



Future State: Scheduling - ESM - Managing Request Lists (Move/Cancel/Book/Reschedule)

Cerner Workflow ID: 7496 (v. 14.0) Client Workflow ID: 361

Last updated by Julia Becevel, Jan 30, 2024 10:09am (UTC -4 hours)

Workflow Details:

Workflow Name: Scheduling - ESM - Managing Request Lists (Move/Cancel/Book/Reschedule)

Workflow State: Future State

Workstream: Pre-Admission/Pre-Visit

Venue: Ambulatory

Acute Care

Client Owner:

Cerner Owner:

Standard: Yes

Related Workflow(s):

Tags:

Workflow Summary:

Service Line:

Related Solution(s): Scheduling Management

Project Name: Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP

TestBuilder Script(s):

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Workflow Notes: For steps to follow the workflow, see [Managing Request Lists Workflow in Scheduling Management](#)

Request lists display requests for appointment actions. Items are added to a request list either

automatically when an order entry is placed or manually in the application. You can access these lists through the Request List inquiry. Utilizing Request Lists helps mainstream the scheduling process for staff by accessing all requests in one location.

Requests can be managed by booking an appointment, moving the request to another queue, and rescheduling or canceling the original request.

Introduced By: WS 1

Validated By: WS 6

Swim Lane:

Role(s): Scheduler

Department(s): Patient Access

Security Position(s): Scheduling - Clerk

Scheduling - Clerk Advanced

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Off Page Reference [65]

Workflow Link: ESM - Orders to Scheduling (CPOE)

Off Page Reference [64]

Workflow Link: ESM - Reschedule Appointment

Start/Stop [3]

Description: Need to Move or Cancel Requests from Request List Inquiry

Step Impact: Policy/Procedure

Work Step [5]

Description: Select the appropriate queue from the "Request by Queue" Inquiry

Comments: If you know the Patient, it is also appropriate to search by the "Request by Patient" Queue

Decision [18]

Description: Which task will be used to complete the request? (Book/Reschedule/Move/Cancel)

Work Step [28]

Description: Search for the original request in Request List Inquiry

Work Step [29]

Description: Right-click the request and select "Move Request". The Modify Request window opens

Work Step [30]

Description: Manage the available lists until the correct ones are selected under "Selected Request List"

Start/Stop [31]

Description: Select "Ok" to successfully move the request

Decision [35]

Description: Cancel from PowerChart or Scheduling Appointment Book?

Work Step [36]

Description: Search for the original request in the Request List

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Work Step [37]

Description: Right-click the request and select Cancel Request. The Cancel Request window opens

Work Step [39]

Description: Select a Cancel reason

Work Step [51]

Description: Select "Ok" to cancel the request

Start/Stop [56]

Description: Request is canceled

System [42]

Description: Any order associated with the request is also canceled

Swim Lane:

Role(s): Provider

Department(s):

Security Position(s):

Work Step [44]

Description: Cancel patient order