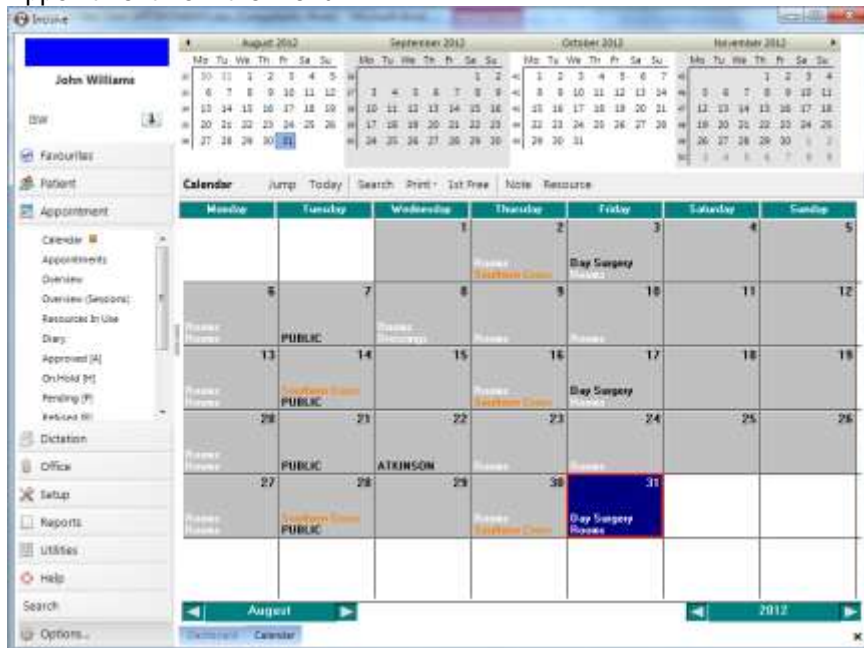


TUTORIAL: APPOINTMENTS

The Appointment Book is used to book patients into either consulting or operating sessions. It can also be used for booking a patient with a nurse or technician, and waiting lists.

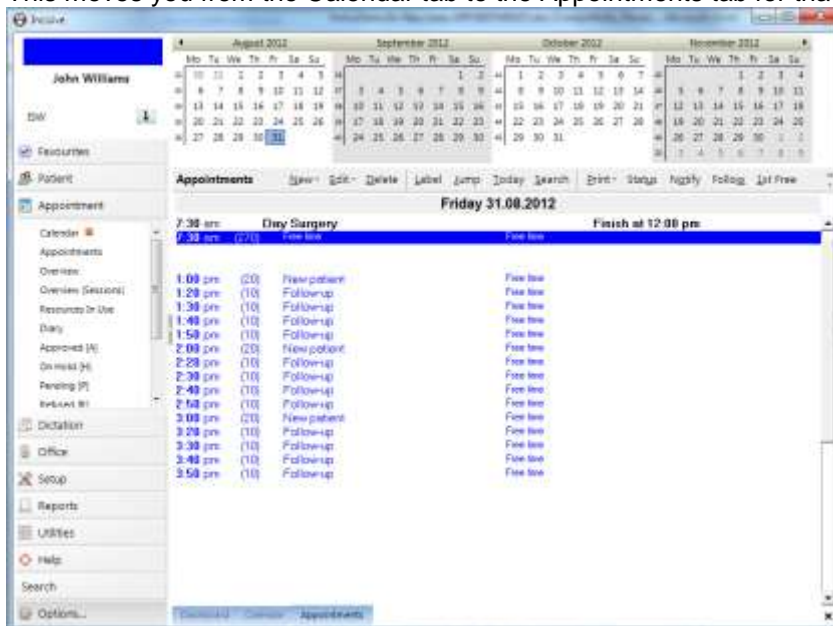
Navigating the Appointment Book

1. Appointment from the menu

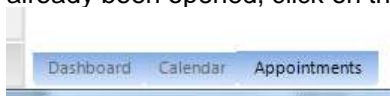


The monthly calendar will display.

2. Click on the day of the clinic.
This moves you from the Calendar tab to the Appointments tab for that day.



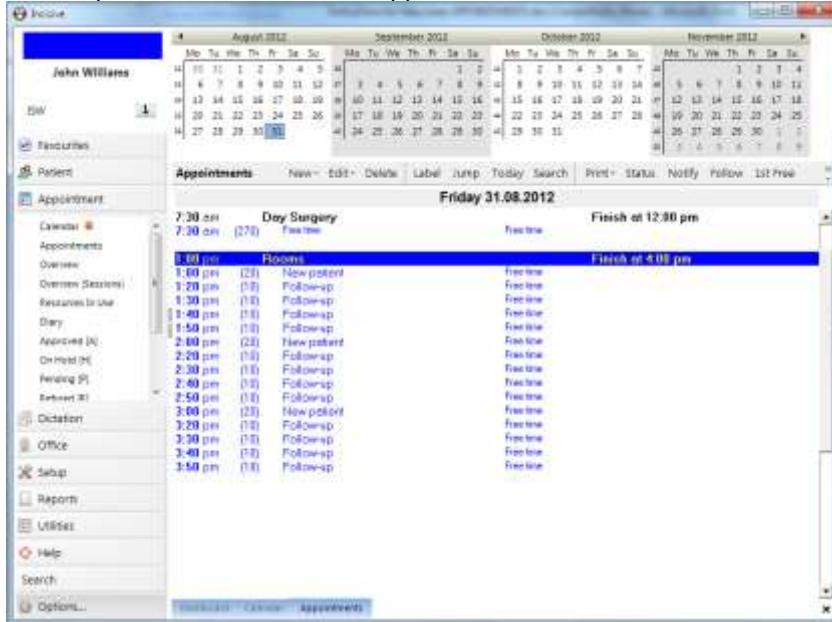
3. Use the left-hand menu to go to other Appointment Book options or, if the option has already been opened, click on the tab at the bottom of the screen.



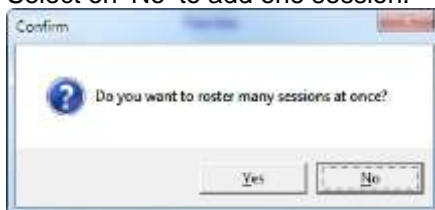
To add a new Session.

The best way to think of a session is as a container that holds the appointments. You cannot make appointments without a session.

- To setup a new session to add appointments, click on New and select Session



- You can either roster multiple sessions, or add a 'one-off' session. Select on 'No' to add one session.



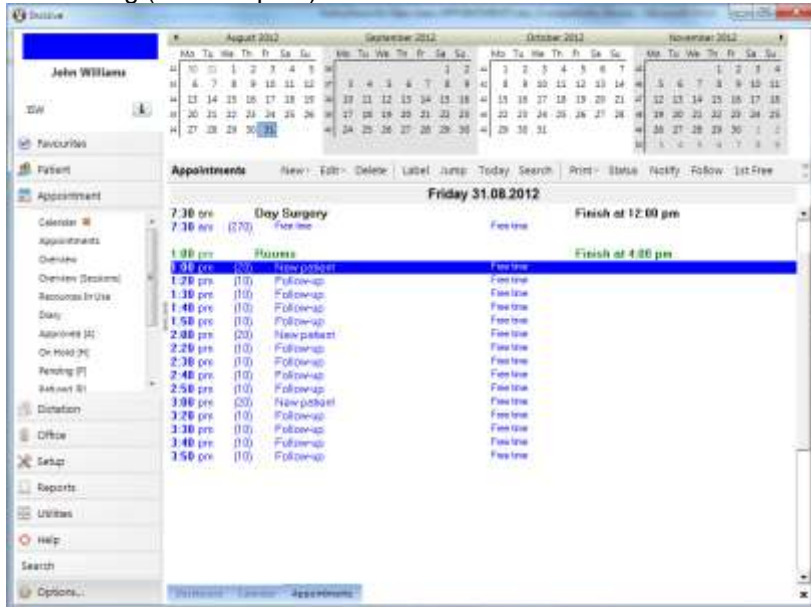
- On the next screen select the appropriate Session Type required, from the selection. Enter the Start and Finish times and the Description and click OK. If an operating session – you can add the usual anaesthetist.

This creates the appointments slots for you on the Appointments screen.

To make an appointment

The term 'appointment' is the same as 'booking'; and the method used is the same whether you are making a consultation appointment or a booking for theatre.

7. Ensure that the focus is on the appropriate free time slot for the appointment that you are making (i.e. 1.30 p.m.).



Remember that the time slots showing are really just lines on a page – you do not need to be restricted to booking the patient into the displayed time slot.

Nor do you need to match the appointment type with text in the time slot – it is just a guide.

8. Either:
 - Click on New and select Appointment, or;
 - Double-click on the empty slot

The Patient selection screen will display.



- Type in the first few letters of the surname for the patient and press Enter or click on 'Search'.

199 patients found

Last Name	First Name(s)	Address	City	DOB	Age	Medicare	Alt ID
SMITH	Abdul			12.09.1960	51		971593
SMITH	Adrian	25 BARKER RD.	NAPIER	24.07.1947	45		98489
SMITH	Alan	RAUPARE RD 5 R D 5,	HASTINGS	03.02.1974	38		
SMITH	Albert John (John)	59 Santa Ave	HAELOCK NOR	03.06.1962	50		981467
SMITH	Alexandra Denise	894 COOK PL.	HASTINGS	30.01.1962	50		931423
SMITH	Allison (Allison)	461 CHARLES ST.	HASTINGS	26.12.1949	52		98925
SMITH	Alistair	534 Hart Drive	HASTINGS	16.07.1993	19		981316
SMITH	Andrew	BOX 8985,	HAELOCK NOR	27.12.1946	55	FAS2916	982572
SMITH	Angela Marie	528 FENWICK ST	HASTINGS	08.02.1957	55		94825
SMITH	Antia	157 Malahour Road Tutira	H.B.	23.10.1919	92		962391
SMITH	Ann		ACCASSESS	11.12.1923	88		951341
SMITH	Anna (Anna)	54 McDONALD STREET,	NAPIER	17.02.1995	107		93435
SMITH	Barbara	41 MONTANA RD RD 5,	HASTINGS	19.07.1945	67		951163
SMITH	Barbara	1584 Cunningham Cres	HASTINGS	29.07.1950	62		94522
SMITH	Bay	48 Walton Way	FLAMERE	21.01.1955	57		931439
SMITH	Bee	457 BRUNSWICK ST.	HASTINGS	07.03.1935	77		94414
SMITH	Ben	TE WHANARU 1,	HASTINGS	12.06.1921	91		98918

- Select the correct patient from the list. If the patient is not on the list either use the 'Find Patient' to additional search options, or use the 'New Patient' to add a new patient to the database.
- Press Enter to Select the patient (or double click with the mouse). The New Appointment – Patient Registration screen will display.

1. Name

Title: Bishop Sex: F

First Names: TEST

Last Name: PATIENT

D.O.B: 02.06.1960 PATTT 60

2. Contact Details

Home Ph: 03 343 6880 Work Ph: 03 343 6882

Mobile Ph: 034 4438 4406 Opt in to SMS Messaging

Physical Address: 99 WHERE ST

Town/City: CITYTOWNTEST

PostCode: State:

Email:

Search GP By: Surname

GP:

Alerts:

Buttons: Help, Cancel, More, Forward >

The focus should be on the Forward button. If the details are correct, press Enter (or F12).

- Enter in the details of the appointment booking.

If the Appointment time is correct (taken from the start of the free time slot you originally selected) then press enter to accept the Appointment Time (or change as required). Either 24hr or 12hr format is accepted.

Appointment

Appt Time: 1:00 pm Notify if earlier appt?

Appt Type: REV Followup consultation

How Long: 10

Details: Review of MRI - L) knee

Budget:

Alerts:

Cancel < Back Forward >

Select “Notify if earlier appt” if the patient requests to go on a notification list.

From the list of available Appointment Types select the one that you want. Note you cannot add new appointment types here. That is done in Setup – Appointments – Appointment Types.

Selecting the Appointment Type will enter the default number of minutes required for this appointment type. If more or less time is required, change as appropriate.

Appt Type: REV Followup consultation

How Long: NP, PO, PUVA, REV, SUT, VFT

Details:

Budget:

If the default amount of time for the appointment is incorrect, then this can also be changed via Setup – Appointments – Appointment Types.

Enter any further details about the appointment as necessary.

Details: Review of MRI - L) knee

Select Forward (F12).

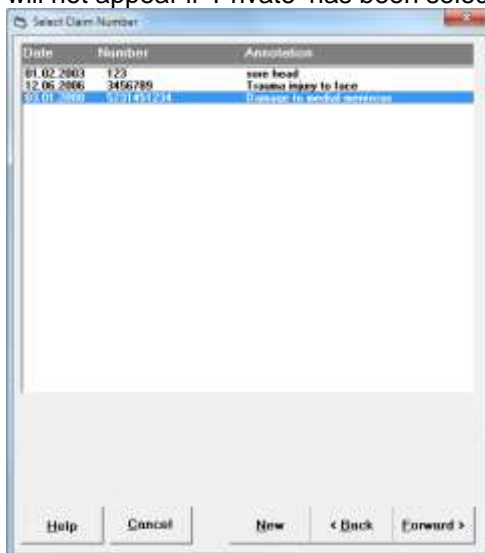
- On the ‘Select Referral’ screen, ensure the correct referral is selected and that it has not expired.

If you are adding a new patient you may also be prompted to add the referral details.



Select Forward (F12)

- Then, if the default Billing Type for this patient requires a 'Claim number' (e.g. ACC or WorkCover), check that the right claim is selected and click on forward. This screen will not appear if 'Private' has been selected as the 'Billing Type' on the referral.



- Finally, select OK on the last screen (Make Appointment).

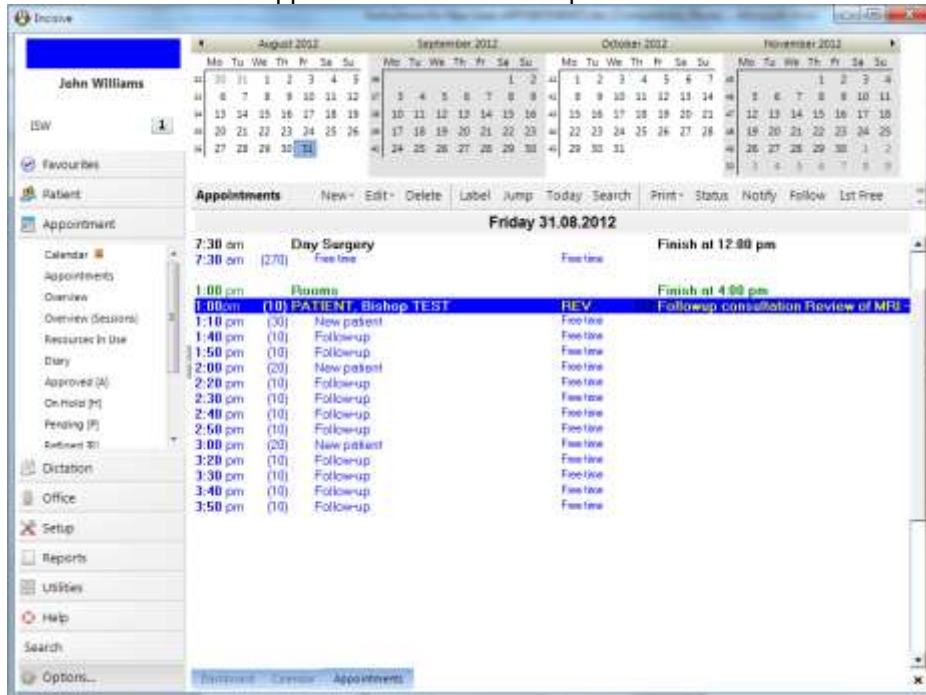


Confirm the appointment details with the patient

If SMS (txt reminder) is enabled, confirm you want it sent

If the patient is at the reception and you are making a follow-up appointment, use the 'Label & OK' option to print a label with the appointment details on it and stick it to the back of the doctors card.

16. You will return to the Appointments tab and the patient will be listed.



Advanced

Operation booking

When making a booking in an operating list, the only difference will be that there are more fields available to enter additional information about the operation.

1. Appointment

Appt Time 7:30 am Notify if earlier appt?

Reporting 7:30 am Rept. Date 31.08.12

Appt Type [dropdown]

How Long [text]

Details [text]

Budget [text]

2. Operation Details

Anaesthetic [text]

Remarks [text]

Fasting Time From [text] Post-Op Date [text] Post-Op Time [text]

Alerts: [icons]

Cancel < Back Forward >

Prompts

When making the booking there are a number of prompts that may appear requiring your attention.

Medical Warning

Sign Off Medical Warnings

Login SH

Password [masked]

Enter your operator login and password. Use your login and password even if SPM was logged in by another operator. The fact that you have read these warnings will be logged in the database. You can press cancel now and go back to read them again but you cannot proceed until you 'sign off' the warnings.

Cancel OK

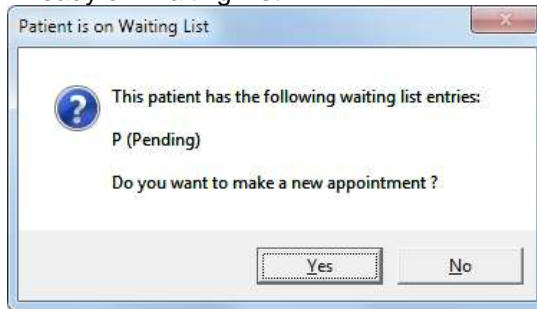
Alerts

Alerts:

[icons]

Help Cancel

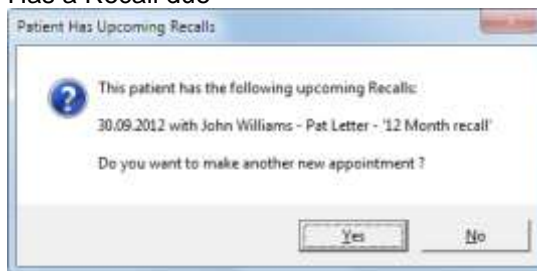
Already on Waiting List



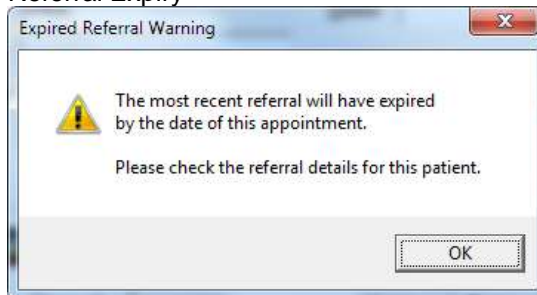
Already has an appointment booked



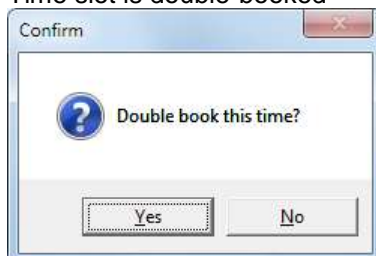
Has a Recall due



Referral Expiry



Time slot is double-booked



Double-booking a time

You are able to double (or more) book a time. A prompt will appear as a warning. The double-booked time will appear in RED

1:00pm (10) PATIENT, Bisho
1:07pm (10) MOUSE, Mrs Min

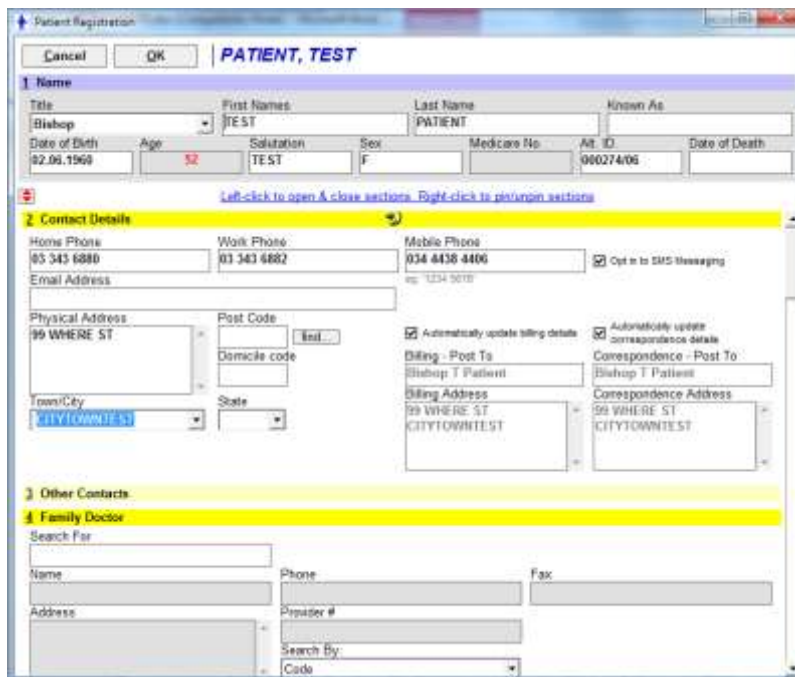
Checking & changing patient details

As you are making the appointment, when you have selected the patient a screen will appear with their basic demographic details, such as address, phone numbers etc.

If you want to add to or change their other details you can select the 'More' button which will forward you to the usual Patient Registration screen.



This screenshot shows a search interface. At the top, there is an 'Email' label. Below it, a 'Search GP By' dropdown menu is set to 'Surname'. A text input field for 'GP' is empty. A 'Refresh' button is located to the right of the input field. Below the search area, there is an 'Alerts' section with a speaker icon and a volume slider. At the bottom, there are four buttons: 'Help', 'Cancel', 'More', and 'Forward >'. The 'More' button is highlighted with a grey border.

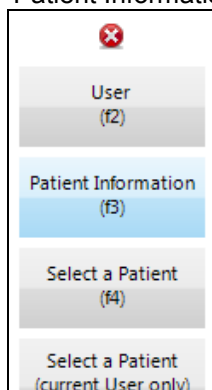


This screenshot shows the 'Patient Registration' form for a patient named 'TEST'. The form is divided into several sections:

- 1 Name:** Includes fields for Title (Bishop), First Name (TEST), Last Name (PATIENT), and Known As. It also has fields for Date of Birth (02.06.1969), Age (52), Salutation (TEST), Sex (F), Medicare No., and Art. ID (960274/06).
- 2 Contact Details:** Includes fields for Home Phone (03 343 6880), Work Phone (03 343 6882), and Mobile Phone (034 4438 4406). It also has an 'Email Address' field and a checkbox for 'Opt in to SMS Messaging'. There are checkboxes for 'Automatically update billing details' and 'Automatically update correspondence details'. Billing and Correspondence addresses are listed as '99 WHERE ST CITYTOWNTEST'.
- 3 Other Contacts:** A section for additional contacts.
- 4 Family Doctor:** Includes a 'Search For' field and fields for Name, Phone, Fax, Address, and Provider #.

Look-up Patient records (F3)

To look-up the patient's Letters, Notes and other records held in the Patient module, highlight their name in the Appointment screen and press the F3 key or select the 'Patient Information' option in the Toolbar.



This screenshot shows a toolbar menu with a red 'X' icon at the top. The menu items are:

- User (F2)
- Patient Information (F3) - This item is highlighted with a blue background.
- Select a Patient (F4)
- Select a Patient (current User only)

Quick Appointments

An option is available, when booking the patient, to skip the prompts for Referral and Claim information. This option is called 'Quick Appointments' and is turned on/off in *Setup → Appointments → Provider Settings*.

The purpose of this is to allow you to speed up the process of making an appointment, especially by telephone. You will be required to complete the referral details when the patient presents to reception.

This option should only be used if you are an advanced user of the SPM application, as there are significant consequences relating to making a booking for a patient who does not have a referral.