

MAY 14, 2025

Ready to Book with a Specialist

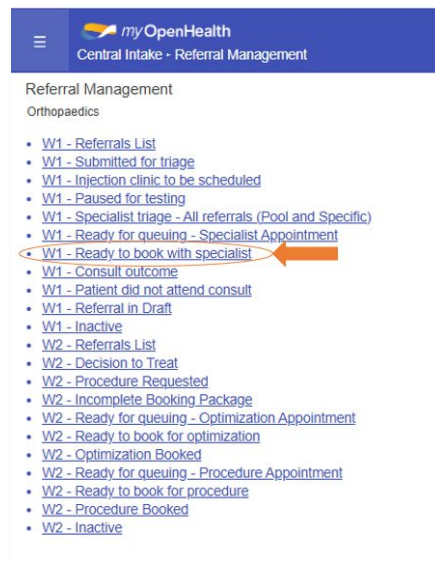
CENTRAL INTAKE



Book the Consult Appointment

Community Wide Scheduling (CWS), the scheduling team/person, or private office staff will inform the Central Intake office when a patient has been booked for their consult with the specialist. The Central Intake team will update the Central Intake solution with the details related to the appointment.

1. Within the Central Intake solution, access **Referral Management**. Click **W1- Ready to book with specialist** link.



2. Locate the patient from the list displayed that is ready to be scheduled for their appointment date with the specialist (i.e., orthopaedic specialist). **Click the link for the selected patient.**

W1 - Ready to book with specialist

Filters | Status: Ready to Schedule Consult Appt.

Referral Count (Current Filter): 6

Triage Consult Zone: Central Reason(s) for Referral: Priority: Last Name: MCP

Clear Find

Referral Id	Referral Type	Patient Name / HCN	Patient Home Zone	Submitted Date	PCP/Referring Physician	Book With Specialist	Reason(s) for Referral	Functional Impairment	Priority	Triage Consult Zone	Triage Consult Specialist	Status Date	Status	Wait Time	Details
ci-0002366	Ophthalmology	VAN HALEN, EDWARD (839570010505)	Central	12-Feb-2025	Brown-Mahar, Tracey, Dr	Next Available	• Cornea	No	P1	Central	Chung, Thomas, Dr	08-May-2025	Ready to Schedule Consult Appt.	91	
ci-0002303	Ophthalmology Legacy	ZTEST, TEST (239722011198)	Central	01-Feb-2025			• Cornea		P2	Central	Next Available	12-Feb-2025	Ready to Schedule Consult Appt.	102	
ci-0002361	Ophthalmology Legacy	BAR, CHOCOLATE (879803505509)	Central	01-Jan-2025			• Retina		P2	Central	Next Available	12-Feb-2025	Ready to Schedule Consult Appt.	133	
ci-0002356	Ophthalmology Legacy	BAR, CHOCOLATE (879803505509)	Central	10-Dec-2024			• Retina		P2	Central	Next Available	12-Feb-2025	Ready to Schedule Consult Appt.	155	
ci-0002264	Ophthalmology Legacy	SYKES, WANDA (789501895500)	Central	06-Dec-2024			• Strabismus		P2	Central	Next Available	24-Jan-2025	Ready to Schedule Consult Appt.	159	
ci-0002263	Ophthalmology Legacy	POOH, WINNIE (-)	Central	03-Dec-2024			• Glaucoma		P3	Central	Next Available	29-Jan-2025	Ready to Schedule Consult Appt.	162	

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Back to Referral Management Export

3. Go to the **Consult Appointment** section of the referral.

4. Select the following information to complete this section:

- [Required] **Specialist** (#1)
- [Required] **Consult Appointment Date** (#1)
- [Required] **Location** (this dropdown appears once a Consult Appointment Date is selected) (#1)
- Click **Save** (#2)

5. Click the **Schedule Consult Appt** (#3) button to update the workflow status for the referral. Enter any additional comments for the referral and click **Update Status**. Note that the status is changed and updated in the **Workflow History** section from **Ready to Schedule Consult Appt to Scheduled Consult Appt**.