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.
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.

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

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

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 patient’s name will be removed as well. The order will reappear on the date specified.

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