

Northland District Health Board

WebPAS/Best Practice

Outpatients Appointment & Clinic User Guide

31/05/2018 This report contains 73 pages





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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 <u>ISServiceDesk@northlanddhb.org.nz</u> for this to be added.

This form can be found by clicking on the help



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 KV200	Goto				
Clinic	Effective Date	Clinic Description		Doctor	1	Active
🔜 133JV	01 Jan 2010	Lockie Teague		TEAGUE Lockie (DR)	7	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 N		NIXON Anthony (MR)		Yes
		<< P	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 <u>webPAS Clinician Search - Finding their Code</u> to <i>find this.



3. Click the Goto button
4. Click the icon beside the required clinician > The Clinic Master List will display:

	Oper	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					
	iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	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 <u>ISServiceDesk@northlanddhb.org.nz</u> for this to be added.
- 5. Click the 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					
📑 СВ	29 Oct 2015	15:30	10	📆 СВ					
🐻 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 temp<u>late</u> code stands for the hospital e.g. C<u>B</u> stands for "Bay of Islands"
- You can also click on the 🔤 icon to see further details.
- 7. Click the icon next to the correct template > the Slot Template will display (this is the basic set-up of your clinic):

			Kelly Vince - S	Slot Template					
Day of Week		Tuesday		Start Ti	me			08:30	
Bookings Finish Time		09:30		End of	Session Time			09:40	
Clinic Type		Fracture		Clinic Ir	ndic ator			Consultant	
Schedule		CW - 01 Jan 2010		Slot Tin	ne Allocated			10	
Comments				Instruc	tions				
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 A	dd 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 Bookings Finish Tin Clinic Type Schedule Comments	ne		Monday 15:30 Orthopaedic CB - 29 Oct 2015 KV200		Start Time End of Session Time Clinic Indicator Slot Time Allocated Instructions		09 15 Ca 10	9:00 5:30 onsultant 0	
Last Open Sess	ion Date: 31 Dec	2018		2017					
				2017					
4 Week	2 Week	Clear			All	All	All	All	All
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 Ye	ar <- Previous Year OpenSess	Cancel	Next Year >>] Oti	her Template Public H	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 <u>ISServiceDesk@northlanddhb.org.nz</u> for this to be added.

- 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 beside the required clinician > The Clinic Master List will display
- 5. Click the 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	ay of Week		onday	Start Time			09:00		
Date Clinic Opened				D	ate Clinic Closed				
Schedule	Finish Time	Finish Time		ited	Slot Template/Open				
📑 СВ	29 Oct 2015	15:30		10		Св			
🔂 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<u>B</u> stands for "Bay of Islands"
- You can also click on the 📖 icon to see further details.
- 7. Click the 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 S	Sessions - Delete Se	ssions - Peter Dry	/burgh			
Day of Week		Monday	Sta	art Time		09:00		
Bookings Finish Tir	ne	09:00	En	d of Session Time		12:30		
Clinic Type		General Surgery	Cli	nic Indicator		Consultant		
Schedule		1W - 01 Apr 2017	Sic	t Time Allocated		30		
Commonte		100-01 Apr 2017	loc	tructions		00		
Comments			113	ti de lionis				
			2017					
Clear			Al	All	Al	All	AI	
January			2	9	16	23	30	
February			6	13	20	27		
Marc h			6	13	20	27		
April			3	10	17	24		
May			1	8 🗌	15 🗌	22	29	
June			5	12	10	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		
Dec ember			4	11 🗌	18 🗌	25		
		Previous Year Delete Sess	Cancel	Next Year >>	Other Template F	ublic Holidays	eave Dates	uspended Dates

- The example above shows a view of all the <u>Monday</u>s. Those with ticks are current open clinics.
- Solid black ticks 24 🗹 are <u>available</u> for closing
- Grey ticks 26 indicate an open clinic with bookings and <u>cannot be closed</u>, 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:

Views 🗟 🗟 🗟 🤜 Thu 24 Nov 2016 🗸 >	•		Group Type All					17:
Selected : 60 Clinic Timetable								8
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 growthe 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:

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

Clinic Type			<< Thu 24 Nov 2016 V >>			
Clinic ID	✓		Clinic Next Available			
Visit Type	✓		Search			
Start	Clinic Type	Clinic	Location	Available Booked New	Booked Review	Booked Special
		<< Previous Next >>				

- 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*)

- 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:

Views 🗟 🗟 🔍 (Mon 23 Feb 2015 🗸 😒								17	31
Selected : 6 Clinic Timetable									
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 Chaic Type Clinic Location Empty New Review Special 22 25 eb 2015 at 00:00 Mon 12:00 Dental Differential Cupitor Dental Cupitors 0 4 0 22 25 eb 2015 at 00:00 Mon 12:00 ORT Orthopaedice Regression Orthopaedic Clinic Dental Cupitors 0 0 4 0 22 25 eb 2015 at 00:00 Mon 17:00 ORT Orthopaedice Regression Orthopaedic Clinic Fracture/Ortho Outpit 7 0 1 0 23 25 eb 2015 at 00:00 Mon 17:30 General Medical Or Towner's Clinic 13 0	Views @ @ @ (Mon 23 Feb 2015 ♥ ≫ Selected : 7 Clinic Timetable								17
22 Feb 2015 at 08:00 Mon 12:00 Dental Dr Hombal/s Dental Clinic Dental Cupaterins 0 0 4 0 22 7 6b 2015 at 08:00 Mon 12:00 ORT Offtopaselica Rogerision Offtopaselic Clinic Fracture/Offtop Outpit 7 0 1 0 23 7 6b 2015 at 08:00 Mon 17:00 General Medical Dr Towner's Clinic 13 0	Start	End	Clinic Type	Clinic	Location	Empty	New	Review	Special
Image: 23 Feb 2015 at 08:00 Mon 12:0 OFT Orthopsedics Ropersion Orthopsedic Clinic Practure/Ortho Culpt 7 0 1 0 Image: 23 Feb 2015 at 08:00 Mon 17:30 General Modical Or Towneys Clinic 113 0	23 Feb 2015 at 08:00 Mon	12:00	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	0	0	4	0
Image: 23 Feb 2015 at 0800 Mon 17.30 General Medical Diff avera's Clinic 113 0.0 0.0 0.0 Image: 23 Feb 2015 at 0800 Mon 115 Exr, Nose and Throat Exr, Nose and Throat ENT Outpatients 0.0 </td <td>23 Feb 2015 at 08:00 Mon</td> <td>12:00</td> <td>ORT Orthopaedics</td> <td>Rogerson Orthopaedic Clinic</td> <td>Fracture/Ortho Outpt</td> <td>7</td> <td>0</td> <td>1</td> <td>0</td>	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 0900 Mon 11.5 Eur, Nose and Throat Eur, Nose and Throat EUR Outpatients 0 0 6 1 23 Feb 2015 at 0900 Mon 1920 Mertal Health General OP WGTN 19 0	23 Feb 2015 at 08:00 Mon	17:30	General Medical	Dr Tauvae's Clinic		13	0	0	0
Image: 23 Feb 2015 at 09800 Mon 1520 Mertal Health Mertal Health General OP WGTN 19 0 0 0 0 Image: 23 Feb 2015 at 09800 Mon 1245 General Surgery Surgery - General General OP WGTN 17 0 0 0 0 Image: 23 Feb 2015 at 1000 Mon 14:00 General Surgery MIESE LED ANGIO General OP WGTN 0 1 5 0	23 Feb 2015 at 09:00 Mon	14:15	Ear, Nose and Throat	Ear, Nose and Throat	ENT Outpatients	0	0	6	1
Image: 23 Feb 2015 at 1000 Mon 12.45 General Surgery Surgery General OP WOTN 17 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 1 5 0 Image: 23 Feb 2015 at 1000 Mon 14.00 General Surgery MURSE_LED ANGIO ASSESSMENTS General OP WOTN 0 1 5 0	23 Feb 2015 at 09:00 Mon	19:20	Mental Health	Mental Health	General OP WGTN	19	0	0	0
23 Feb 2015 at 1000 Mon 14:00 General Surgery NURSE_LED AVGO ASSESSMENTS General OP WGTN 0 1 5 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	14:0D	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):

Views 🗟 🗟 🗟 << 🛛 Fri 25 Nov 201	l6 ▼ [>>	Group Type All	•				17
Selected : 49 Clinic Timetable								
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:

🗖 🛃				Clinic f	or Gareth Lav	vs						
Views	Booking	s Details	•	Date & 1	Start Time					< Wed 04 N	lay 2016 at 13:30 👻	>>
Clinic Type	Orthopa	aedics		Location	ı		Ground Floor OP	NHG				
Session Status Comments				Instruct	ions							
Selected : 14				Clinic List	for 1:30 pm 0-	4 May 2016						
Time	Туре	U/R	Patient		Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed	
13:30	RF											^
13:40	RF	ZAE9538	AUTUMN, Miss Leah (07/04/1992,F, ZAE9538)				•			9 1		
13:50	RF											
14:00	RF											

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

				Clinic f	or Gareth Laws		
Views	Update Slo	its 👻		Date & S	Start Time		Wed 04 May 2016 at 13:30 👻 🖂
Clinic Type	Orthopaed	dics		Location		Ground Floor OP WHG	
Session Status				to also all			
Comments				Instructi	ons		
Slot	Time	Visit Type	Patient				AI
10	13:30	1 Slot - Follow Up					
20	13:40	1 Slot - Follow Up	AUTUMN, Mi	ss Leah (07/04/1992,F, ZA	AE9538)		
30	13:50	1 Slot - Follow Up					[T]
40	14:00	1 Slot - Follow Up					E
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	1 Slot - Follow Up					
130	15:30	1 Slot - Follow Up					
140	15:40	1 Slot - Follow Up					
		I	New Visit Type		 Unavailable 	•	
				Add	Update Delete		

- 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
- 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	Al			
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	Cinician attending departmental meeting					
130	15:30	Cinician 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.



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:

	Add New Time Slot	? - :
Slot Time	ö Θ	
Visit Type	•	
U/R		
Referral No.	C	
	Ok Cancel	

- 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:

110	15:10	1 Slot - Follow Up		
120	15:20	1 Slot - Follow Up		
130	15:30	1 Slot - Follow Up		
140	15:40	Clinician attending departmental meeting		
900	14:25	Overbooked New		a
		New Visit Type	▼ Unavailable ▼	
		Add	Update Delete	

- 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.



- 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 ______ 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

/iew s	Bookings Details	
Clinic Type Session Status Comments	Diagnosis Details Contact Details Update Slots Reschedule Update All Non Attended	
Solocted : 7	Update Comments Suspend Clinic	

the Update Session Comments screen displays:

Update	? = ×	
Session Status	No Registrar	\checkmark
Session Comments	Limit to 10 Patients	
	Ok Cancel	

- 3. Select a Session Status and/or type in free-text Session Comments (you can use one option or both)
- 4. Click
- 5. The information entered will display in the banner of the clinic list and also for the NDHB reporting printable version:



•		
View s	Bookings Details	\checkmark
Clinic Type	Oncology	
Session Status	No Registrar	
Comments		
	Limit to 10 Patients	

Note: You can also see this information when you are booking an appointment by clicking on the "Show Details" tick box:

Clinic List for 1:00 pm 20 Aug 2018						
Newton Reg Team (Oncology) Appointment I				Show Details 🗹	< Mon 20 A ι	ug 2018 at 13:00 💙 >>
Clinic Type				Oncology	Location	Jim Carney Centre
Session St	Session Status No Registrar					
Comments					Instructions	
				Limit to 10 Patients		
Slot	Time	Visit Type	Patien	nt		
10	13:00	Follow Up -1 Slot				



3 OUTPATIENT APPOINTMENTS

This section details how to book an outpatient appointment.



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 <u>adding slots</u>

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 <u>Book a Follow-Up Appointment</u>

- 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:

lected : 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 coordinate bookings or avoid conflicts.

- 3. In the patient menu, click on the 트 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:

📧 🗃 🗎 🗎 🗕	Information 👻 🛗 Actions	🕶 🚊 Printing	•		
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



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)

			Clinic Search					? = ×
linic Type	Fracture	~			»			
linic ID	Erin Ratahi	•		Clinic 🔍 Next Available 🔇				
isit Type		-		Search				
Start		Clinic Type	Clinic	Location	Empty	New	Review	Special
29 Apr 20	16 at 12:30 Fri	Fracture	Erin Ratahi	Ground Floor OP WHG	19	0	0	0
05 May 20	16 at 08:30 Thu	Fracture	Erin Ratahi	Ground Floor OP WHG	16	0	0	0
13 May 20	116 at 12:30 Fri	Fracture	Erin Ratahi	Ground Floor OP WHG	19	0	0	0
19 May 20	16 at 08:30 Thu	Fracture	Erin Ratahi	Ground Floor OP WHG	16	0	0	0
27 May 20	116 at 12:30 Fri	Fracture	Erin Ratahi	Ground Floor OP WHG	19	0	0	0
			End of search r	esuits				
		-	< Previous	Next >>				
		_						

12. Click the icon to select a Clinic > the following screen will display, showing available slots:

		Clinic List for 9:00 am 01 Dec 2017	? = ×
Erin Ratahi A	ppointment List	Show Details	<< Fri 01 Dec 2017 at 09:00 V >>
Time	Visit Type	Patient	Status
9:00 am	Follow Up -1 Slot		
9:10 am	Follow Up -1 Slot		
9:20 am	Follow Up -1 Slot		
9:30 am	Follow Up -1 Slot		
9:40 am	Follow Up -1 Slot		
9:50 am	Follow Up -1 Slot		
		Return	

- Show Details You can click on the box to display other booked patients and information for the clinic
- Return Click on the button to return to the clinic search screen.
- 13. Click on the icon to select the required appointment slot > the Make New Appointment screen will display:

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		Make New Appo	intment	
Clinic	Erin Ratahi	<u> </u>	Date	Fri 17 Nov 2017 at 09:10
Visit Type	FSA - 2 Slots	\checkmark		
Mode of Delivery	Face to Face - 1 Patient	to 1 Clinician 🗸 🗸		
Presenting Complaint	Left Hip Pain			
Diagnosis				🖾
				🖾 🖾
				🖾 🗐
Procedure				
Hocedule				
Problem	HIPP	ip Problem		
				(
Transport		\checkmark	Priority	Routine 🗸
Claim Ty pe	Non Accident	~	Unit	~
Source of Referral	Gen. Practitioner	\checkmark	Reports Required	X-Ray Before Clinic 🗸
Special Arrangements	POP removal	\checkmark	Referring GP	LOCKE Conlin (DR)
Preferred Contact Method		~	Practice	RAUMANGA MEDICAL Œ
Contract	~	•	Inform GP	Yes 🗸
Health Purchaser	35 Base DHB-funded			
Comments	Write comments	according to de	partment requireme:	nts these
	display in Cond	certo and for th	e Clinic	~
Referral Date	01 Nov 2017			
		Ok	Cancel	

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:

Reports Required		Special Arrangements		Transport	de secondario de la companya de la c
Referring GP Inform GP Health Purchaser	Anaesth Assess Req Audiology Appt Req Bloods Before Clinic ECG EchoCardiogram Exercise Treadmill Mammogram Required Private X-Rays Specialist Letter X-Ray Before Clinic zzz Category O1	Preferred Contact Method Contract Comments	Bariatric Equipment Female Consultant For POP removal Interpreter Required Male Consultant Ultrasound Required Wheel Chair Required zzz category SA	Claim Type Source of Referral Special Arrangements Preferred Contact Method Contract Comments	Ambulance Rckup Dargaville Shuttle Katala Bus National Travel Asst Pedestrian Private Transport Public Bus Renal Transport Rest Home Van Taxi zz c at OB Transport

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 > 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.



	Print Appointment Labels & Forms -			? = X
Booking	No of Labels 40 V	Printer	×	
Appointment	No of Labels 40 V	Printer	~	
Mailing	No of Labels 40 V	Printer	~	
GP Labels	No of Labels 40 V	Printer	~	
Print Card		Printer	~	
Print Booking Letter		Printer	~	
Other Letter	✓ Letter OP1 Appointment	Printer	CustomerServices	
	Ok	Cancel]	

- 19. Tick "Other Letter", select OP1 Appointment and select Printer
- 20. Make other selections if required.
- 21. Click > the Appointment Details screen will appear with the appointment information displayed:

- Actions 👻		Appointment Details -	
Clinic	Erin Ratahi	Appointment	Thu 05 May 2016 at 13:00
Clinic Location	Ground Floor OP WHG	Interpreter	
Special Arrangements		Priority	
Referral Source	Gen. Practitioner	Unit	
Transport		Reports Required	
Claim Type	Non Accident	Referral Date	05 May 2016
Referring GP	DR ANNA ZENDER	Mode of Delivery	Face to Face - 1 Patient to 1 Clinician
Booked By	Noni Perkins	Date	05 May 2016 at 13:08:07
Presenting Complaint	Left Knee Pain	Contract	
Diagnosis		Procedures	
Health Purchaser	35 Base DHB-funded	Problems	KNEEP KNEEP
Outcome Comments			
ected : 1		Same Day Appointments	Q 14

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:

Actions 🗸		Appointment Details -		
Clinic	Fracture Clinic	Appointment	Mon 18 Dec 2017 at 10:50	
Clinic Location	KTA Main Reception	Interpreter		
Special Arrangements		Priority	Urgent	

1. Click on the 🛄 icon in the top right hand corner of this screen > the Clinic List displays:



	579
,	
u	

•					Clinic for	r Lyndon Bra	dley						
Views	Bookii	ngs Details	•		Date	& Start Time				<< Tu	e 03 May 2016	at 12:30	▼ >>
Clinic Type	Orthop	paedics			Locat	ion		Ground Floor	OP WHG				
Comments	LB110 Instructions												
Selected : 14	I: Clinic List for 12:30 am 03 May 2016												
Time	Туре	U/R	Patient			Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirm	ed
13:00	RF										-		^
13:10	1N	ZAF7387	(13/08/1992	MITE, Mr Napoleon									

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:

	Clinic for Lyndon Bradley								
Views		Confirmed Appoint	ments 🔻	Date & Start Time					03 May 2016 at 12:30 🔻 🚺
Clinic Type Orthopaedics		Location Ground Floor OP WHG							
Session Commen	Status its LB110 instructio			Instructions	uctions				
Slot	Time	Visit Type	Patient		Special Arrangement	Private	Business	Mobile	Confirmed
40	13:00	1 Slot - Follow Up							
50	13:10	1 Slot - FSA	DYNAMITE, Mr Napoleon (13/08/1992,M, ZA	AF7387)					Noni Perkins 29 Apr 2016 10:53

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 must 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:

	Clinic List for 9:30 am 13 Feb 2018	? = X
Jayantha Sirisena Appointment List	Show Details	Tue 13 Feb 2018 at 09:30 V >>
Tim Visit Type	Patient	Status
	Return	

- icon in the top right hand corner of your screen. 2. Click on the
 - The Clinic Update Slots screen displays:

3.





			Clinic for Jaya	ntha Sirisena		
View s		Update Slots	Date & Start	Time		Tue 13 Feb 2018 at 09:30 V
Dinic Type Session State	e .	Colposcopy	Location		BOI Main Reception	
Comments	5	Colposcopy	Instructions			
Slot	Time	Visit Type	Patient			All
10	09:30	FSA - 1 Slot				
20	10:00	Follow Up -1 Slot				
30	10:30	Follow Up -1 Slot				
40	11:00	FSA - 1 Slot				
50	11:30	FSA - 1 Slot				
60	12:00	FSA - 1 Slot				
			New Visit Type	Unavailable	~	
			Add Upd	ate Delete		
Click∎ ≻ Tł	ne <mark>Ac</mark>	dd New Time Slot	screen displays (Patient o	letails will	populate the U/R and	Referral fields)
			Add New Time Slot			
	Slot T	ime 08:30:00	🛾 🝎 🕣			
	Visit T	Type FSA - 1 Slo	t 🗸			
	U/R	GYL7021	Lady Glow ing Festive CHR	ISTMAS E	1	
	Refer	ral 1272917	Orthopaedic			
			Ok Canc	el		

- 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:

10:30	2N	NM
10:45	RF	ZA



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 Linical icon at the webPAS hospital



- 1. Navigate to the required patient
- 2. At the patient level, click on the is icon > the appointment list will display:

							New Appointm
Selected : 6			Patient Master Miss Leah /	AUTUMN		Q.	TA B
Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
28 Apr 2016 at 08:40	Thu	Margy Pohl	Fracture	1 Slot - Follow Up	Booked		
27 Apr 2016 at 10:00	Wed	Pre-Assessment Walk-in	Pre-Assessment	1 Slot - Follow Up	Attended	Accepted Wait List	۳
27 Apr 2016 at 09:00	Wed	Johnathan Manson	Orthopaedics	1 Slot - Follow Up	Attended	Accepted Wait List	1
22 Apr 2016 at 09:00	Fri	Pre-Assessment	Pre-Assessment	1 Slot - Follow Up	Booked		8
20 Apr 2016 at 08:30	Wed	Fracture Orthopaedic Registrar	Fracture	1 Slot - Follow Up	Attended	Accepted Wait List	
07 Apr 2016 at 08:50	Thu	Erin Ratahi	Fracture	1 Slot - Follow Up	Attended	Accepted Wait List	

- This view will display a list of all appointments current, past or future.
- Click on the icon to view details for an appointment.
- An icon will display next to an appointment if booking comments where entered. Click on this icon to view/update.



17.

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 Lie > the Appointment Details screen will display
- 4. Click on the **use** 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:

Actions V			Appointment Details -		
Clinic	Gareth Laws		Appointment	Tue 22 Nov 2016 at 08:30	
Clinic Location	Ground Floor OP WHG		Interpreter		
Special Arrangements	For POP removal		Priority	Urgent	
Referral Source	Gen. Practitioner		Unit		
Transport			Reports Required	To Radiology First	
Claim Type	Non Accident		Referral Date	16 Nov 2016	
Referring GP	DR CONLIN LOCKE		Mode of Delivery	Face to Face - 1 Patient to 1 Clinician	
Booked By	Noni Perkins		Date	22 Nov 2016 at 12:00:47	
Presenting Complaint	Lower Back Pain - Sciatic		Contract		
Diagnosis			Procedures		
Health Purchaser	35 Base DHB-funded		Problems	BACKP Low back pain	
Outcome					
Comments	this is a comment				
Selected : 0		Same Day Ap	ppointments	Q	T. B
Date	Clinic Type	Clinic	Location	Hospital	Status

- 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.
- 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.

Actions



> the

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 > the appointment list will display
- 3. Click on an 🛄 icon > the Appointment Details screen will display:
- 4. In the appointment screen, select **Reschedule** from the Actions drop-down Reschedule Appointment screen is displayed:

Erin Ratahi		
Fri 14 Oct 2016 at 09:10		
Follow Up - 1 Slot 📃 💌	Originating Booking Visit Type: Follow Up - 1 Slot	
-	Rescheduled 0 Times	
Gen. Practitioner 📃 💌	Unit 🔽	
•]	
V		
V	Printer Spool Report	
v	Health Purchaser 35 Base DHB-funded 💌	
OF	Ok Cancel	
	Fri 14 Oct 2016 at 09:10 Follow Up - 1 Slot	Fri 14 Oct 2016 at 09:10 Follow Up - 1 Slot Follow Up - 1 Slot Follo

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

Note: If the previous appointment was <u>not</u> 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 next to the required appointment > the Reschedule Appointment screen will redisplay.
- 8. Fill in the rest of the required details referencing below:

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

Rescheduled Times	<i>For Reference Only</i> > 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	If you have verbally spoken to the patient, leave un-ticked.
Appointment	
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

Selected : 7		Apr	oointment Details Miss Leah AUT	UMN		Q	% A	
Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments	
04 May 2016 at 10:20	Wed	Fracture Orthopaedic Registrar	Fracture	1 Slot - Follow Up	Booked			•
28 Apr 2016 at 08:40	Thu	Margy Pohl	Fracture	1 Slot - Follow Up	Rescheduled			

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





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 licon > the Appointment List will display
- 3. Click on an icon > the Appointment Details screen will display:
- 4. Select **Cancellation** from the Actions drop-down > The Cancel Appointment screen displays:

Actions

V

		Cancel Appointm	ent PU1	TER Mr Con	1			? = ×
Cancellation Reason		~						
Comments								\sim
Return Referral to Waiting Print Cancellation Letter		>	Printer	Spool Repo	ırt	~		
22 Nov 2016 08:30	925HL	22 Nov 2016	Patient Unv	vell	Noni Perkins		this is a comme	nt
		Ok		Cancel				

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 (<i>defaults to ticked</i>)	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:



?	Do you wish to Click OK to co	o continu ntinue, C	e with this ANCEL to e	cancellatio exit	n?
			ОК	Car	ncel

7. Click Ok

The following message will display:



8. Read this message very carefully and:

|--|

	Or Click	Ok	to Close the	Referral (if the ca	ncellation	means the	patient v	von't be	seen
again)										

> The Close a Referral screen will display:

	Close a Referral			? = ×
Department Date Closed Reason for Closure Comment Closure Outcome Date of Next Review	Orthopaedic 29 Apr 2016 III Time[13:26:14 🝎 🕞 •	Entered by	Noni Perkins	
	Ok Canc	el		

- 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"

 Appointment
 Cancelled Appointment

 28 Nov 2016
 08:30

 SR01
 23 Nov 2016

 P Decined Treatment
 Noni Perkins

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 patients from
- 2. Bring up the **<u>Reschedule</u>** screen:

				Clinic for Maniula Disciardi			
View s Clinic Type Session Statu Comments	IS	Reschedule V Elder		Date & Start Time Location	Ground Roor OP WHS		
Slot	Time	Visit Type	Patient		Priority	Rescheduled Times	Special Arrange
20/0	09:30	FSA - 2 Slots	STERANT (In America Teppinen (1986) (In Constant))		Semi Urgent	0	
40/0	10:30	Follow Up -1 Slot	VA (Mo) Seminario (1770) 1987 (7.45300003)		Routine	0	
50/0	11:00	Follow Up -1 Slot	MANDA (AF-1848) 458 (27700/1003A) (820000)		Routine	0	
60/0	11:30	Follow Up -1 Slot	Mumore an auroper (100111000.04/00100047)		Semi Urgent	0	
				Reschedule to New Session			·
	Clinic Session Date Reason for R Inform GP Print Re-Sche Reset Confirm	& Tme eschedule edule Letter red Appointment	Yes V V Ok Cancel		Printer	WHGTOHORA	006 💙

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



					Clinic for Manju	a Ricciardi					
View s	Update Slots	~			Date & Start Time				< Wed 13 Dec 2017 at 09:00 V >>.		
Clinic Type	Elder				Loc ation		Ground Floor OF	P WHG			
Comments				Instructions							
	ilot Tim		Visit Type			Patient			AI		
	20 09:3	10	Follow Up -1 Slot								
	30 10:0	10	Follow Up -1 Slot								
	40 10:3	10	Follow Up -1 Slot								
	50 11:0	10	Follow Up -1 Slot								
	60 11:3	10	Follow Up -1 Slot								
New Visit Type											
				Add	Update	Delete					

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:

Time	Visit Type	Patient	AI
09:30	Follow Up -1 Slot		
10:00	Follow Up -1 Slot		
10:30	Follow Up -1 Slot		
11:00	Follow Up -1 Slot		
11:30	Follow Up -1 Slot		
	New Visit Type FSA - 2 Slots	Unavailable 🗸	
	Add Update	e Delete	

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:

🗖 🛃				Clinic fo	r Kelly Vince						
Views	Bookings	Details	~	Date & Sta	rt Time					< Mon 23 May	2016 at 09:00 🗸
Clinic Type	Orthopa	edics	-	Location			Ground Floor OP \	NHG			
Session Status Comments	KV200		\sim	Instruction	s						
Selected : 14				Clinic List for	r 9:00 am 23 f	1ay 2016					
Time	Туре	U/R	Patient	Cł In	ieck-	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed
09:00	RF	ZAM1985	PEANUT, Miss Satay (21/05/1997,F, ZAM1985)		l						
09:10	RF	ZAF9576	CASTLE, Miss Sandy (13/05/1986,F, ZAF9576)							1	
19:20	RF	ZAG3590	ANKER, Miss Poppy (11/05/1983,F, ZAG3590)								

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





				Clinic for Kelly Vince				
Views	Reso	chedule 🗸 🗸		Date & Start Time			<< Mon 23 May	2016 at 09:00 🗸 >>
Clinic Type	Orth	opaedics		Location	Ground Floor OP WHG			
Session Status Comments	KV20	00		Instructions				
Slot	Time	Visit Type	Patient			Special Arrangement		Mark
10/ 0	09:00	1 Slot - Follow Up	PEANUT, Miss Satay (21/05/1997,F, ZAM1985)					✓
20/ 0	09:10	1 Slot - Follow Up	CASTLE, Miss Sandy (13/05/1986,F, ZAF9576)					✓
30/ 0	09:20	1 Slot - Follow Up	ANKER, Miss Poppy (11/05/1983,F, ZAG3590)					✓
				Reschedule to New Session				
Cli	nic							
Se	ession Date & Tin	ne		(1
Re	ason for Resche	edule	\checkmark					
Inf	form GP		Yes 🗸					
Pri	int Re-Schedule I	Letter	\checkmark		Printer Spool F	Report 🗸		
Re	eset Confirmed A	ppointment						
			Ok Cancel					

- 3. Click on the 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 \bigtriangleup 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
- 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** (<u>Un-tick</u> 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.

<u>Caution:</u> 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 <u>Close Clinics</u> process instead.

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

View s Clinic Type Session Status Comments	B	lookings Details	v	Date & Start Time Location Instructions		Ground Floor	OPWHG		4	C Thu 16 Nov 201	17 at 08:30 💙	>>
Selected : 3				Clinic List for 8:30 am	16 Nov 2017						8	1
Time			Patient	Check In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed	Followup Appointmer Made	
*** 08:30	2N	100701-007	Execution of the large for (instantion)									^
99:50	2N	ar Discontin	CONTRACTOR NO. Sale Sale (Sole (1998) 1991).	0					▲			
10:30	2N	196208	CONTRACTOR IN CONTRACTOR						Δ			

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



	Suspend Session	? = X
	Suspend Reason	-
3.	Select a Suspend Reason	

4. Click OK

The clinic now displays as "Cancelled" (in green) on the Hospital Level Clinic Views and are no longer available to book into:

Views 🗔 🗟 🗟 << 🛛 Fri 25 Nov 201	6 🕶 [>>	Group Type All 👻						
Selected : 49			Clinic Timetable						
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	

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

CSC Login 16/02 at 11:17 Noni Perkins							
View s 🗸	Actions 🗸	Searches	~				

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

8	Suspended Appointments List									
Clini	ic Type ENT - Ear No	se & Throat 💌	Clinic Id		9	0				
Appointment	Clinic	Visit Type	Patient		Phone No.	Priority	Rescheduled Times	Special Arr.	Mark	
Tue 31 Oct 2017 09:00	ENT Registrar	FSA - 1 Slot	PER ARE BOR MARTING AND ADDRESS (1999)	AL THEOREMINE	0071007100010	Semi Urgent	0	Audiology Required	✓	
Tue 31 Oct 2017 09:30	ENT Registrar	FSA - 1 Slot	PER AN, SEN UN- Solition Agamerature Statistics	DATA TRANSPORT		Semi Urgent	0	Audiology Required	1	
Tue 21 Nov 2017 13:30	Chris Seeley	Follow Up -1 Slot	Recorder (and the stationary (Statistic result (a) (and to constitute))		(0+10700)		0		1	
Tue 21 Nov 2017 15:15	Chris Seeley	Follow Up -1 Slot	CALINE ME CANANGE AND AN OTHER CONTRACTOR		-	Routine	0		~	
Tue 28 Nov 2017 10:15	David Waterhouse	Follow Up -1 Slot	BARRING MALENDARY CONTRACTOR	(Extension)	1011034/145	Routine	0		✓	
Tue 28 Nov 2017 10:30	David Waterhouse	Follow Up -1 Slot	Million W. Marchael Constitution (1984) (1984) (41, 2014) (2014)			Routine	0		~	
< <pre>></pre>										
			Reschedule to M	wew Session						
Clinic Session Date & Tir Reason for Resch Print Re-Schedule Reset Confirmed A	ne edule Letter sppointment				Printer	WHGTOHORA-	006 🔽			
			OK Cancel							

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



- 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

Clinic	KV200	Goto
--------	-------	------

- 4. Click the Goto button.
- 5. Click the icon beside the correct clinician.
 - The Open/Delete Sessions Clinic Master List screen displays:

Open/Delete Sessions Clinic Master List - MH102, Marc Himer								
Day of Week	Time	Clinic Type	Clinic Indicator	Active				
Tuesday	13:00 to 15:10	Orthopaedics	Consultant Led	Yes				
Thursday	12:30 to 15:00	Fracture	Consultant Led	Yes				
Cancel								

V

- 6. Click the icon for the correct session for the suspended clinic
 - > The Open/Delete sessions screen will display:

Day of Week	Tuesday	Clinic Type	Orthopaedics -
Start Time	13:00	Clinic Indicator	Consultant Led -
Date Clinic Opened		Date Clinic Closed	
Comments		Instructions	
Slot Time Allocated	10 mins		
Bookings Finish Time	15:10:00		
End of Session Time	15:10:00		
Location Type			
Clinic Session	MH102 Marc Himer	Hospital	Whangarei Hospital 👻
Discharge after DNA's		Days for Reappointment	
MR Location			
Registrar's Clinic		Suppress Ext. Skit	
Active		Using Extra Screen When Attending	
Using Mediclaims		Provider Number	
Default CMBS Item Template		Ledger	
Room Number		Cost Centre	
	Slot Template Suspend	Clinic Master List Unsuspend	Open List

- 7. Click the [Unsuspend] button
 - > A list of Suspended Clinics displays:

Suspended Sessions for Marc Hirner - Tuesday								
Suspended From	Suspended To	Session Date	Reason	Patients still suspended	Date Suspended	User	Reinstate	
12 Apr 2016	12 Apr 2016	12 Apr 2016	Clinician Away	Yes	06 Apr 2016 15:25:21	CSC Health user		
01 Mar 2016	01 Mar 2016	01 Mar 2016	Christmas Shutdown	Yes	09 Feb 2016 14:40:37	Noni Perkins		
			Unsuspend Clinic Master	Cancel				

- 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

 CSC
 Login 16/02 at 11:17 Noni Perkins

 ---- View s --- Views Group Open/Delete Clinic Se:

> 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:

Views 🗟 Clinic Type ENT - Ear Nose &	Throat 🔽 🚺	2	inic Id David Waterhouse			Location	3 << January 201	1731
Selected : 1			Si	uspended Clinics				
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 Aw ay	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

47											
View s Clinic Type Session Status Commante		Bookings Details General Medicine	v	Date & Start Time Location		Ground Floo	OP WHG		٩	Thu 16 Nov 20	17 at 08:30 💙 🏱
Selected 13				Clinic List for 8:30 am 1	6 Nov 2017	WW = Renal V	Nalik in				
Time	Туре		Patient	Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed	Followup Appointmen Made
08 :30	211	00.001007	MANAGEMENT (M. M. Tanacina (Jordan 1987) (M. M.								-
99.50	214	A LACASE	PLANETON ALL SATISface (1998-1991)	0					Δ		
10:30	211	196,046	Galler, Hill, Mill, Frances, Matterial (2005) 1984 (1994)	0		0			Δ		

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

Print Group Labels & Forms 🗸

> The following screen will display:

					Clinic f	or Kay	e Logan			
View s	Print Group	Labels & Forms 🗸			Date & S	Start Tim	le	Thu 16 Nov 2017 at 08:30	> >>	
Clinic Type	General M	edicine			Location	1		Ground Floor OP WHG		
Session Status										
Comments			Instructi	ons		CW = General Medicine				
Slot	Time	Visit Type		Patient					Mark	
10	08:30	08:30 FSA - 2 Slots BINSIRAVANICH, Mr Eakachai (24/			Eakachai (24/09/1983,M	UVH11	67)			
50	09:50	09:50 FSA - 2 Slots PILKINGTON, Mrs Beth Diane (22/			eth Diane (22/08/1953,F,)	AQX388	35)			
70	10:30	FSA - 2 Slots		GOULTON, Mrs Fran	ces Materoa (26/03/1959	,F, FPA	2080)			
Booking		No of Labels	40 🗸	Printer		~				
Appointment		✓ No of Labels	10 🗸	Printer	WHGTOHORA-006	~	\leftarrow			
Mailing		No of Labels	40 🗸	Printer		\checkmark				
GP Labels		No of Labels	40 🗸	Printer		\checkmark				
Print Form		Stationery Code		✓ Printer		~				
Print Letter		✓ Letter	OP1 Appointmen	nt 🔽 Printer	WHGTOHORA-006	~				
Ok	Cancel									

- 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"



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

				Clinic for	Kaye Logan							
Vienw s	[Bookings Details	~	Date & Sta	rt Time					4	Thu 16 Nov 20	17 at 08:30 🗸 >
Clinic Type		General Medicine		Location			Ground Floo	OPWHG				
Comments	>			Instruction			CW = Genera WW = Renal V	l Medicine Wilk In				
Selected : 3				Clink: List for	8:30 am 16	Nov 2017						8
Time	Туре		Patient		Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed	Followup Appointmen Made
<u>e</u> 08:30	211	100100-002	BERNER AND BOARD AND A TRANSPORT (STORE THE CAR.									
99:50	214	ALLACED IN	PLANETER ALL SAT Dave (CONSTRUCT, MOREND)							Δ		
10:30	2N	THURS	Contraction (Contraction (Contraction))		٥	0				▲		

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

•		_			Clinic for Kaye Logan		
View s		Diagnos	sis Details 🗸		Date & Start Time		< Thu 16 Nov 2017 at 08:30 V >>
Clinic Type		Genera	I Medicine		Location	Ground Floor OP WHG	
Session Sta Comments	tus				Instructions	CW = General Medicine NW = Renal Walk in	
Selected	3			Ci	inic List for 8:30 am 16 Nov 2017		
Time	Туре	U/R	Patient	Diagnosis /Complaint		Comments	1
108:30	2N	20/00/1027	BRANCHING AND BEEN MY COMMENTANT (CONTRACTORY) (CONTRACTORY)	UGI SYMPTOMS		FSA	^
09:50	2N	wDecimies	CONTRACTOR (And Contraction)	Dysphagia		FSA	
10:30	2N	114,2586	(2014) 1920(1975) - Topology Management (2014) - 1923(17. 1996) (2014)	deranged lfts, diarrhoea		FSA	



- 3. Click on the (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:



6.2.1.2 NDHB DAILY CLINIC LIST

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



 $\overline{}$

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VINCE, KELLY, COUP, ROB

Department Orthopaedic

Clinician



Following screen will display:

Date of Clinic	19/12/2017	End Date	19/12/2017 11:59:59 p.m.
Hospital	Whangarei Hospital 🗸	Location	Surgical Admissions Unit, Whangarei Hospital.
Department	Anaesthesia and Pain Management $oldsymbol{\vee}$	Clinic Type	Pre-Assessment
Clinician	PREADMIT CLINIC	Unallocated Slots	Hide V
I∢ ∢ 1	of 2 ▶ ▶ 100% ∨	Find Ne	ext 🔍 🗸 🕲 🚇 🖪

Make the required Selections 4.

Location

Clinic Type

Orthopaedic

- View Report > A Clinic List will display: 5. Click
- 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:

						Clinics
1.	At tl	ne hospital level, click on the N	DHB Report Icon 🚺	@	A B <mark>(</mark> 	} ₹ 2
2.	Click	on Diary and Booking Lists				
3.	Click	WebPas - Clinic Patient Demogra	uphics			
		The following screen displays:				
		Home > <u>Clinical Services Delivery</u> > Outpatients >	Diary and Booking Lists > WebPas	s - Clinic	Patient Demographics	
		Date of Clinic 17/07/2017	En En	d Date	17/07/2017 11:59:59 p.m.	
		Appointment Time	NULL Ho	spital	Whangarei Hospital 🗸	

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 🗸 Se	rches 🗸

 \checkmark

Ground Floor Outpatients Reception Whangarei Hosp \checkmark

Make selections as required, this can be as defined or as broad as required (this displays tomorrows date by 4. default)



5. Click View Report

The following displays:

Id 4 1 067 38 M 100% Find Next Rev (2) (2) (2) Clinic Patient Demographic Forms NORTHLAND DISTRICT HEALTH BOARD NORTHLAND DISTRICT HEALTH BOARD (2) (2	Image:	The following displays.	
Clinic Patient Demographic Forms Whangarei Hospital Patient Demographic Forms Hospital: Whangarei Hospital Clinic Type: Orthopaedic	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	II4 4 1 of 38 I 100% V Find Nex	kt 🔍 • 🕲 🌐 🗒
Hospital: Whangarei Hospital Clinic Type: Orthopaedic	Hospital: Whangarei Hospital Clinic Type: Orthopaedic Report printed on: Friday, July 14, 2017 Page: 1 of 38	Clinic Patient Demographic Forms Whangarei Hospital Patient Demographic Forms	NORTHLAND DISTRICT HEALTH BOARD Te Poart Hauwra & Rohe O Te Tai Tokenau
Depart printed on Friday, July 14, 2017. Dags 1 of 29	Report printed on: Friday, July 14, 2017 Page: 1 of 38	Hospital: Whangarei Hospital Clinic Type: Orthopaedic	
Report printed on. Friday, July 14, 2017 Page. 1 01 30		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):



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:





Selected : 3			Clinic List fo	r 8:30 am 16 No	v 2017	
Time	Туре	U/R	Patient	Check- In	Time Seen	Departure
08 :30	291	20.001007	Contraction (Section	08:27	2	

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:

	Add Contact for Gener	al Medicine		? = ×
Department	General Medicine	Entered By	Noni Perkins	
Health Care Provider	KL100 LOGAN, Kaye (DR) 🔍 🍼		,	
Date	16 Nov 2017 Time 09:50:00 👸 🕒			
Occasion of Service	FSA - First Specialist Assessment			
Type of Contact	Outpatient 🗸			
Direct Minutes	40	Indirect Minutes		
Trav el Time		Mileage		
Claim Type	Non Accident	Location of Service	✓	
Health Purchaser	35 Base DHB-funded 🔽	Contract	~	
Outcome	Follow Up OP Appt			
Last Contact		ACC Number		
Additional HCP				
	Add	Cancel		

2. Enter the required details referencing the table below:

Field	Description and Use
Health Care Provider (Defaults to clinician of	If the patient was seen by a different clinician, change
clinic)	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"
	Becomes available if Last Contact is ticked. Select
Reason for Closure	reason.
	If the patient was assessed by more than one clinician
Additional HCP	during a clinic - tick the box and enter further HCP's



3. Click Add > The Contact screen is displayed:

		Orthopaedic Contact		? = ×
Contact Date	04 May 2016 Time 13:40:0	0 Entered By	Noni Perkins	
Health Care Provider	LAWS Gareth (MR)			
Occasion of Service	FSA - First Specialist Ass	Linked Visit Number	5060656	
Type of Contact	Outpatient -			
Direct Minutes	10	Indirect Minutes	0	
Travel Time	0	Mileage	0	
Claim Type	Accident -	Location of Service		•
Health Purchaser	35 Base DHB-funded 🛛 👻	Contract		•
Outcome	Follow Up OP Clinic 🛛 👻			
Additional HCP				
Cancel				
	ОК	Close Medications Interventions Supplie	s Notes	

4. If Interventions/Procedures/Medications were captured;

Click on the relevant:	Medications	Interventions	Supplies	button and
Add Intervention 2 Intervention		Add and Finis	h	<u></u>
Close 5 Interve	entions			
Or				
OK				

Click **OK** > the Contacts screen will display, showing that you have recorded a contact for the patient:

Orthopaedic Referral Details - JOHN Ms Jo Anne						
Referral Date Referred By	04 Mar 2016 RATAHI Erin (MR)	Referral Source Problem		Other DHB Specialist	7	
Contacts						
Date & Time	Provider	Service	Claim Type	Comment	Notes/Other	
16 Nov 2017 08:40:00	RATAHI Erin (MR)	FSA - First Specialist Assessment	Non Accident		Int	
No more Contacts						
		Previous Add EOC	C Next >>			

- 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"*

Outcome	To GP/Primary Care	•
Last Contact		
Reason for Closure	Service Complete	-



- 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"



2. After adding contact; click on the box

> The Make Follow Up Appointment screen will display:

		Make Follow Up Appoint	ment		? = X
Clinic	Manjula Ricciardi	🖾	Date	Thu 10 May 2018 at 13:30	
Visit Type	Follow Up - 2 Slots	\checkmark	Claim Type	Non Accident	
Mode of Delivery	Face to Face - 1 Pa	tient to 1 Clinician			
Presenting Complaint	Dementia				
Diagnosis				<u> </u>	
				🖾	
	í.				
	, 	, 			
		·			
Procedure		·			
Procedure		·			
					C
	I	J			
Problem	HOP	Health of Older People			
Source of Referral	Gen. Practitioner				
Unit		\checkmark			
Inform GP	Yes				
Patient Follow Up Letter		_	Printer	WHGTOHORA-006	
Contract			Health Purchaser	35 Base DHB-funded	
Comments	4 week follow	<i>v-Up</i> from 10/04/18		~	
				~	
	I				
Link Referral Details	\checkmark				~
		0	k Cancel		





- 3. Click the 📥 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.
	Update so this is relevant to this follow-up booking
	(updating this will not update the original complaint
Presenting Complaint	on the referral)
Source of referral	Leave as defaulted
Inform GP (populated from referral)	Leave as defaulted
	Un-tick and if required use the printing options that
Patient Follow Up Letter (defaults to ticked)	follows on from this screen.
Health Purchaser (Defaults from original	
referral)	Leave as defaulted.
Comments (displays on patient appointment	Enter/update comments relevant to this follow-up
list)	booking
Link Referral Details	Always leave ticked.

6. Click OK > the printing screen will display:

	Print Appointment Labels & F	orms		
Booking	No of Labels 40	Printer		\checkmark
Appointment	No of Labels 40 🗸	Printer		\checkmark
Mailing	No of Labels 40 🗸	Printer		\checkmark
GP Labels	No of Labels 40	Printer		~
Print Card		Printer		\checkmark
Print Booking Letter		Printer	WHGTOHORA-006	\checkmark
Other Letter	Letter	Printer	WHGTOHORA-006	\checkmark
		1		
	Ok	Cancel		

- 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 (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:

Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed	Followup Appointment Made
11:28		11:50	FU			<	Done

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 icon next to the patient

Or

Open up another screen/tab and navigate to the patient

- 3. Click on the 🛄 icon
- 4. Click on the appropriate referral **b** > the Referral screen displays:

Status Update 🗸	Outpatient Bookings V	aiting List 🗸		Paediatrics Referral Details	
Type of Referral Claim Type Reason for Referral Created By	Migrated Follow Up Non Accident PARENT CONCERNED ABOUT SPEECH	Status Code Case Team	Active 07 Sep 2017	Referral Date Responsible HCP Health Purchaser Contract	07 Dec 2015 TUCK/ SHO . (DR) 35 Base DHB-funded
	List Contacts Add Contact	Update Referral List	Paediatrics	nked Referrals Note Req	uest Appts
			Last 5 Contacts		
Date & Time	Provider	Serv	vice Input	Claim Type	Notes / Other

- 5. Click on the
- Request Appts icon> the Request Appointments screen displays:

			Paediat	rics Referral Details					
Referral Date 07 Dec 2015					Referral Source	(Sen. Practitioner		
Referred By TE WHAREORA O TIKIPU	NGA.(DR)				Problem		Paediatrics		Desward As at
Action List OP Appointment								Refe	Request Appt
Status Requested V Include Suspended Appointments	status Requested 🗸 Include Suspended Appointments 🛯								
Selected : 0	kted : 0 Requested Appointments								
Date	Department Requested	Request Reason	Requested By	Preferred Hospital	Clinic Type	Clinic Id	Visit Type	Status	

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

	Appointmen	t Reque	est Mint Marin					? = ×
Requesting Department	Paediatrics	~	Requested By	Noni Perkins	Request Date	26 Feb 2018	Time 14:58:11	Č 🔂 🕣
Reason for Request	Follow Up - Other	~	Linked Referral Nu	mber 1054064				
Department Required	Paediatrics	~	F	Preferred Date	15 Feb 2019) 📅 🛅		
Clinic Type	Paediatric		✓ F	Preferred Hospital	Whangareil	Hospital	~	
Clinic Id	Oliver Hainsworth		✓ F	Preferred Site	NDHB Outpa	atients 🔽		
Visit Type		~	F	Presenting Complaint	SPEECH DEL	AY, 1yr fu x Se	p18 & PM appt	
Claim Type	Non Accident	~	I	Fransport		`	~	
Source of Referral	Gen. Practitioner	~	5	Special Arrangements		`	~	
Priority	Routine	~						
Cancel Request			F	Reason for Removal		```	~	
						~		
Comments								
						· · · ·		
				d Cancel				
			~	Gancer				

7. Enter/Check the following details:

Remember this is a request for a <u>future</u> 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
	Change if it was requested that the follow-up be in
Clinic Type	a different clinic.



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

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

3. Click on the appropriate referral > Referral screen displays:

Status Update V	Outpatient Bookings 🗸	-Waiting List 🗸		Paediatrics Referral Details		
Type of Referral Claim Type Reason for Referral Created By	Migrated Follow Up Non Accident PARENT CONCERNED ABOUT SPEECH	Status Code Case Team Last Updated By	Active 07 Sep 2017	Referral Date Responsible HCP Health Purchaser Contract	07 Dec 2016 TUCK/ SHO . (DR) 36 Base DHB-funded	
	List Contacts Add Contact	Update Referral List	Paediatrics V Internal Referral V	Linked Referrals Note Rec	quest Appts	
			Last 5 Contacts			
Date & Time	Provider	Sen	/ice Input	Claim Type	Notes / Othe	
			No more Encounters			

4. Click on the ______ icon> Request Appointments screen will display:





				Paedia	trics Referral Details						
Referral Date Referred By	07 Dec 2015 TE WHAREORA O TIKIPUI	NGA. (DR)				Referral Source Problem		Gen. Practitioner Paediatrics		Deguaat Apat	
Action List	OP Appointment								Refe	Request Appl	
Status Request	ed 🗸 Include Suspended Appointments										
Selected : 0	Requested Appointments										
Date		Department Requested	Request Reason	Requested By	Preferred Hospital	Clinic Type	Clinic Id	Visit Type	Status		

	Appointm	ient Request - ADA	AS Mrs Anne Philo	mena (13189400	5)		-
Requesting Department	Ophthalmology	Requested By		Request Date	14 May 2018	Tim e 11:25:31	ÖO
Reason for Request	Follow Up after PROC V	Linked Referral N	mber 1345598				
Department Required	Ophth almology	- F	referred Date	15 Nov 20	018 👩 🗔		
Clinic Type	Ophth almology	▼ F	referred Hospital	Whangar	eiHospital 🗸		
Clinic Id	David Dalziel	✓ F	referred Site	NDHB Ou	tpatients 🗸		
Visit Type	~ ~	F	resenting Complaint	SEBACEC	OUS CYST L UPPE	R LID; to SBL May18	T .
ClaimType	Non Accident	1	ransport	-	6	~	
Source of Referral	Gen. Practitioner		pecial Arrangements		1	~	
Priority	Routine	·					
Cancel Request		F	eason for Removal			~	
Commute	Patient to SBL on	14 May for Re	noval Cyst L	Eye.	~		
Connenta	CHOCK WINGCHOL AN	abe to reduire	a prior co bo	oking.	~		

6. Enter/Check the following details:

Remember this is a request for a <u>future</u> 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.
	This doesn't need to be filled in, enter if the patient needs to see a
Clinic ID	specific clinician at the next appointment
Preferred Date	15 th of the month, 6 months from Appointment Date.
Preferred Hospital	Change if patient is to be seen in a different hospital
	Format <u>must</u> be:
	Clinical compliant; "to SBL" month sent forward.
Presenting Complaint	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:

	Input Non Attenda	nce Detaik	5		Visit No. 509	0516	5		? = ×
Outcome	•								
Non Attendance Reason	▼								
	30/05/2016: Booking:	: 6M FU				^			
Comments									
						-			
Print DNA Letter				Printer	Spool Report		•		
Other Letter	Letter	•		Printer	Spool Report		•		
Request Appointment	\checkmark			Reason			•		
		-	New Appoi	ntment Detaik	5				
Clinic		l) 🗐							
Date									
Send Letter	•			Ge	nerate Letter date			<u>ö</u> 🛄	
Link Referral Details									
			Ok	Cancel					

- 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 <u>Book Appointment</u> or <u>Request Appointment for Future Booking</u>:



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 > 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
- 2. Select the required referral
- 3. Select **Close** from the Status drop-down > the Close a Referral screen displays:



l	

	Close a Referral			? = X
Department	Diabetes	Entered by	lynetteh	
Date Closed	10 Apr 2018 🔢 Time 15:25:45 💆 🕂			
Reason for Closure	Service Complete			
Comment	DNA 100418 as per Clinician			
Closure Outcome	Referrer			
Date of Next Review	🗾 🛅 🝎			
	Ok Cancel			

- 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 <u>DNA</u>.
- Makes a new booking before leaving this should be treated as a *<u>Reschedule</u>*.

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 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:

		Supervisor Update -	3 🖬
Clinic Id	Virjean Primeau	Clinic Type	Diabetes Dietician
Appointment	Tue 10 Apr 2018 at 13:30		
Created	12 Apr 2017 10:54:33	Last Updated	Noni Perkins 10 Apr 2018 15:32:02
Date	10 Apr 2018	Check in Time	🔁 💆 🕀
Time Seen	🗖 🝎 🕀	Departure Time	🗖 💆 🖯
Booking Status	Booked	Claim Type	Non Accident
Clinic Indicator	Dietitian	Followup Appointment Done	
Health Purchaser	35 Base DHB-funded		
		Ok Change U/R Cancel	1

- 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.

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:		
Northland District Health Board F Outpatients	teporting		
🕍 Folder Settings			
Diary and Booking Lists	Oncology	Outpatient Details	Outpatient Statistics
Pre-Assessments	Waiting for FSA or Follow Up		
Click	ts		

WebPas - End of Days Summary 3. Click

2.

Following screen will display \geq

Home > Clinical Services Delivery > Outpatients > Diary and Booking Lists > Webpas - End of Days Summary	Home My Subscriptions Help
OP Referral Dept NOT KNOWN, A & R, Allied Healt Hospital to be Seen at Whangarei Hospital, Kaitaia Hos	View Report

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

Dutpatients RS-933 End of Days - Summary								NORTHLAND DISTRICT HEALTH BOARD Te Poari Hawara Å Rohe O Te Tai Tokerau			N			
Is at: 14/02/2018 OP I linic Types: All Click on the blue number	Referral Department:	lanti ingr C	linic Hospital	: Whangarei	Hospital							-		
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
100000000000000000000000000000000000000		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
	100	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

... .. . c 11

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:





	_	For: Clinician:	Friday - 05/	05/2017	Clinic Type: Hospital:	4111		
MAY-17		Time	NHI ¢	Name 🗘		Visit#	Missing Information	Department
		14:30	1122/7488	MONARY, V/M, 22498, (2469), 22		1103098	Outcome is missing	(Toperstaattivettegge
1		For:	Friday - 26/	05/2017	Clinic Type:	1000		
		Clinician:	(Fleighead)	Veral Fall: Tester	Hospital:	4111		
0		Time	NHI ¢	Name 🗘		Visit#	Missing Information	Department
10		14:00	101110-000	102.004.0214 (1127735	Outcome is missing	(Topenthagenoutleggs)
19	>	15:00	_PL1882	STREEK, SPILLING, SPILLING,		1128317	Outcome is missing	Typinhaiteningy

7.4 END OF DAY CORRECTIONS

The following details how to correct End of Day errors:

1. Navigate to the patient in the Clinic:

🔲 🔙 —				Clinic fo	r Rob Coup				
Views	Boo	okings Details	✓	Date & St	art Time				
Clinic Type	Orth	nopaedic Clini	c	Location			Ground Roo	or OP WHG	
Session Status Comments				Instruction	ns				
Selected : 11	L		Clini	ic List for	1:30 pm 22	May 2017			
Time	Туре	U/R	Patient		Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend
13:30	RF	ZAZ4793	HINTER, Mr John (27/02/1985,M, ZAZ4793)		10:44	13:30		FU	

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

	👗 hformation 🗸 Actions	🗸 Printing 🗸 📇 🕄	Supervisor V
Actions 🗸		Appointme	nt Details -
Clinic	Rob Coup	Appointment	Mon 22 May 2017 at 13:30
Clinic Location	Ground Hoor OP WHG	hterpreter	Thai
Special Arrangements		Priority	Routine
Referral Source	Gen. Practitioner	Unit	
Transport		Reports Required	

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

		Supervisor Update -	? = X
Clinic Id	Rob Coup	Clinic Type	Orthopaedic Clinic
Appointment	Mon 22 May 2017 at 13:30		
Created	Noni Perkins 15 Mar 2017 09:19:22	Last Updated	Noni Perkins 29 May 2017 10:44:39
Date	22 May 2017	Check in Time	10:44 🝎 🕒
Time Seen	13:30 🝎 🕒	Departure Time	ö 🙂
Booking Status	Attended V	Claim Type	Accident V
Clinic Indicator	Consultant 🗸	Follow up Appointment Done	
Health Purchaser	35 Base DHB-funded		
	Ok	Change U/R Encounter Ca	ancel

- 4. Remove any times recorded
- 5. Change the Booking Status to "Booked"
- 6. Click Ok > the Appointment Details screen displays.
- Return to the Clinic by clicking on the icon (right hand corner of the appointment screen) > the Clinic List displays.





Time	Туре	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
2 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	Referr	Gen. Practitioner							
Referred By	LOCKE Conlin (DR)	Proble	m	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 Line icon > the Contact screen will display:

				Orthopaedic	Contact			? = ×
(Contact Date	22 May 2017	Time 13:30:00		Entered By	No	ni Perkins	
H	Health Care Provider	COUP Rob (DR)						
0	Occasion of Service	FSA - First Spec	ialist Ass		Linked Visit Num	ber 51	19946	
1	Type of Contact	Outpatient	\checkmark					
	Direct Minutes	10			Indirect Minutes		0	
1	Travel Time	0			Mileage		0	
0	Claim Type	Non Accident			Location of Serv	ice		\checkmark
H	Health Purchaser	35 Base DHB-fu	nded 🗸		Contract			\checkmark
0	Outcome	Follow Up OP A	ppt 🗸					
/	Additional HCP							
	Cancel							
		ОК	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	Referr	al Source	Gen. Practitioner					
Referred By	LOCKE Conlin (DR)	Proble	m	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.



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)
- <u>Face to Face turning into Telehealth</u> (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"

	CSC Login 23				Tra	in Kaitaia H	osp						s
	Views	V Acti	ons 🗸	Searches 🗸 🗸							2 🙆 📇 🔝 🖻	🖻 Η 💿 🚹	×
	🗖 🛃				Clin	ic for Aik Tan							
	View	Bookings	Details	$\overline{}$	Date &	Start Time					Fri 27 May 2	016 at 09:00 🗸 🗸	>>
1	Clinic Type	Elder Tel	ehealth		Locatio	n							
	Session Status Comments	Teleheal	th Clinic		Instruct	ions							
	Selected : 7				Clinic List	for 9:00 am 27	May 2016					8	
	Time	Туре	U/R	Patient		Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed	
	09:00	TEL	ZAM1985	PEANUT, Miss Satay (21/05/1997 F. ZAM1985)									

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:

CSC Login 23					Tra	in Kaitaia H	osp						s		
Clinic Timetable	V Actio	ns 🗸	Searches	~								🕙 🛍 🚔 🔛 🗺 Η 🞯 主 🗙			
🗖 🛃					Clinic for	Christine Bauck	œ								
Views	Bookings I	Details 🗸 🗸]		Date &	Date & Start Time					<< Mon 23 May 2016 at 09:00 💙 >>				
Clinic Type	Elder Tele	health			Locatio	Location KTA Main Reception									
Session Status	Tolohoalti	h Clinic			Instruct	inns									
Commente	reieneard	i cinic													
Selected : 7					Clinic List	for 9:00 am 23 I	4ay 2016					8			
Time	Туре	U/R	Patient			Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed			
09:00	RF	ZAM1985	(21/05/1997,F, 2	/liss Satay ZAM1985)									^		
09:30	RF														

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:

🗖 🛃	_		Clinic for Cl	iristopher Hutchi	nson					
Views	Bookings	Details N	Date &	Start Time					<< Mon 23 May	2016 at 09:00 🗸 >
Clinic Type	Elder		Locatio	n	G	round Floor OP V	/HG			
Session Status Comments			Instruc	tions						
Selected : 7			Clinic List	for 9:00 am 23 I	1ay 2016					8
Time	Туре	U/R	Patient	Check- In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed
09:00	RF									^
109:30	RF	ZAG3590	ANKER, Miss Poppy (11/05/1983,F, ZAG3590)							
10:00	RF									

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

			Clinic fo	or Christopher Hutchinsor	n			
Views	l	pdate Slots 🗸	Da	ate & Start Time			Mon 23 May 2016	at 09:00 💙 >>
Clinic Type	E	der	Lo	cation	Ground Floor OF	WHG		
Session Status Comments	3		Ins	structions				
Slot	Time	Visit Type	Patient				All	
10	09:00	1 Slot - Follow Up						
20	09:30	1 Slot - Follow Up	ANKER, Miss Poppy (11/05/1983,F, ZA	AG3590)				
30	10:00	1 Slot - Follow Up						
40	10:30	1 Slot - Follow Up						
50	11:00	1 Slot - Follow Up						
60	11:30	1 Slot - Follow Up						
70	12:00	1 Slot - Follow Up						
		· ·	New Visit Type	Unavailable	~			
			Add	Update De	elete			

- 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:

			Clinic for Christopher Hutc	ninson					
Views		Update Slots V	Date & Start Time		<< Mon 23 May 2016 at 09:00 💙 >>				
Clinic Type		Elder	Location	Ground Floor OP WHG					
Session Stati Comments	sson Status omments Instructions								
Slot	Time	Visit Type	Patient		AI				
10	09:00	ZAM1985 PEANUT, Miss Satay							
20	09:30	1 Slot - Follow Up	ANKER, Miss Poppy (11/05/1983, F, ZA	G3590)					
30	10:00	1 Slot - Follow Up							
40	10:30	1 Slot - Follow Up							
50	11:00	1 Slot - Follow Up							
60	11:30	1 Slot - Follow Up							
70	12:00	1 Slot - Follow Up							
		New Visit Type	Vnavaiabl						
		[Add Update	Delete					

- 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:





	Ad	d Contact for Health (Older People		? =
Department Health Care Provider	CB180 BAUCKE , Christine (N	IUR) 🔍 🍠	Entored by	Noni Perkins	
Occasion of Service Type of Contact		▼			
Direct Minutes Travel Time	30		Indirect Minutes Mileage		
Claim Type Health Purchaser	Non Accident		Location of Service Contract		
Outcome Last Contact					
Additional HCP					

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:

	Add Contact for Orthopaedic	
Department	Orthopaedic Entered By Noni Perkins	
Date	23 May 2016 Time 13:30:00 👸 🕞	
Type of Contact	Teleheath	
Direct Minutes	10 Indirect Minutes	
Travel Time	Mileage	
Claim Type	Non Accident V Location of Service V	
Health Purchaser	Contract V	
Outcome		
Last Contact		
Additional HCP		
	Add Cancel	

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.



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



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



2. The Appointment Action List will display:

Hospital	Whangarei Hospital	~	Preferred Site NDHB Outpatients V			Preferred D	Preferred Date 🗌 < Mon 30 Apr 2018 🗸 >> 🏢 1 7 31							
Department	Ophthalmology	~	Clinic Type	Ophthalmology Nursing	almology Nursing V Include Waiting Referrals 🗹									
Priority		~	Clinic Id	~		Include Sus	Include Suspended Appointments							
Appointment Action Status	Requested	~				Searc	h							
Selected : 398 Appointment Action List									Q	% 😂				
Patient		Referral Date	Reason	Clinic Type	Clinic Id	Visit Type	Priority	List Days	Must Be Seen By Date	Preferred Date	Appt. Status			

- 3. Make required selections from the drop-downs (Clinic Type is useful for displaying required information).
 - > A list of patients will display:

Selected : 398			Appointment Ac	tion List	Q	% 🔒				
Patient	Referral Date Reason		Clinic Type	Clinic Id	Visit Type	Priority	List Days	Must Be Seen By Date	Preferred Date	Appt. Status
	06 Dec 2012	GLA UCOMA 6M FU x Aug 17 & VF	Ophthalmology Nursing	Fiona Bamforth		Routine	242	11 Sep 2017	15 Feb 2018	📆 Requested
	16 Jul 2010	GLA UCOMA 6MTH FU FROM 12/6 + OCT	Ophthalmology Nursing	Fiona Bamforth		Routine	392		15 Dec 2017	Reschedule
	21 Sep 2017	GLA UCOMA FU	Ophthalmology Nursing	Fiona Bamforth		Routine	221	01 Jan 2018		📆 Waiting
	05 Oct 2007	GLA UCOMA FU 1 YR VF OCT FB	Ophthalmology Nursing	Fiona Barnforth		Routine	192	20 Oct 2017	15 Oct 2018	📆 Requested

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.



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 Reshedule, 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 <u>month due</u> order* :

Preferred Date	Appt. Status
	Reschedule
15 Dec 2017	Pending Reschedule

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

rioritys 🔽	AIL	All Must Be 🕻 🗸	All Preferred Dates	~	oppt. Sta 🗸	
Jrgent	186	01 Nov 2017	15 Nov 2016 15 Apr 2017 15 May 2017		^p ending hedule	,
e	392		15 Jun 2017 15 Jul 2017 15 Aug 2017		Pending hedule	
e	209	04 Dec 2017	15 Sep 2017 15 Nov 2017 01 Dec 2017 15 Dec 2017		Requested	
e	222		1 15 Jan 2018 15 Feb 2018 15 Mar 2018		Requested	

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:

4	A	В	C	D	E	F	G	н	1	J	К	L
1	Hospital		Preferred S	Site	Preferred	Date						
2			1 1		Select Da	teView Tod	ayView Thi	s WeekView	This Month	n		
3	Departmen	nt D	Chill tone	0.00	Include W	aiting Refer	rals					
4	Priority	P	Clinic Id		Include St	ispended A	ppointmen	ts				
5	Appointme	nt Action S	tatus			2	Wat -					
6	Selected :	Appointme	ent Action Lis	st								
7	Patient	Referral D	Reason	Clinic Type	Clinic Id	Visit Type	Priority	List Days	Must Be Se	Preferred I	Appt. Statu	s
8	DOWNING	26-Jun-17	PACE	Pacemake	f	196200,00404	Routine	225		25-Aug-17	Requested	6
9	ROSE, Mr	#########	PACE	Pacemake	er .		Routine	225		01-Jan-18	Requested	
10	BAYCROF	23-Feb-09	PACE	Pacemake	Pacemak	e Follow Up	Routine	190			Pending R	eschedule
11	WALDING	*****	PACE	Pacemake	Pacemak	e Follow Up	Routine	190			Pending R	eschedule
12	RATCLIFF	13-Feb-14	PACEMAK	Pacemake	9T		Routine	13		******	Requested	b I.
13	FERGUSC	26-Oct-16	PACEMAK	Pacemake	ar .		Routine	13		*******	Requested	2
14	VALDER, I	09-Feb-17	PACEMAK	Pacemake	Elisa Thor	nas	Routine	13		*******	Requested	ć.
15	HILTON, N	26-Jul-17	PACEMAK	Pacemake	f.		Routine	13		unnannan	Requested	

	≻ V	Vill I	ook l	ike this	:											
F	le Ho	me	Insert	Page Layo	ut For	mulas Data	Review	View	D	eveloper						
Fro	A From From Web	From	From Of Source	ther Exist s - Conne	ing Re ctions A	fresh al • Edit Lin	tions 21 ties 21	Sort	Filter	で Orer 長 Reapply 登 Advance	Text to Columns	Remove Duplicates V	Data alidation -	Consolidate	What-If Analysis -	Gro
		Get Ex	ternal Da	ta		Connections	ô	Sor	P.	ster			Data Tooli			1
	H1	3		0	<i>f</i> ~ 13											
14	A	1	В	С	D	E	F	G		н	I.	J	К	L		M
1	Patient	- Ref	erral -	Reason -	Clinic T	- Clinic Id -	Visit Typ -	Priority		List Day -	Must Be +	Preferre -	Appt. St	t + is		
2	DOWNIN	IC 26-	Jun-17	PACE	Pacema	aker		Routine	8	225	1	25-Aug-17	Reques	ted		
3	ROSE, I	Ar: ###	manan	PACE	Pacema	aker		Routine	8	225		01-Jan-18	Reques	ted		
4	BAYCRO	DF 23-	Feb-09	PACE	Pacema	ake Pacemake	Follow Up	Routine	8	190			Pending	Reschedu	le	
5	WALDIN	G, ###	manan	PACE	Pacema	ake Pacemake	Follow Up	Routine	8	190			Pending	Reschedu	de	
6	RATCHE	E 13	Feb-14	PACEMAN	Pacema	aker		Routine		13		*******	Reques	ted	100	

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:



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:

Patient Referral Date Reason Clinic Type Clinic Id Visit Type Priority List Days Must be Seen Myster Preferred Date Appt. Status 0 Nov 2016 ELEVATED/OP?, 12mfux Ophthalmology Musting Beth Schw atfleger Routine 209 04 Dec 2017 15 Dec 2017 15 Dec 2017 16 Dec 2017 0 44 Oct 2017 72h HERPES OPTHALLMOUS? Nursing Ophthalmology Nursing Liz Watts Routine 208 01 Feb 2018 11 Watting	elected : 398			Appointment A	ction List					Q	10
30 Nov 2016 E EVATED IOP?, 12m fu x Ophthalmology Nursing Beth Schwartfeger Routine 209 04 Dec 2017 15 Dec 2017 04 Oct 2017 720, HERPES OPTHA LMICUS? Ophthalmology Nursing Liz Watts Routine 208 01 Feb 2018 11 Watting	Patient	Referral Date	Reason	Clinic Type	Clinic Id	Visit Type	Priority	List Days	Must Be Seen By Date	Preferred Date	Appt. Status
C 44 Oct 2017 720 HERPES CPTHA LMCUS/? Ophthalmology Nursing Liz Watts Routine 208 01 Feb 2018	🔁 MEMBER RECEILER (BERLER (BERLER (BERLER)	30 Nov 2016	ELEVATED IOP?; 12m fu x Dec16	Ophthalmology Nursing	Beth Schwartfeger		Routine	209	04 Dec 2017	15 Dec 2017	Requisted
	🔁 MEMA AF Aussamble and Historical Landson	04 Oct 2017	?R) HERPES OPTHA LMICUS/? CATARACT	Ophthalmology Nursing	Liz Watts	0	Routine	208	01 Feb 2018		Haiting
Image: Mar 2012 AMD OCT FU 2 MTHS FROM Ophthalmology Nar sing Fiona Barrforth Routine 222 15 Nov 2017 Prequester	🗅 Mariandan, Mechanisaring programsis starrasts	19 Mar 2012	AMD OCT FU 2 MTHS FROM 09/17	Ophthalmology Nursing	Fiona Barrforth		Routine	222		15 Nov 2017	Requested

- 2. Click the 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.
- Appointment 4. Click the 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**

- Navigate to the required patient 1.
- 2. In the patient menu, click on the
- icon.
- 3. The list of patient referrals will display (before progressing check you are selecting the correct referral)
- Click the icon for the referral to book from > the Referral Details screen will display: 4.

Status Update 🗸Outpat	ient Bookings 🗸			Rheum atology Referra	il 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 Refe	rral V Linked Referrals N	otes Request Appts
			Last 5 Contacts		
Date & Tim e		Provider	Service Input		Claim Type
😡 04 Jul 2017 14:20:00		DR Sanjib GHOSH	Follow Up - Other		Non A ccident
			No more Encounters		





- 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 ¹ > the Update Appointment Request screen will display
- 3. Tick the **Cancel Request** box

	Update Appointm	ent 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 Hosp	pital	\checkmark
Clinic Id	Sanjib Ghosh 🗸	Preferred Site	NDHB Outpa	atients 🗸	
Visit Type	×	Presenting Compla	int PMR & GCA		
Claim Type	Non Accident 🗸	Transport		~	
Source of Referral	Other DHB Specialist	Special Arrangem	ents	~]
Priority	Si Urgent 🗸 🗸				
Cancel Request		Reason for Remov	al	\sim	
				~	
Comments				\sim	
			Cancel		
		Appointment	Cancer		

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

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.
 - The list of patient referrals will display (before progressing check you are selecting the correct referral)
- 3. Click the icon for the referral to book from > the Referral Details screen will display:

Status Update 🗸Outpatie	ent Bookings 🗸			Rheum atology Referral Detail	s
Type of Referral Qaim Type Reason for Referral Created By	Migrated Follow Up Non Accident PMR & GCA CONVREFL 18 Mar 2017 17:03	Status Code Case Team Last Updated By	Active 13 Apr 2016	Referral Date Responsible HCP Health Purchaser Contract	13 Apr 2016 DR. NO CLINICIAN 36 Base DHB-funded
			Last 5 Contacts		
Date & Tim e		Provider	Service Input	Claim T	уре
😡 04 Jul 2017 14:20:00		DR Sanjib GHOSH	Follow Up - Other	Non A cci	ident

- 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			Request	ed Appointm ents				Q. 1	
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.

\triangleright	The Medical Record Mast	ter Enquiry will display:
------------------	-------------------------	---------------------------

Selected : 1	lected : 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 is icon following menu will display, which shows the webPAS tracking history for the record:

		Medical Reco	ras Enquiry		wnangarei Hospita
	M	ovements Visits R	equests Bar Code Labels	Canc el	
Selected: 16		Moveme	ent 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)Surgic al Admission Unit	MARK SANDERS	Admission	Janine Nikora
17 Oct 2017 at 07:39:11	17 Oct 2017	(AWG)3rd Floor	JA NINE 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:





	Single Record M	ovement		? 🗕 🗙
Document Type	Clinical Record	Requested By	Noni Perkins	
Movement Date	09 Apr 2018	Movement Time	11:19:33 📩 🤠 🕒	
Destination	Endoscopy 🗸	Hospital	Whangarei Hospital	
Reason	Admission 🗸	Due Date	09 Apr 2018	
Extension #		Pager #		
Movement Comments				
Document Type	Home Location Volume	Current Location	on Status I	Required
Clinical Record	(AWG) Clinical Records Department 1	(DBI) Clinical Reco	ords Department 2017	✓ ^
	Move	Canc el		~

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
	Defaults to date linked to Reason. Change if required e.g. Clinic is on
Due Date	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

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
	Receiver. Change to clinician's name if request is for a hospital event
Requested By	related to the clinician e.g. Clinic or Theatre Booking
Destination	Location of the Destination. Select an option
	Defaults to date linked to Reason. Change if required e.g. Clinic is on
Due Date	a certain date.

2. Enter the details of the movement, referencing the table below:



	Leave as defaulted unless confirmation is received from coding to
Ignore Incomplete Coding	ignore.
Pager #	Not currently in use
	Defaults to current hospital, change hospitals in webPAS to request
Home Hospital	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.
	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
Medical Records Scan	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:

			Record	Movement		
Mo	ovement Date	09 Apr 2018	11:22:41 苬	Requested By	Noni Perkins	
Ho	ospital	Whangarei Hospital	~	Destination	Surgical Admission Ur	it 🗸
Re	eason	Admission	~	Due Date		
Do	ocument Type	Clinical Record	~	Ignore Incomplete Coding		
Ext	tension #]	Pager #		
Mo	ovement Comments			_		
Ho	ome Hospital	Whangarei Hospital	V	Home Loc ation	Clinical Records Depa	rtment 🔽
U/F	RNumber			Medical Record Scan		
Count: 2						
Delete U/F	R Volume	Patient Name	Current Location		Last Movement	Description
🗙 Z CF4395	X ZCF4395 1 V TESTING Mr Simon (AWG) Clinical R			rds Department		2018
X Z CC7380 2 VM TER Lady Melon			(AWG) Clinical Reco	rds Department		2018
		Move	Continue	Clear Cancel]	

- 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
 - â -
- Click on the ison > Appointment List will display
- 3. Click on the required appointment
- 4. At the appointment level, select Labels and Forms from the Actions drop down



> The Print Appointment Labels and Forms screen will display:





Print Appointment Labels & Forms CASTLE Miss Sandy											
Booking	No of Labels 15 💌	Printer	•								
Appointment	No of Labels 15 💌	Printer	•								
Mailing	No of Labels 15 💌	Printer	•								
GP Labels	No of Labels 15 💌	Printer	-								
Print Card		Printer	•								
Print Booking Letter		Printer Spool Report	•								
Other Letter	Letter	 Printer Spool Report 	•								
	0	k Cancel									

- 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

Selected : 1 Outpatient Letter History Details										
Letter Date	Letter Printed	Appointment Date	Visit	Clinic	Clinic Type	Printed By User				
05 May 2016 OP3 Appointment		05 May 2016 at 08:30	5060672	Erin Ratahi	Fracture	Noni Perkins				

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.



Patient Master Miss Treena	Louise SMITH
Printer	Com Diseases Label
Type of Label	Diagnostic Label
Number of Labels	1 🗸
Clinician and Department*	Rob Coup, Orthopaedic Department
*Only enter clinician and department for diagnostic lab	el
Print	Cancel

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

CSC Login 30/04 at 07:02 Noni Perkins	
V iew s 🗸 A ctions	Searches 🗸 🗸 🗸 🗸 🗸 🗸
URNunter Date of Birth	Sumare Age
	<< Previous

Following screen will display:

		HCP Search						
	Enter Key Words for Search Coup			HOPType	AllActive	~		Search
			You Searched for					
HCP Name		Address					Contact	
	<< Previous						Next >>	

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

	You Searche	d for Coup
HCP Name	Address	Contact
COUP ,DR ROB (RC300) 18783	WHANGAREIHOSPITAL MAUNU ROAD WHANGAREI	Phone:094304100 Fax : Mobile:
		Preferred Name:

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).

Clinics

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



12.2.1.1 ALL VISITS

accessed via the

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):

Administrative Clinical									
Selected : 13				Patient Visit List (All) M	iss Satay PEANUT			Q	To B
Adm/Visit Date	Day	Туре	Unit	НСР	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 Orthonaedics	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	NA	Attended	5060708	
23 May 2016 at 09:00	Mon	OP	ELDERT	Christine Baucke	Kaitaia Hospital- KTA Main Recention	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 Sura Short Shy	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 Recention	NA	Booked	5060303	
18 Feb 2016 at 08:30	Thu	OP	FRAC	Margy Pohl	Whangarei Hospital-Ground Eloor OP WHG	NA	Attended	5060294	
18 Feb 2016	Thu	RF Đ	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	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 Lie 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
- At the patient level, select Visit by Type (Hospital) from the Information drop-down > the following screen will display:

Views	▶ Patient Master Index	✓ 🗂	- Functions	- 🗸	Documents			_			
									Hospital Whangarei Hospital 🗸 Visit	Туре	~
Admission/Visit Date		Day	Туре	Unit	НСР		Location		IIIS CIASS SLALUS	VISIL NO	пец кес
				[Previous	Start	Next				

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.





Hospital 📶 🗸 Visit Type Al 🗸												
Admission/Visit Date	Day	Туре	Unit	НСР	Location	Ins Class	Status	Visit No	Med Rec			
1 Jul 2016 at 09:15:26	Fri	IP		PAGE , lan (DR)	Whangarei Hospital-Eye Procedures	NA	Current IP	5094214				
22 Jun 2016 at 08:26:43	Wed	P		PAGE , lan (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 , lan (DR)	AWG-WHG	ACC	Current	5094069				
	No more visits											
	Previous Start Next											

- Click on the 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 low er limb LEFT MIEDIAL_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
- 2. Click on Waiting for FSA or Follow Up
 - Click on Waiting for First Appointment Summary
- 3. Click on
 - The following screen will display:

Clinics



Home > Clinical Services De	elivery > Outpatients > V	Waiting for FSA or Fo	llow Up > Wai	ting for First	Appointment	- Summary				
Urgency 0 - Not prioritise	ed, 2 - Urgent, 3 💌	Clinic Hospital	Vhangarei Hos	spital, Kaitaia	Host 🗸					
FSA Clinic All Clinics	~	Type of Referral	SA 1st Specia	list, Procedur	e /T 💙					
HSC Scan Field Empty	~	Past Dates E	xclude Past [Dates 🗸						
4 4 1 of 1 ▷	100%	Find	Next 🖳	• 🕲 🖨						
Outpatients							I	ORTHLA	ND DISTRICT	77
Waiting for Firs	t Appointmen	t* - Summa	ary					HE Te Poari Hauon	ALTH BOARD a À Rohe O Te Tai Tokerau	
As at 27/04/2018 Urgend Clinic Types: All Clinics	cy: 0 - Not prioritised, 2 - Past Dates: No	- Urgent, 3 - Semi Ur	gent, 4 - Rout	tine, 6 - Not d	etermined - p	ending test,	7 - Rejected,	TR - Not liste	ed Hospital: All	FSA
	The Ministry of He	ealth has set a targ	get that "No	Patient sh	ould wait lo	nger than	4 months f	or an FSA''		
Pleas	e continue to bo	ok patients wh	o are the	most urg	ent and lo	ongest w	aiters firs	t.		
Please Note: Urgent and Se	mi-Urgent patients will ne	eed to be seen withir	n their clinical	ly appropriate	time-frame v	hich will be	before the 4 r	nonth period		
Click on the blue	number for patient deta	ills								
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		
1										

<u>Tip:</u> 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 Fav	orites Tools Help ges - Intranet Home 🗿 RMS Lite 🗿 Web Si	e 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		
View s	 Actions 	🖌 Searches 🛛 🗸			

12.3.1.1 INFORMATION DISPLAYED ON THIS REPORT

- 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.

ASAP

• 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) <a href="https://www.iseacommutecentergy-desk-end-base-iseacommutecentergy-list-acommut

