Updated Appointment Request Functionality

This tip sheet is for front desk and scheduling staff who work with Appointment Requests via workqueues and the Appointment Desk. The changes to the Appointment Request functionality take effect on 8/22/21.

Appointment requests can be created from a schedulable order, an appointment entry decision tree, or manually created via the Appointment Desk. They are all requests for an appointment. Appointment requests typically route to workqueues for scheduling but can also be scheduled via the Front Desk or Snapboard tools within Epic.

New Button: Cancel Request

A new button, **Cancel Request**, will appear on Appointment Request workqueues as well as the Appointment Desk. This button allows schedulers to remove an appointment request from a workqueue if scheduling cannot be completed. Schedulers should document their outreach via the **New Call** button and then use the **Cancel Request** button if the appointment cannot be scheduled.
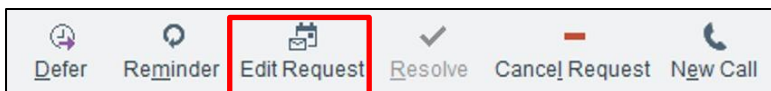

When using the **Cancel Request** button, please select the most appropriate **Reason**.
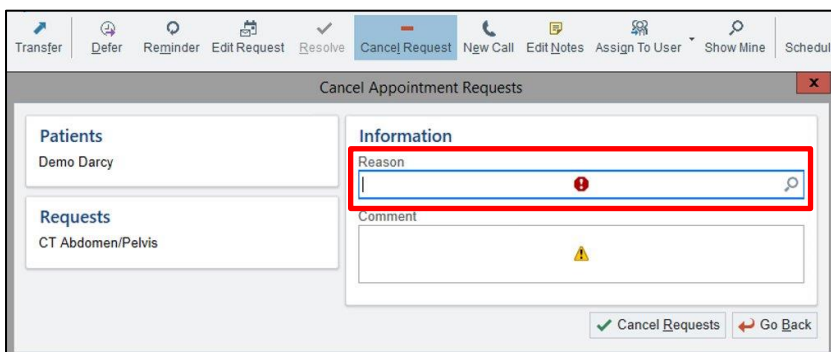
New Button: Edit Request

An additional new button, **Edit Request**, will also appear on Appointment Request workqueues and the Appointment Desk. This function will **not** be used at this time.

Role(s): Front desk staff, Schedulers

Last Updated: August 17, 2021

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Updates to the Appointment Desk Tabs

The following items will be updated on the Appointment Desk:

- Active Requests tab

- Finalized Requests tab (New)

- Reinstate Activity on the Finalized Requests tab (New)

Redesigned: Active Requests Tab

The active request tab can be found on the patient's Appointment Desk. Some columns may have been renamed or added to account for new functionality.

F/S	Class	Status	Creation Date	Appt Req / Expected Date	Proc/Visit Type	Imaging Order Panel	Ordering Department	Requesting Provider
■	Internal, Schedule in Epic	Needs Scheduling	07/07/2021	07/14/2021	MGH Psychiatry Follow Up		BWH VASCULAR [10030010263]	Kit Chan, MD
■	Internal, Schedule in Epic	Needs Scheduling	06/29/2021	07/29/2021	Adult Echo TTE		BWH VASCULAR [10030010263]	Kit Chan, MD
■	Internal, Schedule in Epic	Needs Scheduling	06/29/2021	06/29/2021	Patch Monitor up to 15 days		BWH VASCULAR [10030010263]	Kit Chan, MD

New: Finalized Tab

The finalized tab can be found on the patient's appointment desk. When an appointment request is canceled it falls to the finalized tab. The Finalized tab will also display appointment requests that are scheduled and completed.

ID	Status	Creation Date	Appt Req Date	Proc/Visit Type	Responsible Dept
76957	Canceled	04/22/2021		New Request	SCC PT SANDWICH
76904	Canceled	04/22/2021		EVAL NEURO	SCC PT SANDWICH
64253	Canceled	03/12/2021		New Request	MGH IMA1A WAC608
59515	Completed	03/03/2021	06/03/2021	Echo Transesophageal (TEE) Complete	

New: Reinstate Activity

The **Reinstate** activity is available from the **Finalized** tab. If a patient calls in after their appointment request has been canceled, the Reinstate activity can be used to make the appointment request schedulable again.

ID	Status	Creation Date	Appt Req Date	Proc/Visit Type	Respon
86642	Canceled	05/18/2021	11/18/2021	MRI Neck	
76957	Canceled	04/22/2021		New Reque	
76904	Canceled	04/22/2021		EVAL NEU	
64253	Canceled	03/12/2021		New Reque	
59515	Completed	03/03/2021	06/03/2021	Echo Trans Complete	

CC Results
Edit
Edit Notes
Open Linked Referral
Reinstate
Scheduled Externally

Additional Changes

The Appointment Desk and workqueue buttons will be redesigned in order to add the new pieces of functionality.

Refresh | Filter | Transfer | Defer | Reminder | Edit Request | Resolve | Cancel Request | New Call | Edit Notes | Assign To User | Show Mine | Scheduling Activities | Jump to Patient Activities | Messaging | Radiology Activities