
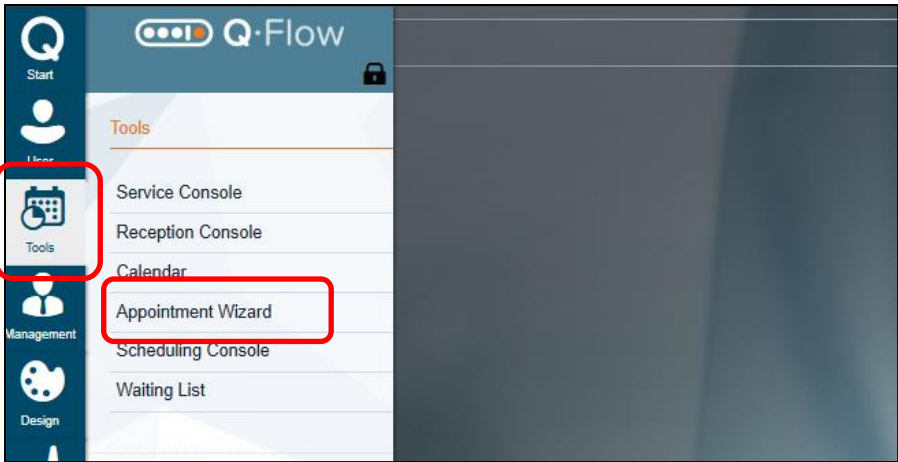
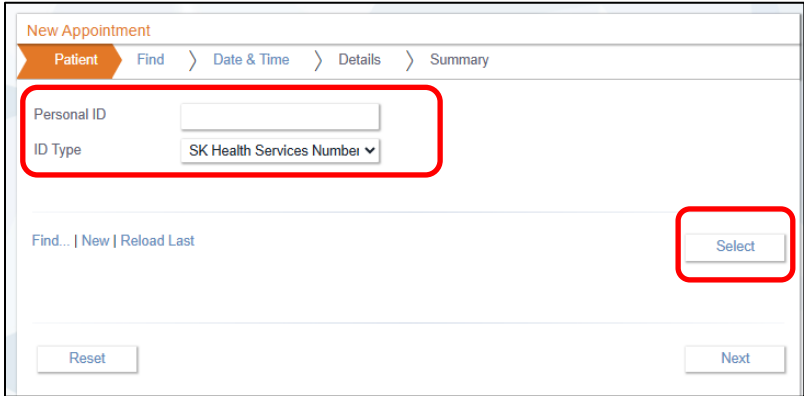


| | | |
|--|---|---|
|  Saskatchewan Health Authority | Standard #: | |
| | Title: | Booking Reoccurring Appointments in Q-flow |
| | Role performing Activity: | Outpatient Services End Users |
| <h1>WORK STANDARD</h1> | Location: | Department/Unit: |
| | Document Owner: Digital Health – Patient Booking System | Date Prepared: 01-Oct-2025 |
| | Last Revision: Enter a date | Date Approved: Enter a date |
| | Related Policies/Documentation: | |

Work Standard Summary: This work standard provides step by step guidance on how to book a securing series, such as weekly therapy sessions, follow-ups, or on-going clinical appointments. Please note, not all the reoccurring appointments in a series are needed to be booked. If a patient only requires a few appointments, the booking process can be stopped once the necessary appointments have been scheduled.

| Essential Tasks: | |
|-------------------------|---|
| 1. | <p>Point the mouse cursor to the Tools icon on the Navigation panel. Click on the Appointment Wizard.</p>  |
| 2. | <p>Enter the patient ID number into the Personal ID textbox and select the appropriate ID Type. Click the Select button, or press Enter on the keyboard.</p>  |

Essential Tasks:

Note: if the patient does not exist in Q-Flow, click on the New link.

3. Confirm it is the correct patient, and review if they want to receive confirmation messages. If yes, click the down arrow next to the **Notification Consent** and select **Allow**. Confirm the patient's contact information. If no, click the down arrow next to **Notification Consent** and select Block. Click the **Next** button.

The screenshot shows the 'New Appointment' form with the following details:

- Name: Adult Patient
- Personal ID: AdultPatient
- ID Type: SK Health Services Number
- Email: kirsten.swedburg@saskhealtha...
- Date of Birth: 11/11/2000
- Notification consent: Block (dropdown menu is open)
- Booker: 1

Buttons visible: Case List..., Edit..., Patient Record, Change Patient, Reset, Next (highlighted with a red box).

Note: Patients must legally give express consent to receive notifications.

4. If needed, click the down arrow next to the **Look In** field. Navigate to and select the correct clinic by navigating through the branches. This should auto populate with the location of your clinic, as set under the My Properties in your user settings.

The screenshot shows the 'Look In' field with the following details:

- Look In: Integrated Community Services (dropdown menu is open)
- Service Type
- Treatment plan
- Composite Appointment Type
- Start Date
- Look For:

The dropdown menu is open, showing the following options:

- Integrated Community Services - Test C
- Resource Calendar #1
- Resource Calendar #2
- Resource Calendar #3
- Resource Calendar #4

The dropdown menu is highlighted with a red box.

Essential Tasks:

5. Click the down arrow next to **Treatment Plan** and click on the correct option. Input the correct **start date** and click the **Find** button.

The screenshot shows the 'New Appointment' interface. At the top, there are navigation tabs: Patient, Find (active), Date & Time, Details, and Summary. Below these are sub-tabs: Basic and Advanced. The 'Look In' dropdown is set to 'Integrated Community Services'. The 'Service Type' dropdown is empty. The 'Treatment plan' dropdown is highlighted with a red box and shows 'ICS - 10min Bi-Weekly'. The 'Composite Appointment Type' dropdown is empty. The 'Start Date' is set to '11/19/2025'. Under 'Look For:', there are three radio buttons: 'Slots reserved for' (unselected), 'Appointment Type' (selected), and 'Any type of vacant slot' (unselected). There are also checkboxes for 'Include reserved slots in search' (unchecked), 'Any Time' (checked), and 'Any Day' (checked). At the bottom left, there is a 'Max Results' field set to '5'. At the bottom right, there is a 'Find' button highlighted with a red box.

6. The Date and Time panel displays. There are several components. You may need to scroll in your browser window to see all sections.
1. Matching service calendar names.
 2. Date selector
 3. Summary
 4. Calendar & Date selected
 5. Calendar Availability
 6. Reoccurring appointment steps
- The below image will label the above sections.

Essential Tasks:

New Appointment

> Patient > Find > **Date & Time** > Details > Summary
3

Matching Services

| Service Name | Date | 13 | 18 | 3 | 0 | 0 | 0 |
|----------------------|------------|----|----|---|---|---|---|
| Resource Calendar #2 | 11/19/2025 | - | + | | | | |
| Resource Calendar #3 | 11/19/2025 | - | + | | | | |
| Resource Calendar #4 | 11/19/2025 | - | + | | | | |

Summary

Patient
Adult Patient

Service
Resource Calendar #2 (Integrated Community Services - 10min Interval)

Appointment Type
10 Minute Appointment (10 Min.)

Unit
Integrated Community Services - Test Calendar
123 Address St. City, Prov Postal Code

Wednesday, 11/19/2025 9:50 AM

4 | Records: 1..3 of 3

Resource Calendar #2 Wednesday, 11/19/2025 Any Vacancy

Working Hours: 8:00 AM - 4:30 PM

| Time | Duration (Min.) | Reservation Reason |
|--|-----------------|--------------------|
| <input checked="" type="radio"/> 9:50 AM | 10 | |
| <input type="radio"/> 10:00 AM | 10 | |
| <input type="radio"/> 10:10 AM | 10 | |
| <input type="radio"/> 10:20 AM | 10 | |
| <input type="radio"/> 10:30 AM | 10 | |
| <input type="radio"/> 10:40 AM | 10 | |
| <input type="radio"/> 10:50 AM | 10 | |

5

Reset
Back
Next

6

ICS - 10min Bi-Weekly

- 1 Bi-Weekly Appt
- 2 Bi-Weekly Appt
- 3 Bi-Weekly Appt
- 4 Bi-Weekly Appt
- 5 Bi-Weekly Appt
- 6 Bi-Weekly Appt
- 7 Bi-Weekly Appt

7. Use the date selector and the calendar availability sections to select a date and time that works best for the patient for the first appointment. Click the **Next** button.

Add Request to Waiting List

Matching Services

| Service Name | Date | 2 | 18 | 3 | 0 | 0 | 0 |
|----------------------|------------|---|----|---|---|---|---|
| Resource Calendar #1 | 11/17/2025 | - | + | | | | |

1 | Records: 1..1 of 1

Working Hours: 8:00 AM - 4:30 PM

| Time | Duration (Min.) | Reservation Reason |
|--|-----------------|--------------------|
| <input type="radio"/> 8:00 AM | 10 | |
| <input type="radio"/> 8:10 AM | 10 | |
| <input type="radio"/> 8:20 AM | 10 | |
| <input type="radio"/> 8:50 AM | 10 | |
| <input checked="" type="radio"/> 9:00 AM | 10 | |
| <input type="radio"/> 9:10 AM | 10 | |
| <input type="radio"/> 9:20 AM | 10 | |

Reset

Back
Next

SHA-Work-Standard-Template

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Essential Tasks:

8. On the Details tab If it is your department/clinic policy enter the appropriate information into the **Subject** textbox. Click the **Finish** button.

The screenshot shows the 'New Appointment' form with the 'Details' tab selected. The 'Subject' field is highlighted with a red box. The 'Finish' button is also highlighted with a red box. The form includes fields for 'Case Details', 'Classifications', 'Notes', 'External Reference', 'Language', and checkboxes for 'Prevent Auto Queue' and 'Walk-In'. The 'Reset', 'Back', and 'Finish' buttons are at the bottom.

9. The Summary tab will indicate if the appointment was successfully booked. The now booked appointment will display in the Reoccurring Appointment steps panel in the bottom right. Click the **Next Step** button to book the next reoccurring appointment.

The screenshot shows the 'New Appointment' form with the 'Summary' tab selected. A green checkmark and the text 'The appointment was saved successfully' are displayed. The 'Next Step' button is highlighted with a red box. The 'Reoccurring 10min Bi-' panel is also highlighted with a red box. The panel shows a list of reoccurring appointments with checkmarks and dates.

| Reoccurring 10min Bi- |
|---|
| ✓ 1 2 Weeks Resource Calendar #1 10/20/2025 8:30 AM |
| ✓ 2 2 Weeks Resource Calendar #1 11/3/2025 8:30 AM |
| 3 2 Weeks |

Essential Tasks:

10. Repeat the process by clicking **Next Step** at the end of each appointment booking as many times as required for the patient. Once complete, click on the Open Calendar button to return to the Calendar.
Note: Not all appointments are required to be filled. For example: If the patient only requires three appointments the Open Calendar link can be clicked after the third appointment booking.

The screenshot shows a web interface for a 'New Appointment'. At the top, there is a breadcrumb trail: > Patient > Find > Date & Time > Details > Summary. The 'Summary' tab is currently selected and highlighted in orange. Below the breadcrumb trail, there is a green checkmark icon followed by the text 'The appointment was saved successfully'. At the bottom of the page, there are four buttons: 'Open Calendar', 'Next Step', 'Invitation', and 'Brochure'. Both the 'Open Calendar' and 'Next Step' buttons are highlighted with red rectangular boxes.