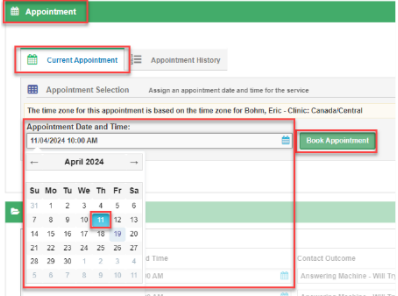


# SWIM – eRequest

## Update a Record

### Quick Reference Guide

Update a patient record to log appointments, contact attempts, and appointment outcomes




Log an appointment	
<p><b>1. Find patient</b></p>	<ul style="list-style-type: none"> <li>Search for the Patient (by last name or PHIN) or select the patient record from any of the <b>Awaiting Scheduling</b> buckets           <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Awaiting Scheduling Cancer Over 21 Days eReferrals that have identified as cancer-related and have not been scheduled for over 21 days</p> <p>Awaiting Scheduling Over 14 days - Emergent eReferrals that have identified as Emergent priority and have not been scheduled for over 14 days</p> <p>Awaiting Scheduling Over 30 days - Urgent eReferrals that have identified as Urgent priority and have not been scheduled for over 30 days</p> <p>Awaiting Scheduling Over 365 days - Elective eReferrals that have identified as Elective priority and have not been scheduled for over 365 days</p> </div> </li> </ul>
<p><b>2. Log appointment</b></p>	<ul style="list-style-type: none"> <li>In the <b>Appointment</b> accordion, select the <b>Current Appointment</b> tab</li> <li>Click on the <b>Appointment Date and Time</b> field           <ul style="list-style-type: none"> <li>select the date of the scheduled appointment from the calendar</li> <li>select the appointment time from the list of available times</li> </ul> </li> <li>Click <b>Book Appointment</b></li> </ul> 
<p><b>3. View History</b></p>	<ul style="list-style-type: none"> <li>Click on the <b>Appointment History</b> tab to view the past appointments with their corresponding outcomes (missed, cancelled or completed)</li> </ul>

Log contact attempts	
<p><b>1. Find patient</b></p>	<ul style="list-style-type: none"> <li>Search for the Patient (by last name or PHIN) or select the patient record from a <b>Dashboard</b> bucket</li> </ul>
<p><b>2. Log contact attempts</b></p>	<ul style="list-style-type: none"> <li>In the <b>Patient Contact Attempts</b> accordion, click <b>Edit</b></li> <li>Click <b>Add New Attempt</b></li> <li>Click on the <b>Contact Date and Time</b> field and select the date and time of the attempted contact</li> <li>Select the <b>contact outcome</b> from the dropdown list</li> <li>Click <b>Save</b></li> </ul>
<p><b>3. Remove contact attempt</b></p>	<ul style="list-style-type: none"> <li>If a contact attempt is entered in error, click <b>Remove</b> beside a contact attempt to delete it</li> </ul>

# SWIM – eRequest

## Update a Record

### Quick Reference Guide

Log appointment outcome	
<p><b>1. Find patient</b></p>	<ul style="list-style-type: none"> <li>Search for the Patient (by last name or PHIN) or select the patient record from the <b>Awaiting Visit Dashboard</b> bucket</li> </ul> <div data-bbox="586 495 1149 596" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Awaiting Visit eReferrals that have an appointment booked</p> </div>
<p><b>2. Log outcome</b></p>	<ul style="list-style-type: none"> <li>In the <b>Appointment</b> accordion, select the <b>Outcome</b> and the <b>Reason</b> from the corresponding dropdown list</li> <li>Add comments, if applicable               <ul style="list-style-type: none"> <li>If the outcome selected was <b>Appointment Cancelled</b> or <b>Did Not Attend</b>,                   <ul style="list-style-type: none"> <li>Click <b>Cancel Appointment</b> to save</li> </ul> <div data-bbox="816 940 1019 995" style="border: 1px solid #ccc; padding: 2px; margin: 10px 0;"> <p>Cancel Appointment</p> </div> <p style="text-align: center;"><i>This record will return to the <b>Awaiting Scheduling</b> status</i></p> <div data-bbox="537 1089 1474 1220" style="border: 2px solid green; padding: 10px; margin: 10px 0;"> <p> <b>If the patient no longer requires an appointment, the record must be cancelled</b></p> </div> <ul style="list-style-type: none"> <li>If the outcome selected was <b>Consult Complete</b> <ul style="list-style-type: none"> <li>Click <b>Complete</b> to save</li> </ul> <div data-bbox="1182 1297 1292 1346" style="border: 1px solid #ccc; padding: 2px; margin: 10px 0;"> <p>Complete</p> </div> <li>If the outcome is surgical, in the top-right corner of the record, click <b>Send to ATC</b></li> </li></ul> <div data-bbox="816 1465 1256 1675" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p> <b>Awaiting Transfer to Wait List</b> </p> <p>Current Location Bohm, Eric - Clinic</p> <p> <span data-bbox="927 1570 1003 1612" style="border: 1px solid #ccc; padding: 2px;">...</span> <span data-bbox="1019 1570 1105 1612" style="border: 1px solid #ccc; padding: 2px;">Complete</span> <span data-bbox="1117 1570 1256 1625" style="border: 2px solid red; padding: 2px;">Send to ATC</span> </p> </div> </li> </ul> </li> </ul>