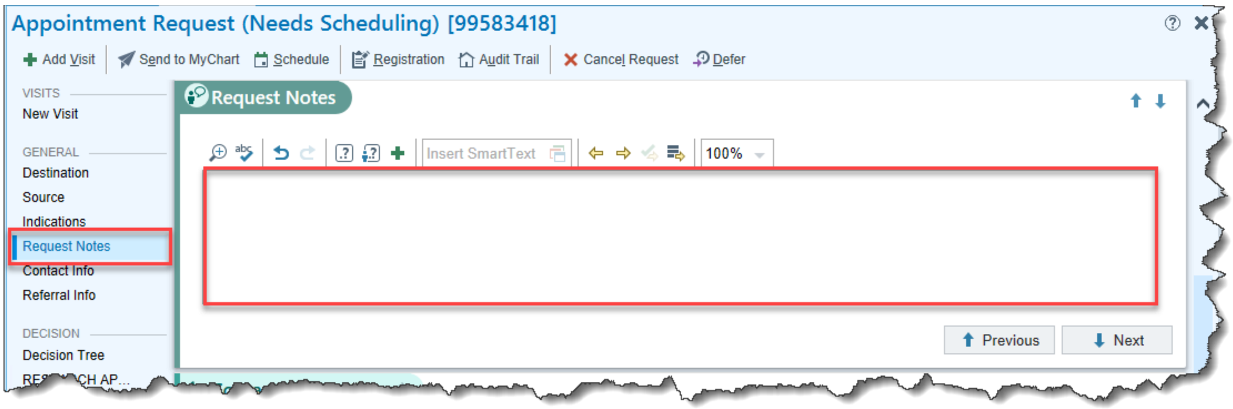


4. Enter patient information in the patient lookup field.
5. Highlight the correct patient and click **Select**.
6. The patient's Appointment Desk will open.
7. Select the **Active Requests tab**.
    - Any requests that **<u>HAVE NOT</u>** been scheduled will be in this tab



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



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.