Royal United Hospital Bath NHS
NHS Trust

Mini Manual
Non Theatre
Booking Co-Ordinator 3

1. **Create Inpatient Encounter**
2. **Send Call Letter**
3. **Look up patient telephone number and GP**
4. **Revise Priority for Expedited Patients**
5. **Update Consultant Transfer**

Support available:

Please contact your local Champion User

Service Desk:

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Create Inpatient Encounter

1. Create Inpatient Encounter

Patient with no Encounter is to be listed for a procedure. You will need to:

Go To to PMOffice to add an Encounter

Within PM Office PMOffice

Step 1. Select Conversation from the Side Bar Menu

Step 2. Double Click to select Elective Waiting List Conversation

The system displays the Patient Search Trace

Step 3. Click Next

The system displays the Patient Search Advance Trace

Step 4. Enter the relevant Patient details i.e. Surname, Date of Birth and Gender

The system displays matching patients in the upper half of the screen; corresponding encounters are displayed in the lower half

Step 5. Select appropriate patient-by clicking on the name

Step 6. Click Add Encounter

'Select Episode' Window opens

Step 7. In a clear area of the Episodes window, right click Add Episode

New Episode Dialogue window displays and prompts to begin the 18 week episode.

New Episode Screen creates new 18 Week Pathway (or new RTT)

Step 8. Click OK

'Select Episode' Window opens showing the new episode.

Step 9. Select correct Episode, (i.e. the one just created)

Step 10. Click OK; Organisation Conversation Box opens.

Step 11. Enter r (for RUH) and press ellipsis [...] icon

Step 12. Select Royal United Hospital from the list and click OK

The Elective Waiting List conversation opens

If the patient is private please ensure you change the 'Admin Category' to Private.

Step 13. Complete Intended Management as required.

Step 14. Referring Clinician will be either the GP or the Clinician within the Trust that referred the patient for admission.

Step 15. Lead Clinician is the clinician in charge of the patient's care once admitted.

Step 16. Select Treatment Function.

Step 17. Select Priority as required (eg Routine or Urgent)

Step 18. Admission Booking Type – 'partial booking'.

Step 19. In the Admission Type Code – 'Waiting list'.

Step 20. Select Short Notice as required (eg No)

Step 21. Enter Decided to Admit Date - Use "T" as a short hand for today if required.

Step 22. In the Pathway ID Issuer enter "Roy" press and select "Royal United Hospital Bath NHS Trust" from the drop down list.

Step 23. Intended RTT Status - enter appropriate RTT.

Step 24. Complete any non-mandatory fields as required

Step 25. Click OK; Pop up displays FIN Num, REQ Num, and Visit ID

Result: New inpatient encounter has been added; the procedure can now be requested.

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Send Call Letter

2. Send Call Letter

Log into PM Office PMOffice

Step 1. Go to Published Waiting List.

Step 2. Double click on IP Wait List by Treatment Function

Step 3. Select your Primary filters for the waiting list you want to view. this can be more than one – and select **OK**

In-Patient Waiting List will be displayed

Step 4. Select your patient Status will be Requested Requested

Step 5. Right click on patient and select conversation - Send in patient Call Letter

The conversation opens and all mandatory fields will be completed

Step 6. Click **OK**

Result: Status Now - Call Letter Sent Call Letter Sent

3. Look up patient telephone number and GP

Open PowerChart PowerChart

Step 1. Enter Patients Name/MRN in the Name Field

Step 2. Click on Binoculars

Step 3. Right Click on your Patient

Step 4. Click OK

Step 5. From the side menu click on Patient Information tab

Update Consultant Transfer

Select the Care Provider Summary tab (within the Patient Information Pane) The system displays the Care Provider Summary Pane, displaying who has been involved in the patients care

Step 6. To view more information about Registered GP, select the Registered GP, right click, and select More Info Clinical staff Information box opens with GP name ,address and telephone number.

Step 7. The third tab in the Patient Information Pane is the Patient Demographics and provides information about the patient such as address, telephone number, etc.

4. Update Consultant Transfer

If Consultant is showing UN Known / Blank or Treatment Function / Main Specialty is Blank.

Step 2. Log into PM Office PMOffice

Step 3. Go To Published Waiting List

Step 4. Find your patient Name or MRN Click **Search**

Step 5. Select your patient and encounter

Step 6. Right Click on your patient select Transfer.

Transfer Box opens

Step 7. Type in The Consultant

Step 8. Select IP Planned procedure from Drop down box

Step 9. Select transfer reason from drop down box

Step 10. Add comments if needed

Step 11. Click OK

Result: Patient will now appear with Lead Clinician Treatment Function or Main Specialty filled in.

Revise Priority for Expedited Patients

5. Revise Priority for Expedited Patients

Step 12. Log into PM Office PMOffice

Step 13. Go To Published Waiting List

Step 14. Find your patient Name or MRN Click **Search**

Step 15. Select your patient and encounter

Step 16. Right Click on your patient select Conversation and move over to Revision Elective Waiting List

If Patient SearchTrace box opens Click Search Select Patient Click OK

Revision Elective Waiting List Click OK

Step 17. Revision elective waiting list opens; Change Priority type.

Step 18. Click OK

Result: Priority now changed

Business Rules
Management of Elective Admissions

1. When the TCI date is confirmed, the Booking Team must update the TCI ward/location using the modify function.
2. All requests on the Add/Set Encounter queue to be added to the waitlist within 24hrs.
3. Pre Assessment appointments will be booked at the same time as the patient is added to the waitlist.
4. Pre Assessment appointments to be booked 6 to 8 weeks before the likely surgery date.
5. The Booking Team will ensure that the correct 18 week pathway is selected for all encounters.