



Mini Manual

Generic

1. Ensure that you have identified the correct patient before proceeding to add anything to their record. (Check spellings of names, Dates of Birth, Post codes, addresses, MRNs, ordering of first/surnames, patient aliases, spellings, etc.)
2. Data entered onto the record should be complete and accurate.
3. Any confidential waste generated (EG: Faxes, printed e-mails, printed data from the clinical systems, etc) should be disposed of securely using confidential waste.

Support available:

Please contact your local Champion User

Service Desk:

Tel: 01225 82 5444

Email: ruh-tr.ITServiceDesk@nhs.net



View Patient Details / Prioritise Referral

1 View Patient's Details

- Step 1.** Within PM Office  select Conversation from the Side Bar menu.
- Step 2.** Select **View Person**, 'Surname, Forename'
Or type the **MRN**, Select the **Gender** Click **OK**
- Step 3.** **Select** the required patient. Click **OK**.
- Step 4.** Type the initial letter (r) into the **Facility Name** box. Press Ellipse Box. Select" Royal United Hospital " Click **OK**

Result: The **View Person** screen opens.

2 Patient Locate

- Step 1.** Launch PM Office , Select Patient Locator icon  Patient Locator window opens
- Step 2.** Enter the name of the patient into the **Name** field and press **Enter**

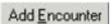
3 Create Outpatient Encounter

- Step 1.** Open PM Office. 
- Step 2.** Double click **Outpatient Referral List**  **Outpatient Referral List** in the Conversation tab.

Note: The Patient Search Window appears. Do not enter information into the first screen.

- Step 3.** Click Next and search in the Patient Search Advanced Trace window.
- Step 4.** In the Patient Search Advanced Trace Window type in the **Surname** of the patient.
- Step 5.** In the **Gender** field click on the downward arrow and choose the gender of the patient.

Prioritise Referral / Contiguous Slots

- Step 6.** Click **Search.** 
- Step 7.** If the search does not return the patient you are looking for you can click **Previous**  and enter additional details such as Forename, Date of Birth etc.
- Step 8.** If the correct patient appears on the list click on the patient and click **Add Encounter.** 
The **Select Episode** window appears.

Note If the patient has been referred by the GP: Right click in the Select Episode screen's top pane and select **Add Episode**.
Click on the OK button on the New Episode window to create a new 18 week pathway. Continue from step 8 of this manual.

If the patient has been referred by another internal specialty/consultant: Select the appropriate existing 18 week pathway on the Select Episode screen and click the **OK** button.

- Step 9.** In the Organisation window enter the first few letters for the Royal United Hospital and click the ellipsis button. 
- Step 10.** Click on Royal United Hospital and click the OK button.
- Step 11.** Click on the Referral Details Tab.
- Step 12.** In the **Source of Referral** field click on the dropdown arrow and choose the referral type eg GP Referral.
- Step 13.** The **Referring Clinician** field will auto populate from the first page if GP Referral is chosen.
- Step 14.** In the **Referral Received Date** field type in the date or use the T key on the keyboard to enter today's date.

Contiguous Slots

Note: Check the Service Type Requested field is correct.

Step 15. Select appropriate **RTT Status** eg 92 – Diagnostics Only or 10 If new 18 week pathway

Step 16. Select pooled or type in consultant name as required . Ensure correct **Treatment Function** and **Reason for Visit** is selected

Step 17. In the **Priority Type** field click on the dropdown arrow and choose the appropriate priority type eg Routine. Click the **OK** button.

4 Prioritise Referral

Step 1. Open PM Office. Click Published Waiting list.

Step 2. Double Click OP Referral - by Treatment Function.

Step 3. In the **Primary Filters** window click dropdown arrow and click appropriate eg Cardiology. This should automatically copy over to the right hand pane if this does not happen click **Copy**. Click **OK**.

Step 4. Right Click on required patient click **Review Referral** and **Accept Priority**

5 Booking New Contiguous slots

Step 1. Open the **PMOffice** application. Click on the Published Waiting List tab. Select OP Referral – By Treatment Function

Step 2. Select the appropriate treatment function (e.g. **Cardiology**) Click **OK**

Step 3. Right-click on correct patient, Select **Schedule**

Step 4. In the **Primary Filters** window click dropdown arrow and click appropriate eg Cardiology. This should automatically copy over to the right hand pane if this does not happen click **Copy**. Click **OK**.

Check In / Check Out

Step 5. Right Click on required patient click **Schedule** the appointment screen will open

Step 6. Enter the Appointment Type in the Appointment tab. Enter the appointment's location into the **Location** field. Enter the appropriate option into the **Schedule With** field. Select whether or not you wish to stop the letter.

Step 7. Click **Move**.

Step 8. Click on the calendar date that you wish to book the appointment on.

Step 9. Click Schedule

Step 10. Select the appropriate resource in the **Resource** field.

Step 11. Adjust start time and duration of appointment as appropriate

Step 12. Click **OK then** Click on the **Confirm** button.

Step 13. In the **Did the patient refuse any offered dates?** field click on the dropdown arrow and choose Yes or No as appropriate. Click **OK**.

6 Booking New Discrete Slots

Step 1. Open the **PMOffice** application. Click on the Published Waiting List tab. Select OP Referral – By Treatment Function

Step 2. Select the appropriate treatment function (e.g. **Cardiology**) Click **OK**

Step 3. Right-click on correct patient, Select **Schedule**

Step 4. In the **Primary Filters** window click dropdown arrow and click appropriate eg Cardiology. This should automatically copy over to the right hand pane if this does not happen click **Copy**. Click **OK**.

Check Out / Business Processes

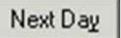
Step 5. Right Click on required patient click **Schedule** the appointment screen will open

Step 6. Enter the Appointment Type in the Appointment tab. Enter the appointment's location into the **Location** field. Enter the appropriate option into the **Schedule With** field. Select whether or not you wish to stop the letter.

Step 7. Click **Move**.

Step 8. Click Suggest . In the Suggested Schedules window, click Suggest

Result: A list of all available appointments will appear.

Note : You can click **Next** or **Next Day**  to view further appointments. Use date range to book in specific time period e.g. 6 weeks in the future, or use **Schedule in** radio button. See manual for more functions

Step 9. **Double click** on the appointment that you require.

Step 10. Click **OK**, A **Confirm** window will appear asking if the patient refused any offered dates. Select yes or no and enter the offered dates as necessary. Click **OK**.

Result: The appointment will now appear in the appointment book under the chosen resource.

Step 11. Click **Confirm** . The appointment colour changes to lilac. If you have added Clinical comments they will display when you hover your mouse over the appointment slot. If you have added Scheduling comments they will display as a blue speech bubble. Double Click the slot to view the comments.

Result: The Appointment for this patient is now scheduled.