

FEBRUARY 14, 2025

RESCHEDULING A CONSULT APPOINTMENT

CENTRAL INTAKE



Impact to patient's Wait Time when an appointment is re-scheduled

Once a patient's referral has been accepted and prioritized, the patient is scheduled to attend a consult appointment with the specialist. However, situations may arise that result in the consult appointment being re-scheduled from the original appointment date. When a re-scheduling of the appointment occurs, there is an impact to how the patient's wait time is calculated and reported.

If the health care system needs to re-schedule the consult appointment, we need to continue to calculate the wait time.

If a patient requests a change to their consult appointment, then the wait time needs to pause the calculation to account for this change that results from outside of the health care system.

The Central Intake team have two basic scenarios for when they will learn about a re-scheduled consult appointment in order to update the CI solution accordingly in order to ensure the wait time is calculated correctly.

Scenario A: Reschedule is identified **AFTER** the scheduled consult appointment is attended

In this scenario, Central Intake staff are informed that a patient has been rescheduled for their consult appointment *after* the patient has attended their appointment.

Scenario: *Patient Tom Thumb was scheduled for a consult appointment on October 10th, 2024 and attended his appointment on November 15th, 2024. Tom had called to re-schedule his appointment. Central Intake learns about this change (e.g., December 3rd, 2024) with the consult appointment date when they are notified that the patient has attended their appointment.*

Assumption: *The delay is the result of the patient calling to reschedule their consult appointment.*

1. Within the Central Intake solution, find the patient's referral (e.g., Tom Thumb) who had their appointment re-scheduled from the original consult appointment (and has subsequently attended the consult appointment).
2. The patient's status is **Scheduled Consult Appointment** (e.g., October 10, 2024)

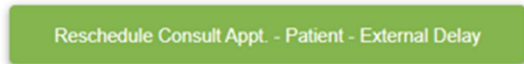
- Note the date of the original consult appointment (October 10, 2024) as it will be needed later.

The screenshot shows a 'Consult Appointment' form with the following fields: Consult Specialist (Eastern Urban), Specialist (Bramwell, Dr), Date (10-Oct-2024), and Location (EZ - Health Sciences Centre). The date field is circled in red. At the bottom right, there are buttons for 'Close', 'PDF', and 'Save'.

- Update the consult appointment date (e.g., November 15, 2024) in the **Consult Appointment** section. Click **Save**.

The screenshot shows the 'Consult Appointment' form with the date updated to 15-Nov-2024. The 'Save' button at the bottom right is circled in red. An orange arrow points from the 'Save' button back to the date field.

- In the **Workflow** section, click the **Reschedule Consult Appt – Patient – External Delay**.



- From the ACTION pop-up, check **Override Status Date**.

The screenshot shows an ACTION pop-up window titled 'Action: Reschedule Consult Appt. - Patient - External Delay'. It contains a 'Comments' text area and a checkbox labeled 'Override Status Date' which is checked. Below the checkbox is a green 'Update Status' button.

- 7. Enter the **date** the patient called to reschedule (if known). If the date is unknown, enter the date of the original consult appointment (e.g., October 10, 2024). Enter any additional details in the Comment box.
- 8. Click **Update Status**.

Action: Reschedule Consult Appt. - Patient - External Delay

Comments
Patient's original consult appt = 10 Oct 2024; Rescheduled to 15 Nov 2024

* Override Status Date
10-Oct-2024

Update Status

- 9. The patient **status** is now set to **Reschedule Consult Appt – Patient – External Delay**.

Patient: THUMB, TOM - (-) Referral Type: Ophthalmology Legacy Referral: ci-0000012 Status: Reschedule Consult Appt. - Patient - External Delay

- 10. Since the patient has attended their consult appointment, the workflow status needs to be updated. Click **Attend Consult Appt** button. Check the **Override Status Date** box and select the date the patient attended the consult appointment, e.g., November 15, 2024.

Workflow

Attend Consult Appt.

Reschedule Consult Appt. - Patient - External Delay

Reschedule Consult Appt. - System Did Not Attend Consult

Cancel Referral

Action: Attend Consult Appt.

Comments

* Override Status Date
15-Nov-2024

Update Status

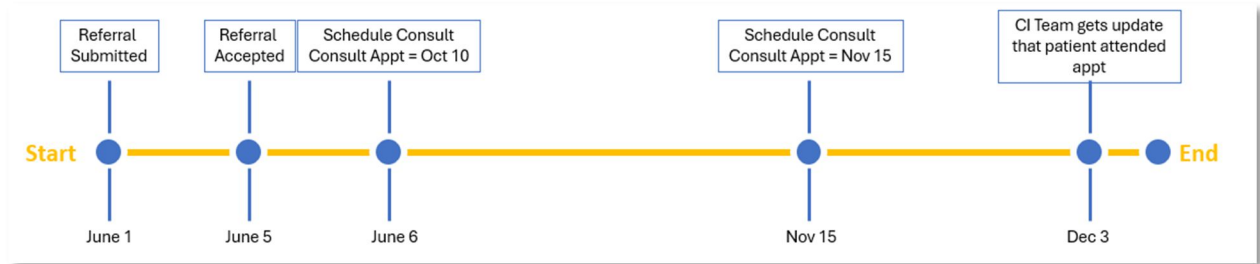
- 11. The patient’s status is updated to **Attended Consult Appt.**

Patient: THUMB, TOM - (-) Referral Type: Ophthalmology Legacy Referral: ci-0000012 Status: Attended Consult Appt.

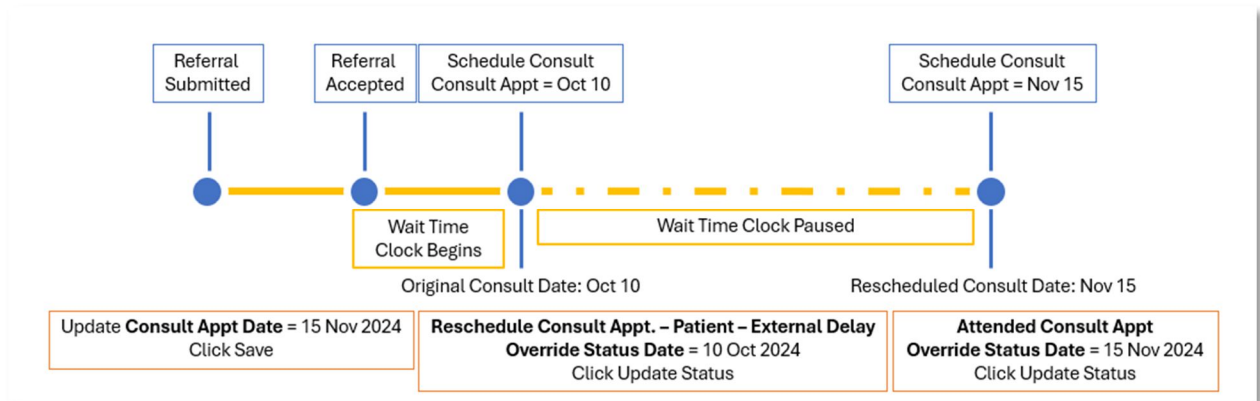
Why do we need to know when a patient reschedules their consult appointment?

One of the benefits of the CI solution is to capture accurate information to calculate a patient’s wait time for the service. One factor that contributes to the wait time calculation includes those scenarios where the patient wants to reschedule an appointment to something other than what was offered to them. Patients who opt to change their appointment (i.e., a reschedule) should not reflect on the healthcare system when calculating a wait time, as these scenarios are outside of the healthcare system’s control. As a result, the CI solution needs to know when to start and pause (or stop) the wait time clock.

In our scenario (below), the patient was originally scheduled for a consult appointment for October 10th which was changed to November 15th. The patient attended the November 15th appointment. The CI team learns of the reschedule and attendance of the appointment on December 3rd after the patient attended the November 15th appointment.



In this case, the CI team needs to “back date” the rescheduling of the appointment in the CI solution for the wait time calculation to accurately reflect a pause in the calculation.



Scenario B: Reschedule **BEFORE** the scheduled consult appointment

Scenario: Patient Winnie P. was contacted on November 29th to inform him of his consult appointment booking for December 18th. On December 2nd, Winnie calls to re-schedule his consult appointment as he is going to be away on December 18th. Winnie is offered a new consult appointment for January 24th.

In this scenario, the patient calls indicating they want to re-schedule their consult appointment before the appointment is scheduled to happen.

The screenshot shows the 'Consult Appointment' interface. At the top, there are dropdown menus for 'Consult Specialist' (Eastern Urban), 'Specialist' (McEachren, Todd, Dr), 'Consult Appointment' (18-Dec-2024), and 'Location' (EZ - Bense McEachren Cataract Centre). Below this is a 'Workflow' section with several buttons: 'Attend Consult Appt.', 'Reschedule Consult Appt. - Patient', 'Reschedule Consult Appt. - Patient - External Delay', 'Reschedule Consult Appt. - System', 'Did Not Attend Consult', and 'Inactive (W1)'. A callout box points to the 'Reschedule Consult Appt. - Patient' button with the text: 'Original Date of Consult Appointment'. Another callout box points to the 'Reschedule Consult Appt. - Patient - External Delay' button with the text: 'Notified Dec 2, patient unable to attend on 18 Dec 2024; Appointment is re-scheduled for 24 Jan 2025'. There are also 'Close', 'PDF', and 'Save' buttons on the right side of the interface.

1. Within the Central Intake solution, find the patient who is requesting to change their consult appointment.
2. Click **Reschedule Consult Appt – Patient** button.
3. From the pop-up, check the box **Set Future Status Date**. **When the Set Future Status Date is checked, the field changes to Reschedule Consult Appt. – Patient – External Delay**. Enter the date of the **ORIGINAL** consult appointment. This will trigger the CI solution to start the external delay clock for the wait time calculation.

The screenshot shows the 'Consult Appointment' interface. At the top, the 'Consult Specialist' is 'Eastern Urban' and 'McEachren, Todd, Dr'. The 'Consult Appointment' date is '18-Dec-2024' and the location is 'EZ - Bense McEachren Cataract Centre'. Below this is a 'Workflow' section with buttons: 'Attend Consult Appt.', 'Reschedule Consult Appt. - Patient' (1), 'Reschedule Consult Appt. - Patient - External Delay', 'Reschedule Consult Appt. - System', 'Did Not Attend Consult', and 'Inactive (W1)'. A modal window titled 'Action: Reschedule Consult Appt. - Patient' is open, showing a 'Comments' field (2), a checked 'Override Status Date' of '18-Dec-2024', and an 'Update Status' button (3). A callout box points to the date field with the text 'Enter the Original Date of Consult Appointment - 18 Dec 2024'.

4. Click **Update Status**.
5. The patient's status (noted in the top right corner) is set to **Rescheduled Consult Appt. - Patient**

The screenshot shows the patient header with the following information: Patient: POOH, WINNIE - 649770797136; Referral Type: Ophthalmology; Referral: ci-0000354; Status: Rescheduled Consult Appt. - Patient (circled in red).

6. Select the date of the new consult appointment (e.g., January 24th) for the **Consult Appointment** field and click **Save**.

The screenshot shows the 'Consult Appointment' interface with the following information: Consult Specialist: Central, Specialist, Dr; Date: 24-Jan-2025; Location: CZ - Central NL Regional Health Centre. The 'Save' button is circled in red.

If the patient calls to re-schedule the appointment again, before the rescheduled appointment has occurred, follow the same process as outlined above. Click the Reschedule Consult Appt – Patient button to extend the external delay. Does the date entered remain as the first (original) appointment (i.e., December 18th)? Enter the date of the third re-scheduled consult appointment. Click Save.

Scenario C: Patient Unavailability – Patient has a scheduled consult appointment but will be unavailable

Some patients may be scheduled for a consult appointment but may have scheduled plans where they will be unavailable for a period of time. A common example of this would be those who travel outside of Canada for 1-3 months in the winter or who work away from home for an extended period of time. To account for this period of unavailability, and ensure the wait time is calculated appropriately, the CI solution allows for the tracking of this period of unavailability and ensure the wait time clock is stopped.

Scenario: Jane Doe has been notified of a scheduled consult appointment (e.g., February 7th) but has called to indicate that she will be out of province from January 2nd until January 31st.

1. Within the Central Intake solution, find the patient's referral who has indicated they will be away for a period.
 - a. From the **Referrals List**, select the patient and **open the referral**.

Referrals List

*Service Line
Ophthalmology

Filters | Referral Count (Current Filter): 104

Status | Problem(s)






| Referral Id | Referral Type | Patient Home Zone | Book With Specialist | Patient Name / HCN | Problem(s) | Status Date | Status |
|-------------|---------------|-------------------|----------------------|------------------------------------|--------------|-------------|-------------------------------------|
| ci-0000352 | Ophthalmology | Eastern Urban | Bramwell, Dr | CHERRY, LUNA, TPCHI (899561275434) | • Glaucoma | 03-Dec-2024 | Submitted Referral |
| ci-0000353 | Ophthalmology | Eastern Urban | Bramwell, Dr | BERG, ALLAN, TPCHI (149532371395) | • Strabismus | 03-Dec-2024 | Submitted Referral |
| ci-0000354 | Ophthalmology | Central | Next Available | POOH, WINNIE (649770797136) | • Cataract | 03-Dec-2024 | Rescheduled Consult Appt. - Patient |
| ci-0000357 | Ophthalmology | Central | Dogar, Dr | THUMB, TOM (-) | • Cataract | 03-Dec-2024 | Scheduled Consult Appt. |

Page 6 of 6


Export Result Set

2. With the referral open, scroll down to the **Patient Unavailability** section (below the Workflow History). Click the **Add Unavailability** button.

Workflow History

| Status | Status Date | Status Updated By | Status Detail |
|------------------------------------|-------------|-------------------|---|
| Scheduled Consult Appt. | 03-Dec-2024 | loisgibson |   |
| Ready to Schedule Consult Appt. | 03-Dec-2024 | loisgibson |  |
| Accepted & Prioritized for Consult | 03-Dec-2024 | cprclncpcpmh |  |
| Submitted Referral | 03-Dec-2024 | cprclncpcpmh |  |

Patient Unavailability

| Start Date | End Date | Reason | Future Statuses |
|------------|----------|--------|---|
| | | |  |

3. The Patient Unavailability pop-up is displayed. There are three required fields that must be completed.

- a. ***Start Date** [Required] – First day the patient is unavailable
- b. ***End Date** [Required] – Last day the patient is unavailable
- c. ***Reason** [Required] – Select the reason the patient is unavailable – If the patient has indicated they are unavailable, choose **Inactive – Patient Request**. If the patient is unavailable for other medical reasons / treatment, choose **Inactive – Medical**.



d. **Comments** – [Optional] Enter any comments / details to further explain the reason for the period of unavailability.

4. Click **Save**.

5. The **Patient Unavailability** section of the patient’s referral is updated with the information to show when the patient is unavailable. This period of inactivity is **NOT** included in the calculated wait time for the patient.

Patient Unavailability

| Start Date | End Date | Reason | Future Statuses |
|-------------|-------------|--|-----------------|
| 02-Jan-2025 | 31-Jan-2025 | Inactive - Patient Request (self select) | |

[Add Unavailability](#)

a. If you were to view this patient during the period of unavailability (e.g., between January 2 and 31), the patient’s status would show **Inactive**.

Scenario D: System Unavailability – Patient has a scheduled consult appointment, but the healthcare system has initiated a delay

Some situations may arise where a patient’s consult appointment needs to be rescheduled to conditions arising within the healthcare system. For example, if the specialist is not available or the facility is unavailable, then the patient’s consult appointment needs to be rescheduled. In these situations, the wait time clock is not stopped since it is not the patient who is causing the delay of the service.

1. Within the Central Intake solution, find the patient whose consult appointment needs to be change due to change initiated by the healthcare system.
2. Enter the **date of the new consult appointment** (Step 1). Click **Save**. (Step 2)
3. Click **Reschedule Consult Appt – System** button. (Step 3)

- Complete the **comments** section with an explanation as to why the appointment is being rescheduled. (Step 4)
- Click **Update Status**. (Step 5)

The screenshot shows the 'Consult Appointment' form with the following details:

- Consult Specialist:** Eastern Urban (marked with a red asterisk and a circled '1')
- Specialist:** McEachren, Todd, Dr
- Consult Appointment:** 25-Mar-2025 (marked with a red asterisk and a circled '1')
- Location:** EZ - Bense McEachren Cataract Centre

Buttons at the top right include 'Close', 'PDF', and 'Save' (circled with a '2').

The **Workflow** section shows a sequence of steps: 'Attend Consult Appt.', 'Reschedule Consult Appt. - Patient', 'Reschedule Consult Appt. - Patient - External De', 'Reschedule Consult Appt. - System' (circled with a '3' and an arrow), 'Did Not Attend Consult', and 'Inactive (W1)'. A 'Cancel Referral (End)' button is also present.

A modal window titled 'Action: Reschedule Consult Appt. - System' is open, showing a 'Comments' field with the text 'Specialist unavailable' (circled with a '4') and an 'Update Status' button (circled with a '5'). There is also an 'Override Status Date' checkbox.

- The **Workflow Status** section is updated to reflect the change in the rescheduled consult appointment to reflect the change is the result of a system reschedule.

Workflow History

| Status | Status Date | Status Updated By | Status Detail |
|------------------------------------|-------------|-------------------|--|
| Rescheduled Consult Appt. - System | 30-Jan-2025 | loisgibson | [Detail Icon] [Edit Icon] [Close Icon] |
| Scheduled Consult Appt. | 01-Jul-2023 | data.converter | [Detail Icon] |
| Ready to Schedule Consult Appt. | 26-Jun-2023 | data.converter | [Detail Icon] |
| Accepted & Prioritized for Consult | 20-Mar-2023 | data.converter | [Detail Icon] |