



Mini Manual

Booking Co Ordinators 1

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Support available:

Please contact your local Champion User

Service Desk:

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Bringing it all together

Add a Waiting List Encounter RUH Theatres

1. Add a Waiting List Encounter RUH Theatres



Log into Appointment Book

Step 1. On the toolbar click the Request List Enquiry  icon

The screen will default to 1. Add / Set Encounter

Step 2. From the Request List Queues: select '**RUH Theatres Request List** or "**Non Theatres**"

Step 3. Click the Find  button

Step 4. Right click on your patient from the context menu and select Patient select Add Encounter.

Step 5. Waiting List Encounter - select **Yes**

Step 6. Upper box - Episode Box, select the episode you require

When you select the right 18 week pathway this will populate the encounter in the lower section (at this stage you must make a note of the Nurse Unit to enable you to find the missing follow up appointment to make the Pre Assessment Appointment)

NB If there is already an appropriate IP/ DC waitlist encounter cancel out at this stage. Then use instructions to **Set Encounter** from this point.

Step 7. Click **OK**

Step 8. Type in 'R' and click on the ellipsis  button

Step 9. Select Royal United Hospital

Step 10. Click **OK**

Step 11. Fill out yellow mandatory fields and click **OK**

Step 12. Confirm - click **OK**

Result: Patient now on To Be Scheduled List

Schedule Pre Assessment Appointment

2. Schedule Pre-Assessment Appointment



Log into Appointment Book

Step 1. Go to the Appointment enquiry  icon

Step 2. Select **Location Tab**

Step 3. Enquiry drop down to **Clinic Patients Missing Follow Up**

Step 4. Location Type is **Ambulatory**

Step 5. Fill in location, as noted from **Nurse Unit**

If not known, View Appointment in Powerchart.

Step 6. Select range of dates – ensure this covers the period when the patient was seen in Outpatients.

Step 7. Click the Find  button

If Not Found Go To Migrated Patient MM

Step 8. Right click on your patient and from the context menu go to **Schedule Next OP Appt**

Now the main appointment book screen opens with the appointment tab uppermost the patient name is already filled in

Step 9. In the Appointment type box type 'pre' then click the ellipsis  button

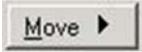
Step 10. From the appointment type box select Pre Assessment Nurse F/up

If Pre Assessment Nurse F/up does not appear as an option. You must contact CRS team to enable the link for this appointment type.

Step 11. Appointment location will automatically fill, complete yellow mandatory fields

Set Encounter

Step 12. Add Scheduling comment including Surgeon and Operation

Step 13. Click the Move  button to move the details over to Work in Progress box

Step 14. **Select your date from the Calendar**

Step 15. **Select your appointment Time.**

Step 16. **Click Schedule**

The patient's appointment will appear in a pending state in this colour until you confirm the appointment

Step 17. Click **Confirm button** in the Work in Progress window

You will now be able to view the pre assessment letter that will be sent to the patient

Step 18. Click **OK**

Result: Your Patient's Pre Assessment Appointment will now change colour to show it has been confirmed

3. Set Encounter

Set Encounter to be used if the patient has an existing Day Case/Inpatient Waiting list Encounter which should be used

Example: Incorrect procedure has been ordered and Inpatient encounter added, incorrect procedure then removed and replaced with correct procedure, which then appears on the Add Set Encounter List.

Step 1. Select patient again from add set encounter / RUH Theatres request list queue

Step 2. Right click and select **modify** from context menu

Step 3. At the bottom of the screen click 'Set Enc' button.

Step 4. Select the correct IP/DC Waiting list encounter

Step 5. Click OK

Result: Patient now on To Be Scheduled List

Sort To Be Scheduled List, using Fit for Surgery flag

4 Sort To be Scheduled List, using Fit for Surgery flag

Step 1. Log into Appointment Book



Step 2. Go to Request List enquiry  icon.

Step 3. In Request list go to Enquiry and drop down to **To be Scheduled**

Step 4. In the Request List Queues drop down to "S" and then up to RUH Theatre Request List

Step 5. Scroll down to select as many of the functions as appropriate, Consultant treatment function and as many options as you can to reduce the amount of patients on the list

Step 6. Click **Find**

Result: You will now see the list of patients to be scheduled which you can scroll across to check all the information. Use your preferences option to adjust the columns.

Send Call Letter for Routine Patients

5. Send Call Letter for Routine Patients

Log into PM Office 

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**

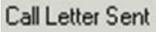
In-Patient Waiting List will be displayed

Step 4. Select your patient Status will be Requested 

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 

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.