



Mini Manual

Single sided

Receptionist

1. Appointment Book - Recommended Default Settings

Default Settings

1 Setting Appointment Book preferences

Step by Step Instructions

Step 1. Open the Appointment Book.

Scenario: When the Appointment Book is opened for the first time by a user they can set their preferences to display the relevant books (department).

Step 2. Click on the bookshelf.

Step 3. Click View, Options, User defaults and click on the dropdown arrow next to Default location then click the OK button.

Step 4. To delete any empty schedules and view as many books as possible across the bookshelf click on the View menu and click on the Empty Schedules option (there will not be a tick present).

Appointment Book

To ensure that Appointment Book stays on the booked date after booking appointment:

Step 5. Click on the View menu and then click on Options.

Step 6. Click on the Confirm tab and click on the radio button to the left of the Maintain focus on last confirmed appointment option.

Note: Appointment Book will start at 0:00 hours and it will appear that there are not any available slots. The time will need to be changed to an appropriate start time.

To ensure that Appointment Book starts at the correct time:

Step 7. Right click in the grey area and click on Book settings then click on Properties.

Step 8. Type in the required Begin time and click the OK button.

To set these changes to your Smart Card it is necessary to Task and Exit (main menu) the Appointment book and re-launch from the Millennium home screen:

Result: Options and preferences are set within Appointment Book.

Appointment Book

Business Rules

1. Notes must be prepped for clinic and have the referral letter, history sheets and any results filed correctly. Outcome forms must be attached to the front of every set of notes.
2. Patients who DNA must be discharged back to their GP (except Paediatrics, Cancer or if there is a clinical reason for rebooking e.g. long term condition Diabetes).
3. Check in must be performed in real time and demographics checked including Ethnic category and phone number.
4. An outcome form must be completed for every patient seen with one RTT status selected.
5. Check out must be performed real time.
6. Follow ups must only be booked if within 6 weeks.
7. If a follow up is due more than 6 weeks in the future an order is placed in PowerChart.
8. Receptionists/Admin staff will ensure that the correct 18 week pathway is selected when booking a follow up appointment.
9. Patients not receiving any future appointment must be discharged.
10. Notes must be tracked using a push method in real time.
11. Overbooking clinics must be agreed with the relevant clinician and specialty manager, this will be monitored regularly.
12. The 'patients missing follow ups', 'to be scheduled' and 'deferred encounters w/o request' work lists must be monitored regularly by receptionists and actioned appropriately.

Support available through the following options:

1. Please contact your local Champion User
2. Service Desk
 - a. Tel: 01225 82 5444
 - b. Email: ruh-tr.ITServiceDesk@nhs.net
3. Self Service Call Logging via Intranet

