



Mini Manual Receptionists

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

Support available:

Please contact your local Champion User

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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.
- Step 6.** Click the **OK** button.
- 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. The rollover text will show the patient has checked in.

Note: To undo a check In right click on the appointment and choose Actions and Check In Undo. Following this right click and choose Patient and Modify Encounter.

Did Not Attend

2. 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.
- Step 5.** The No Show window will open and the date and time fields will be automatically populated.

Note: To undo a DNA right click on the appointment and choose Actions and DNA Undo.

If the patient was discharged following a DNA:

- Step 1.** Click the **PM Office** icon.
- Step 2.** Click on the dropdown arrow and choose **Undo Discharge**.
- Step 3.** Search for the patient.
- Step 4.** Click on the dropdown for **Reason for Correction** and choose the appropriate reason.
- Step 5.** Click the **OK** button.

Cancelling an Appointment

3. 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 eg 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.

Rescheduling an Appointment

4. Rescheduling an Appointment

- Step 1.** Right click on the patient's appointment and click **Actions – Reschedule** from the menu.
- Step 2.** In the **Existing encounter** window click the Yes button to retain the association with the current encounter.
- Step 3.** Click on the **Suggest** button.
- Step 4.** In the Suggested Schedules window click on the **Suggest** button.
- Step 5.** Click on the required appointment time slot.
- Step 6.** Click on the **Select** button.
- Step 7.** 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 8.** Click on the **Confirm** button.
- Step 9.** 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 10.** Click on the **OK** button.
- Step 11.** In the Reschedule window click on the dropdown arrow and choose the **Reason** the appointment needed to be rescheduled from the dropdown list.
- Step 12.** Click on the **OK** button.
- Step 13.** The patient is now confirmed in a new slot.

Modify Appointment Comments

5. 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.

Note: 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.

Business Rules