

## **S – RESCHEDULING APPOINTMENTS**

This demonstrates how either the facility secretary's or the referring HCP's office can initiate a booking change.

Part 1: Here is how the referring HCP's office requests an appointment change

The referring HCP or her staff logs in. She wishes to move an already-scheduled test or procedure forward and have it occur sooner. She opens the Request (whose status is Pre-Service Approved), updates with her new date request and Saves.

On the facility secretary's Manage Requests screen, there is no obvious indication of this update. She is made aware of it as she works through the tabs at the bottom of the screen. The updated Request appears in the "Waiting for My Reply" dropdown, under "Pre-Service Approved." She opens the Request, reads the new post from the referring HCP, then deletes the existing service appointment and creates a new one.

She updates and Saves.

This generates an automatic email notification to the referring HCP's office email. Additionally, the service manager's and the facility secretary's calendars have automatically updated after the appointment change.

The HCP's office clicks through to the Request and notes the revised time and date and conveys it to the patient.

Part 2: Here is how the facility's office initiates an appointment change

Let's say that the facility must move all of Tuesday appointments to Monday. Either on the facility secretary's Manage Requests screen or on the calendar, she identifies each of the Tuesday's appointments and opens each Request (status Pre-Service Approved), one by one. She deletes the existing appointment, creates a new one with the new appointment time and date, updates and Saves.

An email notification to the referring HCP is automatically generated. Here is that email notification. The HCP's office clicks through to the Request and notes the revised appointment date. In this example, the referring HCP has a problem with the revised appointment date. The HCP's office therefore responds, by posting to the thread.

Note that as a result of this response, the status has not changed. It remains Pre-Service Approved. There is no obvious indication of the referring HCP's update on the facility secretary's Manage Requests screen. She is made aware of it as she works through the tabs at the bottom of the screen. The updated Request appears in the "Waiting for My Reply" dropdown, under "Pre-Service Approved". She opens the Request, reads the new

post from the referring HCP, then deletes the existing test/procedure appointment and creates a new one. She updates and Saves.

Here is the new appointment time and date. The services manager's and the facility secretary's calendars have again automatically updated after the most recent appointment change and of course, an email notification is automatically generated to the referring HCP .