



Mini Manual

ED Receptionist

1. **Create an Out Patient Encounter for a fracture clinic appointment.**
2. **Schedule OP Fracture Appointment picking them up from the OP Referral List.**

Support available:

Please contact your local Champion User

Service Desk:

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Bringing it all together

ED Create an OP Encounter to place on OP Referral List

1 **ED – Create an OP Encounter for fracture clinic appointment**

Scenario: The patient has been assessed and needs a fracture clinic appointment.



- Step 1.** Log into PMO 
- Step 2.** Select Outpatient Referral List conversation.
- Step 3.** Search for patient, clicking Next to skip the simple search to access the Person Search Advance Trace window.
- Step 4.** Type in name in Surname field
- Step 5.** Gender - select from drop down menu.
- Step 6.** Click search.
- Step 7.** Click on relevant patient in the upper pane.
- Step 8.** Click Add Encounter .
- Step 9.** The Select Episode Window appears.
- Step 10.** Right click in the white space of the top pane and then click on "Add Episode".
- Step 11.** The New Episode 18 Week Pathway window appears (change no details).
- Step 12.** Click OK.
- Step 13.** The screen returns to the Select Episode window.
- Step 14.** A new 18 week wait pathway appears at the top of the episodes list (it has the date and time it was created). Double click on this or select and Click the OK button.
- Step 15.** The Facility Search window opens
- Step 16.** Type in "Royal" and click ellipsis button  to search for facility
- Step 17.** Select Royal United Hospital

ED Create an OP Encounter to place on OP Referral List

- Step 18.** Click OK
- Step 19.** The Outpatient Referral List conversation opens.
- Step 20.** Check Demographics and Address details – these should all be correct, as they would have been checked on admission to ED.
- Step 21.** Complete Referral Details tab – mandatory fields in yellow.
 - Source of Referral – select "**A&E dept referral**" from drop down.
 - Referral Received Date – type "t" for today's date
 - Service Type Requested – defaults to advice/consultation.
 - Pathway ID Issuer – Type "Royal U" and search by clicking the ellipsis button. Select "Royal United Hospital Bath NHS Trust"
 - RTT Status – Select "**12 Consultant Referral – New Condition**" from drop down.
 - Set To Pooled – defaults to yes, this indicates the patient can be seen by any Consultant team.

Note: This can be changed to no if the referral is for a specific Consultant team. If no is selected the Lead Clinician field becomes mandatory; when the clinician is selected the treatment function field auto populates (unless the Clinician has more than one treatment functions and then you must select one).

- Treatment function – Select Trauma and Orthopaedics from the drop down list.
- Reason for visit - select fracture from drop down.
- Priority Type – select urgent from drop down.
- Admission Booking Type – defaults to partial booking and does not need to be changed.
- Short Notice – defaults to no.
- Building – defaults to outpatients..

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- Step 22.** Click OK
- Step 23.** The Out Patient Referral List aliases window appears.
- Step 24.** Click OK
- Result:** The patient has been added to the waiting list to be scheduled for a fracture clinic appointment.

2 ED - Schedule OP fracture Appointment



- Step 1.** Log into PMO
- Step 2.** Select Published Waiting list
- Step 3.** Select the OP Referral – by patient waiting list icon . The patient search window opens.
- Step 4.** Type in Surname (or MRN) and click Search to find the appropriate patient.
- Step 5.** Check the correct patient is displayed, click on the T&O encounter to highlight.
- Step 6.** Right click to bring up the context menu.
- Step 7.** Click "Schedule".

Note: This will automatically take you to the Appointment Book application where you will schedule the appointment.

The first time you access the Appointment Book you can change your settings so that the focus is maintained on the patient you are dealing with throughout the process. To do this:

- Select **View** from the menu bar in the top left hand corner of the screen.
- Select **Options** from the context menu.
- Select the **Appointment** tab at the top of the pop up box.
- Click the box for **Maintain focus on pending**

Schedule OP Fracture Appointment

appointment during reschedule.

- Click the **OK** button to return to the appointment book main screen.

When you Confirm the appointment the focus should remain on your patient/appointment .

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- Step 8.** Appointment Type - type fracture.
- Step 9.** Click the ellipsis button to search for the appointment type.
- Step 10.** Select the appropriate appointment type from the Appointment Type Help window
- Step 11.** Click OK.
- Step 12.** Appointment Location - defaults to T&O RUH .
- Step 13.** Patient Name – auto populates.
- Step 14.** Schedule with - select First Available from drop down.
- Step 15.** Do You Wish to Stop Letter – select Yes or No.

Note: Selecting "Yes" means an appointment confirmation letter will not be printed. "No" means the letter will be printed.

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- Step 16.** Click the Move button to move the information to the Work in Progress window (WIP). A&E fracture clinics will display.
- Step 17.** Click the suggest button. Suggest window loads.
- Step 18.** Select suitable appointment by clicking on the appointment.
- Step 19.** Click select, and then click ok.
- Step 20.** The suggest window closes.
- Step 21.** The pending appointment will appear (as a salmon pink box) under the Clinicians name on the date/time you selected.

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- Step 22.** Click the Confirm button.
- Step 23.** The Confirm window appears.
- Step 24.** Select the appropriate response in the "Did the patient refuse any offered dates?" drop down
- Step 25.** Click OK, the confirmed slot changes to a lilac colour.
- Result:** A fracture clinic appointment has been scheduled for the patient.

Business Rules