Create a new enquiry

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Overview

The process of creating an enquiry is best explained through the following real-life scenarios:

- A potential patient calling to enquire on their own behalf.
- A family member, friend or other calling on behalf of a potential patient.

The following terminology is used in the Enquiries module:

- Enquirer: The Person calling
- Subject: The Potential Patient

Create a new Enquiry

To record a new enquiry from the patient,

1. Click **Correspondence**.
2. Select the **Enquiry** tab
3. Click on **New Enquiry**
    a. The start date and time will default to the present day and time, however, can be amended if necessary.
4. Type the surname of the Enquirer and click **Search**. If the contact exists, click **Select**.
    a. The Enquirer is the person making the enquiry and they may already exist as a contact/or the same patient.
5. If the contact does not exist and you have enough information (first and surname names) to create a new contact, select Create New Contact.
6. Select Anonymous Contact if the information is not provided. Again, most fields will be populated.
7. Add free text in Enquiry Text explaining the detail of the enquiry.
8. Click **Create Enquiry**.

⊕ **Scenario 1: Potential Patient Calls**

⊕ **Scenario 2: Calling on Behalf of a Potential Patient**