Royal United Hospital Bath NHS
NHS Trust

Mini Manual

Receptionists

1. **PAS Standard Enquiry/Pathway List**
2. **Clinic Sign Off List**
3. **Deferred List**
4. **Missing follow-up List**
5. **To be Scheduled List**

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BT
Bringing it all together

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PAS Standard Enquiry List

1. PAS Standard Enquiry List/Pathway Enquiry List

Scenario: A list of the patient's appointments within a particular date range.

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

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

Step 3. Click on the **Person** tab.

Step 4. In the **Enquiry** field choose the **PAS Standard Patient Enquiry** list.

Note: Use the **Pathway Enquiry** to view the clinician (resource) the patient has seen.

Step 5. Type in the patient's surname and click on the ellipsis button. Select the patient from the patient search window and click OK.

Step 6. Ensure the required **Start Date** and **End Date** is entered. You can type T from the keyboard to enter today's date or use the up and down arrows to select the date.

Step 7. Click **Find**.

Note: To see a future appointment enter the future date in the End Date field.

Clinic Sign-Off List

2. Clinic Sign Off List

Scenario: To be run following every clinic to check the status of the patients. Their status should be Checked Out, Cancelled or No show.

Step 1. Open the Appointment Book.

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

Step 3. Click on the **Location** tab.

Step 4. In the **Enquiry** field choose the **Clinic Sign Off by Location** list.

Step 5. In the **Location type** field choose **Ambulatory**.

Step 6. In the **Location** field choose the appropriate clinic.

Step 7. Ensure the correct **Start Date** and **End Date** is entered. You can type T from the keyboard to enter today's date or use the up and down arrows to select the date.

Step 8. Click **Find**.

Deferred List

3. Deferred List

Scenario: A list of patients who have cancelled appointments.

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

Step 2. Click **Appointment Enquiry** icon**.**

Step 3. Click on the **Location** tab.

Step 4. In the **Enquiry** field choose the **Deferred Encounters w/o Request l**ist.

Step 5. In the **Location type** field choose **Ambulatory**.

Step 6. In the **Location** field choose the appropriate clinic.

Step 7. Ensure the correct **Start Date** and **End Date** is entered. You can type T from the keyboard to enter today's date or use the up and down arrows to select the date.

Step 8. Click **Find**.

Note: To reschedule the appointment from the Deferred list right click on the patient and click on **Reschedule**. The patient's details will be entered into the appointment tab ready to book the appointment.

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).

Missing Follow-up List

4. Missing follow-up List

Scenario: A list of patients who have been checked out of clinic and require further action. Only action patients from this list if the 'Request Present' field is No. If 'Request Present' is Yes they must be actioned from the To be Scheduled list.

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

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

Step 3. Click on the **Location** tab.

Step 4. In the **Enquiry** field choose the **Clinic Patients Missing Follow-ups** list.

Step 5. In the **Location type** field choose **Ambulatory**.

Step 6. In the **Location** field and choose the appropriate clinic.

Step 7. Ensure the correct **Start Date** and **End Date** is entered. You can type T from the keyboard to enter today's date or use the up and down arrows to select the date.

Step 8. Click **Find**.

Business Rules Continued

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.

To be Scheduled List

5. To be Scheduled List

Scenario: A list of patients who have had an order for a follow-up placed in PowerChart.

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

Step 2. Click **Appointment Enquiry** icon**.**

Step 3. Click on the **Request List** tab.

Step 4. In the **Enquiry** field choose **2. To be Scheduled** list.

Step 5. In the **Request List Queues** field choose the appropriate queue.

Step 6. Click **Find.**

Note: To book an appointment from the To be Scheduled list right click on the patient and click on **Schedule**. The patient's details will be entered into the appointment tab ready to book the appointment.

Business Rules Continued

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.