

Recording Contact Attempts for Scheduling a Patient

1. When a patient is in a Request List and there is an attempt to contact the patient for an appointment, right click on the patient in the queue. Select **Contact**.
2. The **Contact** window will appear.
It will populate the **Contact Date/Time** to now. Adjust as needed.
It will suggest a **Follow-up date** for contact, adjust as needed.
Utilize the **Predefined Comments** drop down to record contact, and/or the Comments section for additional information regarding the contact of the patient.
When all fields are populated, select **OK**.

Contact

Name: [REDACTED] MRN: 88000052;11000356 DOB: 01/Jan/1993
Age: 31 Years Sex: Female

General Summary Guidelines Notification Conversation Summaries Itineraries Locks Booking Notes

Contact date: 27/Oct/2024 Contact time: 1053 Follow-up date: 28/Oct/2024

Predefined Comments: <None>

Comments:

3. To view contacts made to the patient, double click on your patient to bring up the **Appointment View** box.
Go to the **Action History** tab. This will display the dates and times of contact as well as who performed these actions.
The **Action Details** tab will display the comments.

Appointment View

General Event Details Resources Action Details Action History Scheduling Comments Orders Recurring

Action Performed	Action Performer	Time Performed
Request	[REDACTED]	27/Oct/2024 - 10:44 AM
Contact	[REDACTED]	27/Oct/2024 - 10:49 AM
Contact	[REDACTED] Katherine	27/Oct/2024 - 10:56 AM