



## Mini Manual Receptionists

1. Overbooking and Contiguous Slots
2. Group Appointments
3. Recurring Appointments
4. Cancelling Clinics
5. Swap Slots

Support available:

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Bringing it all together

## Overbooking and Contiguous Slots

### 1. Overbooking and Contiguous Slots

**With the patient's appointment details in the Work in Progress window:**

- Step 1.** Click on the **Schedule** button.
- Step 2.** In the **Resource** field click on the drop down arrow and click on the appropriate consultant.
- Step 3.** For overbooking - In the **Default Slot** click on the drop down arrow and click on **(None)**.
- Step 4.** For contiguous slots – Do not change the **Default Slot**.
- Step 5.** In the **Time** field type in or use the arrows to choose the time the patient is due to be seen.
- Step 6.** In the **Duration** field use the arrows to enter the appointment duration.
- Step 7.** Click **OK**.
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- Note:** The appointment will be displayed in salmon with a status of **Pending**.
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- Step 8.** Click on the **Confirm** button.
- Step 9.** In the Did the patient refuse any offered dates? field click on the dropdown arrow and choose Yes or No as appropriate.
- Step 10.** Click OK.
- Step 11.** In the Conflict Window click on Override.

## Group Appointments

### 2. Group Appointments

- Step 12.** Select Task.
- Step 13.** Click Group Session – Create.
- Step 14.** Enter the Appointment Type.
- Step 15.** In the group session type click the ellipsis button. Click on the appropriate Group Session and click OK.
- Step 16.** Type in a Description.
- Step 17.** Enter the Capacity as appropriate.
- Step 18.** Enter the Begin date and Time.
- Step 19.** Click Check. If a conflict has occurred change the details and click Check again and click OK.
- Step 20.** Click Yes on the Create a Group Session window.
- Step 21.** Click the Appointment Tab and choose the Appointment Type.
- Step 22.** Type in the patient's name and click the ellipsis button.
- Step 23.** Click the patient and click the required encounter.
- Step 24.** Click OK.
- Step 25.** Click on the Schedule With field and choose the appropriate type.
- Step 26.** Click on the downward arrow next to Do you wish to Stop the Letter? and choose No (unless it is a short notice appointment).
- Step 27.** Click Move.
- Step 28.** Click Suggest.
- Step 29.** Pick appointment and click Select.
- Step 30.** Click OK.
- Step 31.** Click Confirm and click OK.

## Recurring Appointments

### 3. Recurring Appointments

**With the patient's appointment details in the Work in Progress window:**

- Step 1.** Click Recur.
- Step 2.** Click Recurrence Pattern – Weekly and select the required day for the appointment by clicking on the tick boxes next to each day to be deselected.
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- Note:** In the **Range of Recurrence** the start date will default to today's date.
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- Step 3.** Choose the number of recurring appointments required in the End after Instances field or choose an End date.
- Step 4.** Click OK.
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- Note:** The details for all the appointments will now be visible in the **Work in Progress** window.
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- Step 5.** Click Suggest.
- Step 6.** Click Suggest in the Suggested Schedules window.
- Step 7.** Click on the group of appointments required and click Select.
- Step 8.** Click OK.
- Step 9.** Click on Confirm to confirm all the appointments.

#### Business Rules

- 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.
- 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).

## Cancelling Clinics

### 4. Cancelling Clinics

- Step 1.** Right click on the resource to be removed.
- Step 2.** Click on Resource in the context menu.
- Step 3.** Click Add Resource Comment.
- Step 4.** Type a description into the Comment Description field.
- Step 5.** Type a comment into the Resource Comment field.
- Step 6.** Check the Selected Resource and Begin date / End date fields are correct.
- Step 7.** Click Add.
- Step 8.** Click Apply and then click **Close**.

**Note:** An aqua blue bubble is displayed next to the resource name and the comment will be displayed when the speech bubble is double-clicked.

- Step 9.** Click on one of the slots to be removed and hold shift key to select multiple slots. Use the control key to select non-adjacent slots.
- Step 10.** Click on Slots in the context menu and then Remove Slots.
- Step 11.** In the warning window click **Yes**.

#### Business Rules Continued

- Check in must be performed in real time and demographics checked including Ethnic category and phone number.
- An outcome form must be completed for every patient seen with one RTT status selected.
- Check out must be performed real time.
- Follow ups must only be booked if within 6 weeks.
- If a follow up is due more than 6 weeks in the future an order is placed in PowerChart.
- Receptionists/Admin staff will ensure that the correct 18 week pathway is selected when booking a follow up appointment.

## Swap Slots

### 5. Swap Slots

- Step 1.** Right click on the patient in the **To be Scheduled** list.
- Step 2.** The patient's details will be in the **Work in Progress** window ready for booking an appointment.
- Step 3.** In the **Appointment Attributes** window choose No for **Do you wish to stop the letter?**
- Step 4.** Click on the first slot to be removed and hold shift down and select all other slots to be removed. Use the control key to select non-adjacent slots.
- Step 5.** Right click and choose **Slots** and then **Remove Slots**.
- Step 6.** In the warning window click **Yes**.
- Step 7.** Click **Schedule**.
- Step 8.** Click on the **Default slot** dropdown arrow and click on **(None)** at the top of the list.
- Step 9.** Click into the **Time** field and enter the required start time. Click into the **Duration** field and enter the required duration.
- Step 10.** Click the **OK** button.
- Step 11.** Click the Confirm button.
- Step 12.** Click the OK button.

#### Business Rules Continued

- Patients not receiving any future appointment must be discharged.
- Notes must be tracked using a push method in real time.
- Overbooking clinics must be agreed with the relevant clinician and specialty manager, this will be monitored regularly.
- 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.