Royal United Hospital Bath NHS

NHS Trust

Mini Manual

Receptionists

1. **Check Out**
2. **Book a Follow-Up Appointment**
3. **Order a Follow-Up Appointment**
4. **Update an RTT and Discharge a Patient**
5. **Tracking Notes**

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RUH

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BT Bringing it all together

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Check Out

1. Check Out

Step 1. Open the **Appointment Book.**

Step 2. Right click on the patient's appointment and click on **Actions** and **Check Out.**

Note: The Date and Time are automatically populated.

Step 3. In the Check Out window click on the **Medical Staff Type** and choose the appropriate option.

Step 4. Click on the dropdown arrow next to the **Outcome of Attendance.** Select Another Appointment Given if you need to book another appointment at check out. Select Appointment at a Later Date to order a follow-up. Enter the RTT code from the outcome form.

Book a Follow-Up Appointment

2. Book a Follow-Up Appointment – following Appointment Given chosen at Check Out

Step 1. Following Another Appointment Given being chosen at check out the patient's name will be added to the appointment tab.

Step 2. Enter first few letters of **Appointment type** and click on the ellipsis button. Choose the follow-up appointment type.

Step 3. Click on the dropdown arrow by the **Appointment Location** and choose the appropriate location.

Step 4. Click on the downward arrow by the **Do you wish to stop the letter?** field and choose Yes or No as appropriate.

Step 5. Type in **Scheduling Comments** as required.

Note: Scheduling comments appear as a bubble on the patient's appointment.

Step 6. Click on the **Move** button to transfer the details to the Work in Progress window.

Step 7. Click on the **Suggest** button.

Step 8. Click on the **Suggest** button in the Suggest Schedules window.

Step 9. Click on the required appointment time slot.

Step 10. Click on the **Select** button.

Step 11. Click on the **OK** button.

Note: The appointment will be displayed in salmon in the appointment book diary view and Pending.

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

Step 13. Click on the **OK** button.

Note: The appointment will be confirmed and displayed in purple in the appointment book diary view.

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Order a Follow-Up Appointment

3. Order a Follow-Up Appointment – following an Appointment at a Later Date being chosen at Check Out

Step 1. Highlight the Patient's name and click the **Launch Powerchart** icon.

Step 2. Select **Requests** from the **Side Bar** menu.

Step 3. Click **Add** under the **Requests** title.

Step 4. Select **Contains** from the drop-down list.

Step 5. Type **F/Up** in the **Search** field and click the **Binoculars** icon.

Step 6. Click the appropriate **Follow-Up.**

Step 7. Complete the **mandatory fields.**

Step 8. When all details are complete click **Sign.**

Note: The value in the **Status** column changes to **Processing**.

Step 9. Click **Refresh .**

Note: The value in the **Status** column changes to **Ordered.** The patient is now on the **To be Scheduled** list.

Update an RTT and Discharge a Patient

4. Update an RTT and Discharge a Patient

Step 1. Open the **Appointment Book.**

Step 2. Click the **Appointment Enquiry** (eye) icon**.**

Step 3. From the **Side Bar** menu scroll select **Location.**

Step 4. Select **Clinic Patients Missing Follow-Ups** list.

Step 5. Select **Ambulatory.**

Step 6. Select the **Location**.

Step 7. Select the **Start Date** and **End Date.**

Step 8. Click **Find**.

Update an RTT and Discharge a Patient

Step 9. Highlight the Patient's name and click **Launch Powerchart** .

Step 10. Select **AdHoc.**

Step 11. Select **Referral to Treatment.**

Step 12. Click **Record.**

Step 13. Complete **mandatory fields**, and any comments if necessary**.**

Step 14. Click **Sign Form** icon. This option confirms completion of chart data.

Step 15. Close PowerChart.

Step 16. Right click on the patient in **the Clinic Patients Missing Follow-Ups** list.

Step 17. Select **Modify**.

Step 18. Click on the dropdown arrow next to the **Outcome of Attendance** field and click on **Discharged from Consultants Care.**

Tracking Notes

5. Tracking notes

Step 1. Open **HIM Tracking**.

Step 2. Open the Patient Record by scanning the barcode or searching for Patient manually.

Step 3. Select the relevant volume.

Step 4. Click **Update Location for Selected Records** icon.

Step 5. Select the location to which the notes are to be tracked.

Step 6. Click **OK.**

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 <u>one</u> 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.