



Mini Manual Receptionists

1. Check In
2. Did Not Attend & Undo DNA
3. Cancel an Appointment
4. Modify Appointment Comments
5. Reschedule an Appointment

Support available:

Please contact your local Champion User

Service Desk:

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Bringing it all together

Check In

1. Check In

- Step 1.** Open the Appointment Book.
- Step 2.** In diary view right click on the patient's appointment.
- Step 3.** Click on **Actions**.
- Step 4.** Click on **Check In** from the context menu.
- Step 5.** The **Check In** window will open and the date and time fields will be automatically populated. Click the **OK** button. The
- Step 7.** The **Check In Referral** window will open to confirm the patient's demographics including **Ethnic Category** and **phone number**.
- Step 8.** Click the **OK** button. The appointment slot will be shown in green in the appointment book diary view.
- Result:** The rollover text will show the patient has checked in.

Undo CheckIn

2. Undo CheckIn

To undo a CheckIn

- Step 1.** **Right click** on the appointment and choose **Actions** and **Check In Undo**.
- Step 2.** Then right click and choose **Patient** and **Modify Encounter**.
- Result:** CheckIn should now be back at the confirmed state.

Did Not Attend

3. Did Not Attend

- Step 1.** Open the Appointment Book.
- Step 2.** In diary view right click on the patient's appointment.
- Step 3.** Click on **Actions**.
- Step 4.** Click on **Did not Attend** from the context menu.

The No Show window will open and the date and time fields will be automatically populated.

Undo - Did Not Attend

- Step 5.** To undo a DNA right click on the appointment and choose Actions and DNA Undo.
- Step 6.** Then right click and choose **Modify**.
- Step 7.** Change **outcome** as appropriate.
- Result:** DNA undone

Caution: If the patient was discharged following a DNA:

- Step 1.** Select PM Launch icon  , from drop down select Undo Discharge.
- Step 2.** Search for the patient.
- Step 3.** In the Undo Discharge window, select appropriate **Reason for Correction** field.
- Step 4.** Click the **OK** button.
- Step 5.** **STILL AT CONFIRMED!! Check in or DNA?**
- Step 6.** Rebook from **Appointment Tab** in Appointment Book, (this will prevent booking

Cancelling an Appointment

errors occurring).

Result: Discharged DNA undone

4. Cancelling an Appointment

- Step 1.** In diary view right click on the patient's appointment.
- Step 2.** Right click on the patient's appointment and click **Actions – Cancel** from the context menu.
- Step 3.** In the **Attendance** field choose the appropriate reason eg Appointment cancelled or postponed by hospital.
- Step 4.** In the **Outcome of Attendance** field choose the appropriate reason e.g. Appointment at a later date.
- Step 5.** In the **Cancel Reason** field choose the appropriate reason.
- Step 6.** Click the **OK** button.

Note: The patient will now be on the Deferred Encounters w/o Request list.

Modify Appointment Comments

- Step 1.** Right click on the patient's appointment and click **Actions – Modify** from the context menu.
- Step 2.** Click on Details tab and enter comments.
- Step 3.** Click the OK button.
- Result:** The comments have been added and a speech bubble is shown on the appointment. The comment can be viewed by double-clicking on the speech bubble.

Rescheduling an Appointment

6. Rescheduling an Appointment

- Step 4.** Right click on the patient's appointment and click **Actions – Reschedule** from the menu.
- Step 1.** In the **Existing encounter** window click the Yes button to retain the association with the current encounter.
- Step 2.** Click on the **Suggest** button.
- Step 3.** In the Suggested Schedules window click on the **Suggest** button.
- Step 4.** Click on the required appointment time slot.
- Step 5.** Click on the **Select** button.
- Step 6.** Click on the **OK** button.

Note: Patient is now in a Pending state. The appointment slot is shown in salmon in the appointment book diary view.

- Step 7.** Click on the **Confirm** button.
- Step 8.** In the Confirm window click on the dropdown arrow next to the Did the patient refuse any offered dates? field and click on yes or no as appropriate.
- Step 9.** Click on the **OK** button.
- Step 10.** In the Reschedule window click on the dropdown arrow and choose the **Reason** the appointment needed to be rescheduled from the dropdown list.
- Step 11.** Click on the **OK** button.
- Result:** The patient is now confirmed in a new slot.

Business Rules

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.