

## Introduction

This tip sheet describes the **CHPS – (NGL) Nutrition & Growth Lab Appointment Intake Request** process. This process will be initiated via the *Epic In-Basket* by the *PI/Research Study Coordinators* to request appointments within the department.

**Note:** Patients must have a CHOP MRN number in order to request an NGL appointment. Patients need to be registered in Epic in order to locate and send an appointment request. If the patient is not in Epic, you will need to get the patient registered before requesting the appointment.

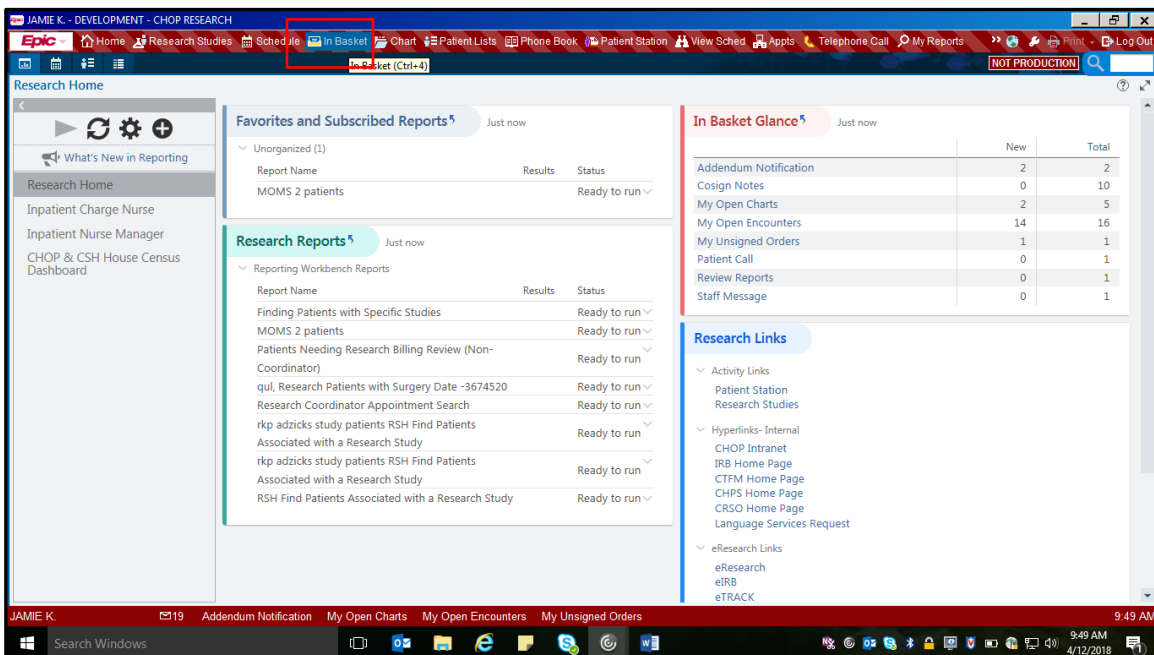
To support this process, (2) two Smartphrase (dotphrase) templates were created to assist with submitting your request.

- **.NGL1RSHSCHEDULEREQUEST** - Used for Appt. Request for **Main Campus – (NGL 1)**
- **.NGL2RSHSCHEDULEREQUEST** - Used for Appt. Request for **3550 Market St - (NGL 2)**

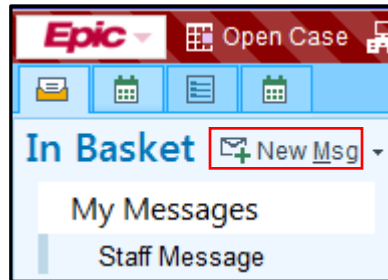
You will utilize these Smartphrases in the Notes: section of the In-basket Message. You will be required to complete each field when submitting an appointment request for either department.

## Access and Complete the CHPS NGL Appointment Intake Request

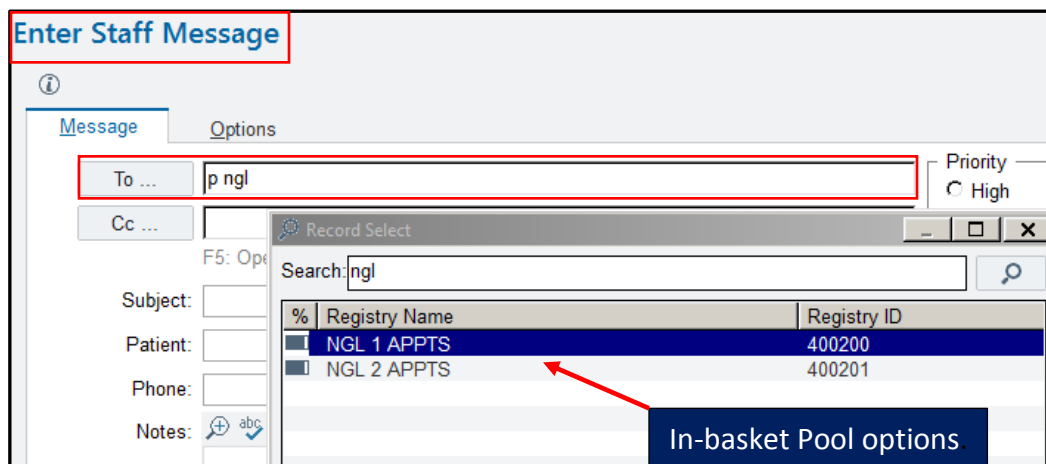
1. Access the **In-basket** icon from the Epic Toolbar.



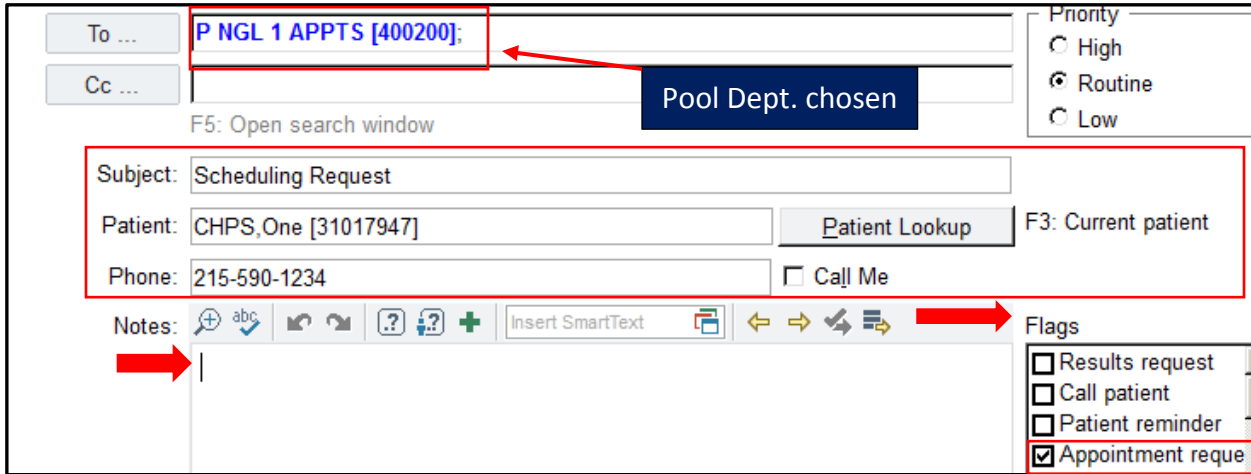
2. Click **New MSG**.



- a. This will automatically open the *Enter Staff Message* window.

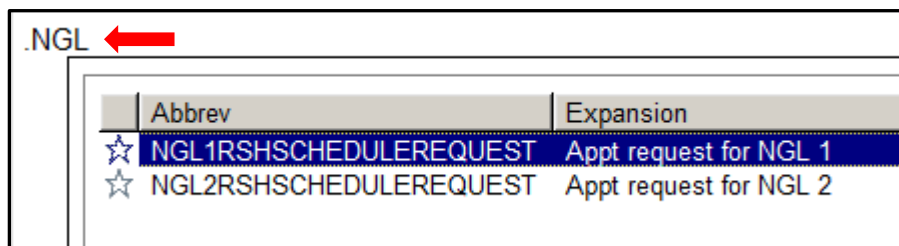


3. Type **p ngl** (p space ngl) in the *“To... field”*.
  - a. Select the department location where the visit will occur.
4. Press **Enter**.
  - a. The *Record Select* window will appear showing the (2) two separate NGL In-basket Pools.
5. Choose the pool for the department where you want the patient appointment to be scheduled.
  - i. Everyone that schedules for the NGL 1 or NGL 2 will receive the Epic In-basket message.



6. Complete the following fields:

- a. **Subject:** Enter Study Protocol & ID# indicate one of the following: -Scheduling Request, Reschedule Request or Cancellation Request
- b. **Patient:** Enter patient name in last name, first name format. The medical record number will also appear.
  - i. You may also pull in the patient name by using either the Patient Lookup button or using the F3 button on your keyboard.
- c. **Phone:** Enter the phone where you can be reached should there be questions.
- d. **Flags:** Select Appointment Request
- e. **Notes:** Type the dotphrase (.NGL) for the department where the visit will be scheduled. You will see a list of smartphrases that begin with NGL appear.
  - i. **.NGL1** - Used for Appt. Request in *NGL 1*
  - ii. **.NGL2**- Used for Appt. Request in *NGL 2*



Abbrev	Expansion
☆ NGL1RSHSCHEDULEREQUEST	Appt request for NGL 1
☆ NGL2RSHSCHEDULEREQUEST	Appt request for NGL 2

7. Double-click on either NGL1 or NGL2 and it will pull the **smart phrase template** into the Notes section.

**Note:** The smartphrases have dropdown lists or freetext (\*\*\*) fields to be completed.



The screenshot shows the 'Enter Staff Message' interface. The 'To' field contains 'P NGL 1 APPTS [400200]'. The 'Subject' is 'Appointment request'. The 'Patient' is 'Cadence,BoyeiGht [31016936]'. The 'Phone' is '215-469-7896'. The 'Notes' field has a dropdown menu open, displaying a list of study IDs and titles, with '82 Lowe' selected. The 'Flags' section on the right has several checkboxes, with 'Appointment request' checked. There are also fields for 'Due date' and 'Due time'.

- a. To navigate:
  - i. Click the **F2** key on your keyboard to go to the first area to complete.
  - ii. Pressing F2 will take you through all the necessary fields.
  - iii. Click the **F3** key to enlarge the workspace.
  - iv. **Left-click** to select.
  - v. **Right-click** to insert selection into field.

**Laptop Users** – You will need to hold down the **FN** key while clicking the **F2** or **F3** keys. The **FN** key is generally located at the bottom left of your laptop keyboard.

8. Complete the following fields:

- a. **Study ID/Title:** Choose the study ID /title from the dropdown list.
- b. **Appt. requested by:** Select the requested by information.
- c. **Requested appointment date:** Type in the date (s). You may also type in more than one date for consideration.  
**Example:** 1<sup>st</sup> Option – 7/27/18, 2<sup>nd</sup> Option – 8/1/18, 3<sup>rd</sup> Option – 8/16/18
- d. **Requested appointment time:** Type in the time. You may also type in more than one time for consideration.  
**Example:** 1<sup>st</sup> Option – 10am, 2<sup>nd</sup> Option – 1pm – 3pm, 3<sup>rd</sup> Option – 9am – 11am
- e. **Subject ID #:** Type in the ID #.
- f. **Study Visit:** Type in the visit info.

**Note:** Press **F2** to make sure you have completed all the fields including the free text/lists.

9. Click **Accept** to send the staff message.
10. Appointment confirmation or request for additional dates will come back to you from NGL In-basket. If the appointment was confirmed, proceed to record it in your study tracking system or calendar. NGL will no longer send an outlook invites.
11. If the request does not work, NGL will message you through In-basket requesting additional information until the appointment can be confirmed.

### Submit a Request to Reschedule an Appointment via Epic In-basket:

Staff should **send an In-basket Staff Message** to the NGL (1 or 2) Pool requesting to have an appointment rescheduled.

In the **Subject Field**: Type the Study Protocol & ID# – Reschedule Request. Provide all pertinent information including new dates for future appointment.

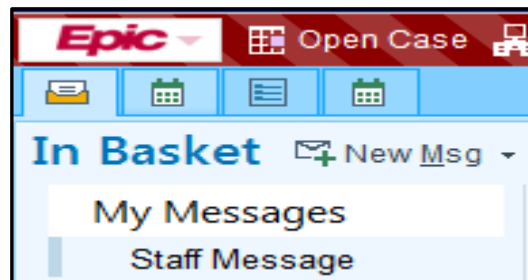
### Submit a Request to Cancel an Appointment via Epic In-basket:

Staff should **send an In-basket Staff Message** to the NGL (1 or 2) Pool requesting to have an appointment cancelled.

In the **Subject Field**: Type the Study Protocol & ID# – Cancellation Request. Provide any additional information you feel would be important for future appointment coordination.

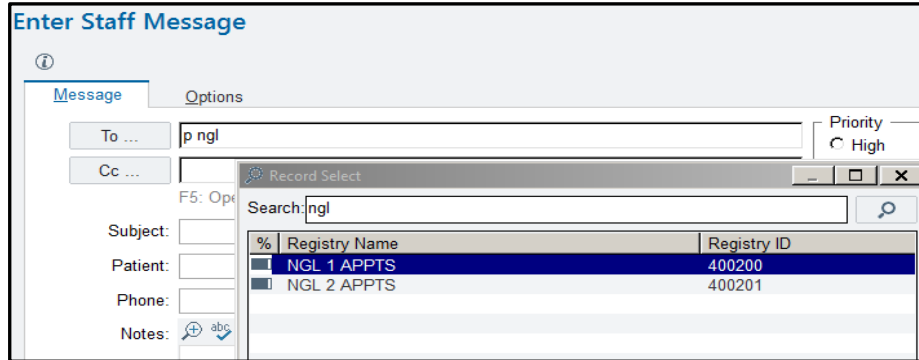
### Send an Epic In-basket Staff Message:

1. Access the **In-basket** icon from the Epic Toolbar.
2. Click **New MSG**.

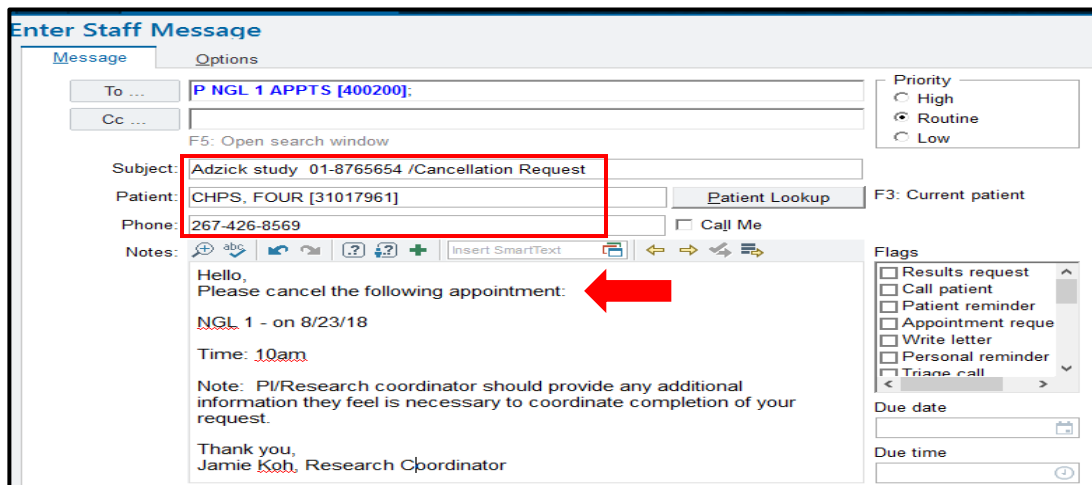




- a. This will automatically open the *Enter Staff Message* window.



- 3. Type **p ngl** (p space ngl) in the "To... field".
  - a. Select the department location where the visit will occur.
- 4. Press **Enter**.
  - a. The *Record Select* window will appear showing the (2) two separate NGL In-basket Pools.
- 5. Choose the pool for the department where the appointment will occur and needs to be rescheduled or cancelled.
- 6. Complete the following fields:
  - a. **Subject:** Enter Study Protocol & ID# indicate **one** of the following: *-Scheduling Request, Reschedule Request or Cancellation Request*
  - b. **Patient:** Enter patient name in last name, first name format.
  - c. **Phone:** Enter the phone where you can be reached should there be questions.
  - d. **Notes:** Enter the appointment information and detail to initiate the request for Cancellation or rescheduling of the appointment.



- 7. Click **Accept** to send message when done.