



Scheduling an appointment without a referral

Note: Ensure you check ESM for a valid referral before booking an appointment without a referral. These instances where an appointment needs to be booked without a referral usually only arise through ad hoc requests.

1. Click the **ESM scheduling appointment book** icon from the App Bar.

Create an appointment

1. Select the **appointment** tab on the **appointment scheduling book**.
2. Enter the first few letters of the **appointment type** name to help find the appropriate appointment type.

3. Select the **appointment type** from the drop down list e.g. Ortho Gen New (Orthopaedics General New).

4. Review the **appointment location** box. The location should reflect where the service will be delivered (note, this often defaults automatically but if there are multiple options the user will have to select one before proceeding).

5. Click the **person name ellipsis** button. The **person search** window will open.

6. Enter the patient details in the **search field** pane. Click **search**.

7. Select the correct patient from the **patient search** results.

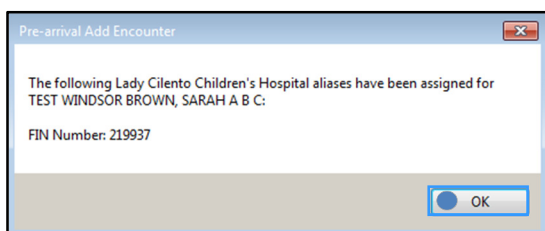
8. Click **add encounter**.
9. The encounter **available conversations** window will display.

10. Select **pre-arrival add encounter** and click **OK**.
11. The **pre-arrival add encounter** window will display. The following fields must be checked and updated before clicking **OK**.
12. **Start date** and **start time**.
13. **Building** and **patient location**.
14. **Treating clinician** (use the search box or start typing the clinician's full name and it will populate).
15. **Chargeable status** (public).
16. **Payment class** (Medicare).

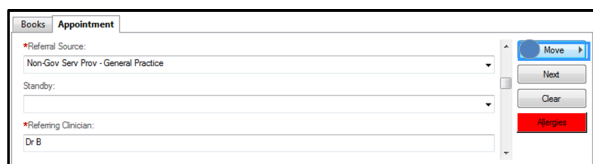
17. The **document selection** window will display. Ensure the **do not print documents** box is checked and click **OK**.



18. The **pre-arrival add encounter** confirmation window will display. Click **OK**.



19. Complete the remaining appointment fields in the **appointment** tab **as per below**:
- **primary resource**: Select from options
 - **new case category**: "Awaiting further information"
 - **length of referral**: "Other"
 - **date referral received**: Today's date (or date of appointment for retrospective appointments)
 - **date on referral**: Date ad hoc request was made
 - **referral source**: "Other"
 - **Referring clinician**: "NO REFERRAL"
 - **provider number**: (leave blank)
 - **Address and postcode**: (leave blank)
 - **Scheduling comments** [Date] – Referral yet to be received – [initials]
20. Click **move** to transfer the appointment information to **WIP**.



21. The **appointment attributes** window will display. Review (and update) any relevant tabs to ensure the information is correct and click **OK**.
22. The new appointment details will display in the **WIP** window.
23. Now click **schedule** and schedule as normal.