NORTHLAND DISTRICT HEALTH BOARD
Te Poari Hauora Ā Rohe O Te Tai Tokerau

Northland District Health Board

WebPAS/Best Practice

Outpatients Appointment & Clinic User Guide

31/05/2018
This report contains 73 pages

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1   CONTENTS

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RED = Business Rule
Black Bold = Action
BLUE = View
External Guidelines/Policy

2 CLINIC MAINTENANCE

This section details information about how to manage clinic sessions and clinic details within webPAS. It is divided into three parts:

Opening and Closing Clinics

In order to book patient appointments you will require open clinic sessions. The opening and closing of these sessions will be based around the clinician roster for your department and other ad-hoc requests.

Note: Only open clinics when you know the roster is confirmed. Don't open clinics forever into the future just because you might need them as this can restrict other hospitals/departments being able to open their clinics and also gives an incorrect impression of the department's capacity.

Clinic Searches

Once opened > clinics will display in the webPAS clinic searches.

Managing Clinic Appointment Slots

WebPAS gives you the ability to adjust how many or what type of appointment slots are available in open clinics.

2.1 OPEN CLINICS

The following details how to open clinic(s) so that they are available for booking into, once opened these clinics will display in the clinic search options:

Note: If at any point during the following processes you are unable to find the options you require; please send a Clinic Request form via email to customer services ISServiceDesk@northlanddhb.org.nz for this to be added.

This form can be found by clicking on the help [icon] icon found in the top right hand corner of webPAS.

1. At the hospital level, select **Open/Delete Clinic Sessions** from the Actions menu > the Clinic List screen will be displayed:

Clinic List - Open/Delete Sessions			Clinic KV200	Goto
Clinic	**Effective Date**	**Clinic Description**	**Doctor**	**Active**
133JV	01 Jan 2010	Lockie Teague	TEAGUE Lockie (DR)	Yes
141WV	17 Mar 2017	Scott Davidson (GP)	DAVIDSON Scott ((DR)	Yes
155SL	01 Jan 2010	Peripheral Visual Field Tester	PERIPHERAL VISUAL FIELD TESTER	Yes
214HX	01 Jan 2010	Russell Bourchier	BOURCHIER Russell (MR)	Yes
225LH	01 Jan 2010	Andrew Hill	HILL Andrew A (DR)	Yes
248LM	01 Jan 2010	David Dalziel	DALZIEL David (MR)	Yes
259BX	01 Jan 2010	David Crabb	CRABB David (MR)	Yes
291RW	01 Jan 2010	Stephen Dunn	DUNN Stephen (MR)	Yes
300MC	01 Jan 2010	McGrath Registrar Team	REGISTRAR Mcgrath (DR)	Yes
303NN	01 Jan 2010	Anthony Nixon	NIXON Anthony (MR)	Yes
		<< Previous	Next >>	

2. Type in the Clinicians Code in **UPPER CASE** in the **Clinic** field (highlighted above)

Note: If you are unsure of your clinician's code you can use the webPAS Clinician Search - Finding their Code to find this.

3. Click the [Goto] button

4. Click the icon [icon] beside the required clinician > The Clinic Master List will display:

Open/Delete Sessions Clinic Master List - KV200 , Kelly Vince			
Day of Week	**Time**	**Clinic Type**	**Clinic Indicator**
Monday	09:00 to 11:10	Orthopaedic	Consultant
	10:00 to 15:30	Orthopaedic	Consultant
	12:30 to 15:00	Fracture	Consultant

Note: If for some reason the day, clinic or time-frame you need does not display:
- Please send an email request to customer services ISServiceDesk@northlanddhb.org.nz for this to be added.

5. Click the icon [icon] next to the day and time you want to open clinics for > The Master screen will display.

6. Click the [Slot Template] button > The Open Slot Template Master List will display:

Open/Delete Sessions - Open Slot Template Master List - Kelly Vince				
Day of Week		**Monday**	Start Time	**09:00**
Date Clinic Opened			Date Clinic Closed	
Schedule	**Open Date**	**Finish Time**	**Slot Time Allocated**	**Slot Template/Open**
CB	29 Oct 2015	15:30	10	CB
CW	29 Oct 2015	11:10	10	CW
		Clinic Master	Cancel	Closed Templates

Note: If you are unsure of which one to pick:
- *The last letter in the template code stands for the hospital e.g. C**B** stands for "Bay of Islands"*
- *You can also click on the [icon] icon to see further details.*

7. Click the [icon] icon next to the correct template > the Slot Template will display *(this is the basic set-up of your clinic):*

Kelly Vince - Slot Template				
Day of Week	**Tuesday**		Start Time	**08:30**
Bookings Finish Time	**09:30**		End of Session Time	**09:40**
Clinic Type	**Fracture**		Clinic Indicator	**Consultant**
Schedule	**CW - 01 Jan 2010**		Slot Time Allocated	**10**
Comments			Instructions	

Slot	**Time**	**Visit Type**		**All**
10/ 0	08:30	Follow Up -1 Slot		☐
20/ 0	08:40	Follow Up -1 Slot		☐
30/ 0	08:50	Follow Up -1 Slot		☐
40/ 0	09:00	Follow Up -1 Slot		☐
50/ 0	09:10	Follow Up -1 Slot		☐
60/ 0	09:20	Follow Up -1 Slot		☐
70/ 0	09:30	Follow Up -1 Slot		☐
	New Visit Type [▼]	Unavailable [▼]		
Add	Add Multiple	Open Sessions	Update	Delete	Group Booking	Cancel	Delete Sessions
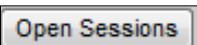
8. Click on the [Open Sessions] button > The Open Sessions screen will display:

Open/Delete Sessions - Open Sessions - Kelly Vince			
Day of Week	Monday	Start Time	09:00
Bookings Finish Time	15:30	End of Session Time	15:30
Clinic Type	Orthopaedic	Clinic Indicator	Consultant
Schedule	CB - 29 Oct 2015	Slot Time Allocated	10
Comments	KV200	Instructions	

Last Open Session Date: 31 Dec 2018 ☐

2017

				All	All	All	All	All
4 Week	2 Week	Clear						
January				2 ☐	9 ✓	16 ☐	23 ✓	30 ☐
February				6 ☐	13 ☐	20 ✓	27 ☐	
March				6 ✓	13 ☐	20 ✓	27 ☐	
April				3 ✓	10 ✓	17 ☐	24 ☐	
May				1 ✓	8 ☐	15 ✓	22 ✓	29 ✓
June				5 ☐	12 ✓	19 ✓	26 ✓	
July				3 ☐	10 ✓	17 ✓	24 ✓	31 ✓
August				7 ✓	14 ☐	21 ✓	28 ☐	
September				4 ☐	11 ✓	18 ✓	25 ☐	
October				2 ✓	9 ☐	16 ✓	23 ☐	30 ✓
November				6 ✓	13 ✓	20 ✓	27 ✓	
December				4 ☐	11 ✓	18 ☐	25 ☐	
	View Prev Year	<< Previous Year	OpenSess	Cancel	Next Year >>	Other Template	Public Holidays	Leave Dates	Suspended Dates

- *The example above shows a view of all the* <u>*Tuesday*</u> *clinics available to be opened for the time-frame selected*
- *Grey ticks* ☑ *are clinics already open.*
- *Green shaded boxes mean that a clinic is already open in* <u>*another*</u> *Slot Template for this day (you will need to close this before you can open what you need)*
- *Orange shaded boxes mean that the clinic has been suspended (you will need to un-suspend before you can open this clinic)*
- *Blue shaded boxes are public holidays (these can be opened but only if you specifically tick the box).*

9. Tick the boxes or use the buttons to select the required dates

10. Click on the [OpenSess] button > *the selected sessions are now open for booking.*

11. If you have other clinics you want to open, use the cancel buttons to go back to the beginning. Otherwise you can just leave this screen by clicking on another option like patient search.

2.2   CLOSE CLINICS

The following details how to close clinics. The webPAS term is to "Delete" a session; however it does no more than close the session off so it does not appear for booking.

It is also recommended that you use this option as a preference over "suspending" as "suspending" clinics stops other hospitals being able to open clinics on the same day as the suspended one.

Note: If during the following process what you require does not display; please send an email request to customer services ISServiceDesk@northlanddhb.org.nz for this to be added.

1. At the hospital level, select **Open/Delete Clinic Sessions** from the Actions menu > the Clinic List screen will be displayed
2. Type in the Clinicians Code in **UPPER CASE** in the **Clinic** field
3. Click the [Goto] button

4. Click the icon [icon] beside the required clinician > The Clinic Master List will display

5. Click the icon [icon] next to the day and time you want to open clinics for > The Master screen will display.

6. Click the [Slot Template] button > The Open Slot Template Master List will display:

Open/Delete Sessions - Open Slot Template Master List - Kelly Vince				
Day of Week		Monday	Start Time	09:00
Date Clinic Opened			Date Clinic Closed	
Schedule	Open Date	Finish Time	Slot Time Allocated	Slot Template/Open
CB	29 Oct 2015	15:30	10	CB
CW	29 Oct 2015	11:10	10	CW
		Clinic Master	Cancel	Closed Templates

Note: If you are unsure of which one to pick:
- *The last letter in the template code stands for the hospital e.g. C**B** stands for "Bay of Islands"*
- *You can also click on the [icon] icon to see further details.*

7. Click the [icon] icon next to the correct template > the Slot Template will display *(this is the basic set-up of your clinic)*

8. Click on the [Delete Sessions] button > The Delete Sessions screen will display:

Open/Delete Sessions - Delete Sessions - Peter Dryburgh				
Day of Week	Monday	Start Time	09:00	
Bookings Finish Time	09:00	End of Session Time	12:30	
Clinic Type	General Surgery	Clinic Indicator	Consultant	
Schedule	1W - 01 Apr 2017	Slot Time Allocated	30	
Comments		Instructions		

2017

	All	All	All	All	All
Clear					
January	2 ☐	9 ☐	16 ☐	23 ☐	30 ☐
February	6 ☐	13 ☐	20 ☐	27 ☐	
March	6 ☐	13 ☐	20 ☐	27 ☐	
April	3 ☐	10 ☐	17 ☐	24 ☐	
May	1 ☐	8 ☐	15 ☐	22 ☐	29 ☐
June	5 ☐	12 ☐	19 ☐	26 ☐	
July	3 ☑	10 ☑	17 ☑	24 ☑	31 ☑
August	7 ☐	14 ☐	21 ☐	28 ☐	
September	4 ☐	11 ☐	18 ☐	25 ☐	
October	2 ☐	9 ☐	16 ☐	23 ☐	30 ☐
November	6 ☐	13 ☐	20 ☐	27 ☐	
December	4 ☐	11 ☐	18 ☐	25 ☐	
	<< Previous Year	Delete Sess	Cancel	Next Year >>	Other Template	Public Holidays	Leave Dates	Suspended Dates

- *The example above shows a view of all the Mondays. Those with ticks are current open clinics.*
- *Solid black ticks [24 ☑] are available for closing*
- *Grey ticks [26 ☑] indicate an open clinic with bookings and cannot be closed, unless you reschedule the patients.*

9. Un-tick the required boxes with the solid ticks [☑]

10. Click on the [Delete Sess] button > *the selected sessions are now closed.*

11. If you have other clinics you want to close, use the cancel buttons to go back to the beginning. Otherwise you can just leave this screen by clicking on another option like patient search.

2.3   CLINIC SEARCHES

Once clinics have been opened; this section details how to view these clinics which is where you will be booking your patients into.

2.3.1   CLINIC LIST BY DEPARTMENT

The Clinic List by Department is the preferred options for clinic searches - this view displays a list of clinics for the department selected:

1. At the hospital level, select **Clinic List by Department** from the Views drop-down > the search screen will display:

Start	End	Clinic Type	Clinic	Location	Empty	New	Review	Special
24 Nov 2016 at 08:00 Thu	17:00	Renal	Renal Nurse	Ground Floor OP WHG	10	0	0	0
24 Nov 2016 at 08:00 Thu	16:30	Sleep	Catherine Corble	Ground Floor OP WHG	26	0	0	0

2. Make the required selections:

- Use the Group Type drop down to display <u>all</u> clinics for a selected department e.g. "General Surgery" = General Surgery, Breast etc.

- The date defaults to today's date, select different date(s) using the date/calendar options (highlighted above).

    Please note: You will only see clinics for the month you have selected a date in, from the date you selected. E.g. if I select the 24th of November I will only see clinics from the 24th in November.

- Click on an [icon] icon to view the corresponding "Clinic List" > *this displays patients booked into the clinic (if any).*

2.3.2   CLINIC LIST BY LOCATION

The Clinic List by Location is the same as Clinic List by Department except it displays clinics by location e.g. *Ground Floor Outpatients Whangarei*

2.3.3   DAILY CLINIC SEARCH

This view displays a specific list of clinics for the information and dates selected:

1. In the hospital level, select **Daily Clinic Search** from the Views drop down > the search screen will display:

Start	Clinic Type	Clinic	Location	Available	Booked New	Booked Review	Booked Special

2. Make the required selections:

-   The date defaults to today's date, select a different date using the date/calendar options

-   Make required selections using drop down boxes of "Clinic Type" and "Clinic ID" (*Note: these are mandatory for displaying results and making a selection from "Visit Type" will result in no clinics displaying*)

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- Tick "Clinic" to display <u>all clinics</u> or "Next Available" to display <u>only clinics with available slots</u> after the date defined.

3. Click [**Search**] > the clinics are listed

4. Click on an 📖 icon to view the corresponding "Clinic List" > *this displays details for the clinic*

2.4   CLINIC AVAILABILITY AT A GLANCE

The clinic views display important information about clinics including the availability of slots. Depending on the status of the clinic, coloured shading may display.

2.4.1   ORANGE BAND OVER CLINIC

An orange band will display over a clinic that is booked to capacity (all original slots have been booked into) .

This band will disappear if a booking is cancelled or rescheduled; leaving a slot and time available:

Start	End	Clinic Type	Clinic	Location	Empty	New	Review	Special
23 Feb 2015 at 08:00 Mon	12:00	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	0	0	4	0
23 Feb 2015 at 08:00 Mon	12:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic	Fracture/Ortho Outpt	7	0	1	0
23 Feb 2015 at 08:00 Mon	17:30	General Medical	Dr Tauvae's Clinic		13	0	0	0
23 Feb 2015 at 09:00 Mon	14:15	Ear, Nose and Throat	Ear, Nose and Throat	ENT Outpatients	0	0	4	1
23 Feb 2015 at 09:00 Mon	19:20	Mental Health	Mental Health	General OP WGTN	19	0	0	0
23 Feb 2015 at 09:00 Mon	12:45	General Surgery	Surgery - General	General OP WGTN	17	0	0	0

Note: To book into a clinic booked to capacity – additional slots will need to be added – please see Adding Slots

2.4.2   RED BAND OVER CLINICS

A red band will display over a clinic that is over-booked (additional slots have been added and then booked into)

This band will disappear if the additional bookings are cancelled or rescheduled:

Start	End	Clinic Type	Clinic	Location	Empty	New	Review	Special
23 Feb 2015 at 08:00 Mon	12:00	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	0	0	4	0
23 Feb 2015 at 08:00 Mon	12:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic	Fracture/Ortho Outpt	7	0	1	0
23 Feb 2015 at 08:00 Mon	17:30	General Medical	Dr Tauvae's Clinic		13	0	0	0
23 Feb 2015 at 09:00 Mon	14:15	Ear, Nose and Throat	Ear, Nose and Throat	ENT Outpatients	0	0	6	1
23 Feb 2015 at 09:00 Mon	19:20	Mental Health	Mental Health	General OP WGTN	19	0	0	0
23 Feb 2015 at 09:00 Mon	12:45	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
23 Feb 2015 at 10:00 Mon	14:00	General Surgery	NURSE-LED ANGIO ASSESSMENTS	General OP WGTN	0	1	5	0

2.4.3   GREEN BAND OVER CLINICS

A green band over a clinic indicates the clinic has been suspended (cancelled):

Start	End	Clinic Type	Clinic	Location	Empty	New	Review	Special
25 Nov 2016 at 08:00 Fri	17:00	Renal	Renal Nurse	Ground Floor OP WHG	11	0	0	0

2.5   MANAGING CLINIC APPOINTMENT SLOTS

This section details how manage the appointment slots within a clinic. This gives you the flexibility to change the type or add or delete slots above what the normal set-up would be for your clinic.

1. Using the clinic search options, navigate into the required clinic:

2. At the clinic level, select **Update Slots** from the Bookings Details drop-down (highlighted above) > the update slots screen will display:

-   *This screen is used for all updates made to the slots in a clinic*

3. From this screen you can go onto the following sections:
    -   Make Slots Unavailable (Reserve)
    -   Make Unavailable Slots Available
    -   Adding Slots
    -   Deleting Slots

2.5.1   MAKING SLOTS UNAVAILABLE (RESERVE)

This option is commonly used when you are reserving slots for later use or where the clinician has a break or meeting.

Note:
-   *You can only make a slot unavailable if no patient is booked into the slot. You must reschedule or cancel the patient's booking before you can make the slot unavailable.*

- *If you find you have a regular slot time that you want to make unavailable for a clinic, contact the PAS administrator as this can be added to the clinic set-up.*

1. Navigate to the Update Slots screen
2. In this screen, tick the boxes next to the slots you want to make unavailable:

3. Select a reason from the **Unavailable** drop-down box (the unavailable comments field will display):

New Visit Type		Unavailable	Clinician Break		Unavailable Comments	

4. Enter a comment (if required) in the **Unavailable Comments** field as shown:

Unavailable Comments	Clinician Attending MDM

5. Click the **Update** button > The screen refreshes with the unavailable slots shown in red:

Slot	Time	Visit Type	Patient		All
10	13:30	1 Slot - Follow Up			☐
20	13:40	1 Slot - Follow Up	AUTUMN, Miss Leah (07/04/1992,F, ZAE9538)		
30	13:50	1 Slot - Follow Up			☐
40	14:00	1 Slot - Follow Up			☐
50	14:10	1 Slot - Follow Up			☐
60	14:20	1 Slot - Follow Up			☐
70	14:30	1 Slot - Follow Up			☐
80	14:40	1 Slot - Follow Up			☐
90	14:50	1 Slot - Follow Up			☐
100	15:00	1 Slot - Follow Up			☐
110	15:10	1 Slot - Follow Up			☐
120	15:20	Clinician attending departmental meeting			☐
130	15:30	Clinician attending departmental meeting			☐
140	15:40	Clinician attending departmental meeting			☐
		New Visit Type		Unavailable	
		Add	Update	Delete	

6. You can return to the "Clinic List" > at the clinic level, select **Booking Details** from the Views drop-down.
7. *The slots will now appear in the "Clinic List" as unavailable with the reason and comments (if entered). These will no longer be available for booking.*

2.5.2 MAKING UNAVAILABLE SLOTS AVAILABLE

To make unavailable slots available for bookings again:

1. Navigate to the clinic update slots screen
2. In this screen, tick the unavailable slots you want to make available:

3. Select "Follow Up – 1 Slot" (always this option) from the **New Visit Type** drop-down:

New Visit Type	Follow Up -1 Slot

4. Click **Update** button > the screen refreshes with the slots now showing as available.
5. To return to the "Clinic List" > in the clinic level, select **Booking Details** from the Views drop-down.

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6. *The slots now appear in the clinic as available and can be booked into.*

2.5.3 ADDING SLOTS

The following details how to add slots to a clinic. This option is used to over-book a clinic or to book more than one patient at the same time.

Note: Please proceed with caution as your department may require approval before progressing with adding patients over and above the agreed amount.

1. Navigate to the clinic update slots screen.

2. At the bottom of this screen, click the [Add] button:
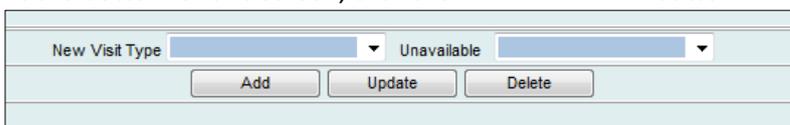
3. The Add New Time Slot screen will display:
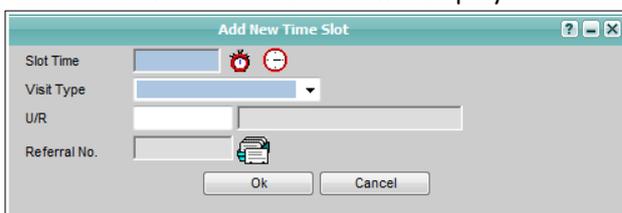
4. Enter the **Slot Time** *(either type in the time or use the icons to select)*
5. Select a **Visit Type***

Note: *Do not enter the U/R (NHI) at this stage - this process is confusing and increases the process time.*
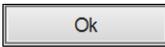
6. Click [Ok] > The update slots screen displays

7. If you select an over-booked type this will show at the bottom of the screen (regardless of the slot time) with a pink band over it:

8. Changing the view back to the "Clinic List" will display the overbooked slot in the correct time order, with the slot now available for booking into.

9. *If required at this point; proceed to booking a patient into this slot using the usual booking process.*

*Important Notes:

If you select an "over-booked" slot type the clinic will display as over-booked in the webPAS clinic search views, however these slots won't print in patient order for bulk printing or reschedule on bulk. If this is also cancelled or rescheduled, the slot will automatically be removed as the over-booking is no longer required.

If you find that you have to do this because a clinic does not have the required slots to start with; please contact the WebPAS Administrator as these can be changed in the clinic set-up.

2.5.4 DELETING SLOTS

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This section details how to delete slots from a clinic. This option can be used when the clinician has specifically asked for fewer patients in their clinic and you don't want the slots to be booked into:

1. Navigate to the Update Slots screen
2. In this screen, tick the boxes next to the slots you want to delete:

   ☑
   ☑
   ☑
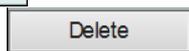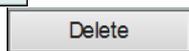
3. Click the **Delete** button > *the selected slots are now deleted from the clinic.*
4. To return to the clinic; at the clinic level, select **Bookings Details** from the Views drop-down.

Note:

If for some reason you want to add these back, this can be done using the Adding Slots process above.

If you find you have to delete slots because they should not have been there as part of the clinic set-up > please contact the WebPAS Administrator as this set-up can be changed.

2.6   CLINIC SESSION COMMENTS

High-level comments can be added to a clinic to communicate important messages to staff in relation to the clinic
This information will display in the clinic list, for the printable version and when booking.

---

1. Navigate to the "Clinic List" for the required clinic
2. At the clinic level, select **Update Comments** from the Views drop-down

   ➢ the Update Session Comments screen displays:
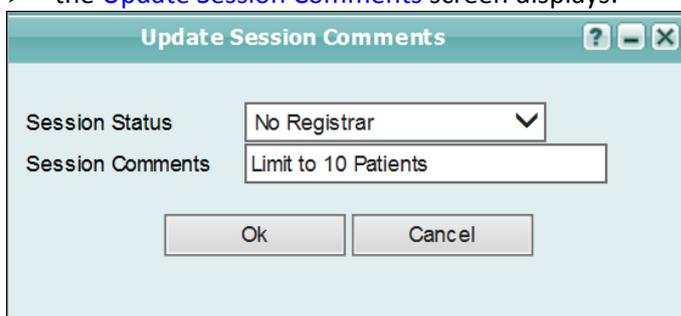
3. Select a **Session Status** and/or type in free-text **Session Comments** *(you can use one option or both)*
4. Click **Ok**
5. *The information entered will display in the banner of the clinic list and also for the NDHB reporting printable version:*
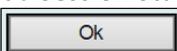
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Note: You can also see this information when you are booking an appointment by clicking on the "Show Details" tick box:

3   OUTPATIENT APPOINTMENTS

This section details how to book an outpatient appointment.

Tip! Booking Tips:

To help with clinic construction; have the clinic you are booking into open on one screen while you book on the other screen. This will give you an idea on how you are constructing the clinic as a whole instead of patient by patient.

If you are booking the clinic from scratch and know how many patients you are booking, it can also help to make sure you have enough slots. You can add additional slots by going to section adding slots

3.1   MAKING THE FIRST APPOINTMENT

The following details how to make the first booking off a "Waiting" referral. To make a follow-up appointment please see Book a Follow-Up Appointment

1. Navigate to the required patient

2. At the patient level, click on the ⬚ icon > A list of current and past outpatient appointments will display:

Selected : 2		Appointment Details Mr Arthur BONES					
Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
13 Nov 2015 at 13:00	Fri	Whg Fracture ER400	Fracture	1 Follow Up	Booked		
12 Nov 2015 at 08:30	Thu	Whg Fracture MP500	Fracture	1 Follow Up	Attended		

Before progressing to booking it is good practice to check this list for other booked appointments to co-ordinate bookings or avoid conflicts.

3. In the patient menu, click on the ⬚ icon.
4. The list of patient referrals will display (before progressing check you are selecting the correct referral)
5. Click the ⬚ icon for the referral to book from > the Referral Details screen will display:

---- Status Update ---- ▾	--Outpatient Bookings-- ▾		----Waiting List-- ▾		Orthopaedic Referral Details		
Type of Referral	FSA		Status Code	Waiting	Referral Date	26 Apr 2016	
Claim Type	Non Accident		Case Team		Responsible HCP	COUP Rob (DR)	
Reason for Referral	Left Knee Pain				Health Purchaser	35 Base DHB-funded	
Created By	Noni Perkins 26 Apr 2016 12:59		Last Updated By	Noni Perkins 27 Apr 2016 16:20:41	Contract		

[List Contacts] [Add Contact] [Update] [Referral List] [---- Copy Referral ---- ▾] [---- Internal Referral ---- ▾] [Linked Referrals] [Notes] [Request Appts]

6. At the referral level, select **Book Outpatient** from the Outpatients Bookings drop-down

---- Information ---- ▾
---- Status Update ---- ▾   --Outpatient Bookings--
Type of Referral   **Book Outpatient**
Claim Type   Series Booking
Reason for Referral   Multiple HCP Series Booking
                            Linked Visits

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7. The Clinic Search screen will display with the **Clinic Type** and **Clinic ID** (if recorded) defaulted from the referral (this can be changed if required):
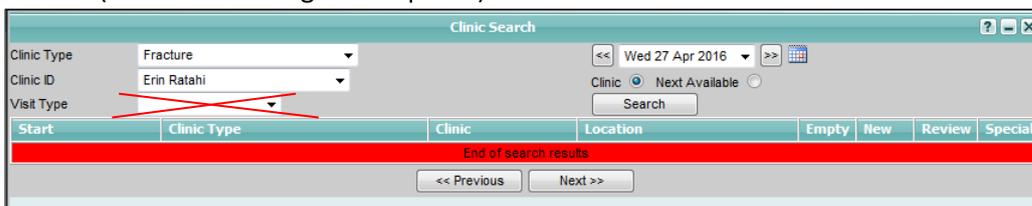
8. Make/change selections from the drop-downs as required
   Note: Do not select "Visit Type" when searching as no options will appear

9. Use date fields/icons to select a date

10. Select **Clinic** [Clinic ◉] (to see all clinics under the search criteria) or **Next Available** [Next Available ◉] (to only see clinics with available slots)

11. Click [Search] > A list of clinics will display based on selections made:
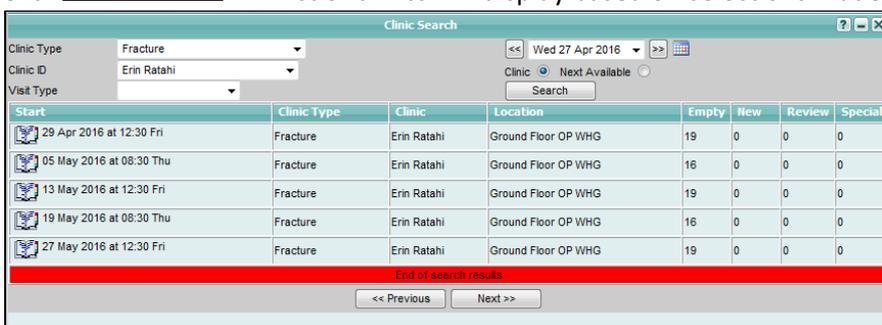
The [<< Previous] [Next >>] buttons can be clicked to scroll through the clinics

12. Click the [icon] icon to select a Clinic > the following screen will display, showing available slots:
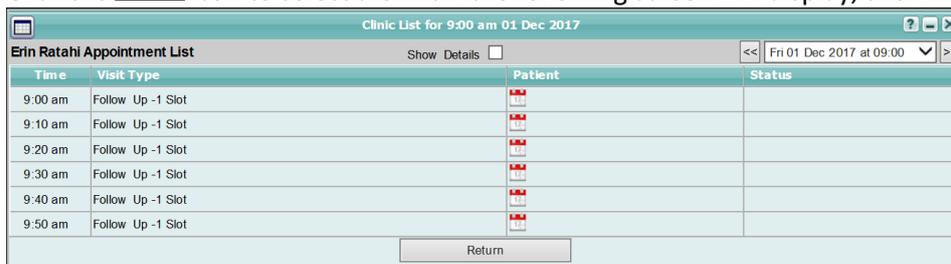
- You can click on the [Show Details ☐] box to display other booked patients and information for the clinic
- Click on the [Return] button to return to the clinic search screen.

13. Click on the [icon] icon to select the required appointment slot > the Make New Appointment screen will display:

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Note: It is still possible to change the Clinic and Date at this point if required, by clicking on the card file 🗄 *icon*

14. Update the **Visit Type** for the type of appointment and slots required (Mandatory)
15. Update **Mode of Delivery** if required
16. Make selections if required from other drop-downs:

17. Type information in **Comments** field (these will display on the printed clinic list and is used to inform staff of patient needs and preparation requirements)
Note: Please be aware when typing sensitive information in this field as it is displayed throughout webPAS including Concerto.

18. Click [Ok] > the Printing screen will display:

If you identified the patient as ACC during referral entry the ACC screen will display > please progress to *Appointment with ACC details.*

19. Tick "Other Letter", select OP1 Appointment and select Printer

20. Make other selections if required.
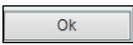
21. Click [Ok] > the Appointment Details screen will appear with the appointment information displayed:

3.1.1   APPOINTMENT WITH ACC DETAILS

If you identified the patient as ACC when entering the referral – the Injury/Accident Data Screen will display after you have finished entering booking details.

1.   Click on the [🔍] icon next to ACC Number field and select applicable ACC event > the ACC details previously entered will populate into the required fields – Any updates that you do here will flow back to the original information.

3.1.2   CONFIRMING APPOINTMENTS

The following option is used to highlight patients in a clinic that have had their appointment verbally confirmed.

When you have finished booking an appointment you will end up in the Appointment Details screen:

1.   Click on the [▦] icon in the top right hand corner of this screen > the Clinic List displays:
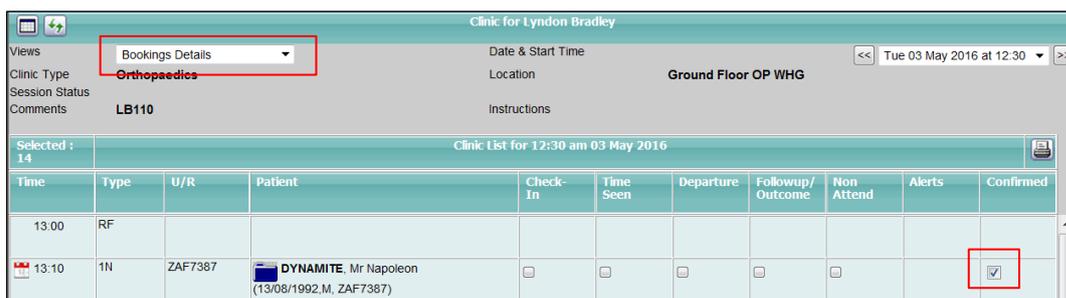
2. Tick the **Confirmed** box next to the patient (highlighted above) > the patient will now display as "Confirmed" for this clinic.

To view further details for this confirmation:

3. Select **Confirmed Appointments** from the Views drop down (highlighted above) > The Confirmed Appointments screen will display:
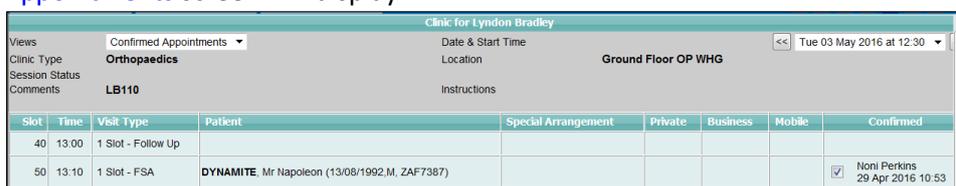
-   *This view displays a list of contact details along with information related to the person/date /time for the confirmation.*

Note: This information serves as the notification date for NPF (National Patient Flow). If a patient has been added with an urgent referral and you book them straight after doing this; the Confirmed box <u>must</u> be ticked to populate the required MoH information.

3.1.3 ADDING SLOTS WHEN MAKING AN APPOINTMENT

This section details how to add slots during the booking process:
Note: Please proceed with caution as your department may require approval before progressing with adding patients over and above the agreed amount.

1. *You are in the middle of booking your patient and you find the required slots are unavailable:*
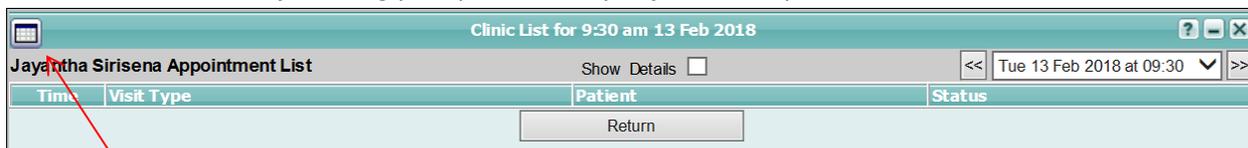
2. Click on the icon in the top right hand corner of your screen.
    ➤ The Clinic Update Slots screen displays:

3. Click [Add]
   ➢ The Add New Time Slot screen displays *(Patient details will populate the U/R and Referral fields)*

4. Enter the **Slot Time** and **Type**

5. Click [Ok]
   ➢ The Booking Screen for the patient will display

6. Complete as usual.

3.1.4   VISIT TYPE IMPORTANT NOTES

The following is important to note in regards to **Visit Type** selections in order to avoid 'accidental' over-booking:

If there is already a patient booked in the time-slot after you have booked your patient and you change their slot type from a 1 to 2 slot; the system will not adjust the following appointment to allow for the increased time.

In this example the first patient is booked in at 10:30 into one slot and the second at 10:45:

The first patients slot time is updated to a 2 slot type; however the following patient has not had their time adjusted:

3.2   SERIES BOOKING

Series booking is an option available for use when making multiple appointments for patients either as a regular series or across several clinics in one day.

We are currently working on writing up these instructions. Please contact your webPAS Administrator for more information.

4   MANAGING APPOINTMENTS

This section details the management of outpatient appointments.

4.1   OUTPATIENT WAITING LIST MANAGEMENT

To know which person to book next will be based on priority and days waiting. This information is provided via two waiting list reports*:

-    NDHB reporting "Waiting for FSA – Summary"
-    WebPAS "Appointment Action List"
Please see relevant sections for more information about these reports.

4.2   PATIENT APPOINTMENTS LIST

The patient WebPAS appointment list contains a list of all outpatient appointments (current and historical) across NDHB since the implementation of webPAS on 20th March 2017.

All visits and appointments prior to this occurred in the old PAS (Patient Administration System) and can be

viewed via the clinical workstation Concerto. This can be access using the [icon] icon at the webPAS hospital

level:

1.   Navigate to the required patient

2.   At the patient level, click on the [icon] icon > the appointment list will display:

-    *This view will display a list of all appointments current, past or future.*

-    *Click on the [icon] icon to view details for an appointment.*

-    *An [icon] icon will display next to an appointment if booking comments where entered. Click on this icon to view/update.*

3. Click on an ⬜ icon to view details for an appointment > the Appointment Details screen will display

4.2.1   NAVIGATING INTO THE CLINIC LIST FROM THE APPOINTMENT

The following details how to navigate into the clinic the patient is booked into from their appointment:

1.   Navigate to the required patient

2.   Navigate to the patients appointment list

3.   Click on the appointment ⬜ > the Appointment Details screen will display

4.   Click on the ⬜ icon found in the right hand corner of this screen > the Clinic List will display

4.3   UPDATE APPOINTMENT DETAILS

The following option is used when you want to update the details of a booked appointment.

You can use this option to update things like the **Visit Type** (how many slots or type of appointment) or **Claim Type** (ACC details). If you need to change the clinic date or time you will need to use the reschedule option.

1.   Navigate to the patient

2.   At the patient level, click on the ⬜ icon > the appointment list will display

3.   Click on an ⬜ icon > the Appointment Details screen will display:

4.   Select **Update** from the Actions drop-down (highlighted above) > the Update Appointment Details screen will display.
5.   Update fields as required
6.   Click **OK** > *changes to the appointment details are saved.*
7.   If an "Accident" code has been selected in the **Claim Type** field – the Injury/Accident Details screen will display > Update fields as required
8.   Click **OK >** *changes to appointment details are saved.*

4.4   RESCHEDULE A SINGLE PATIENT APPOINTMENT

The following details how to reschedule a single patient's appointment.

Examples include:
- The patient is unable to attend their current appointment and another one is available to book into.

If an entire clinic needs to be rescheduled you can use the Bulk Reschedule option

1. Navigate to the patient

2. At the patient level, click on the [icon] icon > the appointment list will display

3. Click on an [icon] icon > the Appointment Details screen will display:

4. In the appointment screen, select **Reschedule** from the Actions drop-down [---- Actions ---- Clinic] > the Reschedule Appointment screen is displayed:

Re-Schedule Appointment - - CROSS Mr Philip Richard	
Clinic	Erin Ratahi
Date	Fri 14 Oct 2016 at 09:10
Visit Type	Follow Up - 1 Slot Originating Booking Visit Type: **Follow Up - 1 Slot**
Reason for Reschedule	Rescheduled 0 Times
Source of Referral	Gen. Practitioner Unit
Special Arrangements	
Reset Confirmed Appointment	☑
Print Reschedule Letter	☑ Printer Spool Report
Contract	Health Purchaser 35 Base DHB-funded
Comments	

Ok   Cancel

5. Click on the card file [icon] icon to perform a search of clinics (DO NOT use the [icon] icon):

Note: If the previous appointment was not a "Follow Up - 1 Slot" the Visit Type will display "no slots available". Ignore this and continue.

➢ The Clinic Search screen will display

6. Search for and select the required clinic.

7. Click the [icon] icon next to the required appointment > the Reschedule Appointment screen will re-display.

8. Fill in the rest of the required details referencing below:

Visit Type	Select Correct Type *(Important for showing correctly on clinic views)*

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Rescheduled …Times	*For Reference Only* > Keeps an automated count of number of rescheduled appointments that have occurred for this patient's referral.
Source of Referral	Leave as defaulted
Unit	Not in Use
Special Arrangements	Use if required
Reset Confirmed Appointment	If you have verbally spoken to the patient, leave un-ticked.
Print Reschedule Letter	Tick and Select **Printer** if required
Contract	Not in Use
Health Purchaser	Leave Defaulted
Comments	Add/Update if required.

9. Click **OK** > The following message will display:
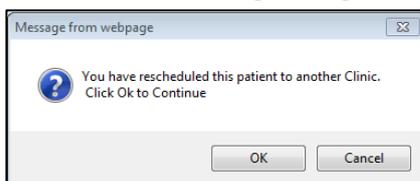
10. Click **OK** to reschedule or **Cancel** to return to the patient without rescheduling.
11. The "Printing" screen will display > make selections if required
12. Click **OK** > The Appointment Details screen is displayed, showing the rescheduled booking.

Note:
If the reschedule occurs after you have already sent letters out for the clinic; send the patient their reschedule letter and notify the patient verbally.

If you notify the patient verbally at any point – it is advised you use the Confirmed Appointment option so clinic staff are aware of this.

4.4.1.1   VIEW RESCHEDULED APPOINTMENT HISTORY

The history of rescheduled appointments can be seen via Appointment list:

1. Navigate to the patient's Appointment List

2. If you click on the icon next to the rescheduled booking a message will appear giving details of the reschedule:

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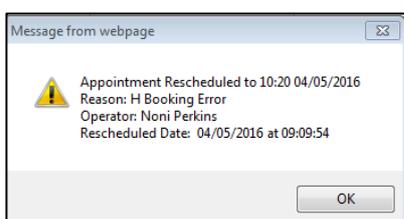
4.5   CANCEL A PATIENTS APPOINTMENT

The following details how to cancel a patient's appointment.

Examples include:
- The patient no longer requires an appointment and does not want any further appointments
- The patient cannot attend an appointment and requires a new appointment that cannot be allocated at the time
- The clinic is cancelled and all patients require a new appointment but this appointment date is not known

If you want to cancel an appointment and give the patient another one straight away, use the **reschedule** option.

1. Navigate to the patient

2. At the patient level, click on the ![icon] icon > the Appointment List will display

3. Click on an ![icon] icon > the Appointment Details screen will display:

4. Select **Cancellation** from the Actions drop-down [---- Actions ---- / Clinic] > The Cancel Appointment screen displays:

Note: If previous cancellations have occurred, the details for these will display on the screen.

5. Complete the Cancellation screen referencing the table below:

Cancellation Reason	Select a reason
Comments	Free-text field to further detail cancellation
Return Referral to Waiting *(defaults to ticked)*	This will only display if the status of the referral was originally waiting before you made this appointment you are now cancelling. Always leave defaulted – returns patient to Appointment Action List as "Waiting"
Print Cancellation Letter	Un-tick as there is **No** Cancellation letter

6. Click [Ok]
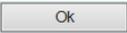
   ➢ the following message will display:
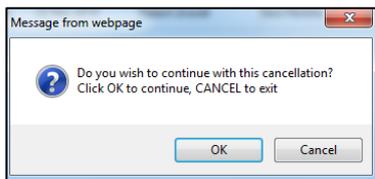
7. Click [Ok]
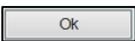
   ➢ The following message will display:
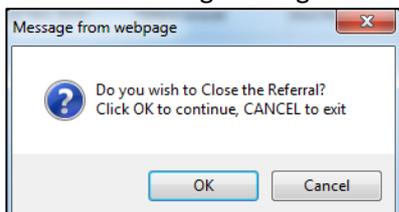
8. Read this message very carefully and:
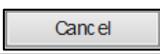
   Click [Cancel] to **Exit** *(this will complete the cancellation of the appointment only)*

   Or Click [Ok] to **Close** the Referral *(if the cancellation means the patient won't be seen again)*

   ➢ The Close a Referral screen will display:

9. Enter the **Reason for Closure**

10. Enter a **Comment** *if required*

11. Enter **Closure Outcome**

12. Click [Ok] > The Cancelled Appointment List will display, and the referral will be "Closed"

4.5.1.1   VIEW CANCELLED APPOINTMENT HISTORY

The history of cancelled appointments is seen via the cancellation list:

1. Navigate to the required patient

2. At the patient level, select **Cancelled Appointments** from the Information drop-down.

3. The Cancelled Appointments list will appear, showing details for cancellation/s:

Cancelled Appointment							
Appointment	Clinic	Date Cancelled	Reason	Operator	Rescheduled	Cancellation Comments	Appointment Comments
16 Nov 2015 12:30	A33002	16 Nov 2015	Treated Privately	Noni Perkins		Patient has gone private	
05 Nov 2015 12:30	A33007	16 Nov 2015	Patient Unwell	Noni Perkins		Patient phoned in to say has chest infection and will ring once better to organise another appointment	

Note: This history of rescheduled appointments will also transfer to this list if the appointment is ultimately cancelled.

5   BULK RESCHEDULE

The following process can be used to save time when you are rescheduling several patients from one clinic to another.

Business Rule: When rescheduling an entire clinic, the priorities of the patients and reason for booking must be checked and taken into account when making the new bookings.

Notes:
- If you want to <u>cancel</u> the appointments instead of rescheduling this can only be done at the patient level.
- Patients in **over-booked** slots won't reschedule using this process; this has to be done at the patient level.
- To shut off the clinic for any further bookings <u>before</u> rescheduling: make the remaining slots <u>unavailable</u> and put a <u>comment</u> in the clinic to state the clinic is cancelled.

5.1   BULK RESCHEDULE PREP

It is recommended that the following steps are taken prior to bulk rescheduling; to ensure a smooth transition from the old to the new clinic. The ideal is to work across two screens for this, however separate tabs will also do:

1. On screen 1; open up the Clinic List for the clinic you are rescheduling the <u>patients from</u>
2. Bring up the **Reschedule** screen:

3. On screen 2; open up the Clinic List for the clinic you are rescheduling the <u>patients into</u>
4. Bring up the **Update Slots** screen:

5. Make <u>all</u> the slots in this clinic match the clinic you are rescheduling from (this includes the times, types and any unavailable slots)

For example:

In the clinic I am rescheduling into I would make the first slot "FSA-2 Slots" because this is what it is in the clinic I am rescheduling from:

6. Once you have completed this, you will then be able to use the standard bulk reschedule process.

5.2   BULK RESCHEDULE

1. Navigate to the "Clinic List" for the required clinic:

2. At the clinic level, select **Reschedule** from the Bookings Details drop-down > the "Reschedule" view will display:

3. Click on the 🖨 icon at the hospital level to print out a list of these patients before progressing

4. Select the tick boxes under the Mark column for each patient you are rescheduling

5. Click on the 📇 icon > the Clinic Search screen will display

6. Search for and select the required clinic and slot time *(all patients will reschedule in the same order from the time that you select)*

7. The "Reschedule" view will re-display with the "Session Date & Time" now displaying the new clinic

8. Select a **Reason for Reschedule**

9. **Print Reschedule Letter** (defaults to ticked – un-tick if patient unaware of current booking – this is where confirming patient appointments comes in handy) > Select **Printer**

10. **Reset Confirmed Appointment** (*Un-tick* if reschedule has been verbally communicated with the patient)

11. Click [**OK**] > the "Reschedule" view will re-display

12. If rescheduling patients individually: repeat steps until clinic is empty of booked appointments.

13. Click [**Cancel**] to return to the "Clinic List"

5.3   SUSPEND A CLINIC

The suspend option is used when you want to record that a clinic has been cancelled and why.

⚠Caution: Suspending stops all other users from opening the same clinic for that clinician on the same day. If the clinician is likely to hold this clinic in another location, use the Close Clinics process instead.

1. Open the Clinic List for the clinic you want to suspend

2. Select **Suspend Clinic** from the Views drop-down > The Suspend Session screen will display:

3. Select a **Suspend Reason**
4. Click
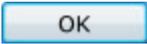
The clinic now displays as "Cancelled" (in green) on the Hospital Level Clinic Views and are no longer available to book into:

5.4   PATIENTS IN A SUSPENDED CLINIC (SUPERVISOR RESCHEDULE)

If you suspend a clinic that has patients still in it > there is a view called "Supervisor Reschedule" where you can view these patients and reschedule at a later date.

It is really important if you are using this option to regularly check this list and not leave anyone in a suspended clinic past the date the clinic was to be held.

1. At the hospital level, select **Supervisor Reschedule** from the Actions drop-down

2. Suspended Appointments List will display
3. Select Clinic Type
   ➢ A list of all patients in suspended clinics for the selected displays:

4. By using the Tick boxes in the "Mark" column you can reschedule the patients out of this list.

5.5   UN-SUSPEND A CLINIC

The following details the process if you are required to reverse a clinic that has been suspended:

1. At the hospital level, select **Open/Delete Clinic Sessions** from the Actions drop-down

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> ➢ The Clinic List - Open/Delete Sessions screen will be displayed

3. Type in the Clinicians ID (e.g. KV200) in UPPER CASE in the **Clinic** box

4. Click the [Goto] button.

5. Click the icon beside the correct clinician.

> ➢ The Open/Delete Sessions Clinic Master List screen displays:

6. Click the icon for the correct session for the suspended clinic

> ➢ The Open/Delete sessions screen will display:

7. Click the [**Unsuspend**] button

> ➢ *A list of Suspended Clinics displays:*

8. Tick the Reinstate box next to the required session

9. Click the [**Unsuspend**] button

The Open/Delete sessions screen will display and the clinic will now be available for booking into.

5.5.1 VIEW SUSPENDED CLINICS

The Suspended Clinics List will display a list of suspended (cancelled) clinics.

1. At the hospital level, select **Suspended Clinics List** from the Views drop-down

> The View will display

2. Select the relevant **Clinic Type**, **Clinic ID** or **Location** and **Date** > the View will display suspended clinics based on the selections made:

Clinic	Clinic Type	Suspended From	Suspended To	Session Date	Reason	Patients suspended	Date Suspended	User
David Waterhouse	ENT - Ear Nose & Throat	03 Jan 2018	03 Jan 2018	03 Jan 2018	Clinician Away	No	17 Oct 2017 at 13:11:19	

6   CLINIC PREPARATION

This section details the webPAS processes related to clinic preparation (the jobs associated with preparing documentation for staff on clinic day).

6.1   BULK PRINT CLINIC LETTERS AND LABELS

This section details the processes for printing multiple letters or labels for patients on a clinic list:

1. Open the Clinic List for the clinic you are printing for

2. Select **Print Group Labels & Forms** from the Views drop-down

    ➢ The following screen will display:

3. All patients in the clinic will default to ticked (de-select if required)
4. If **Labels** required: Tick **Appointment**, Select **No of Labels** and **Printer**
5. If **Letter** required: Tick **Letter**, Select **OP1 Appointment** and **Printer**
6. Click [Ok]
    ➢ *The selected labels/letters will print*
7. To return to the clinic; at the clinic level, select **Bookings Details** from the Views drop-down.
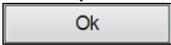
6.2   PRINT CLINIC LIST

The following details how to print out a clinic list. This list displays patients booked in clinic and is often used to capture outcomes for patients which is an important part of the End of Day process.

There are two types of common clinic lists used, ask your department for their preference:

- webPAS Diagnosis View
- NDHB Reporting "Daily Clinic List"

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6.2.1.1   WEBPAS DIAGNOSIS VIEW

This list displays basic patient details including comments and the problem for which they are being seen:

1. Open the Clinic List for the relevant clinic

2. In the clinic, select **Diagnosis Details** from the Views drop-down > the following screen will display:

3. Click on the [printer icon] (top right hand corner of the list)
4. The printing screen will display – you will need to make sure this is set to print landscape:
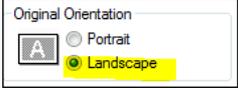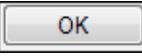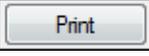
5. Click [Preferences] > Select Landscape [Original Orientation: Landscape] > click [OK]
6. Click [Print] > *Clinic List will print.*

6.2.1.2   NDHB DAILY CLINIC LIST

This report will print with additional patient details like phone numbers and GP:

1. At the hospital level, click on the **NDHB Report** Icon [N icon]

2. Click on the [Diary and Booking Lists] Folder

3. Click on the [WebPas - Daily Clinic List] Folder

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Te Poari Hauora Ā Rohe O Te Tai Tokerau

➢ Following screen will display:

4. Make the required Selections

5. Click [**View Report**] > A Clinic List will display:

6. To print this report, Click on the 🖨 icon (highlighted above) (make sure you print in landscape).

6.3 PRINT PATIENT DEMOGRAPHIC FORMS

This report prints out a demographic form for each patient booked into a clinic. These forms are then given to patients upon arrival to verify and amend demographic details in webPAS:

1. At the hospital level, click on the **NDHB Report** Icon

2. Click on [Diary and Booking Lists]

3. Click on [WebPas - Clinic Patient Demographics]
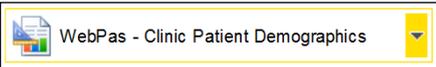
➢ The following screen displays:

Tip: At this stage you can add this screen to your favourites so it's quicker next time. Right Mouse Click (on report screen) > Select **Add to Favourites** > Select **Favourites Bar** from "Create in:" drop-down > Click **Add**. (this will now display in your favourites bar of the internet page for webPAS)
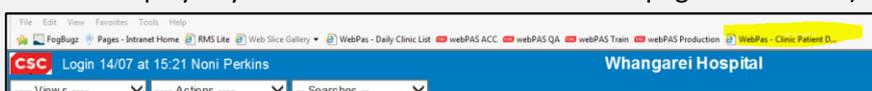
4. Make selections as required, this can be as defined or as broad as required (this displays tomorrows date by default)

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5. Click [View Report]

   ➢ The following displays:

   Clinic Patient Demographic Forms

   Whangarei Hospital Patient Demographic Forms

   Hospital: Whangarei Hospital ..... Clinic Type: Orthopaedic

   Report printed on: Friday, July 14, 2017   Page: 1 of 38
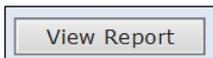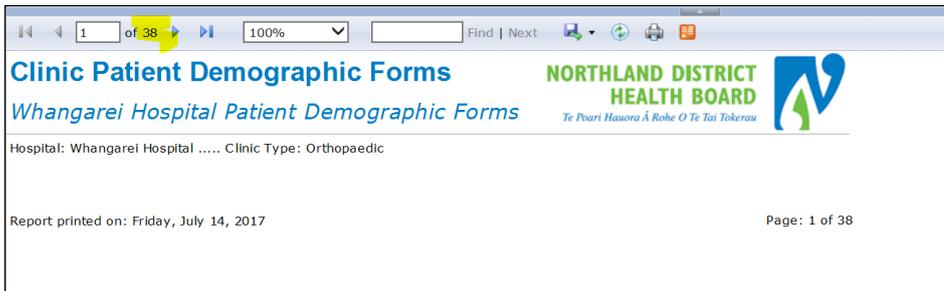
6. You will notice a blank page, but also that there are further pages (see above in yellow)

7. If you click the next button [1 of 38 ▶ ▶|]
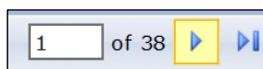
   ➢ The Demographic Form for the first patient in that clinic will display.

8. Click on the print icon to print _____ (the demographic forms will print out in patient order for that clinic, with a blank page in between each clinic if more than one has been picked)

7   END OF DAYS

This section details the process of recording attendance and outcome details for patient appointments. This information sends data that assists the DHB in statistical reporting, ensures the correct funding is acquired for each event and supports the ongoing care of patients.

Generally this process is completed retrospectively at the end of a clinic hence the term "End of Days".

Business Rule: All EOD processes are MANDATORY and must be completed within 2 working days of the of the clinic completion.

The EOD process is completed as follows (in order):

① Record Patient **Attendance** and **Outcome**

② **Action** each outcome

③ Run the **NDHB End of Days Summary Report** (to audit completion)

This entire process is carried out via the 'Clinic List' view for the required clinic.

7.1   PATIENTS WHO ATTENDED

7.1.1   RECORD CHECK-IN

Check-In is only used in services that have the ability to record in real-time a patient's attendance and time of arrival.

If your department is not able to do this, please proceed to Record Outcome and Interventions.

1. Tick the **"Check-In"** ☐ icon for the patient > the clinic list will refresh with the check-in time displayed:
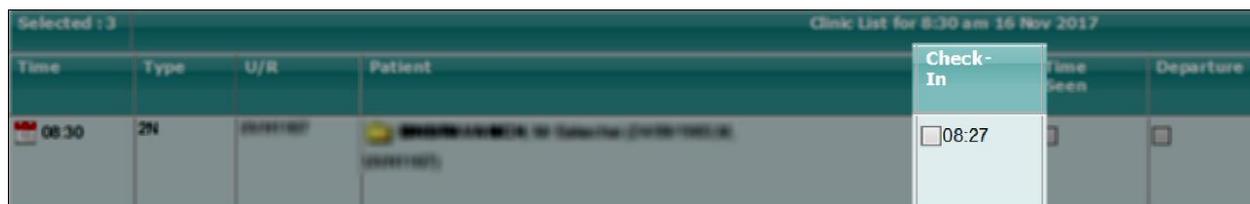
7.1.2   ADD A CONTACT

The following details how to record a contact which includes what happened during the assessment, the outcome (next step as determined by the clinician) and any interventions/medication/supplies (codes used to record expensive items/procedures e.g. ECG or lesion removal)

1.   Tick the **"Departure"** ☐ icon for the patient > the Add Contact screen will display:

2.   Enter the required details referencing the table below:

Field	Description and Use
Health Care Provider *(Defaults to clinician of clinic)*	If the patient was seen by a different clinician, change these details.
Occasion of Service	Select
Type of Contact	Form of service the patient received.
Outcome	Select an outcome as defined by the clinician
Last Contact	Tick if referral is to be "closed"
Reason for Closure	Becomes available if Last Contact is ticked. Select reason.
Additional HCP	If the patient was assessed by more than one clinician during a clinic - tick the box and enter further HCP's

3.   Click [Add] > The Contact screen is displayed:

4.   If Interventions/Procedures/Medications were captured;

Click on the relevant: [Medications] [Interventions] [Supplies] button _and_
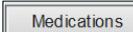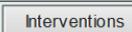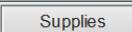
Or
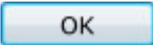
Click [OK] > the Contacts screen will display, showing that you have recorded a contact for the patient:

5.   Click the [**X**] button in the top right hand corner of the screen > _the Clinic List will re-display (with the patient showing Time Seen, Departure and Follow-up/Outcome information)_

6.   Proceed to the next patient.

7.1.3   COMMON OUTCOMES AND NEXT ACTIONS

This section details the most common outcomes for those who attended and the next action:

7.1.3.1   SERVICE COMPLETE (OUTCOME = **TO GP/PRIMARY CARE** OR **TO REFERRER**)

The clinician assessed the patient and decided that they have finished with the service for that particular health care event.

1.   Add a Contact (see Adding a contact (Record Outcome and Interventions/Medications/Supplies) with:
     a)   **Outcome** = "To GP/Primary Care" or "To Referrer"*

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b) Tick the **Last Contact** box > *the Reason for Closure drop-down will display*

c) **Reason for Closure** = "Service Complete" *(this will close the referral)*

The referral for the patient will now be closed and you have completed the process for these patients.

*If the patient has been returned to another location other than GP/Primary Care or Referrer (e.g. Hospice, Rest Home) the MoH wants to know this information. In this case, don't tick the "Last Contact" box. Select "Disch Close on Ref" instead and close the patients referral with the relevant details.

7.1.3.2 MAKE A FOLLOW-UP APPOINTMENT STRAIGHT AWAY (OUTCOME = FOLLOW UP)

The patient requires a follow-up and you are able to book this straight away:

Important note: booking the appointment must be completed after the contact (attendance and outcome) has been recorded for the patient otherwise a webPAS error will occur.

1. Add a Contact (see Adding a contact (Record Outcome and Interventions/Medications/Supplies) with:
   - **Outcome** = "Follow Up OP Appt"

Followup/
Outcome

☐FU

2. After adding contact; click on the [   ] box
   ➢ The Make Follow Up Appointment screen will display:

3. Click the [icon] icon
4. **Search for** and **Select** the required clinic and slot time > The Follow-Up screen will re-display with **Date** displaying the selected appointment
5. Enter/update the remaining fields, referencing below:

Field	Description and Use
Visit Type	Update if required
Mode of Delivery (Populates from previous appointment)	Update if required.
Presenting Complaint	Update so this is relevant to this follow-up booking (updating this will not update the original complaint on the referral)
Source of referral	Leave as defaulted
Inform GP (populated from referral)	Leave as defaulted
Patient Follow Up Letter (defaults to ticked)	Un-tick and if required use the printing options that follows on from this screen.
Health Purchaser (Defaults from original referral)	Leave as defaulted.
Comments (displays on patient appointment list)	Enter/update comments relevant to this follow-up booking
Link Referral Details	Always leave ticked.
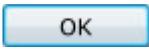
6. Click [OK] > the printing screen will display:
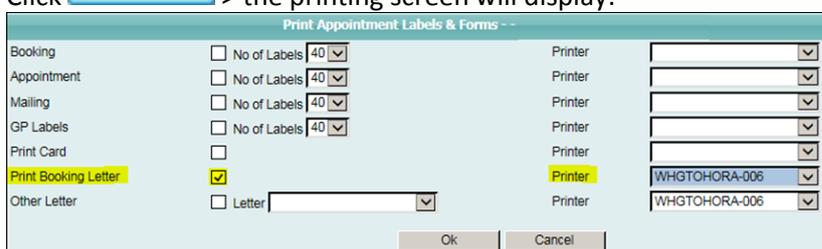
7. If a letter is required = Tick **Print Booking Letter** & Select a **Printer**
8. Click **[Ok] >** the Appointment Details screen will display (for the appointment just made)
9. Click on the [icon] icon *(this will take you back to the clinic you came from).*
   ➢ The Clinic List will display with "Done" under the **Followup Appointment Made** column next to the patient:

7.1.3.3   CREATE REQUEST FOR A FUTURE FOLLOW-UP (OUTCOME = FOLLOW UP OP APPT)

If the patient requires a follow-up but you are unable to book this straight away; you can make a "Request Appointment" which places the patient on a list for booking.

1. Add a Contact (see Adding a contact (Record Outcome and Interventions/Medications/Supplies) with:

- **Outcome** = "Follow Up OP Appt"

2. After adding contact either;

   Click on the [calendar] icon next to the patient
   Or
   Open up another screen/tab and navigate to the patient

3. Click on the [icon] icon

4. Click on the appropriate referral [icon] > the Referral screen displays:
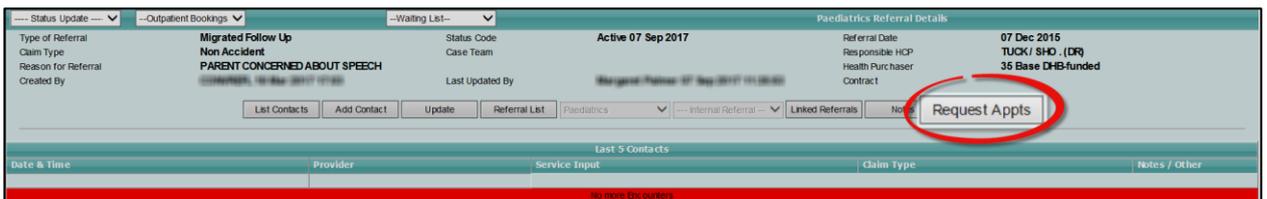
5. Click on the [Request Appts] icon> the Request Appointments screen displays:

6. Click on the [Request Appt] icon > the Appointment Request screen displays:

7. **Enter/Check** the following details:

   Remember this is a request for a __future__ follow-up so you need to check the information that defaults and make sure it displays everything that the clinician has requested.

Field	Description and Use
Reason for Request	Make a selection
Clinic Type	Change if it was requested that the follow-up be in a different clinic.

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Clinic ID	This doesn't need to be filled in, enter if the patient needs to see a specific clinician at the next appointment
Preferred Date	15th of the month the follow-up is due, unless this is weeks
Preferred Hospital	Change if patient is to be seen in a different hospital
Presenting Complaint	Format <u>must</u> be: clinical compliant, length of follow-up period (e.g. 6m), 'from' or 'x' last apt, & any other important information e.g. *Adult Bests Syndrome, 12m fu x Sep17 & OCT*

8. Click [Add] > Request Appointments screen displays, showing the requested appointment.

9. Repeat this process for any other patients who require this.

10. After completing return to the clinic on your other screen.

7.1.3.4   FOR SURGERY (OUTCOME = PRE ASSESSMENT)

Patient is assessed and the decision is that surgery would benefit them. As all patients must be assessed by pre-assessment and deemed anaesthetically fit before the surgery before this can occur the outcome for this will be "Pre-assessment"

The following details the process for end of day entry:

1. Add a Contact (see Adding a contact (Record Outcome and Interventions/Medications/Supplies) with:
   - **Outcome** = "Pre Assessment"

After completing the Contact proceed to creating a **Request Appointment** for this patient:

2. After adding contact either;

   Click on the [icon] icon next to the patient
   Or

   Open up another screen/tab and navigate to the patient's referral list [icon]

3. Click on the appropriate referral [icon] > Referral screen displays:
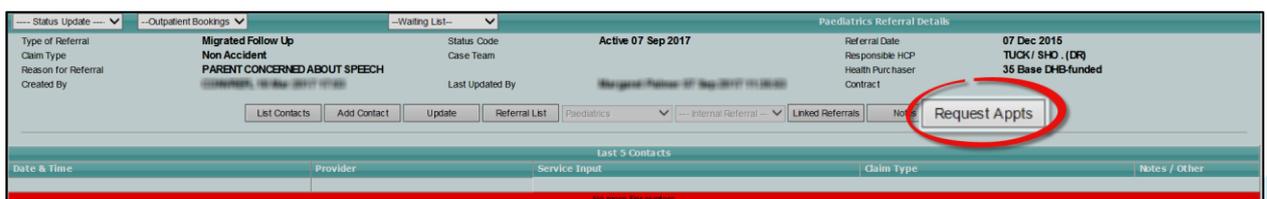
4. Click on the [Request Appts] icon> Request Appointments screen will display:
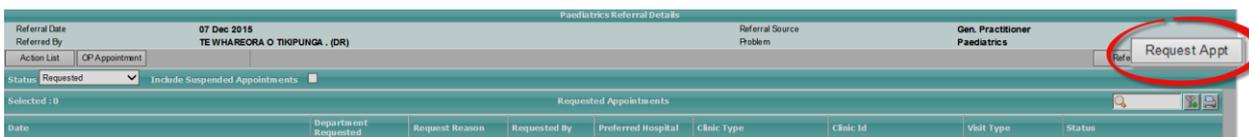
5. Click on the [Request Appt] icon > the Appointment Request screen will display:

6. **Enter/Check** the following details:
Remember this is a request for a future follow-up so you need to check the information that defaults and make sure it displays everything that the clinician has requested.

Field	Description and Use
Reason for Request	Select Follow Up after PROC
Clinic Type	Change if it was requested that the follow-up be in a different clinic.
Clinic ID	This doesn't need to be filled in, enter if the patient needs to see a specific clinician at the next appointment
Preferred Date	15th of the month, 6 months from Appointment Date.
Preferred Hospital	Change if patient is to be seen in a different hospital
Presenting Complaint	Format must be: Clinical compliant; *"to SBL"* month sent forward. e.g. *Knee Pain; to SBL May 18*

7. Click [Add] > Request Appointments screen will re-display, showing the requested appointment.
8. Repeat this process for any other patients who require this.
9. After completing return to the clinic on your other screen.

7.1.3.4.1 WARD FOLLOW-UPS AFTER SURGERY

Once a patient has had their surgery and a referral is received from the ward for a follow-up it is important that the original request is picked up and booked off to complete the patient journey.

7.2 PATIENTS WHO DNA (DID NOT ATTEND) DNW (DID NOT WAIT)

7.2.1 COMMON OUTCOMES AND NEXT ACTIONS

Non Attendance is separated into two types:

DNA   Did Not Attend
The patient did not attend the appointment and there was no communication before the appointment. If there was a communication, this is classified as a cancellation.

DNW   Did Not Wait
The patient arrives for the appointment but does not wait to receive the service.
If the patient leaves without arranging for a new Booking, the appointment is treated the same as a DNA.
If the patient makes a new booking before leaving this should be treated as a Patient Reschedule.

7.2.1.1 DID NOT ATTEND (DNA) = FURTHER BOOKING

This details the process for where a patient DNA's and the clinician decides the patient requires another appointment:

➤ In the clinic list; click the **Non Attend** box for the required patient > the Input Non Attendance Details screen displays:
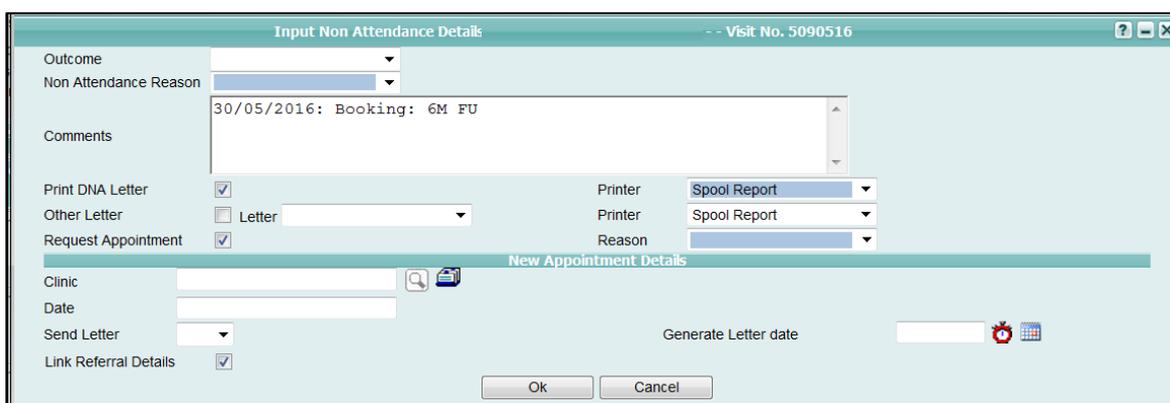
➤ **Outcome** = Select DNA/DNW/INC Booking
➤ **Non Attendance Reason** = Select a Reason
➤ **Comments** = Enter/Update comments relevant to the new booking for the DNA (this will display on the new appointment)
➤ **Print DNA Letter** = Un-tick
➤ Proceed to either Book Appointment or Request Appointment for Future Booking:

7.2.1.1.1 BOOK APPOINTMENT

This is where you are able to book the appointment straight away:
1. Un-tick Request Appointment
2. Click on the [icon] icon > Clinic Search screen displays
3. Search for and select the required clinic and slot time > date/time selected will populate into Date field
4. Send Letter = Yes
5. Leave "Link Referral Details" ticked
6. Click **Ok** > the Clinic List will display

7.2.1.1.2 REQUEST APPOINTMENT FOR FUTURE BOOKING

This is where you place the patient on a list for future booking:
1. Leave **Request Appointment** = ticked
2. **Reason** = FSA Post DNA/DNW or FU Post DNA/DNW
3. Click **Ok** > Request Appointment screen will display
1. Fill in required details (please see Make a Request for a Future Appointment)
2. Click **Update**
3. If required navigate back to the clinic to complete further processing.

7.2.1.2 DID NOT ATTEND (OUTCOME = TO GP/PRIMARY CARE OR TO REFERRER)

This details the process for those that DNA and the clinician decides to refer back to the GP/Referrer:

Important Note: The referral must be closed separately through the patient as there is no option for this in the clinic.

1. **Outcome** = Select "To GP/Primary Care" or "To Referrer"
2. **Non Attendance Reason** = Select a Reason
3. **Comments** = Enter further comments if required.
4. **Print DNA Letter** = Un-tick
5. **Request Appointment** = Un-tick
6. Click **Ok** > Clinic List will re-display

Progress to **Closing** the patients referral:

This needs to be done separately away from the clinic:

1. Navigate to the patient's Referral List [icon]
2. Select the required referral [icon]
3. Select **Close** from the Status drop-down > the Close a Referral screen displays:

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7. Enter details referencing above screen-shot.
8. Click **Ok**.
9. If required navigate back to the clinic to complete further processing.

7.2.2 DNW RULES

If the patient:
- Leaves without arranging for a new Booking, the appointment is treated the same as a _DNA._
- Makes a new booking before leaving this should be treated as a _Reschedule._

However; if they have been checked-in you will need to reverse this before processing as either a reschedule or DNA:

1. In the clinic list, click on the [icon] icon next to the required patient > the Appointment Details screen will display.

2. Select **Supervisor** from the Actions drop-down > the Supervisor Update screen will display:

3. Change the **Booking Status** from "Attended" to "Booked"
4. Delete the **Check in Time**
5. Click **[Ok]** > the Appointment Details screen will re-appear.
6. Either progress back to the clinic to proceed with the DNA process or reschedule the appointment as detailed earlier in this document.

7.3 END OF DAYS EXCEPTION REPORT

The End of Days Summary is an exception report found in NDHB reporting, which displays any patients who have not had their attendance or outcome information entered during "End of Days".

It is designed to be used as a final check which can be run at the end of this process or as a regular task. **Please note:** All EOD processes are MANDATORY and must be completed within 2 working days of the of the clinic completion.

1. At the Hospital Level, Click on the NDHB Reporting Icon

   ➢ The following screen will display:

2. Click [Diary and Booking Lists]

3. Click [WebPas - End of Days Summary]

   ➢ Following screen will display

4. Make selections using the drop-down options *(refine to the specific clinics/hospital relevant to you)*:

   ➢ The following will display:

   Outpatients
   RS-933 End of Days - Summary

   As at: 14/02/2018 ..... OP Referral Department: .... Clinic Hospital: Whangarei Hospital
   Clinic Types: All

   Click on the blue number for patient details

HS Department	Clinic	MAR-17	APR-17	MAY-17	JUN-17	JUL-17	AUG-17	SEP-17	OCT-17	NOV-17	DEC-17	JAN-18	FEB-18	Total
		0	0	1	0	2	0	0	0	0	0	0	0	3
		0	0	0	0	1	0	0	1	1	1	1	0	5
		8	13	19	18	32	9	4	10	15	12	14	14	168
		0	0	0	2	0	0	1	1	5	2	5	7	23
		0	0	0	0	0	0	0	1	0	0	1	0	2
		0	0	3	0	0	1	0	0	0	0	1	0	5
		0	0	0	0	0	0	1	0	0	0	0	0	1
		0	0	0	0	0	0	0	0	0	0	1	0	1
	Total	8	13	23	20	35	10	6	13	21	15	23	21	208
	Total	8	13	23	20	35	10	6	13	21	15	23	21	208

   This displays the number of patients missing information for the month they are booked into.

5. If you click on the blue number the patient details will display, separated by clinic:

7.4   END OF DAY CORRECTIONS

The following details how to correct End of Day errors:

1.   Navigate to the patient in the Clinic:

2.   Click on the icon > the Appointment Details screen displays.

3.   Select **Supervisor Corrections** from the Actions drop-down > the supervisor update screen displays:

4.   Remove any times recorded
5.   Change the Booking Status to "Booked"
6.   Click [Ok] > the Appointment Details screen displays.
7.   Return to the Clinic by clicking on the icon (right hand corner of the appointment screen) > the Clinic List displays.
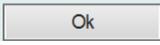
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Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend
📅 13:30	RF	ZAZ4793	📁 HINTER, Mr John (27/02/1985,M, ZAZ4793)	☐	☐	☐	☐	☐

If you recorded a contact you will need to cancel this:

8.   Click on the Departure Box > the following message will display:

Message from webpage ☒

❓ Linked contacts exist for this appointment.
OK to enter additional contacts, Cancel to abort

OK   Cancel
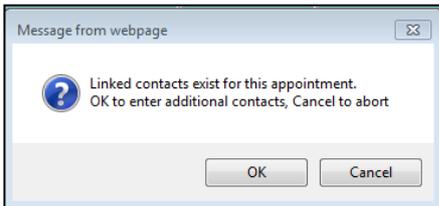
9.   Click **Ok** > the following screen will display, with the incorrect Contact (outcome):

Orthopaedic Referral Details - HINTER Mr John

Referral Date	27 Feb 2017	Referral Source	**Gen. Practitioner**
Referred By	**LOCKE Conlin (DR)**	Problem	**Foot Pain**

Contacts

Date & Time	Provider	Service	Claim Type	Comment	Notes/Other
22 May 2017 13:30:00	COUP Rob (DR)	FSA - First Specialist Assessment	Non Accident		

10. To delete this, click on the ⬛ icon > the Contact screen will display:

Orthopaedic Contact

Contact Date	22 May 2017 Time 13:30:00	Entered By	Noni Perkins
Health Care Provider	COUP Rob (DR)		
Occasion of Service	FSA - First Specialist Ass	Linked Visit Number	5119946
Type of Contact	Outpatient		
Direct Minutes	10	Indirect Minutes	0
Travel Time	0	Mileage	0
Claim Type	Non Accident	Location of Service	
Health Purchaser	35 Base DHB-funded	Contract	
Outcome	Follow Up OP Appt		
Additional HCP	☐		
Cancel	☐		

OK   Close   Medications   Interventions   Supplies   Notes

11. Click the **Cancel** box

12. Click **Ok** > the following screen will re-display with a line now through the incorrect contact:

Orthopaedic Referral Details - HINTER Mr John

Referral Date	27 Feb 2017	Referral Source	**Gen. Practitioner**
Referred By	**LOCKE Conlin (DR)**	Problem	**Foot Pain**

Contacts

Date & Time	Provider	Service	Claim Type	Comment	Notes/Other
~~22 May 2017 13:30:00~~	~~COUP Rob (DR)~~	~~FSA - First Specialist Assessment~~	~~Non Accident~~	-	

13. Exit this screen ⊠ and proceed as usual.

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8   TELEHEALTH CLINIC PROCESS

A Telehealth Clinic is one where the clinician is not present with the patients and the consult is achieved via a video-conferencing link. This is usually used for the Regional Hospitals.

There are 3 scenarios for a Telehealth clinic:

- Whole Clinic (clinic with Telehealth patients only)
- Mixed Clinic (clinic with "face to face" and Telehealth patients)
- Face to Face turning into Telehealth (physical clinic turning into a Telehealth clinic e.g. if the plane does not fly)

The following details the process for each:

8.1   WHOLE CLINIC

The patients are booked in the peripheral hospital, into a "Telehealth" Clinic Type for the clinician e.g. "Elder Telehealth"

Recording End of Day information for these patients occurs as normal.

Note: If you do not have a "Telehealth" Clinic available for your service please contact the PAS Administrator.

8.2   MIXED CLINIC

1. The patients' are booked in the peripheral hospital, into a "Telehealth" Clinic Type, under the name of the person supporting the clinic at the physical location:

   For this example the following patient is booked into an "Elder Telehealth" clinic in Kaitaia under the Nurse Christine Baucke:

For each patient booked in the peripheral location, a slot is reserved as "Telehealth" in the Clinician's Clinic (at the base location):

2. Navigate to the required clinic:

3. At the clinic level, select **Update Slots** from the Views drop-down (highlighted above) > the Update Slots view will display:

4. Tick the box corresponding to the slot that has been booked for the Telehealth patient in the peripheral clinic *(for this example we will tick 09:00)*

5. Select **Tele Health Support** from the Unavailable drop-down

6. An Unavailable Comments box will display > Type in the NHI and Name of the patient

7. Click **Update** > the Update Slots view will re-display, showing the slot reserved for this patient:
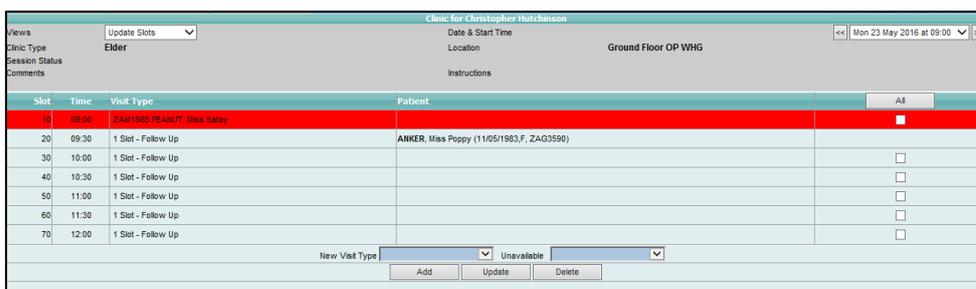
8. Repeat steps 4-7 for each patient, booked into the peripheral clinic.

9. During End of Days (for the peripheral clinic), the Clinician who assessed the patient is identified in the Health Care Provider field:

8.3   FACE TO FACE TURNING INTO TELEHEALTH

1. The existing clinic is kept the same (a comment can be placed on the clinic to identify it is a Telehealth Clinic)
2. During End of Days, the patients' are identified as "Telehealth" in the Type of Contact field:

8.4   VIRTUAL CLINICS

Virtual Clinics are captured the same way as Telehealth Clinics.

It is important that if the clinic is entirely "Virtual" that a Virtual clinic is used e.g. "Virtual Pre-Assessment". This will ensure that these clinics can be viewed in Concerto as different to other face-to-face clinics.

NORTHLAND DISTRICT HEALTH BOARD
Te Poari Hauora Ā Rohe O Te Tai Tokerau

9	APPOINTMENT ACTION LIST

When you create a request for a future appointment, this displays on the Appointement Action List found in webPAS.

Important Note: This list also displays patients waiting for their first appointment (waiting referrals); however this group of patients are currently managed via the First Appointment Summary Report found in NDHB

Reporting

1. At the hospital level, select Appointment Action List from the Actions drop-down

2. The Appointment Action List will display:

3. Make required selections from the drop-downs (Clinic Type is useful for displaying required information).

➢ A list of patients will display:

9.1.1 APPT STATUS

The Appt. Status can be one of the following:

Waiting	A <u>new</u> referral where the patient has not had a first appointment*
Requested	A request for a future follow-up after being seen in clinic
Pending Reschedule	A request for another appointment following DNA/DNW (Did Not Attend or Did Not Wait)

*Many referrals came across from the old patient management system with a status of "Waiting" but have already had appointments. These will have been added to the system prior to webPAS go-live of 20th March 2017.

9.1.2 DUE DATES

Each of these statuses' has a corresponding due date/month:

Must Be Seen By Date   Applicable to Waiting Referrals Only, this is entered against the referral upon entry.

Preferred Date   Applicable to Requested and Pending Reschedule, this is entered in the request.

As the Must Be Seen By Date stays forever against the referral you will notice once a request is made that these patients will have both a Must Be Seen By Date and Preferred Date.

Must Be Seen By Date	Preferred Date	Appt. Status
11 Sep 2017	15 Feb 2018	📅 Requested

9.1.3   FILTER THIS LIST

Once a list of patients has displayed there are options to filter this.
You can click on any Column Heading to put this in order e.g. *put in month due order* :

Preferred Date	Appt. Status
	📅 Pending Reschedule
15 Dec 2017	📅 Pending Reschedule

You can click on the [icon] icon to place drop-down filters on each column e.g. *select a specific date*:
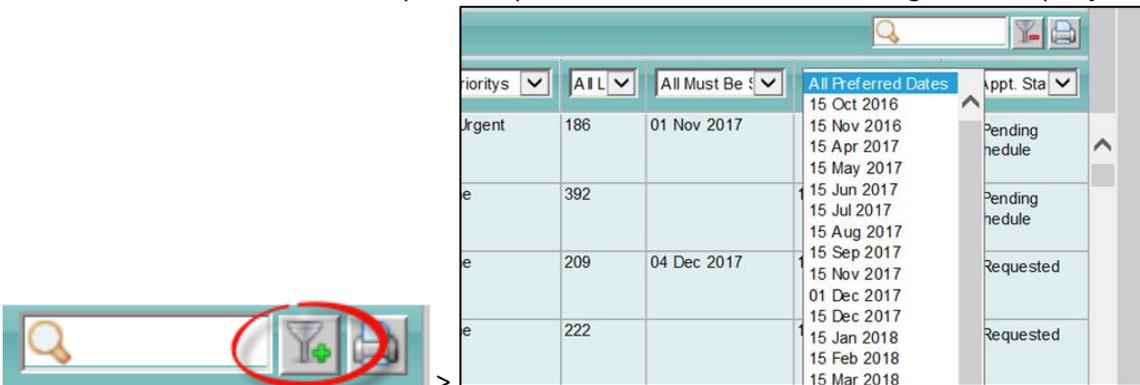
>

Important Note: In the above Preferred Dates drop-down you will notice each date with the 15th. This is why you enter the 15th of the month when creating requests – so that you can view everyone who is due in a month.

9.1.4   SEARCH FOR A PATIENT

Once a list of patients has been returned, you can search from a specific patient on this list by using the
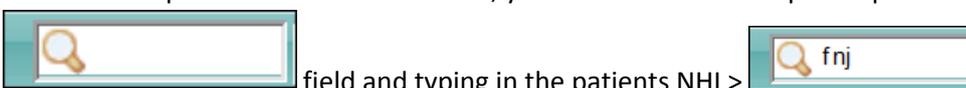
[🔍] field and typing in the patients NHI > [🔍 fnj]

9.1.4.1 EXPORT TO EXCEL

The following details how to export an entire list of patients to excel. This option allows for more flexible filters and can be turned into reports:

1. On Appointment Action List screen, press **Ctrl A** then **Ctrl C** (this will highlight all and copy)
2. Open a <u>new</u> excel spread-sheet on another screen
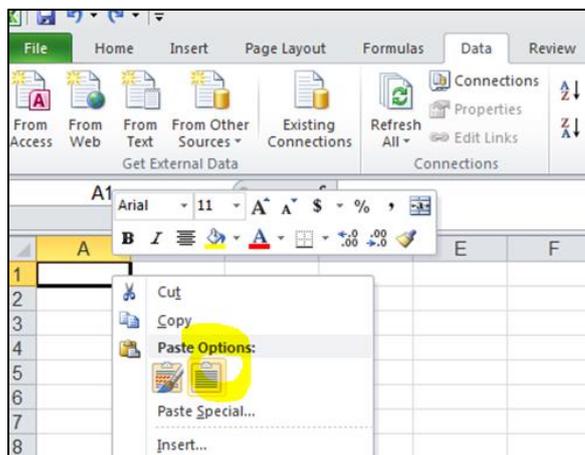
3. In excel; **right click** into the first cell and select basic paste:

4. Will look like this > then delete up to the column headers:

> ➢ Will look like this:

5. If required you can then place a **filter** on each column by clicking on the filter icon (highlighted above).

9.2 BOOK FOLLOW-UP FROM REQUEST APPOINTMENT

This section details how to book a follow-up from a request appointment. There are two ways to do this:

60

Via the Appointment Action List
Via the **Patient**

Important Note: Booking off the request ensures it comes off the Appointment Action List which maintains the lists accuracy.

9.2.1   BOOK VIA THE APPOINTMENT ACTION LIST

The following details how to book a follow-up from a request on the Appointment Action List:

1. Navigate to the required patient on the Appointment Action List:
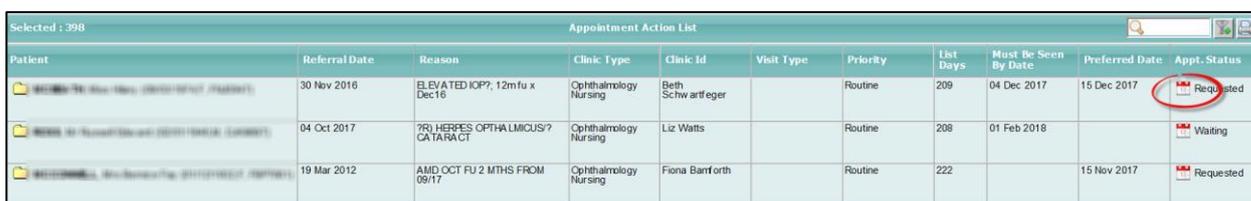
Selected : 398										Appointment Action List
Patient	**Referral Date**	**Reason**	**Clinic Type**	**Clinic Id**	**Visit Type**	**Priority**	**List Days**	**Must Be Seen By Date**	**Preferred Date**	**Appt. Status**
	30 Nov 2016	ELEVATED IOP?; 12mfu x Dec16	Ophthalmology Nursing	Beth Schwartfeger		Routine	209	04 Dec 2017	15 Dec 2017	Requested
	04 Oct 2017	?R) HERPES OPTHALMICUS/? CATARACT	Ophthalmology Nursing	Liz Watts		Routine	208	01 Feb 2018		Waiting
	19 Mar 2012	AMD OCT FU 2 MTHS FROM 09/17	Ophthalmology Nursing	Fiona Bamforth		Routine	222		15 Nov 2017	Requested

2. Click the [icon] icon in the Appt Status column, for the required patient
   ➢ the Update Appointment Request screen displays

3. Check the details of the request and update if required.

4. Click the [Appointment] button
   ➢ the Clinic Search screen displays

5. Proceed with booking as usual

Once the appointment has been completed this request will be removed from the Appointment Action List.

9.2.2   BOOK VIA THE PATIENT

1. Navigate to the required patient

2. In the patient menu, click on the [icon] icon.
3. The list of patient referrals will display (before progressing check you are selecting the correct referral)
4. Click the [icon] icon for the referral to book from > the Referral Details screen will display:
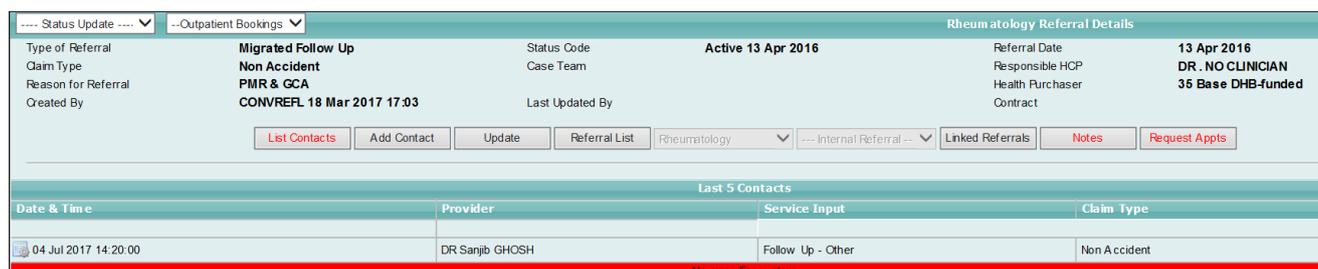
---- Status Update ---- ⌄	--Outpatient Bookings ⌄				Rheumatology Referral Details	
Type of Referral	**Migrated Follow Up**		Status Code	**Active 13 Apr 2016**	Referral Date	**13 Apr 2016**
Claim Type	**Non Accident**		Case Team		Responsible HCP	**DR . NO CLINICIAN**
Reason for Referral	**PMR & GCA**				Health Purchaser	**35 Base DHB-funded**
Created By	**CONVREFL 18 Mar 2017 17:03**		Last Updated By		Contract	

List Contacts	Add Contact	Update	Referral List	Rheumatology ⌄	--- Internal Referral -- ⌄	Linked Referrals	Notes	Request Appts

Last 5 Contacts			
Date & Time	**Provider**	**Service Input**	**Claim Type**
04 Jul 2017 14:20:00	DR Sanjib GHOSH	Follow Up - Other	Non Accident
No more Encounters			

5. Click the **Request Appts** button.

6. Click the [icon] icon
   ➢ the Update Appointment Request screen displays
7. Check the details of the request and update if required.

8. Click the **Appointment** button
   ➢ the Clinic Search screen displays

9. Proceed with booking as usual

Once the appointment has been completed this request will be removed from the Appointment Action List.

9.3   CANCEL A REQUESTED APPOINTMENT

The following details how to cancel a request appointment if it is no longer required:

1. Navigate to the Request Appointment (either via the Appointment Action List or Patient)

2. Click into the Request Appointment [icon] > the Update Appointment Request screen will display
3. Tick the **Cancel Request** box

Update Appointment Request				? _ □ X
Requesting Department	**Rheumatology**	Requested By	**Adine Hopwood**	Request Date **30 Aug 2017 at 16:02:33**
Reason for Request	Follow Up - Other	Linked Referral Number	**1045400**	
Status	**Requested**			
Department Required	Rheumatology	Preferred Date	01 Feb 2018	
Clinic Type	Rheumatology	Preferred Hospital	Kaitaia Hospital	
Clinic Id	Sanjib Ghosh	Preferred Site	NDHB Outpatients	
Visit Type		Presenting Complaint	PMR & GCA	
Claim Type	Non Accident	Transport		
Source of Referral	Other DHB Specialist	Special Arrangements		
Priority	Semi Urgent			
Cancel Request	☐	Reason for Removal		
Comments				
	Update	Appointment	Cancel	

   ➢ The Reason for Removal window will display
4. Select from the drop down
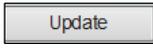
5. Click **Update**
   ➢ The request will be cancelled.

9.4   VIEWING REQUEST APPOINTMENT HISTORY

In webPAS there is a view you can access which display request appointment history, including cancellations and booked requests:

1. Navigate to the required patient

2. In the patient menu, click on the [icon] icon.
    ➢ The list of patient referrals will display (before progressing check you are selecting the correct referral)

3. Click the [icon] icon for the referral to book from > the Referral Details screen will display:

---- Status Update ---- ⌄	--Outpatient Bookings ⌄				Rheumatology Referral Details		
Type of Referral	**Migrated Follow Up**	Status Code	**Active 13 Apr 2016**		Referral Date	**13 Apr 2016**
Claim Type	**Non Accident**	Case Team			Responsible HCP	**DR . NO CLINICIAN**
Reason for Referral	**PMR & GCA**				Health Purchaser	**35 Base DHB-funded**
Created By	**CONVREFL 18 Mar 2017 17:03**	Last Updated By			Contract	

| List Contacts | Add Contact | Update | Referral List | Rheumatology ⌄ | --- Internal Referral -- ⌄ | Linked Referrals | Notes | Request Appts |

Last 5 Contacts			
Date & Time	**Provider**	**Service Input**	**Claim Type**
04 Jul 2017 14:20:00	DR Sanjib GHOSH	Follow Up - Other	Non Accident
		No more Encounters	

4. Click the [Request Appts] / [Request Appts] button.
    ➢ The Request Appointments screen will display

5. Use the Status drop-down option [Status Requested ⌄] to display historical/current requests:

Selected : 1		**Requested Appointments**							
Date	**Department Requested**	**Request Reason**	**Requested By**	**Preferred Hospital**	**Clinic Type**	**Clinic Id**	**Visit Type**	**Status**	
30 Aug 2017 at 16:02:33	Rheumatology	Follow Up - Other		Kaitaia Hospital	Rheumatology	Sanjib Ghosh		Cancelled	

10 CLINICAL RECORDS MANAGMENT

Patients have physical notes created to hold documents related to health care events. A representation of this is created in webPAS to track the movement of these across the DHB. This section details viewing and management of these.

10.1 CLINICAL RECORDS ENQUIRY

The following details how to view the current location and tracking history of clinical records:
1. Navigate to the required patient
2. Next to the patients name (in the patient banner), click on the [ ] icon*

Note: If this icon does not appear there are currently no record volumes created for this patient, please contact clinical records.

➢ The Medical Record Master Enquiry will display:

Selected : 1			Medical Record Master Enquiry				
Document Type	**Vol**	**Hosp**	**Home Loc.**	**Current Location**	**Status**	**Comments**	**MicroFilm**
Clinical Record	1	Whangarei	Clinical Records Department	(DBI) Clinical Records Department	2017	Medical Records 2017	

Note: Any time that a clinical record is tracked outside of it's home location, the location will display in Red (as seen in above screen-shot)
Locations are: AWG = Whangarei
 BKT = Kaitaia
 CDG = Dargaville
 DBI = BOI

3. If you click on the [ ] icon following menu will display, which shows the webPAS tracking history for the record:

Medical Records Enquiry						Whangarei Hospital
	Movements	Visits	Requests	Bar Code Labels	Cancel	
Selected : 16			Movement History			
Movement Date	**Due Date**	**Location**	**Requested By**	**Reason**	**Moved by User**	
09 Apr 2018 at 11:11:52	09 Apr 2018	(DBI) Clinical Records Department	Noni Perkins	Booked Admission	Noni Perkins	
09 Apr 2018 at 11:11:24	09 Apr 2018	(CDG)Dargaville Outpatients	Noni Perkins	Assessment	Noni Perkins	
09 Apr 2018 at 11:11:06		(BKT)Clinical Coding	Noni Perkins	Acute Visit	Noni Perkins	
17 Oct 2017 at 08:24:27	14 Nov 2017	(AWG)Surgical Admission Unit	MARK SANDERS	Admission	Janine Nikora	
17 Oct 2017 at 07:39:11	17 Oct 2017	(AWG)3rd Floor	JANINE NIKORA	Waiting List		
16 Oct 2017 at 19:43:41	17 Oct 2017	(AWG) Clinical Records Department	PU SURG (JANINE)	Waiting List		

4. Clicking **Cancel** will return you to the list of the patient's records.

10.2 RECORD MOVEMENT (SINGLE PATIENT)

If record(s) for a patient are moved from one place to another you must make sure this new location is reflected in webPAS. The following details this process:

1. Navigate to the required patient
2. At the patient level, select **Single Record Movement** from the Actions drop-down > the Single Record Movement screen will display:

3. Enter required details, referencing the table below:

Field	Description and Use
Document Type	Defaults to Clinical Record, select another option if required.
Movement Date	Defaults to current date, select another date if required.
Destination	Destination Location > Select an option
Reason	Reason for movement > Select an option
Extension #	Not required
Movement Comments	Free-text field to further explain movement if required
Requested By	Receiver. Change to clinician's name if request is for a hospital event related to the clinician e.g. Clinic or Theatre Booking
Movement Time	Leave as defaulted
Hospital	Destination Hospital. Select an option
Due Date	Defaults to date linked to Reason. Change if required e.g. Clinic is on a certain date.
Pager #	Not required

4. (If there is more than one volume) Tick the **Required** box next to each record being moved
5. Click on the **Move** button > The Patient Demographic screen displays – the record(s) are now moved.

10.3 BULK RECORD MOVEMENT (SEVERAL PATIENTS)

The following details the process for tracking clinical records in bulk, across several patients:

1. At the hospital level, select **Bulk Record Movement** from the Actions drop-down > the Record Movement screen will display
2. Enter the details of the movement, referencing the table below:

Field	Description and Use
Movement Date/Time	Defaults to current date/time, or select other date/time using icons
Hospital	Destination Hospital. Select an option
Document Type	Defaults to Clinical Record, select another option if required.
Extension #	Not currently in use
Requested By	Receiver. Change to clinician's name if request is for a hospital event related to the clinician e.g. Clinic or Theatre Booking
Destination	Location of the Destination. Select an option
Due Date	Defaults to date linked to Reason. Change if required e.g. Clinic is on a certain date.

Ignore Incomplete Coding	Leave as defaulted unless confirmation is received from coding to ignore.
Pager #	Not currently in use
Home Hospital	Defaults to current hospital, change hospitals in webPAS to request records from other clinical record department locations
Home Location	Select an option
U/R Number	Enter the known U/R number or search and select.
Medical Records Scan	Scan patient label. If scanner is being used - leave the cursor in this field and scan for each record. Cannot test this function until scanner and labels are functional.

3. As each U/R is entered (followed by clicking Enter button) or scanned in, the patient record information will display:

-   *By default the most recent record is requested (highlighted above), select from the drop down if a different volume is required.*

-   *Click **Clear** to clear all the current records on the list, or clear individual records by clicking on the button next to the relevant U/R.*
-   *If you are interrupted, Click **Continue** to move the listed records without losing your movement options you have selected*

4. Click the **Move** button > the Record Movement screen displays - the selected records are now tracked.

11   APPOINTMENT LABELS AND LETTERS

Most processes in webPAS offer (if required) the option of printing labels and letters. This section details how to print outside of the process e.g. the patient didn't get a letter or some extra labels are required.

Important Note: for webPAS printing you must have a visit in context to be able to print e.g. to print a referral label you must be in the referral, to print an appointment letter you must be in the appointment.

Note: these can also be printed out in bulk, please see Bulk Print Letters and Labels

This details how to print out the following:
Letters
- **Appointment Letter (or "Print Booking Letter")** = Informing the patient of their appointment date and time
- **Reschedule Letter** = Informing the patient of a rescheduled appointment with the new appointment date and time
- **DNA Letter** = Informing the patient of a DNA (non-attendance) and a clinical decision has been made to discharge from the service.
- **GP DNA Letter** = Informing patients GP of a DNA (non-attendance) and a clinical decision had been made to discharge the patient from the service.
- **Pre-Assessment GP Letter** = <u>Not</u> for general outpatients use.

Labels
- **Booking** = Label that prints out with Clinician and Department details for the appointment
- **Appointment** = Exactly the same as the Booking Label
- **Mailing** = Label with patients address
- **GP Labels** = Label with GP's practice address

11.1 PROCESS

1. Navigate to the required patient

2. Click on the [icon] icon > Appointment List will display

3. Click on the required appointment [icon]

4. At the appointment level, select **Labels and Forms** from the Actions drop down
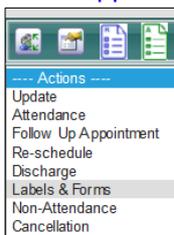
   ➢ The Print Appointment Labels and Forms screen will display:

5. Make the required selections.
6. Click **Ok**

11.2 VIEW OUTPATIENT LETTER HISTORY

1. Navigate to the required patient, the Patient Demographic screen will display

2. In the patient level, select **Outpatient Letter History** from the Information drop down > the Outpatient Letter History Details screen will display

11.3 DIAGNOSTIC LABEL

A diagnostic label is a label used on blood and laboratory requests when there is no referral or visit that will print out the requestor's details.

It can be accessed by clicking on the [icon] icon at the patient level:

Type of Label = Diagnostic Label

Clinician and Department = Type in **Clinician** and **Department** the results are to be *returned to*

12 VIEWS AND REPORTS

12.1 WEBPAS CLINICIAN SEARCH – FINDING THEIR CODE

The following details how to find a clinician's code if required:

1. At the patient level, select All Clinicians from the Searches drop-down
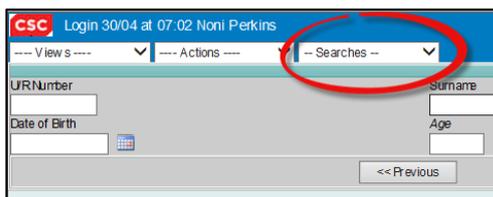
> Following screen will display:

2. Type in the name of the clinician you need a code for and press [Search] > following details will display, including clinician code:
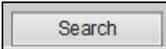
12.2 WEBPAS PATIENT VIEWS

This section details the different types of views that are available that display a list of visits/events for a patient.

The different visit/event types are:

- EMG = Emergency Attendance
- IP = Inpatient Admission
- RF = OP Referral
- OP = Outpatient Appointment
- W/L = Waiting List Entry

Important Note: Please be aware this information only contains visits/events created in webPAS from 20th March 2017 (WebPAS Go-Live) and any open outpatient referrals that migrated across from the old PAS (Patient Administration System).

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A full list of historical visits can be viewed in the Clinical Documentation System "Concerto" which can be

accessed via the [icon] icon at the hospital level:

12.2.1.1 ALL VISITS

This view displays all visits for a patient and can be filtered to show administrative or clinical information:

1. Navigate to the required patient
2. At the patient level, select **All Visits** from the Information drop-down > the following screen will display (this defaults to the "Administrative" view):

Adm/Visit Date	Day	Type	Unit	HCP	Location	Claim Type	Status	Visit No.	Med Rec Volume
27 May 2016 at 09:00	Fri	OP	ELDER	Christopher Hutchinson	Whangarei Hospital-Ground Floor OP WHG	NA	Booked	5060750	
24 May 2016 at 14:08:56	Tue	IP		COUP , Rob (DR)	Whangarei Hospital-Wd 01 Orthopaedics	ACC	Current IP	5060725	
24 May 2016 at 11:47:41	Tue	EMG		COUP , Rob (DR)	AWG-WHG	ACC	Current	5060724	
23 May 2016 at 13:30	Mon	OP	ORTHO	Rob Coup	Whangarei Hospital-Ground Floor OP WHG	NA	Attended	5060708	
23 May 2016 at 09:00	Mon	OP	ELDERT	Christine Baucke	Kaitaia Hospital-KTA Main Reception	NA	Attended	5060714	
23 May 2016	Mon	RF	HOP	TAN Aik (DR)	Kaitaia Hospital	NA	Active(Last Enc.23/05/16)	5060713	
23 May 2016	Mon	RF	ORT	COUP Rob (DR)	Whangarei Hospital	NA	Active	5060707	
04 Apr 2016 at 15:37:47	Mon	IP	ORT	COUP , Rob (DR)	Whangarei Hospital-	NA	Pre-adm	5060302	
23 Mar 2016 at 10:19:30	Wed	IP	ORT	COUP , Rob (DR)	Whangarei Hospital-Wd 03 Surg Short Sty	NA	Disc- Routine 23/03/2016 10:21:53	5060295	
22 Feb 2016 at 10:00	Mon	OP	FRAC	Fracture Clinic	Kaitaia Hospital-KTA Main Reception	NA	Booked	5060303	
18 Feb 2016 at 08:30	Thu	OP	FRAC	Margy Pohl	Whangarei Hospital-Ground Floor OP WHG	NA	Attended	5060294	
18 Feb 2016	Thu	RF	ORT	COUP Rob (DR)	Whangarei Hospital	NA	Active(Last Enc.18/02/16)	5060293	
16 Feb 2016 at 07:23:00	Tue	IP	ORT	COUP , Rob (DR)	Whangarei Hospital-Wd 01 Orthopaedics	NA	Disc-Self dc 11/03/2016 08:28:08	5060285	
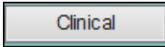
- Click on the [Clinical] button, to view the "Diagnosis/Procedure" information for inpatient or emergency visits.
- Click on the [icon] icon to view details for the corresponding visit or referral.

12.2.1.2 VISITS BY TYPE (HOSPITAL)

This view displays all visits for a patient and can be filtered to show these by hospital or type:

1. Navigate to the required patient
2. At the patient level, select **Visit by Type (Hospital)** from the Information drop-down > the following screen will display:
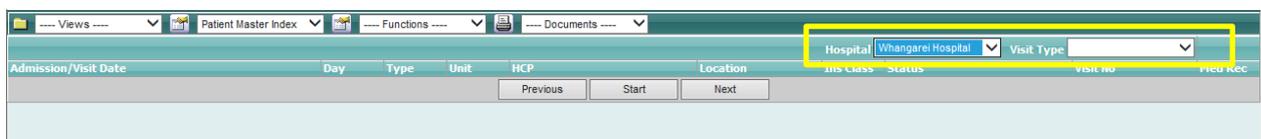
3. Use the **Hospital** and **Visit Type** drop-down options (highlighted above) to define what is displayed:

Note: the **Hospital** will default to the current hospital you are in. The **Visit Type** needs to be selected to display results.

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Admission/Visit Date	Day	Type	Unit	HCP	Location	Ins Class	Status	Visit No	Med Rec
Hospital All							Visit Type All		
01 Jul 2016 at 09:15:26	Fri	IP		PAGE , Ian (DR)	Whangarei Hospital-Eye Procedures	NA	Current IP	5094214	
22 Jun 2016 at 08:26:43	Wed	IP		PAGE , Ian (DR)	Whangarei Hospital-Wd 01 Orthopaedics	NA	Disc- Routine 01/07/2016 09:14:21	5094070	
22 Jun 2016 at 08:25:33	Wed	EMG		PAGE , Ian (DR)	AWG-WHG	ACC	Current	5094069	
No more visits									

Previous	Start	Next

- Click on the [icon] icon to view details for the corresponding visit or referral.

12.2.2 NATIONAL VISITS AND EVENTS ENQUIRY

This view displays inpatient visits for the patient at a National level (across all DHB's)

1. Navigate to the required patient, the Patient Demographic screen will display
2. In the patient level, select **National Visits** from the Information drop-down > the following screen will display:

National Event History			
Start	End	Description	Facility
16 Feb 2018	19 Feb 2018	IP_A_Other obesity BMI 43_ICD-10-AM eighth edition_Diagnosis_E668	4111Whangarei Hospit
07 Jun 2016	07 Jun 2016	IP_A_2 Isolated proteinuria with focal and segmental glomerular lesion	4111Whangarei Hospit
12 Nov 2015	12 Nov 2015	IP_A_Atherosclerotic heart disease, of native coronary artery_ICD-10-A	3260Auckland City Ho
30 Dec 2010	01 Jan 2011	IP_A_Cellulitis of lower limb LEFT MEDIAL_ICD-10-AM sixth edition_Dia	4111Whangarei Hospit
08 Feb 2010	12 Feb 2010	IP_A_Sepsis, unspecified_ICD-10-AM sixth edition_Diagnosis_A419	4111Whangarei Hospit

12.3 NDHB REPORTS

12.3.1 WAITING FOR FIRST APPOINTMENT - SUMMARY

This report displays a view of all patients waiting for their first appointment (Referrals with a true status of "Waiting"*) by department and due month (according to the MoH maximum waiting time of 4 months).

*Many referrals came across from the old patient management system with a status of "Waiting" but have already had appointments. These will have been added to the system prior to webPAS go-live of 20th March 2017 but will not be included in this reporting.

1. At the hospital level, click on the **NDHB Report** Icon [icon]

2. Click on [Waiting for FSA or Follow Up]

3. Click on [Waiting for First Appointment - Summary]

➢ The following screen will display:

Home > Clinical Services Delivery > Outpatients > Waiting for FSA or Follow Up > Waiting for First Appointment - Summary

Urgency	0 - Not prioritised, 2 - Urgent, 3 ⌄	Clinic Hospital	Whangarei Hospital, Kaitaia Hosp ⌄	
FSA Clinic	All Clinics ⌄	Type of Referral	FSA 1st Specialist, Procedure /T ⌄	
HSC Scan	Field Empty ⌄	Past Dates	Exclude Past Dates ⌄	

| ◀◀ ◀ 1 of 1 ▶ ▶▶ | 100% ⌄ | | Find | Next |

Outpatients

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Waiting for First Appointment - Summary

As at 27/04/2018 ….. Urgency: 0 - Not prioritised, 2 - Urgent, 3 - Semi Urgent, 4 - Routine, 6 - Not determined - pending test, 7 - Rejected, TR - Not listed …… Hospital: All …… FSA Clinic Types: All Clinics …… Past Dates: No

The Ministry of Health has set a target that **"No Patient should wait longer than 4 months for an FSA".**
Please continue to book patients who are the most urgent and longest waiters first.

Please Note: Urgent and Semi-Urgent patients will need to be seen within their clinically appropriate time-frame which will be before the 4 month period

Click on the blue number for patient details

Speciality	Clinic Type	MOH ESPI*	ASAP	May-18	Jun-18	Jul-18	Aug-18	Total
Allied Health	AIDFIT		1			1		2
	AUD		6	1	1		2	10
	DIABDT		8					8
	DIABPS		1					1
	DIAN		2					2
	DIET		29			2		31

Tip: At this stage you can add this screen to your favourites so it's quicker next time. Right Mouse Click (on report screen) > Select **Add to Favourites** > Select **Favourites Bar** from "Create in:" drop-down > Click **Add**. (this will now display in your favourites bar of the internet page for webPAS)

File Edit View Favorites Tools Help
⭐ 📄FogBugz ⭐ Pages - Intranet Home 📄RMS Lite 📄Web Slice Gallery ▾ 📄WebPas - Daily Clinic List 📄webPAS ACC 📄webPAS QA 📄webPAS Train 📄webPAS Production 📄WebPas - Clinic Patient D...

CSC Login 14/07 at 15:21 Noni Perkins   **Whangarei Hospital**

---- Views ---- ⌄   ---- Actions ---- ⌄   -- Searches -- ⌄

12.3.1.1 INFORMATION DISPLAYED ON THIS REPORT

ASAP
1

- You can click on the blue number to see patient details

- This information can be separated into **Type of Referral**
  Type of Referral FSA 1st Specialist, Procedure /T ⌄
  which is based on what the user selects from the type of referral drop-down on the referral in webPAS.

- FSA's are sent to the MoH if they have their Type of Referral as "FSA 1st Specialist" and are a service/clinic that meets the definitions of FSA. Those counted have a "Y" in MoH ESPI column:

Clinic Type	MOH ESPI*
ENT	Y
ENTN	
ENTPRO	
PA	
Total	

- Selections can be used to define or broaden as required

- You can click on the print icon to print

13   WEBPAS SUPPORT

Email help-desk (NDHB) ISServiceDesk@northlanddhb.org.nz

Contact the webPAS Support Team

Louise Miller

☎ NDHB Extension: 60798   Mob +64 21 709 903   **#1555**

✉ louise.miller@northlanddhb.org.nz

Noni Perkins

☎ NDHB Extension: 60799   Mob +64 21 529 943   **#1191**

✉ noni.perkins@northlanddhb.org.nz