## How to Add a Patient to a Request List (without Scheduling the Patient)

1. On the Appointment Tab, fill in the required fields as if you were going to be scheduling the patient. Once the details are populated, select **MOVE**.

ooks Appointment		
Appointment location:	^	Mo
SC MHPHY		Ne
Appointment type: MHA Consult Face to Face		<u>C</u> le

The patient will be in the Work in Progress window.
 Select the Request button to the right of the WIP window.

Work in progress:	
	Schedule
🖶 🕸 MHA Consult Face to Face	Carling
🚊 📲 Current Schedule	Coniim
	Recur
C Resource	
	Suggest
	Request
	Insert

## 3. The **Request for Book** window will appear.

Adjust the requested **Appointment Date** as needed.

The Requested Date Range can be modified to an appropriate range for the clinic (end date should be the furthest away you are allowed to schedule the patient). OR you can select the Request In fields.

Select the **Request list** and use the arrows to move it into the **Select Request Lists** box (you can select multiple request lists if you wish). There will be an appropriate one in the list already. You can select the **Show All** button if you wish to see all available Request Lists.

			Ane: 31 Years		Sev: Female		
Scheduling Criteria Summary General Details Orders	Guidelines Notification Conversat	tion Summaries Eligibility Bo	poking Notes				
Appointment Date			,, <b>,</b>				
Requested date range:	27/Oct/2024		• ~	25/Nov/2024			
O Request in:	1	+ Days	From:	27/Oct/2024			
Mon Tue	Wed	Thu	Fri		Sat		
Appointment Time							
Time range:	0800		:	1800			
Time restrictions:	AM Only						
Request List			Selected request lists:				
MH CAPS Future Book							
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- Once you have selected your Request List, click OK.
  The patient details have disappeared and your patient is now in the Request List to be scheduled.
- 5. To check your Request List, select the **Request List Inquiry** button from the top bar of the Scheduling Appointment Book.

The Schedule Inquiry box will appear. You can select the inquiry **Request by Queue**. And select your **Request List Queue** from the drop down. Click Find. The appointments to be scheduled will appear on the right hand side.

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Name:											Age:				9	iex:	
Request List	Request Made Dt Tm 27/Oct/2024 - 10:44 AM	Sch Comments Y	Order Comments	lso St	st Inp	Action Book	Person Name SCHED, KATIE	Appointment Type MHA Consult Face to Face	Earliest Date 27/Oct/2024 - 8:00 AM	Time 08:00	Orders	Ordered As	Ordering Location	Special Instructions	Ordering Provider	Scheduled Date	Isc
Request By Queue																	
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Find Clear Close	<																

6. To schedule the patient from here, right click on the patient and select **Complete Request**. This will bring your patient into the Work in Progress box to be scheduled.