

Temporary Deferral for Follow-Up Orders

When a follow-up appointment is ordered by a provider for further out than the schedule is built, the scheduling staff may prefer to temporarily defer the order to prevent the scheduling worklist ("Orders Requiring FU") from overpopulating or getting too large to handle efficiently.

The following steps demonstrate how to temporarily defer a follow-up order until the appointment can be scheduled.

Step One

From the Orders Requiring FU worklist, highlight the order you wish to defer.

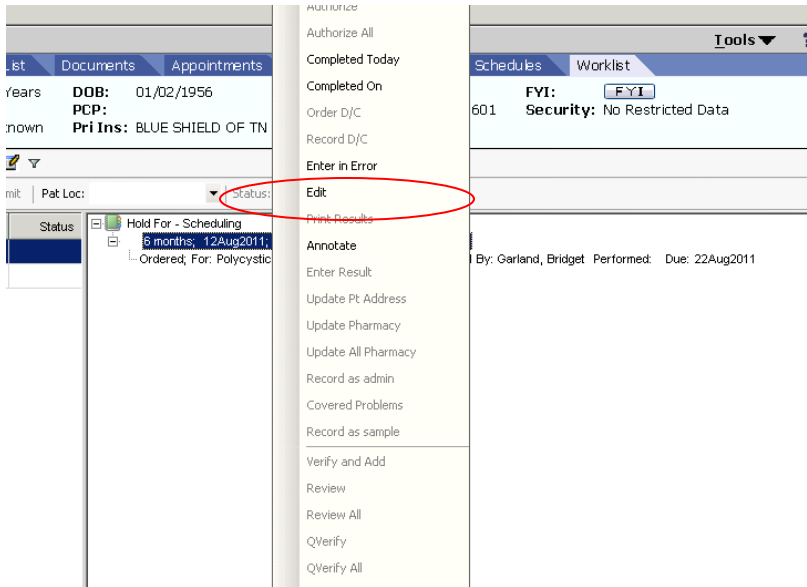
The screenshot displays a medical software interface with a patient profile for 'TEST, HEART'. The patient's details include Age: 55 Years, Sex: F, DOB: 01/02/1956, H Phone, MRN: 001000641274601, and Security: No Restricted Data. The 'Orders Requiring FU' dropdown menu is highlighted with a red circle. The worklist table shows the following orders:

Order	Patient Name	Location	Status
6 months; 12Aug2011; Status: Hold For; Garland, Bridget	TEST, HEART		
Ordered; For: Polycystic Ovarian Syndrome (256.4); Ordered By: Garland, Bridget	TEST, QUARTERS		

A red arrow points to the first order in the list. The bottom status bar shows 'User: qarlandbr Site: Ouillen Physicians Admini...'

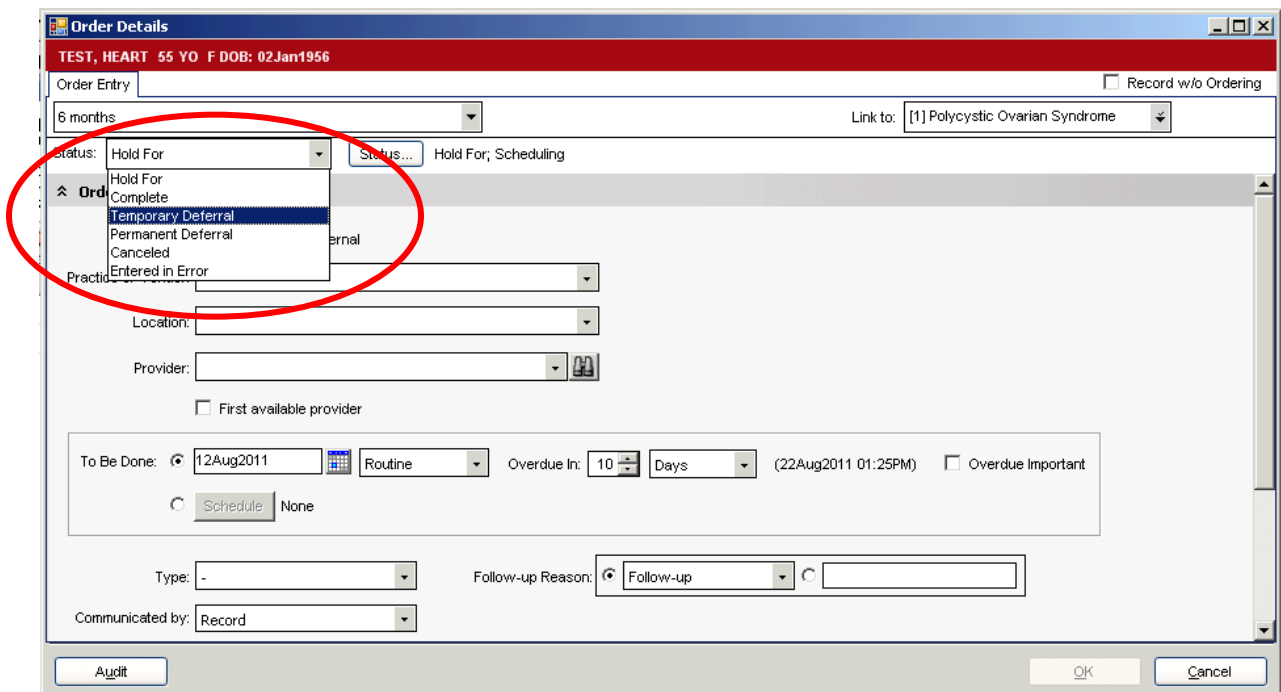
Step Two

Right click on the order and select edit.



Step Three

An Order Details box will appear. In the Status field, use the drop down box to select “Temporary Deferral.”



Step Four

A Change Status box should pop up. Click on the Calendar icon to select a date in the future on which the order should reappear.

Order Details

TEST, HEART 55 YO F DOB: 02Jan1956

Order Entry [] Record w/o Ordering

6 months Link to: [1] Polycystic Ovarian Syndrome

Status: Temporary Deferral

Change Status

TEST, HEART 55 YO F DOB: 02Jan1956

Change Status To: Temporary Deferral

As Of: 12Aug2011

Defer For: 0 Days

- Illness
- Pt requests deferral
- Pt refuses
- Patient reports item recently done
- Condition may interfere with Testing
- Staffing Issue
- Out of Supplies
- Religious or other belief

OK Cancel

Select a Date

Aug 12 2011

August 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

September 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
4	5	6	7	1	2	3
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Jump: 2 weeks <<>> Today

Selection: 12AUG2011

OK Cancel

You can choose to jump forward to a specific amount of days, weeks, or months.

Jump: 6 months <<>>

Step Five

Once the date is entered and you have confirmed the Orders Detail screen is accurate, click “OK.” Then click on the “Commit” button.

Order Details

TEST, HEART 55 YO F DOB: 02Jan1956

Order Entry: 6 months

Status: Temporary Deferral

Link to: [1] Polycystic Ovarian Syndrome

Order Details

Internal External

Practice or Vendor: []

Location: []

Provider: []

First available provider []

To Be Done: 12Aug2011 Routine Overdue In: 10 Days (22Aug2011 01:25PM) Overdue Important []

Schedule None

Type: - Follow-up Reason: Follow-up

Communicated by: Record

Audit OK Cancel

Then. . . .

Commit Pat Loc: [] Status: []

Hold For - Scheduling

6 months; 12Aug2011; Status: Hold For; Garland, Bridget

Ordered; For: Polycystic Ovarian Syndrome (256.4); Ordered By: Garland, Bridget Performed: Due: 22Aug2011

Step Six

The Encounter Summary will appear, where you can confirm that the order was deferred correctly. Click “Save and Continue.”

Encounter Summary
TEST, HEART 55 YO F DOB: 02Jan1956 Chart Update 8/12/2011

Enc Summary For: Chart Update, 12Aug2011 08:36AM

Billing: Reason For Visit:
Performing: Scheduling Loc:

View By: Problem Pat Loc: Status:

Polycystic Ovarian Syndrome
Polycystic Ovarian Syndrome (256.4) ASSESSED
6 months - Follow-up Status: Temporary Deferral 2/12/2012 (Polycystic Ovarian Syndrome) Record; ADDED;EDITED

New

Patient Education Content
 CareGuide Patient Instructions Ad Hoc Patient Instructions
 CareGuide Patient Monographs Medication Profile
 Print Monographs in Spanish

Print options
 Use Default Rx Printer
 Use Default Order Requisition Printer

Print Pt.Ed Continue Save and continue Save Delete Unsaved

Notice that the order disappears from the worklist and the patient’s name is in italics. If you leave and return to the worklist, the patients name will be removed as well. The order will reappear on the date specified.

Orders Requiring FU Alpha

Commit Pat Loc: Status:

!	Patient Name	Location	Status
	<i>TEST, HEART</i>		
	TEST, QUARTERS		

There are no items to show in this view

The italics indicates that the deferral is complete and that the patient will be removed from the list upon refreshing the screen.