

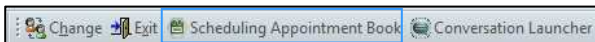


## Modify category and add scheduling comments

Clinicians with read only access can modify a referral category from uncategoryed and add scheduling comments.

**Please note:** Upgrading a referral category should be performed by administration support staff to ensure the correct correspondence is also sent to the patient and their GP.

1. Log into **PowerChart** using your current **Novell** username and password. If you don't have a current **Novell** username and password you can log a job with the Info Service Centre via the desktop or phone 1800 198 175.
2. Click on the **scheduling appointment book** button in the toolbar. This button may appear through a sub menu.

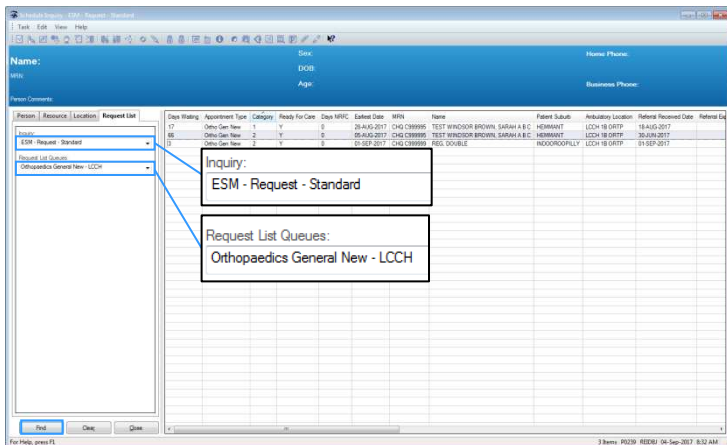


3. Click on the **appointment inquiry** button from the banner bar.

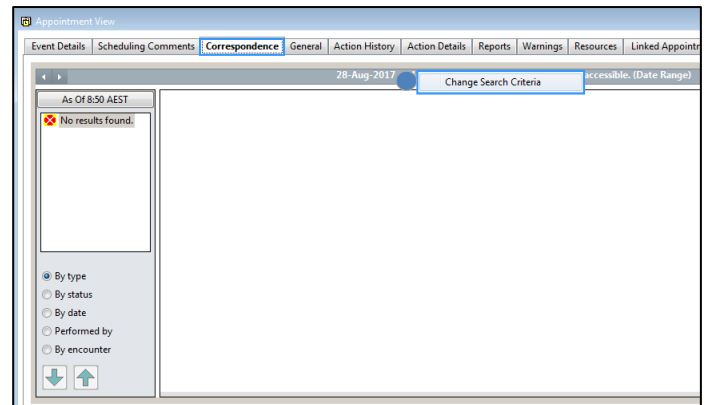


### Option 1: Specialty request list view

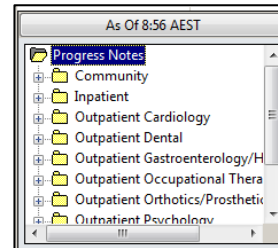
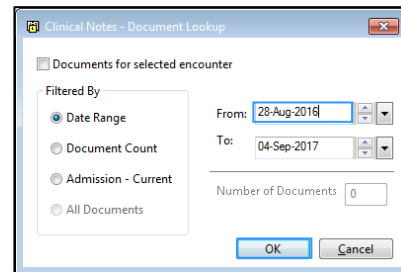
4. Click on the **request list** tab, select **ESM – request – standard**, then locate the corresponding request list for your service (e.g. Orthopaedics General New – LCCH).



5. Sort the request list by clicking on **days waiting** and then **category**.
6. Locate the referrals under the category of **uncategoryed**. Double-click the referral to bring up the **appointment view** screen. From here, you can search the ieMR for documentation (including previously scanned referrals). Click on the **correspondence** tab.



7. Right click on the date bar, **change search criteria**. Select **from** date as one year in the past, **OK**. Double click on the corresponding documentation you wish to read. This will open within ESM.



### Categorising from uncategoryed

8. Right click on the record, **modify**.





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ieMR Enterprise Scheduling Management (ESM)

9. Click on the **details** tab, and update the following fields:
  - a. **new case category**: this should be the treating clinician's categorisation (1 to 3)
  - b. **reason for appointment**: Diagnosis of the referral based on clinical content (e.g. severe tonsillitis)
 Click **OK**.

10. The referral has now been categorised and the **reason for appointment** has been added.

### Adding comments to a referral entry

8. Right click on the corresponding record, **modify**.
9. Click on the **details** tab and scroll to the bottom field **scheduling comments** to record your relevant comment (e.g. *04/09/17 - Mother will bring pathology results to appointment – BR*).

10. Click **OK**.
11. **Scheduling comments** have now been added to the record.

### Option 2: Patient search view (request list or appointment search)

4. Click on the **request list** tab, select **ESM – request – person** then locate the corresponding request list for your service (e.g. Orthopaedics General New – LCCH).

Alternatively, you can perform an appointment search by clicking on the **person** tab, select **ESM person Inquiry**, locate the person and click **find**.

**Follow steps 6 to 11 above.**

