S – FACILITY TRIAGE OF APPOINTMENT REQUESTS

Here's how the facility's staff triage service requests.

Each Portal's New Request screen displays its own unique instructions for the composition of service requests and requisitions. These requirements are customized by the services manager and are office location-specific. The referring HCP fills out all required fields, attaches a requisition and sends.

The facility secretary sees a new Booking Request displayed in red on her Manage Requests screen. (Red = for secretary's immediate attention). She opens it, reads the service request post and the attached requisition. She then either creates and posts an appointment booking, declines the service request, or refers it to the services manager for further disposition.

Part 1: Declining a Request

If the service request is unsuitable or cannot be accommodated, the secretary declines the request by selecting "Booking Declined" and adding her reply in the “Update this Request” field. She can select a response from the “canned response” dropdown menu and then modify or add to it. She then saves. The Request status changes to from “Booking Request” to “Booking Declined” and an email notification is automatically generated and sent to the referring HCP's office.

The referring HCP's office opens the notification and clicks through to the post. The referring HCP's staff has the opportunity to reply and try to renegotiate or accept the refusal. In the latter case, she would then copy the entire thread to the patient's EMR or print it for the paper record, click "Yes, I have printed the Request" and “Close the Request”.

The Request status changes from “Booking Declined” to "Copy and Close", which is displayed in red, on the facility secretary's Manage Requests screen. She opens the Request, copies the entire thread to the patient's EMR or prints it for their paper medical record, clicks "Yes, I have printed the Request" and clicks "Delete this Request", which deletes the ticket from the Portal’s database. As a result, it will not longer appear on her Manage Requests screen.

Part 2: How the Secretary Refers a Request to the Services Manager

If the facility secretary is uncertain about a Booking Request and requires the services manager to review the service request before proceeding, she simply updates with a "?", checks "Pre-Service for Approval" and Saves.

The service manager’s Manage Requests screen will now display this Request in green (to indicate that it is for immediate action). The status has changed from “Booking

Request” to "Pre-Service for Approval". All “Pre-Service for Approval requests are consolidated in the Pre-Service for Approval tab, located at the bottom of the service manager's screen. Clicking on this tab will display only the "Pre-Service for Approval" requests that must be attended to by the service manager.

The service manager opens the Request, reads it and reviews the attached requisition. He /she will now either click "Booking Declined" and add a comment and Save, or click on "Service Manager Approved" (below the “Update this Request” field) and Save. In this scenario, he updates, selects "Service Manager Approved" and Saves.

The request status changes to from “Pre-Service for Approval” to “Service Manager Approved”. It is automatically brought to the facility secretary’s attention because it is displayed in red on the secretary's Manage Requests page.

It is also consolidated with all other requests of the same status in the secretary’s "Service Manager Approved" tab. She opens the request, knowing by the status that it has been approved by the service manager and proceeds to book the appointment. She selects a response from the dropdown, schedules the date and time using the calendar, copies and pastes it into the Update field, and Saves. This generates an automatic email notification to the referring HCP’s office.

The request status changes to from “Service Manager Approved” to “Pre-Service Approved”, with the appointment time and date and clearly indicated.

The referring HCP's office opens the email notification named "Pre-Service Approved" in their inbox and clicks through to the post. The date and time is displayed in the Service Session box at the top of the thread, as well as appearing in the most recent post made by the facility’s staff.

Both the referring HCP and facility's offices can now notify the patient of the appointment.