SOP Name:	Appointment Types
Effective Date:	February 12, 2025
Next Review Date:	February 12, 2028
Approving Authority:	Health PEI EMR (Electronic Medical Record) Operations

Purpose:

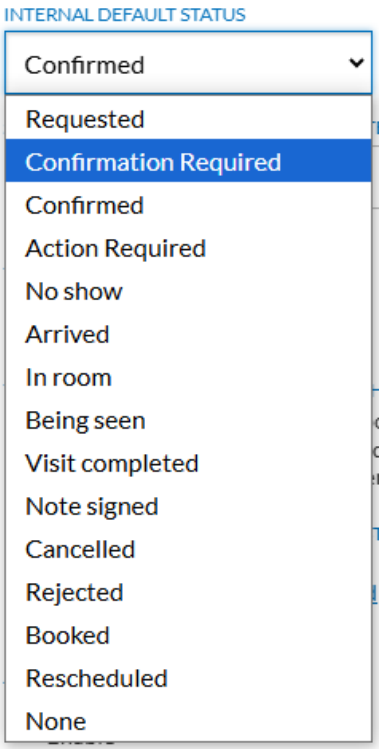
The purpose of this SOP is to establish guidelines and the naming convention for the different appointment types for use in the Provincial EMR to ensure clarity, consistency, and standard reporting. If a clinic requires Location specific Appointment Types an enhancement request must be sent to emrsupport for approval.

Scope:

The scope of this standard operating procedure applies to all Provincial EMR Users. There are two main categories of Appointment Types in the Provincial EMR, Global and Location specific Appointment Types.

- Use Global Apt Types as default.
- Location specific Apt Types to be used when specific notifications for patients are required beyond the standard. They require a naming convention for easier search.
- Appointment Types are not Presenting Issues.

Definitions	
Global Appointment Type	It is a type of appointment that has default notification messages for all clinics across the province. Location information is specific to each clinic.
Location-Specific Appointment Type	Created under a specific location in the Provincial EMR. It can only be used by staff members at that location. Notification messages, length, and color can be changed if their name is clearly defined.
Group Visit	Group Visits are available in the Provincial EMR to create an appointment for multiple patients at a time. Notification messages cannot be modified. Everyone has access to them.
Recurring Visit	It is used to book repeat appointments for the same patient with the same appointment reason or repeat group visits.

Type of Visit	• **Virtual visit.** Enables health care professionals to schedule and conduct a virtual video visit and live chat with a patient in the Prov EMR. (Please note, this is not referring to Zoom Health) • **Physical Visit.** Also select this visit type for phone appointments since the workflow for a virtual visit is more complex.
Qnaires	Questionnaires can be linked to appointment types. They will be sent once an appointment has been booked.
Appointment Internal Status (when clinic staff books the appointment): The default is **CONFIRMED.** Notification messages are sent only if an appointment status is **Confirmed, Booked, Rescheduled, Action Required, or Cancelled.**	

Responsibilities:
• Maintain an electronic appointment scheduling system for accurate record-keeping. • The clinic staff is accountable for booking the appointments and updating the status of No shows, cancellations, and accurate reporting through Prov. EMR. • Clinic Managers/Leads are responsible for keeping track of the location-specific appointment types and their notification messages requested via emrsupport.

Approvals:
EMR Operations Committee