

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

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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.

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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.

Dashboard	Calendar	Appointments
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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.

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

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

-		
Do y	ou want to roster many session	ns at once?
•		

6. 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.

Session Type	Braemar Day	6
Starting Time	0800	
Einishing Time	1200	
Beporting Time	1	(optional default time)
Repeat gvery	1 weeks	from Tue 03.07.2007
Untit	31.12.2007	
Description	Braemar Day	Stay
Surgeon	Winston McE	wan
Annesthetist	Dr Smith	
Assistant	-	

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.).

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John Williams	4 4 4		7 4 7 8 15 11 12 7 17 13 15 8	1 14 14 14 14 15 14 14 1 4 3 4 7 1 1 12 15 14 15 7 14 15 15 14 15 7 14 15 15 15 15 8 15 15 15 15 15 1 15 15 15 15 15 1 15 15 15 15 15 1 15 15 15 15 1 15 15 15 1 15 15 15 15 15 15 15	2 4 3 2 3 8 41 8 20 3 18 4 15 18 37 23 42 22 23 34	Th A Sa Sa Sa 4 3 6 7 a 12 12 13 14 a 13 13 21 21 4 a 25 26 21 21 24 a	28 20 25 27 29 24 25	
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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.

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

gumame sмt I 99 patients fou	Search		ile Number ledicare No. User (W)	C Date o Alterno	vie ID		
Last Name	First Name(s)	Address	City	008	Ann	Medicare	AILID
SMITH	Abdul	Princips	SARY	12.09.1960	51	Medicare	97/1593
BMIDH	Adrian	25 BARKER RD.	NAPIER	24 07 1947	65		004488
SMITH	Alan	RAUFARE RD5 R D 5	HASTINGS	03.02.1974	38		
SMITH	Albert John (John)	50 Samta Ave	HAVELOCK NOR		50		93/1467
SMITH	Alexandra Denise	894 COOK PL	HASTINGS	30.01.1962	50		B3/1423
SWTH	Alison (Alison)	461 CHARLES ST.	HASTINGS	26.12.1949	62		96/925
SWITH	Alistair	534 Hart Drive	HASTINGS	16.07 1993	19		88/1316
BWITH	Andrew	BOX 8985.	HAVELOCK NOR	27.12.1946	65	FAS2916	99/2572
SMITH	Angela Mate	528 FENWICK ST	HASTINGS	09 02 1957	55		94/825
SMITH	Anita	167 Matahoura Road Tutina	HB.	23 10 1919	92		96/2391
SMITH	Ann		ACC ASSESS	11.12.1823	88		95/1341
SWITH	Anna (Anna)	64 MCDONALD STREET,	NAPIER	17.02.1905	107		93/435
SMITH	Barbara	41 HONTANARD RD 5.	HASTINGS	10.07.1945	87		95/1163
SMITH	Barbara	1584 Cunningham Cres	HASTINGS	29.07.1950	-62		94/522
SMTH	Bay	40 Walton Way	FLAMMERE	21.01.1058	57		93/1439
SWITH	Bee	457 BRUNSWICK ST.	HASTINGS	07.03.1935	77		94414
SMITH	Ben	TE WHANA,RD 1.	HASTINGS	12.06.1921	91		08/918
+							+

- 10. 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.
- 11. Press Enter to Select the patient (or double click with the mouse). <u>The New Appointment – Patient Registration screen will display.</u>

1 Name		3200		
Title	Bishop	*		Sex F
First Names	TEST			
Last Name	PATIENT			
D.O. <u>B</u>	02.06.1960	PATTT 60		
2. Contact De	tails			
Home Ph	03 343 6880	Work Ph	3 343 6882	2
Mobil <u>e</u> Ph	034 4438 4486	P Opt in to	SMS Mes	saging
Physical A <u>d</u> dress	99 WHERE ST			
Town/City	CITYTOWNTES	st		
PostCode			State	
Email	-			
Search GP By GP	Surname •	Г		
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and a second second				

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

12. 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.

Appointmen	nt		-
Appt <u>T</u> ime	1:00 pm	₽ Notity if earlier appt?	
Appt Type	REV	 Followup consultation 	-1
How Long	10	2	
Details	Review of MRI	-L) knee	
Budget			-
arts: alfa	-		
erts: २)(जु	9		
erts: ol g	•		

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.

Аррt Туре	REV	Followup consultation
How <u>L</u> ong	NP	
<u>D</u> etails	PO PUVA	
	REV SUT	
B <u>u</u> dget	VFT	

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

Enter any fu	irther details about the appointment as necessary
<u>D</u> etails	Review of MRI - L) knee

Select Forward (F12).

13. 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.

iatu	Reterral		Comme	100
5 17 2003 9 11 2006 0 05 2007 4 08 2008 13 06 2010	Paukit Pavata Theopon Walkcover Theopon ACC Private Sheldan Walkcover	GP Other Not Applicable GP Other Bot Applicable Self-referred Not Applicable GP Not Applicable	Dy Carol ubninjie Dr Carol Sore wi	copic ne yn Thompson et Sheidon
	WARNERS	Referration	stare left IUIO ISSERIAE	knee

14. 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.

)ate	Number	Annotation	
1.62.2003	123 3456789	sere head Trauma injury to face	-
	350/14966.7A	And the second second second	10

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

Maka Appointm	
Patient	MOUSE, Mrs Minivero 123 Harakeke St. Riccarton
Appointment	Fridøy 31 August 2012, 1:10 pm
Referral	0306.2010 GP Dr Paul Sheidon
Claim Number	03.01.2008 5231451234 Demage to medial maniscus
Resources	8
Mobile	0274333843
	Sond SMS Appointment Reminder Disr Reporting Time in manifer instead of Appointment Time
SMS Preview	Appt reminder for Minners on Fin 31 Aug at 1.10 pm with Dr. John Williams. Call 03 343 6882 to confirm
Cancel	K Beck Lebel & QK

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.

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		Mo Tu	August 20 We Th Pr	38 Su			1007-2011 71- 1/1		Mal	Deteine Tu We T	t fr Sa		Mo. 7	coversaer. 2 Wy 76		* 30	
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🚇 Patient		Appointe	wents	New-	Edit- D	elete	Label	Amp	Today	Search	Print -	Status	Noti	y Follow	A LST R	ee :	4
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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.

Appt Time	7:30 am		otify if ea	arlier appt?
Reporting	7:30 am	Rept	Date	31.08.12
Appt Type	1	•		· · · · · · · · · · · · · · · · · · ·
How <u>L</u> ong	-			
Details				
Budget	1			n.
Operation De	etails			
1 M 100	stails			
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, Operation De Anaesthetic Remarks Fasting Time From Post-Oo Date		Post-	Op Ti <u>m</u> e	3
Anaesthetic Bemarks Fasting Time		Post-	Op Ti <u>m</u> e	8
Anaesthetic Bemarks Fasting Time From Post-Op Date		Post	Op Ti <u>m</u> e	8
Anaesthetic Bemarks Fasting Time From		Post-	Op Ti <u>m</u> e	3
Anaesthetic Bemarks Fasting Time From Post-Op Date		Post-	Op Ti <u>m</u> e	3

Prompts

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

Medical Warni	ng
Sign Of	ff Medical Warnings
Login SH	
Password	-
login and password another operator. Th wornings will be log press cancel now an	login and password. Use your even if SPM was logged in by he fact that you have read these ged in the dotabase. You con d go back to read them again but until you "sign off" the warnings.
Cancel	🖌 ОК
Alerts	
Alerts:	10 - 1
<u>H</u> elp	<u>C</u> ancel

Already on Waiting List

Patient is	on Waiting List
?	This patient has the following waiting list entries: P (Pending) Do you want to make a new appointment ?
	<u>Үез</u> <u>N</u> о

Already has an appointment booked

0	This patient has the following upcoming appointments:
	31.08.2012 with John Williams
	Do you want to make another new appointment ?

Has a Recall due

Patient Ha	s Upcoming Recalls	-
0	This patient has the following upcoming Recalls: 30.09.2012 with John Williams - Pat Letter - '12 Month re Do you want to make another new appointment ?	call'
	Ţe	No

Referral Expiry

1	The most recent referral will have expired by the date of this appointment.
	Please check the referral details for this patient.
	OK

Time slot is double-booked

2	Double book	this time?	
ſ	Yes	No	1

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.

Email Search GP	By Sumame *					
GP						
		Befresh				
Alerts: 4						
Help	Cancel	More	Eorward >			

Cancel	QK	PATI	ENT, TES	ST						
Name										
Tale		First No	met	Last Name		ne	Known As			
Bisbop + TEST			10.0	PATIE						
Date of Elvth	Apr	58	latation	ation Sex		Medicare No		0	Date of Death	
02.06.1960 S2 TE:		ST	F			000274/06				
9		Left-cit	k to open A c	lose sectio	ca Right-ch	ck to pis/unpin a	aition			
Contact Details				3	2					
Home Phone		Walk Pt	ione.	té Mobie Phone						
03 343 6880		03 543	882	82 034 4438		8 4406		Cut in to SMS thesauging		
Email Address					eg: '1234 5010'					
A CONTRACTOR OF A										
Physical Address		Post Co			-			Autoritation	for up data	
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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.

۲
User (f2)
Patient Information (f3)
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 \rightarrow Appointments \rightarrow 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.