



# Mini Manual

## Booking Co-Ordinators Migrated Patients.

### 1. Schedule Pre Assessment Appointment

Support available:

Please contact your local Champion User

Service Desk:

Tel: 01225 82 5444

Email: [ruh-tr.ITServiceDesk@nhs.net](mailto:ruh-tr.ITServiceDesk@nhs.net)



## Schedule Pre Assessment Appointment

### 1 Schedule Pre-Assessment Appointment

Log into Appointment Book



Step 1. Click the Appointment Tab

Step 2. In the Patient Name Tab click on the  button

Step 3. Type in Name or MRN Click Find

Step 4. Click on your Patient

Step 5. Select appropriate Outpatient encounter  
**(Outpatient encounter from which the patient was listed)**

**If you find an appropriate encounter go to Path A**

**If you are unable to find an appropriate encounter go to Path B**

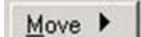
## Path A

### Path A

Step 1. In the Appointment type box type 'pre' then click the ellipsis  button

Step 2. From the appointment type box select Pre Assessment Nurse F/up

Step 3. Add Scheduling Comment including Surgeon and Operation.

Step 4. Click the Move  button to move the details over to work in progress box

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**If an error message appears you will need to go back to step 2 and amend appointment type to Pre Assessment Nurse F/up \_1**

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Step 5. Select your date from the Calendar

Step 6. Select your appointment Time.

Step 7. Click **Schedule**

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

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Step 8. Click **Confirm** button in the Work in Progress window

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

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Step 9. Click **OK**

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

## Path B

### Path B

- Step 1. Click Add Encounter.
- Step 2. Select 18 Week Pathway Click Yes
- Step 3. From the dropdown, select Outpatient Referral Conversation.
- Step 4. Select the correct episode in upper window.click OK
- Step 5. Type in 'R' and click on the ellipsis  button select Royal united hospital
- Step 6. Complete yellow mandatory fields. Eg. Referral Select G.P. Referral, Treatment Function Select Anaesthetic, Date of referral You will find from PPM List Etc
- Step 7. Click OK
- Step 8. In the Appointment type box type 'pre' then click the ellipsis  button
- Step 9. From the appointment type box select Pre Assessment Nurse New.
- Step 10. Select to block letter
- Step 11. Add Scheduling Comment including Surgeon and Operation.
- Step 12. Click the Move  button to move the details over to work in progress box
- Step 13. Select your date from the Calendar
- Step 14. Select your appointment Time.
- Step 15. Click **Schedule**
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- The patient's appointment will appear in a pending state until you confirm the appointment
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- Step 16. Click **Confirm** button in the Work in Progress window

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

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- Step 17. Click **OK**

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

### 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.