

## S – FACILITY SECRETARY’S WORKFLOW

This shows how tabs streamline staff workflow.

Each of the facility’s secretaries logs in at the start of the day, clicks Dashboard at the top right of the screen, and then selects Appointment Calendar from the orange menu across the top of the screen. The calendar opens in a new browser tab, and can be consulted at any time. She then navigates back to the original tab using the “Back” arrow, and selects "Manage Requests" at the very top of the screen.

She will first scroll through “Manage Requests” to identify top priority statuses, marked in red. These include the following Request statuses: “Booking Request”, “No Show” and “Copy and Close”. She opens and attends to each of these in turn.

In the next step in the workflow, she opens the footer tabs sequentially from left to right. In "For Secretary’s Attention" she finds tasks assigned by the services manager or technician. In this scenario she opens a Request marked 'Service Pending More Tests/Procedure', in which the technician has recommended that an additional test be performed. She updates advising the referring HCP how to order the test and then unchecks the “For Secretary's Attention” box and Saves. This generates an automatic email notification to the referring HCP's office.

She clicks the "For Secretary’s Attention" tab again and opens the next Request, whose status is "Consult Pending More Tests/Procedure". In this case, the technician's last update reads that the test was not completed successfully and must be repeated. The facility secretary creates a new appointment, copies the new date and time to the Update field, unchecks the "For Secretary's Attention" box and Saves. This generates an automatic email notification to the referring HCP's office.

Clicking back to the "For Secretary's Attention" tab, she opens the last remaining Request, whose status is "Service Conducted". The latest post made by the technician reads "Test performed uneventfully". The report has not yet been generated, so the facility secretary closes the Request. When the report is available, she reopens the Request, unchecks the "For Secretary's Attention" box, attaches the report, adds her reply to the update field and Saves, generating an automatic email notification to the referring HCP's office email.

The "For Secretary's Attention" screen is now empty, so she moves on to the green "Services Manager Approved" tab. She opens a Request, containing a test/procedure appointment Request which one of the facility staff had previously referred to the services manager for approval. The services manager OKed the booking, so the secretary now goes ahead and schedules the appointment. In her update, she asks that the referring HCP’s office relay the appointment information to the patient.

It took only 30 seconds for the facility secretary to schedule a test/procedure appointment, automatically post it to the appointment calendar and generate an automatic email notification to the referring HCP's office email!

She is now ready to click through each submenu in the "Waiting for my Reply" tab at the bottom of the screen. This tab contains questions and comments from referring HCPs (excluding those that are specifically directed to the services manager). Working from the top down, she begins with "Pre-Service Approved" and works through the tickets.

In the first Request, the referring HCP's office has asked for an earlier booking for the patient. To reschedule the appointment, she scrolls to the top of the thread, and clicks the red X beside the appointment time to delete the original booking. She then scrolls down to create a new post to schedule a new, earlier appt. This automatically updates the Appointment Calendar and generates a notification to the referring HCP's office email.

She navigates back to the "Pre-Service Approved" submenu in the "Waiting for my Reply" tab, and opens the remaining Request. In this case, the referring HCP has uploaded some new test results, in advance of the patient's upcoming procedure appointment. She replies with "Thanks" and Saves.

All "Pre-Service Approved" Requests have been cleared, so she moves on to the next submenu screen in "Waiting for my Reply": "Booking Declined", which contains only one Request. Here the referring HCP's office has replied to a declined booking with reasons why the patient should be booked for the test. The facility secretary adds her reply and schedules a test appointment by scrolling to the top of the thread, clicking "Show Options" and changing the status of the ticket from "Booking Declined" to "Booking Request". She Saves.

Now that the status is "Booking Request", she may scroll back down to the update field, where she selects the appointment date and time, includes it in her update, and Saves.

The "Booking Declined" submenu screen is now empty, so the facility secretary moves on to the "Service Pending Tests" submenu screen. This screen is empty.

Lastly, she clicks the "Service Conducted" tab, which is empty. She clicks Manage Requests at the top of the screen, and quickly scans that page for any new Booking Requests that have arrived while she was working on the tabs.

Note that the secretary can refer to her Calendar screen, which is open in a second browser window, at any time. In the Calendar, the different office locations are colour coded. The calendar can be viewed Monthly, Weekly, or Daily, and can be printed.