

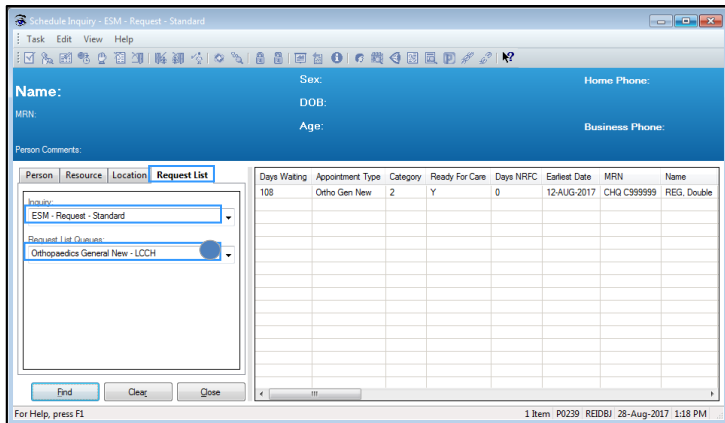
Scheduling a new appointment from a request list

Note: All referrals must be added to a request list before an appointment is booked (except walk-ins for the day of appointment). Find the patient's entry on the request list to book their first appointment.

1. Click the **scheduling appointment book** icon in the **AppBar** to load ESM. Click the **appointment inquiry** button.



2. Click the **request list** tab and select **ESM – request – standard** from the **inquiry** drop-down list. Select the corresponding **request list** e.g. Orthopaedics General New – LCCH.

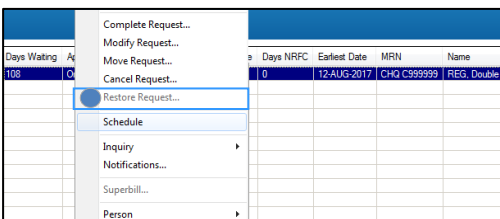


3. To ensure patients are scheduled off a **request list** in alignment with the principles of treat-in-turn and in-time, sort the lists by clicking on **days waiting** and the **category**.

Days Waiting	Appointment Type	Categ	Ready For Care
108	Ortho Gen New	2	Y

The **request list** is now sorted by the longest waiting patient within each **category**.

4. Locate the **patient** to schedule from the list. Right click, **schedule**.

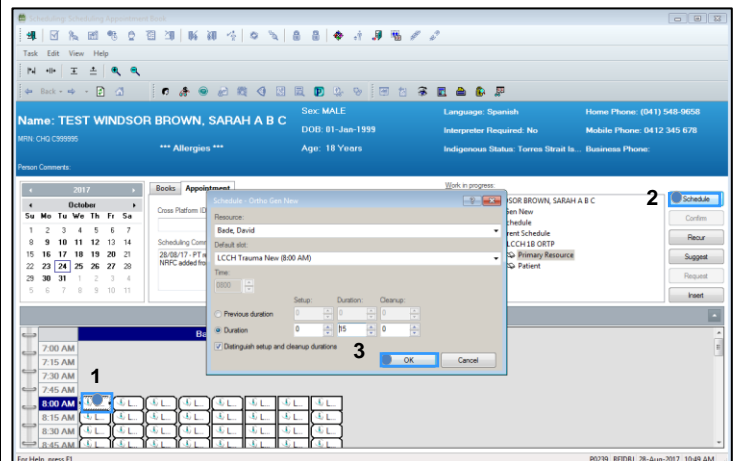


5. The **appointment attributes** window will open, click **ok**. The appointment information now displays in the **work in progress (WIP)** box.

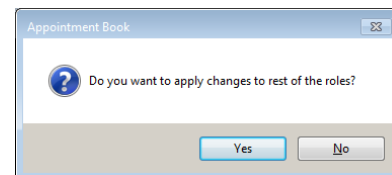
6. Locate the corresponding **appointment date** for the appointment. The calendar will display vacant appointments for your **appointment type** by having **bold** dates.



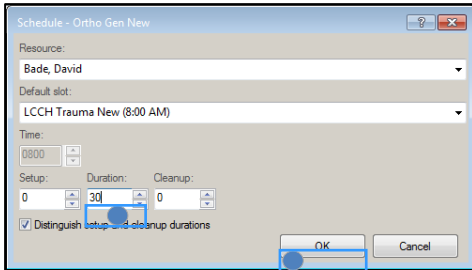
7. Schedule the appointment by selecting the **appointment** and clicking **schedule, ok**.



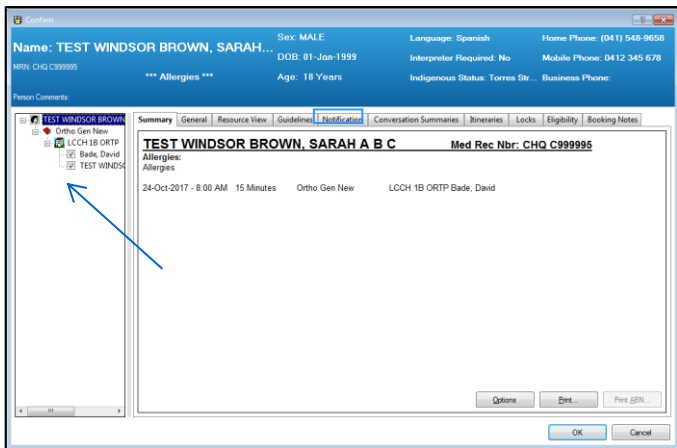
Note: If you need to redo step 7 you will be presented with the pop-up box below. Always select **“Yes”** so that both resource and patient appointments are updated.



8. Ensure the correct **resource** is listed and the appointment **duration** is correct. This can be modified before clicking **ok**.



- Click **confirm** to secure the appointment. If the patient is aware of the new appointment date, there is no need to untick the checkboxes. If the patient is not aware of the appointment, these boxes must be unselected.



- Click the **notification** tab to print a letter. Select the **reports** menu, the corresponding **letter**, your **printer** and the right arrow. Click **ok**.

Appointment letter considerations

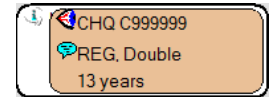
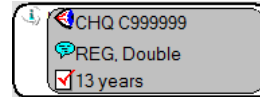
If your area is supported by letter batching services, you do not need to print a letter if the appointment is more than six weeks away.

If your area is not supported by letter batching, you will always need to print this letter. You may also need to include relevant clinical information sheets.

Appointment offer letters

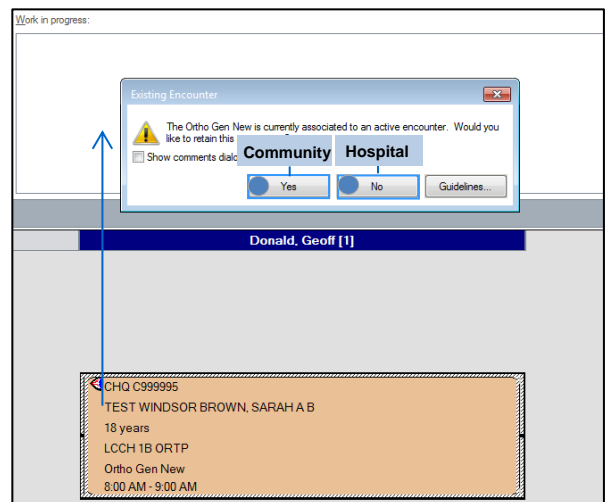
Letter	When to use
OUTPT - Appt Confirm	Appointment has been scheduled. Details of the appointment are included. Patient is request to call the local clinic phone to directly confirm their appointment
OUTPT - Appt Offer	Appointment has been scheduled. Details of the appointment are included.

- The appointment is now in either a **scheduled** (grey) or **confirmed** (latte) status depending on whether the patient is aware of the appointment.

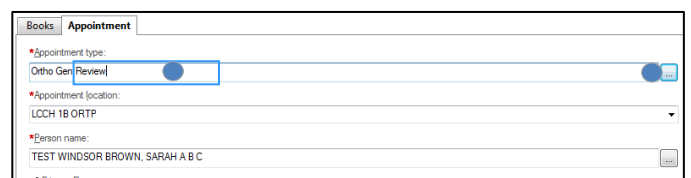


Scheduling a review appointment from a previous appointment

- Locate the previous appointment, either through the **appointment grid** or the **appointment inquiry** button and perform a **person search**. The following processes are to be followed depending on the search.
 - From the **appointment grid**, drag the appointment to the WIP; **or**
 - From the **person inquiry** search, right click, **reschedule**.
- An **existing encounter** window will appear.
 - For **hospital encounters**, click **no**.
 - For **community encounters**, encounters should be retained until the patient has been discharged. Click **yes**.



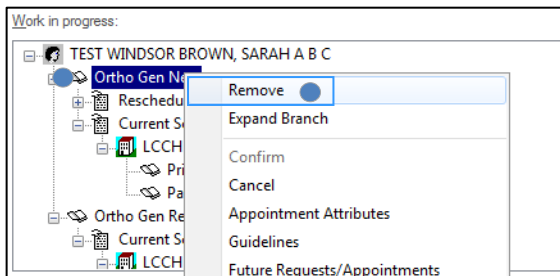
- Click the **next** button to use this appointment as a template. Over-key the previous appointment extension with **review** (if different) and click the **ellipsis** button.



- Update the **referral expiry date** field. If you are scheduling a **review** from a previous **new** appointment, the **referral expiry** date field will require manual completion. If you are scheduling this appointment from a previous **review**, this may not be required.

Length of referral	Date to apply
General Practitioner (12 months)	Today 'T' (plus) 1 Year (minus) 1 Day
Specialist to Specialist (3 months)	Today 'T' (plus) 3 Months (minus) 1 Day
Other	Today 'T' (plus) specific ref duration (minus) 1 Day
Indefinite	01-Jan-2100
Data take-up (expired)	02-Feb-2100

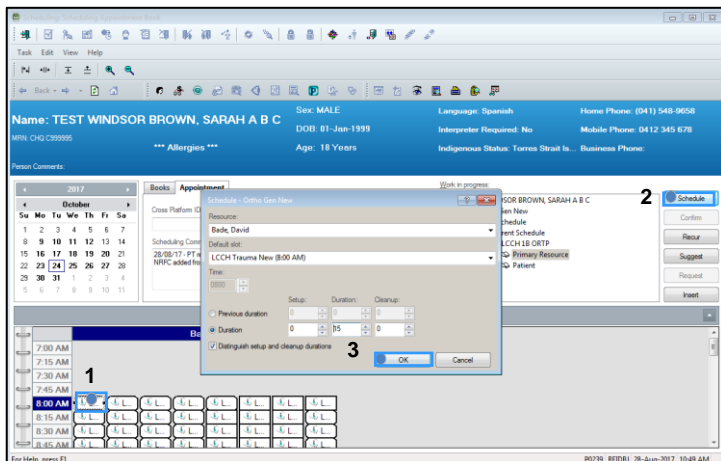
- Enter relevant scheduling comments into the **scheduling comments** field (e.g. 28/08/17 – 6/12 review as per Dr Ben – BR). Click **move**.
- Right click on the original template appointment in the **WIP**, click **remove**. The newly created **review appointment** will remain in the **WIP**.



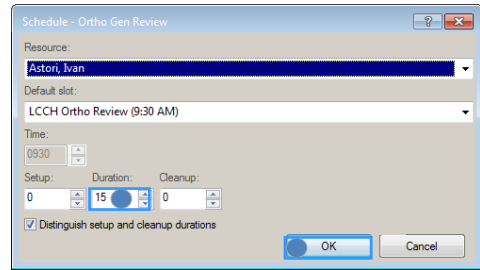
- Locate the corresponding **appointment date** for the appointment. The **calendar** will display vacant appointments for your **appointment type** with **bold** dates.



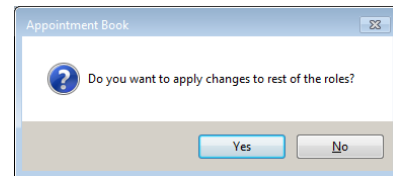
- Schedule the **appointment** by selecting the appointment and clicking **schedule, ok**.



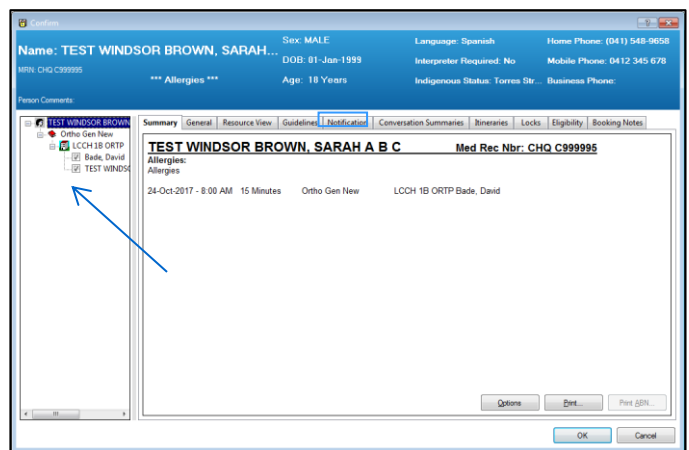
- Ensure the correct **resource** is listed and the appointment **duration** is correct. This can be modified before clicking **ok**.



Note: If you need to redo step 13 and 14 you will be presented with the pop-up box below. Always select "Yes" so that both resource and patient appointments are updated.



- Click **confirm** to secure the appointment. If the patient is aware of the review appointment date, there is no need to untick the checkboxes. If the patient is not aware of the appointment, these boxes must be unselected.



- Click **notification** tab to print a letter. Select the **reports** menu, the corresponding **letter**, your **printer** and the right arrow. Click **ok**.

Appointment letter considerations

If your area is supported by letter batching services, you do not need to print a letter if the appointment is more than six weeks away.

If your area is not supported by letter batching, you will always need to print this letter. You may also need to include clinical information sheets.

Appointment offer letters

Letter	When to use
OUTPT - Appt Confirm	Appointment has been scheduled. Details of the appointment are included. Patient is request to call the local clinic phone to directly confirm their appointment
OUTPT - Appt Offer	Appointment has been scheduled. Details of the appointment are included.

17. The appointment is now in either a **scheduled** (grey) or **confirmed** (latte) status depending on whether the patient is aware of the appointment.

