



webPAS Outpatient User Guide NZ

Software Release V10

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1 Introduction

The webPAS Outpatient module is designed to help Outpatient Departments perform registration and scheduling of patients for appointments.

The Outpatient module provides the following features:

- A choice between Doctor and Generic based Clinics
- Customised screens to meet hospital-specific requirements
- Re-scheduling of individual or entire clinics
- Comprehensive enquiry and reporting facilities
- Extensive statistical reporting

1.1 How this Guide is Organised

This guide describes how to use enter patient information into the Outpatients module, and is intended for use by clerical and administrative staff.

The functionality of the Outpatients module is divided into the following main areas:

1.1.1 Appointments

- Booking appointments by patient or clinic
- Checking a patient in arrival and recording other attendance details
- Rescheduling and cancelling appointments

1.1.2 Managing Clinics

- Opening and closing clinic sessions
- Adding appointment slots
- Blocking out time for staff meetings or other absences

1.1.3 Printing Labels, Forms and Reports

Labels, forms and reports can be printed at various stages of a patient's progress through an Outpatient clinic. Where and how these labels, letters, forms and reports are printed depends on the set up of the system parameters.

1.2 Related Documentation

This user guide should be read in conjunction with the webPAS Standard Conventions User Guide, the webPAS ACC User Guide, the webPAS PMI User Guide, the webPAS Referral Management User Guide and the webPAS Outpatients NZ Standard Process document.

Many of the options available in the Outpatients module are common functionality with the PMI and are described in detail in the webPAS PMI User Guide. Outpatient Clinics can be linked to Referral Departments and Contacts recorded against the Referral when Attending an Outpatient visit.

The webPAS Outpatients Configuration Guide details the set-up required for system parameters and Categories and Codes.

2 Appointments

Outpatient appointments can be made via a patient or via a Clinic List.

2.1 Booking an Appointment at the Patient Level

1. Navigate to the required patient.
2. Select **Appointments** from the appropriate patient level drop down menu.

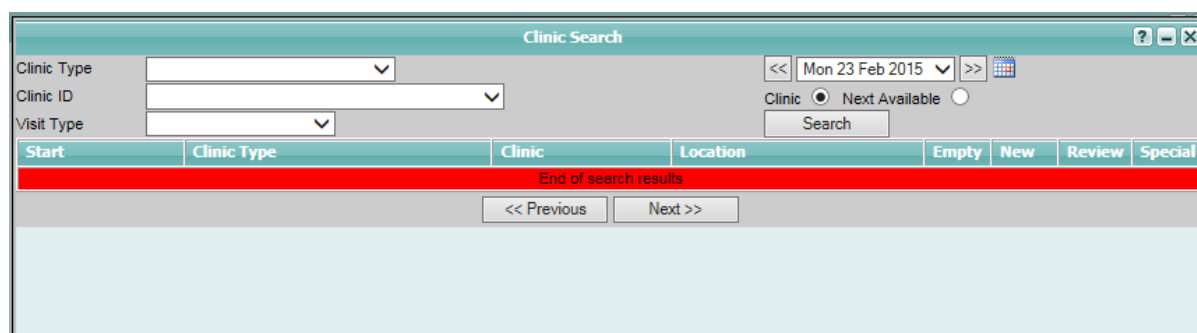
The Appointment Details template will display. Existing appointments will display on this template.



Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
10 Feb 2015 at 09:00	Tue	Community Clinic	Community Health	Routine Follow-Up	Booked		
02 Jul 2012 at 11:00	Mon	Maori Mental Health	Mental Health	Routine Follow-Up	Attended		
13 Feb 2012 at 11:00	Mon	Maori Mental Health	Mental Health	Routine Follow-Up	Attended		
13 Feb 2012 at 10:00	Mon	Dr Henshall's Dental Clinic	Dental	Routine Follow-Up	Attended		
20 Dec 2011 at 12:30	Tue	Watson Dental Surgical Clinic	Dental	Routine Follow-Up	Attended		
07 Dec 2010 at 12:00	Tue	Maori Mental Health	Mental Health	Routine Follow-Up	Attended		
06 Jul 2010 at 10:00	Tue	Maori Mental Health	Mental Health	Routine Follow-Up	Attended		
02 Jul 2010 at 10:00	Fri	Surgery - General	General Surgery	Routine Follow-Up	DNA	Did Not Attend	
22 Jun 2010 at 08:30	Tue	MMH Choice-Clinic	Mental Health	Routine Follow-Up	Attended		

3. Click **New Appointment**.

The Clinic Search template will display.



Clinic Search

Clinic Type: [Dropdown]
 Clinic ID: [Dropdown]
 Visit Type: [Dropdown]

Date: << Mon 23 Feb 2015 >> [Calendar Icon]
 Clinic: Next Available
 Search

Start	Clinic Type	Clinic	Location	Empty	New	Review	Special
End of search results							

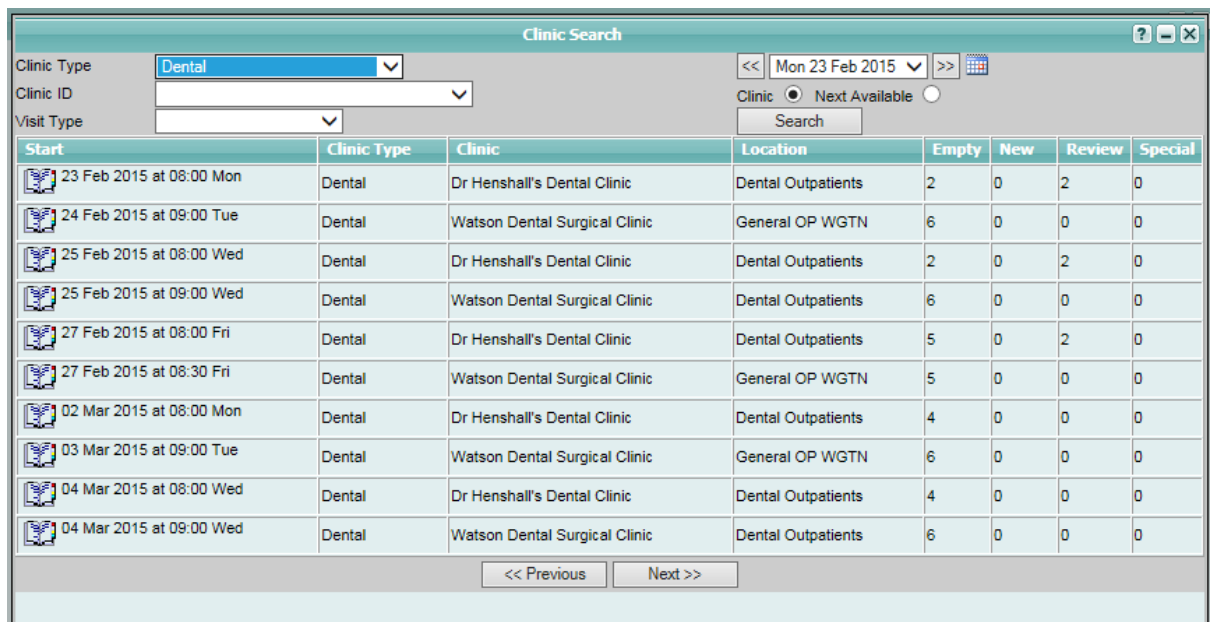
<< Previous Next >>

4. Complete the fields as required.

Note: If the Clinic Type field only is populated, the next 10 available appointments for all Clinics within the selected Clinic Type will be displayed.

5. Click **Search**.

The Appointment Search screen will display the next 10 available slots.



Start	Clinic Type	Clinic	Location	Empty	New	Review	Special
23 Feb 2015 at 08:00 Mon	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	2	0	2	0
24 Feb 2015 at 09:00 Tue	Dental	Watson Dental Surgical Clinic	General OP WGTN	6	0	0	0
25 Feb 2015 at 08:00 Wed	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	2	0	2	0
25 Feb 2015 at 09:00 Wed	Dental	Watson Dental Surgical Clinic	Dental Outpatients	6	0	0	0
27 Feb 2015 at 08:00 Fri	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	5	0	2	0
27 Feb 2015 at 08:30 Fri	Dental	Watson Dental Surgical Clinic	General OP WGTN	5	0	0	0
02 Mar 2015 at 08:00 Mon	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	4	0	0	0
03 Mar 2015 at 09:00 Tue	Dental	Watson Dental Surgical Clinic	General OP WGTN	6	0	0	0
04 Mar 2015 at 08:00 Wed	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	4	0	0	0
04 Mar 2015 at 09:00 Wed	Dental	Watson Dental Surgical Clinic	Dental Outpatients	6	0	0	0

6. The **Next** and **Previous** buttons can be clicked to scroll through available slots.

7. Click the session icon beside the required Clinic List.

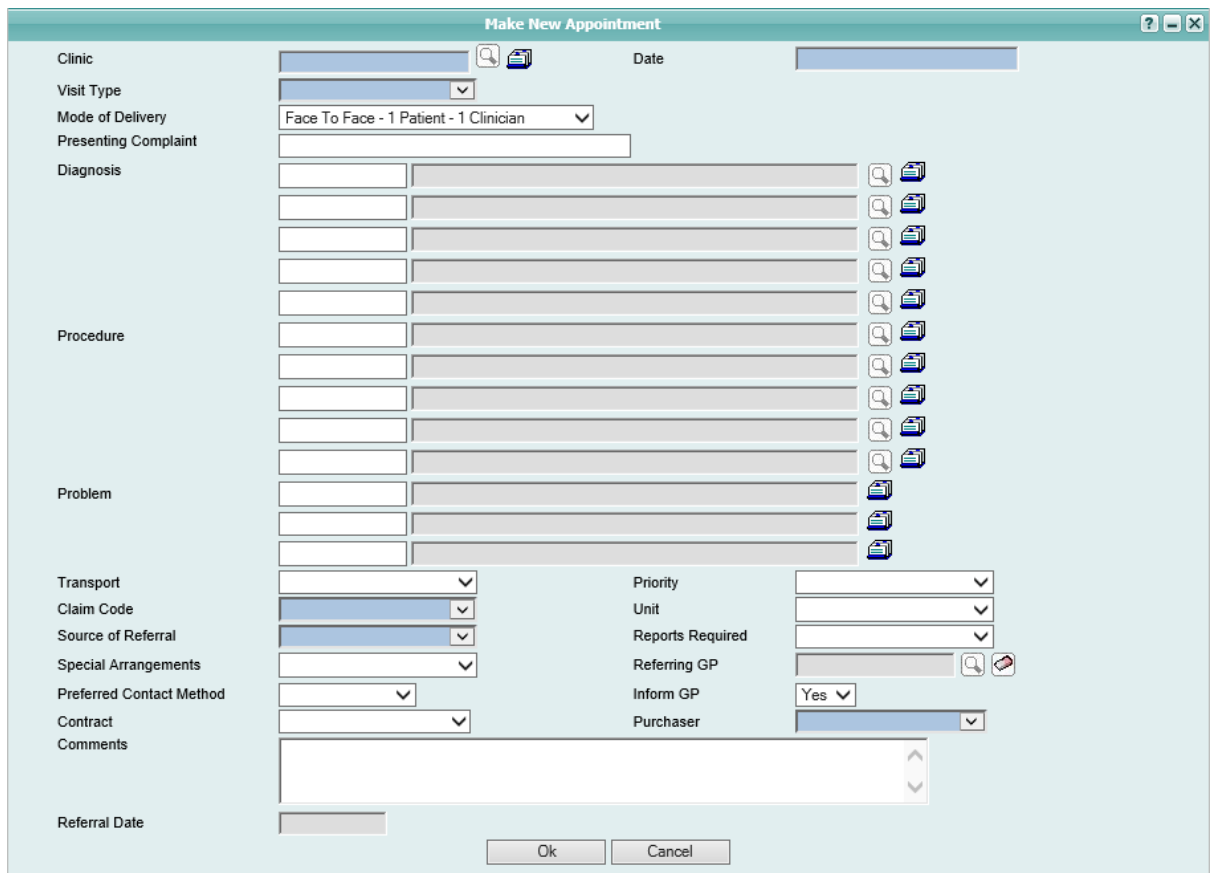
Available slots for the selected Clinic List will display.



Time	Visit Type	Patient	Status
9:00 am	Routine New Attend		
11:00 am	Routine Follow-Up		
11:30 am	Routine Follow-Up		
12:00 pm	Routine Follow-Up		
12:30 pm	Routine Follow-Up		







8. Click the appointment icon beside the required time slot.

The Make New Appointment template will display.



The Clinic, Date / Time and Visit Type values will default from the appointment slot that was selected.

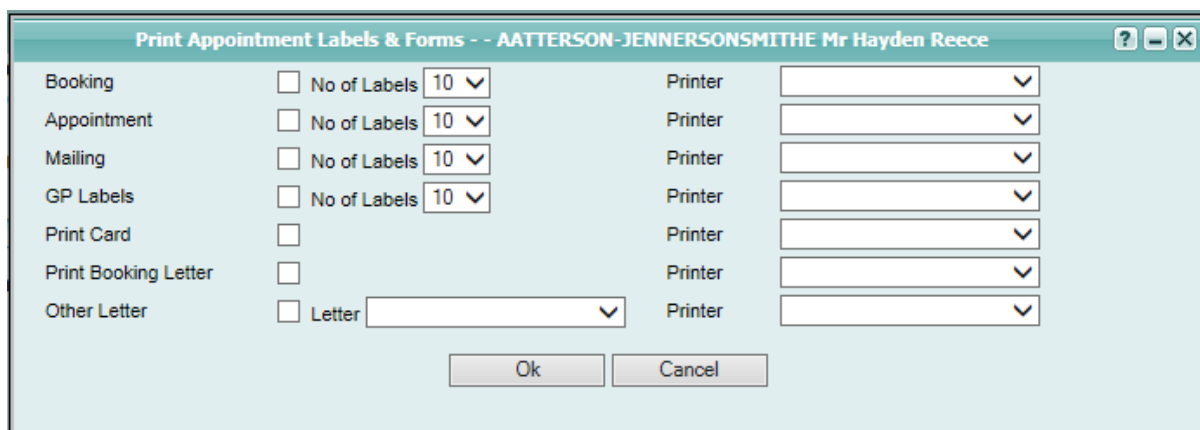
9. Complete the fields, referencing the table below.

Field	Description and Use
Presenting Complaint	Enter a Presenting Complaint (free-format text field).
Diagnosis	Click the search icon  to perform a keyword search on ICD10 Diagnosis codes. Alternatively, click the look up icon  if Clinic-specific Diagnosis codes have been configured.
Procedure	Click the search icon  to perform a keyword search on Procedure codes. Alternatively, click the look up icon  if Clinic-specific Procedure codes have been configured.
Problem	Click the look up icon  if Clinic-specific Problem codes have been configured.
Transport	Select a value from the drop down list if transport has been booked for the patient to attend the appointment.
Priority	Select a value from the drop down list.
Claim Type	Select a value from the drop down list.
Unit	Select a value from the drop down list.
Source of Referral	Record the referral source by selecting from a list of options.
Reports Required	This is a user-defined field, for recording if any Reports are Required at the appointment.
Special Arrangements	If required select any special arrangements need for the patient from the list, for example, Wheelchair access.
Referring GP	Click on the search  icon to locate the required referring GP.
Preferred Contact Method	Select a value from the drop down list

Field	Description and Use
Inform GP	Select this field to ensure that the patient's visit will appear on a GP view (if being used).
Contract	Select a value from the drop down list.
Purchaser	Select a value from the drop down list.
Comments	Enter comments relevant to the appointment (free-format text field).
Referral Date	If the appointment is being made from a Referral the Referral Date will default into this field.

10. Click **Ok**.

The Print Appointment Labels & Forms template will display.



11. Tick the check box beside each of the items required.

12. Select the number of labels required for each type of label that has been selected.

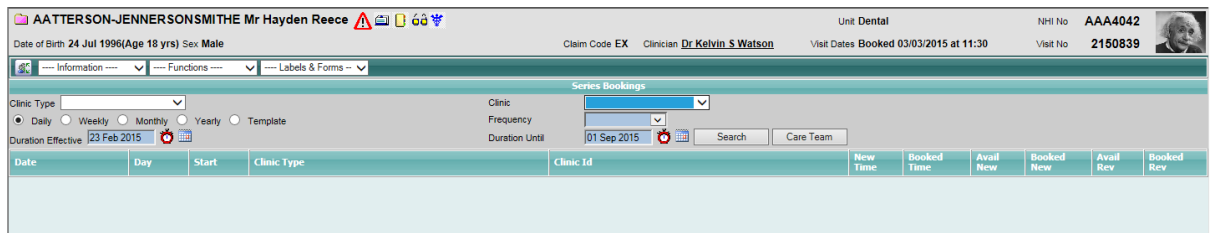
13. Select a printer for the items to print to.

2.1.1 Making a Series of Booking for a Patient

Use this option to make several bookings for the same type of appointment and clinic, for example, regular ante-natal checks.

To make a series of bookings for a patient:

1. On the Patient Demographics screen, select **Series Booking – Single HCP** from the **Functions** menu. The Series Bookings screen displays.
2. Select the **Clinic Type** or **Clinic** and the frequency of the appointments required including a start and end date for the series.



Series Bookings

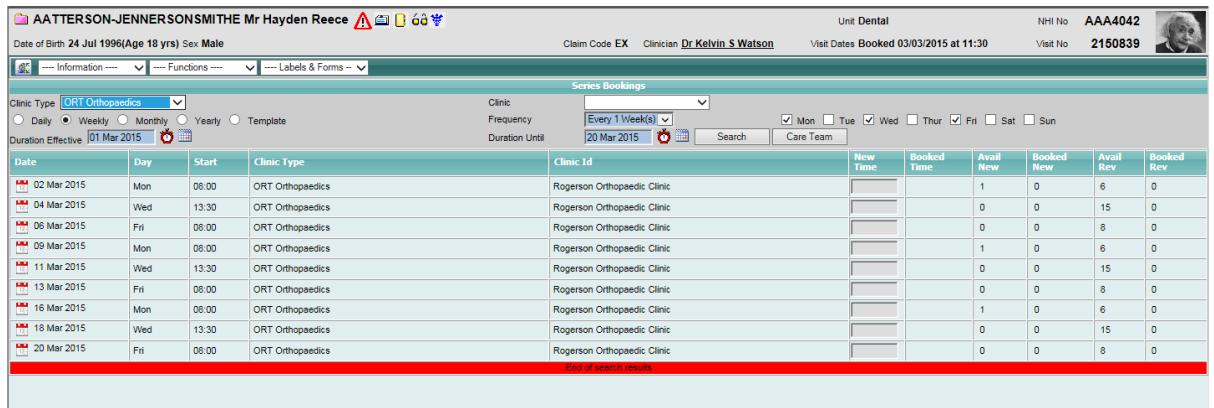
Clinic Type: Clinic:

Frequency:

Duration Effective: 23 Feb 2015 Duration Until: 01 Sep 2015

Date	Day	Start	Clinic Type	Clinic Id	New Time	Booked Time	Avail New	Booked New	Avail Rev	Booked Rev

3. Click **Search**. The search results will display.



Series Bookings


Clinic Type: **ORT Orthopaedics** Clinic:

Frequency: **Every 1 Week(s)**


Duration Effective: 01 Mar 2015 Duration Until: 20 Mar 2015

Date	Day	Start	Clinic Type	Clinic Id	New Time	Booked Time	Avail New	Booked New	Avail Rev	Booked Rev
02 Mar 2015	Mon	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			1	0	6	0
04 Mar 2015	Wed	13:30	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	15	0
06 Mar 2015	Fri	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	8	0
09 Mar 2015	Mon	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			1	0	6	0
11 Mar 2015	Wed	13:30	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	15	0
13 Mar 2015	Fri	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	8	0
16 Mar 2015	Mon	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			1	0	6	0
18 Mar 2015	Wed	13:30	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	15	0
20 Mar 2015	Fri	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	8	0

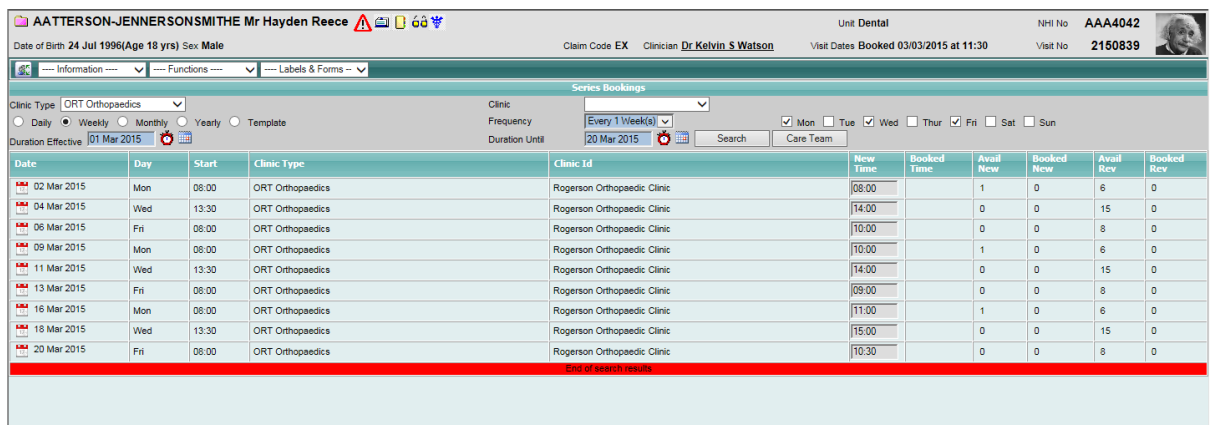
End of search results

4. Click the Appointment icon  to display all the available time slots for that day. The following screen displays:



5. Select an appointment time by clicking the Appointment icon .

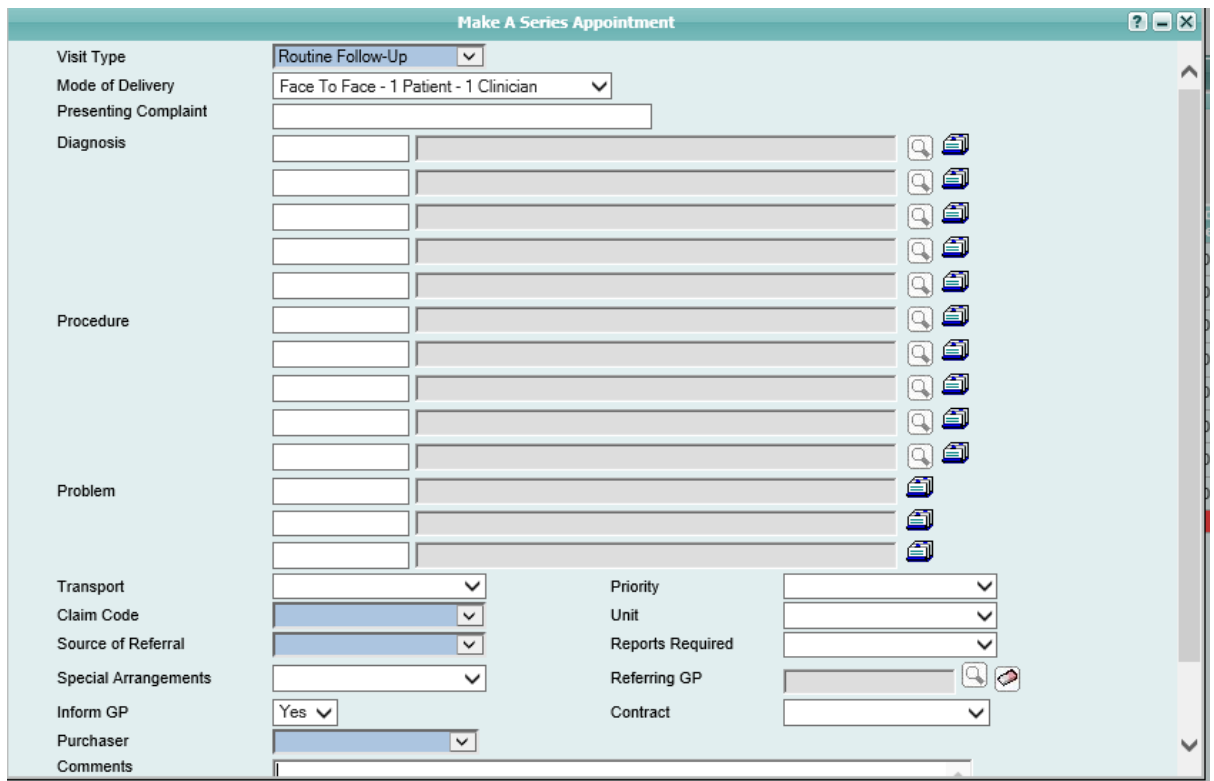
The Series Booking screen is updated with the time.



6. Repeat steps 4 and 5 until all the appointment times that you want are complete.

7. Click **OK**.

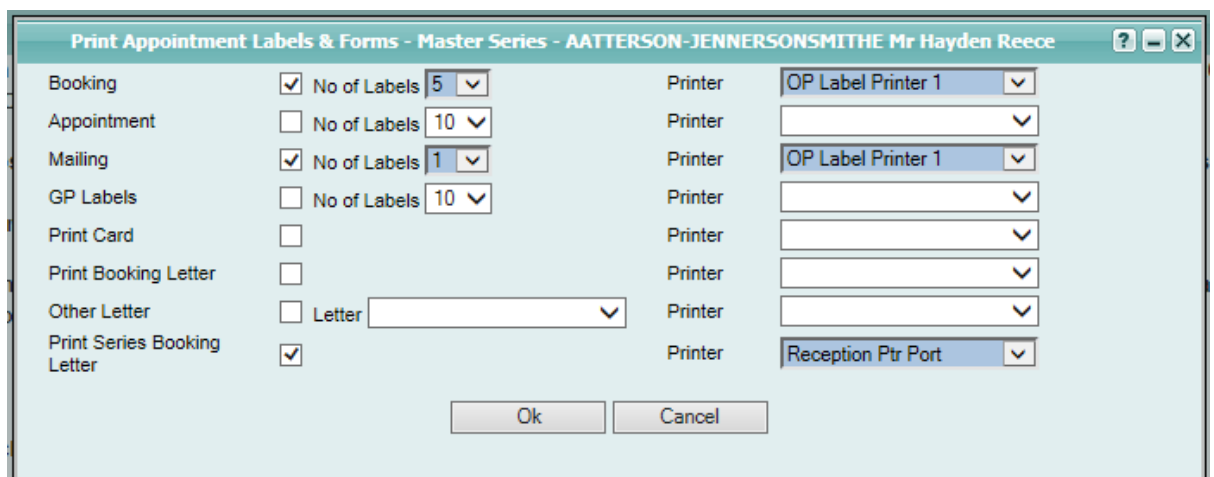
The appointment times are saved and the Make a Series Appointment screen will display.



8. Complete the details as required and click **Ok**.

Note: If the Claim Code is an ACC code the ACC details screen will be displayed. Refer to the webPAS ACC User Guide for details on ACC45 data capture.

The Print Appointment Label & Forms screen will display.



9. Select the appropriate boxes if you want to print labels and a booking letter for the series of appointments

Note: If Labels or Letters are selected to be printed the Number of Labels to print and the Printer fields become mandatory.

10. Click **Ok** or **Cancel**.

2.1.2 Care Teams

A Care Team is a group of health care professionals assigned to a patient to manage their care.

Care Team details can be added by:

- Consultant
- Clinic Type
- Clinic ID
- Case Team

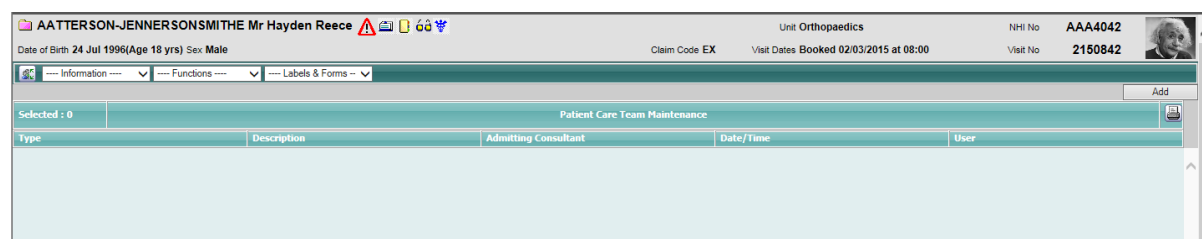
When searching for a Single HCP Series Booking, only those appointments matching the Care Team details will display.

2.1.2.1 Adding a Care Team

To add a Care Team to a patient:

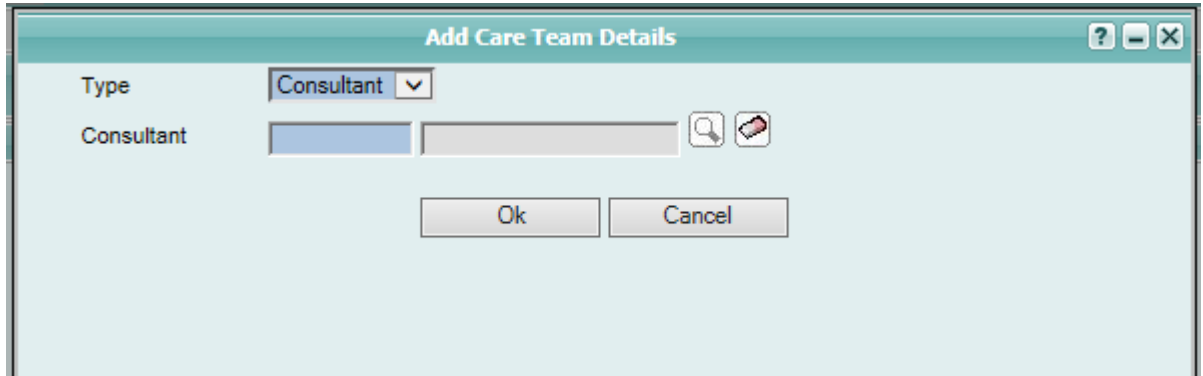
1. Select the patient.
2. Select Care Team from the Information menu (patient level).

The following screen will display:



3. Click Add.
4. Select one of the options from the Type drop down list to enter Care Team details.

Type: Consultant

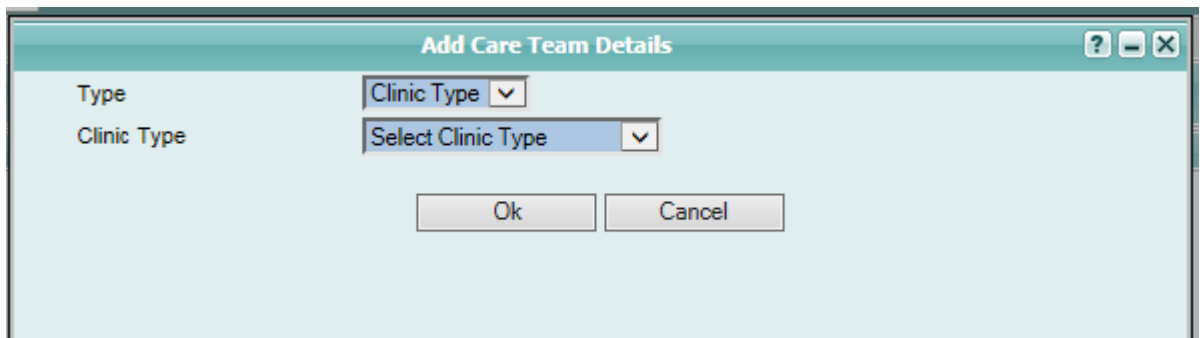


The screenshot shows a dialog box titled "Add Care Team Details". It has a teal header bar with a question mark, minus, and close button. The main area contains two labels: "Type" and "Consultant". The "Type" label is next to a dropdown menu currently showing "Consultant". The "Consultant" label is next to a text input field, a search icon, and a delete icon. At the bottom, there are "Ok" and "Cancel" buttons.

5. Enter the Doctor code if known, otherwise use the lookup icon to search for one.

Note: If the patient is an Inpatient, the Admitting Consultant will default to the Patient Care Team Maintenance screen.

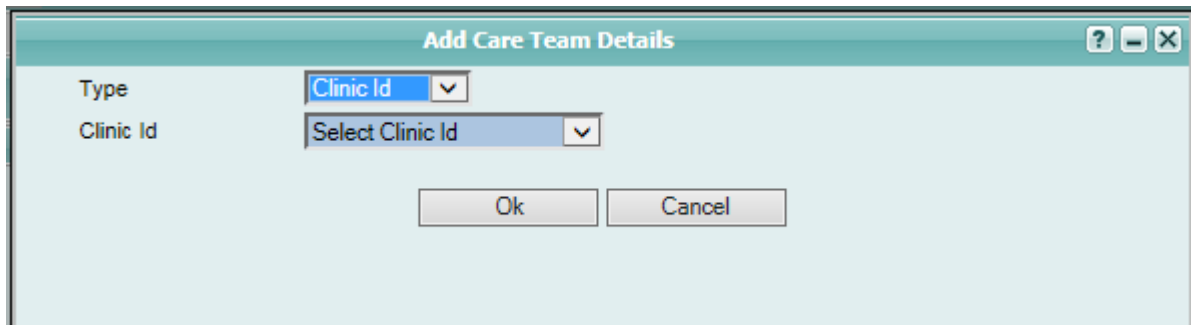
Type: Clinic Type



The screenshot shows a dialog box titled "Add Care Team Details". It has a teal header bar with a question mark, minus, and close button. The main area contains two labels: "Type" and "Clinic Type". The "Type" label is next to a dropdown menu currently showing "Clinic Type". The "Clinic Type" label is next to a dropdown menu currently showing "Select Clinic Type". At the bottom, there are "Ok" and "Cancel" buttons.

1. Select a Clinic Type from the Clinic Type drop down list.
2. Click OK to add the Clinic Type to the Patient Care Team Maintenance screen.

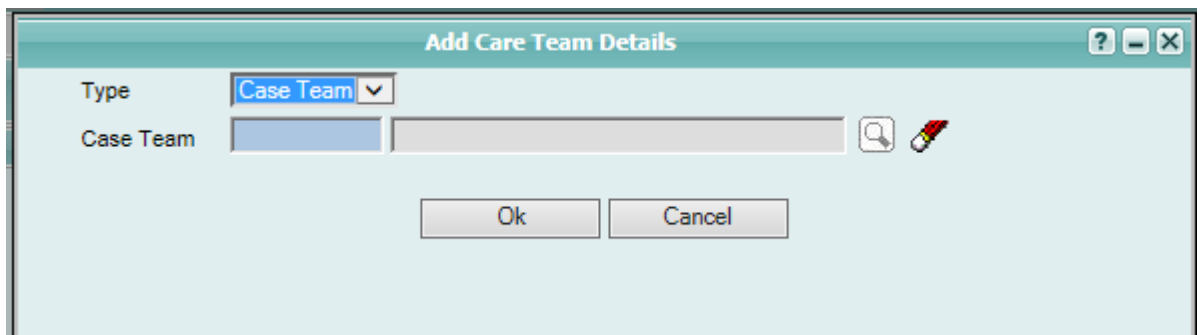
Type: Clinic ID



The screenshot shows a dialog box titled "Add Care Team Details". It contains two dropdown menus: "Type" with "Clinic Id" selected, and "Clinic Id" with "Select Clinic Id" selected. At the bottom, there are "Ok" and "Cancel" buttons.

1. Select a Clinic ID from the Clinic ID drop down list.
2. Click OK to add the Clinic ID to the Patient Care Team Maintenance screen.

Type: Case Team



The screenshot shows a dialog box titled "Add Care Team Details". It contains a "Type" dropdown menu with "Case Team" selected. Below it is a "Case Team" text input field with a search icon and a pencil icon to its right. At the bottom, there are "Ok" and "Cancel" buttons.

1. Enter the Case Team code if known, otherwise use the lookup icon to search for one.

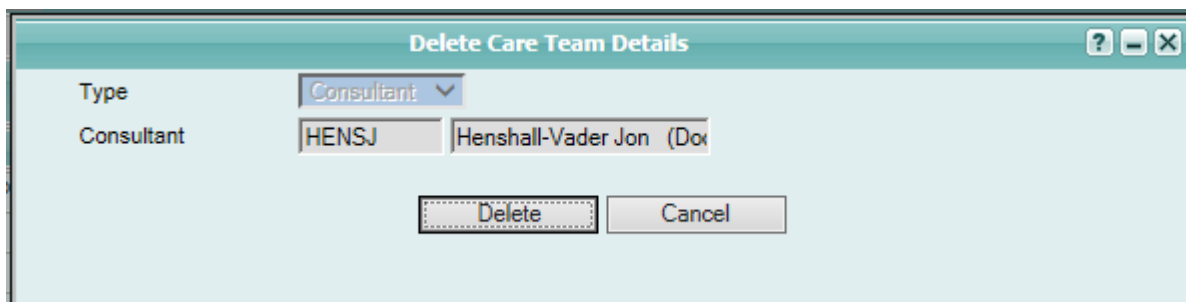
Once the Care Team has been created for the patient, the Single HCP Series Booking can be made using the Care Team search functionality.


This will narrow the appointment search to only include the Consultants, Clinic Types, Clinic IDs or Case Teams in the patients Care Team.

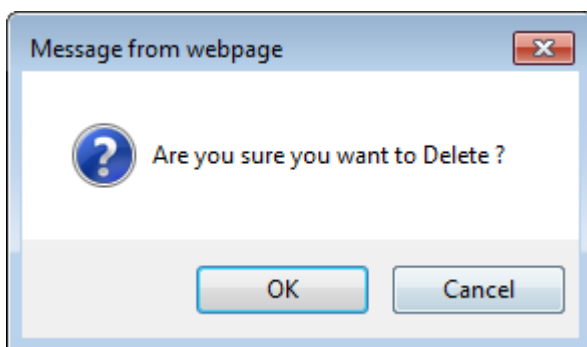
2.1.2.2 Removing a Care Team

To remove Care Team details from a patient record:

1. Navigate to the Patient Care Team Maintenance screen.



2. Click the maintenance  icon beside the Care Team member you wish to remove.
3. Click the **Delete** button.
4. Click OK to the following warning:

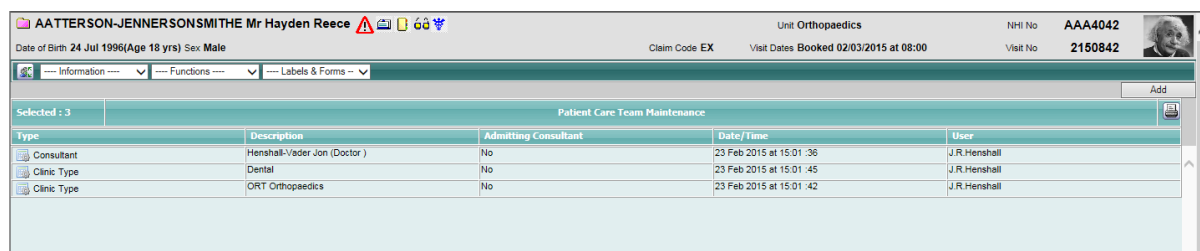


The screen will refresh and the Care Team record will no longer exist.

2.1.3 Single HCP Series Booking – Via a Care Team

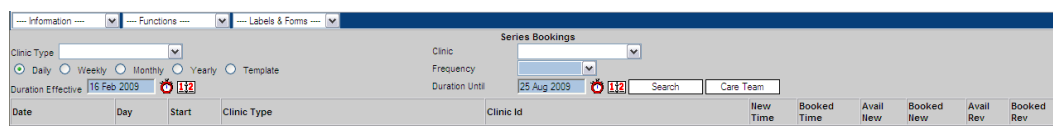
To book a Single HCP Series Booking via a Care Team:

1. Select the patient that the booking is to be made for.
2. Ensure the patient has a Care Team assigned. If a Care Team has not been assigned to the patient, refer to [Adding a Care Team](#) on page 16.



3. Select **Series Booking – Single HCP** from the appropriate patient level drop down menu.





The Series Booking screen will display.




4. Select whether the appointment is to occur daily, weekly or monthly.
5. Select the Frequency of the appointment.
6. Complete the additional fields that display based on the Frequency selection.
7. Enter dates in the Duration Effective and Duration Until fields.

8. Click the **Care Team** button.

Search results will display based on the Care Team that has been assigned to the patient.

AATERSON-JENNERSONSMITHE Mr Hayden Reece    

Date of Birth 24 Jul 1996(Age 18 yrs) Sex Male Unit Orthopaedics NHI No AAA4042
 Claim Code EX Visit Dates Booked 02/03/2015 at 08:00 Visit No 2150842 

Information Functions Labels & Forms

Series Bookings
 Clinic Type: Daily Weekly Monthly Yearly Template
 Clinic: Frequency: Every 1 Week(s) Mon Tue Wed Thur Fri Sat Sun
 Duration Effective: 01 Apr 2015 Duration Until: 20 Apr 2015

Date	Day	Start	Clinic Type	Clinic Id	New Time	Booked Time	Avail New	Booked New	Avail Rev	Booked Rev
10 Apr 2015	Fri	08:00	Dental	Dr Henshall's Dental Clinic			1	0	5	0
10 Apr 2015	Fri	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	8	0
10 Apr 2015	Fri	09:00	Ear, Nose and Throat	Ear, Nose and Throat			0	0	6	0
13 Apr 2015	Mon	08:00	Dental	Dr Henshall's Dental Clinic			0	0	4	0
13 Apr 2015	Mon	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			1	0	6	0
13 Apr 2015	Mon	09:00	Ear, Nose and Throat	Ear, Nose and Throat			0	0	4	0
17 Apr 2015	Fri	08:00	Dental	Dr Henshall's Dental Clinic			1	0	5	0
17 Apr 2015	Fri	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			0	0	8	0
17 Apr 2015	Fri	09:00	Ear, Nose and Throat	Ear, Nose and Throat			0	0	6	0
20 Apr 2015	Mon	08:00	Dental	Dr Henshall's Dental Clinic			0	0	4	0
20 Apr 2015	Mon	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic			1	0	6	0
20 Apr 2015	Mon	09:00	Ear, Nose and Throat	Ear, Nose and Throat			0	0	4	0

End of search results

9. Refer to [Making a Series of Booking for a Patient](#), step 4 for further instructions on how to complete the Series Booking.

2.1.4 Booking a Series of Appointments on the same Day for Different Clinics

Use this option to make several bookings for a patient for different clinics on the same day. For example, rather than a patient returning to the hospital on different days, you can make appointments for X-ray, physiotherapy and the Specialist on the same day if available.

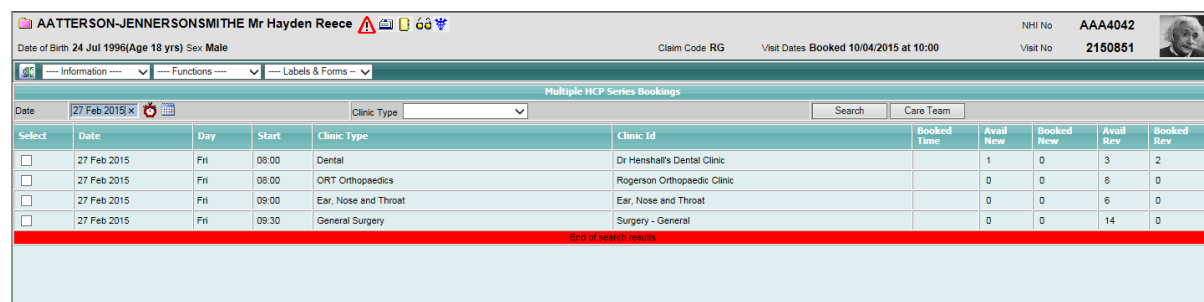
To make several appointments on the same day:

1. Navigate to the required patient.
2. Select **Multiple HCP Series Booking** from the appropriate patient level drop down menu.

The Multiple HCP Series Booking screen will display.

3. Select the Date and click **Search**.

A listing of the clinics available on that day is displayed.



Select	Date	Day	Start	Clinic Type	Clinic Id	Booked Time	Avail New	Booked New	Avail Rev	Booked Rev
<input type="checkbox"/>	27 Feb 2015	Fri	08:00	Dental	Dr Henshall's Dental Clinic		1	0	3	2
<input type="checkbox"/>	27 Feb 2015	Fri	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic		0	0	6	0
<input type="checkbox"/>	27 Feb 2015	Fri	09:00	Ear, Nose and Throat	Ear, Nose and Throat		0	0	6	0
<input type="checkbox"/>	27 Feb 2015	Fri	09:30	General Surgery	Surgery - General		0	0	14	0

4. Check the boxes of the required clinic.
5. Click **Ok**.

The Multiple HCP Series Booking screen will display.

Note: A maximum of six clinics can be selected.

Multiple HCP Series Bookings

Dr Henshall's Dental Clinic	Dental	Rogerson Orthopaedic Clinic	ORT Orthopaedics	Ear, Nose and Throat	Ear, Nose and Throat	Surgery - General	General Surgery
27 Feb 2015	08:00	27 Feb 2015	08:00	27 Feb 2015	09:00	27 Feb 2015	09:30
	Visit Type		Visit Type		Visit Type		Visit Type
08:00	Routine New Attend	08:00	Routine Follow-Up	09:00	Routine Follow-Up	09:40	Pre-Surgical Assessm
10:00	Routine Follow-Up	08:30	Routine Follow-Up	09:30	Routine Follow-Up	09:50	Pre-Surgical Assessm
11:30	Routine Follow-Up	09:00	Routine Follow-Up	10:00	Routine Follow-Up	10:00	Routine Follow-Up
14:30	Routine Follow-Up	09:30	Routine Follow-Up	10:30	Routine Follow-Up	10:10	Routine Follow-Up
		10:00	Routine Follow-Up	11:00	Routine Follow-Up	10:20	Routine Follow-Up
		10:30	Routine Follow-Up	11:30	Routine Follow-Up	10:30	Pre-Surgical Assessm
		11:00	Routine Follow-Up			10:40	Pre-Surgical Assessm
		11:30	Routine Follow-Up			10:50	Routine Follow-Up
						11:00	Routine Follow-Up
						11:10	Routine Follow-Up
						11:20	Routine Follow-Up
						11:30	Routine Follow-Up
						11:40	Routine Follow-Up
						11:50	Routine Follow-Up
						12:00	Routine Follow-Up
						12:10	Routine Follow-Up
						12:40	Routine Follow-Up
						12:50	Routine Follow-Up

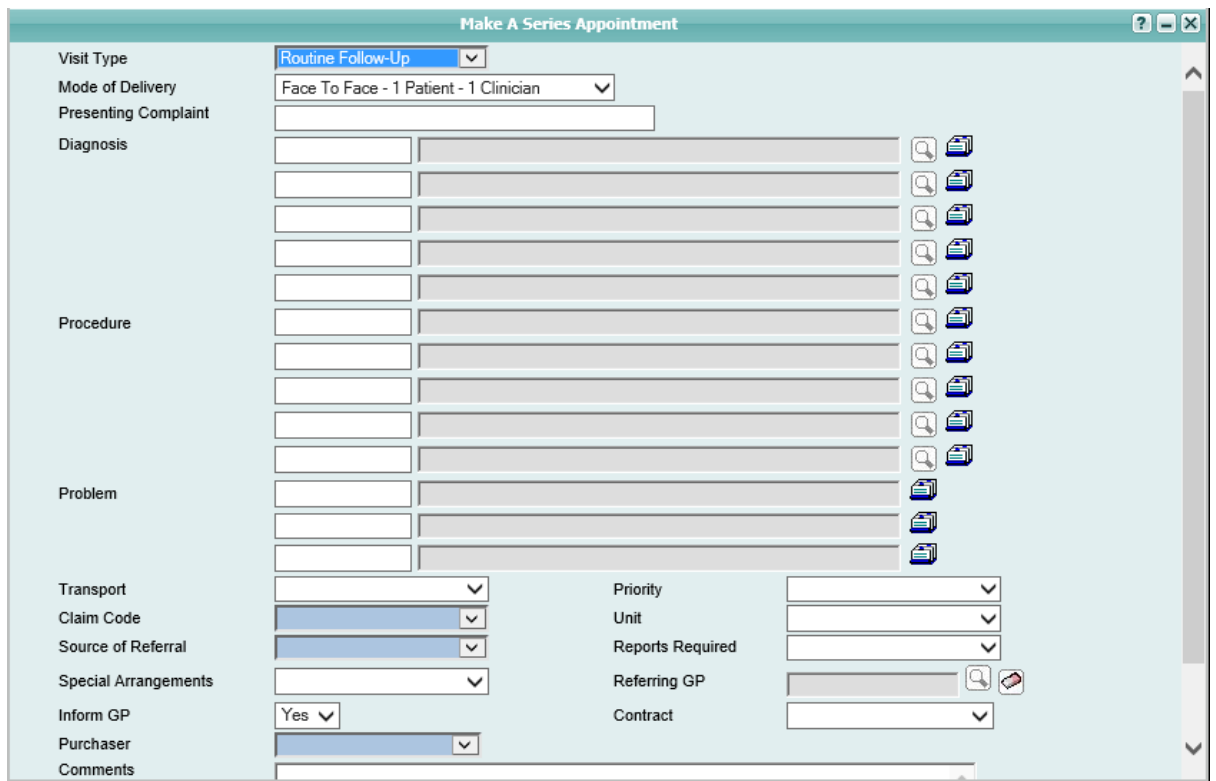
The available time slots for the selected clinics are displayed across the screen.

6. Reserve the time slots by clicking the Appointment icons beside the relevant times.

Multiple HCP Series Bookings

Dr Henshall's Dental Clinic	Dental	Rogerson Orthopaedic Clinic	ORT Orthopaedics	Ear, Nose and Throat	Ear, Nose and Throat	Surgery - General	General Surgery
27 Feb 2015	08:00	27 Feb 2015	08:00	27 Feb 2015	09:00	27 Feb 2015	09:30
	Visit Type		Visit Type		Visit Type		Visit Type
08:00 - Reserved	Routine New Attend	08:00	Routine Follow-Up	09:00	Routine Follow-Up	09:40 - Reserved	Pre-Surgical Assessm
10:00	Routine Follow-Up	08:30	Routine Follow-Up	09:30	Routine Follow-Up	09:50	Pre-Surgical Assessm
11:30	Routine Follow-Up	09:00 - Reserved	Routine Follow-Up	10:00	Routine Follow-Up	10:00	Routine Follow-Up
14:30	Routine Follow-Up	09:30	Routine Follow-Up	10:30 - Reserved	Routine Follow-Up	10:10	Routine Follow-Up
		10:00	Routine Follow-Up	11:00	Routine Follow-Up	10:20	Routine Follow-Up
		10:30	Routine Follow-Up	11:30	Routine Follow-Up	10:30	Pre-Surgical Assessm
		11:00	Routine Follow-Up			10:40	Pre-Surgical Assessm
		11:30	Routine Follow-Up			10:50	Routine Follow-Up
						11:00	Routine Follow-Up
						11:10	Routine Follow-Up
						11:20	Routine Follow-Up
						11:30	Routine Follow-Up
						11:40	Routine Follow-Up
						11:50	Routine Follow-Up
						12:00	Routine Follow-Up
						12:10	Routine Follow-Up
						12:40	Routine Follow-Up
						12:50	Routine Follow-Up

7. When all the slots are reserved, click the Appointment icon to book the time. The following screen displays:



The screenshot shows a software window titled "Make A Series Appointment". It contains several sections for data entry:

- Visit Type:** Routine Follow-Up (dropdown)
- Mode of Delivery:** Face To Face - 1 Patient - 1 Clinician (dropdown)
- Presenting Complaint:** Text input field
- Diagnosis:** Multiple rows of text input fields, each with a magnifying glass and a document icon to its right.
- Procedure:** Multiple rows of text input fields, each with a magnifying glass and a document icon to its right.
- Problem:** Multiple rows of text input fields, each with a document icon to its right.
- Transport:** Dropdown menu
- Claim Code:** Dropdown menu
- Source of Referral:** Dropdown menu
- Special Arrangements:** Dropdown menu
- Inform GP:** Yes (dropdown)
- Purchaser:** Dropdown menu
- Comments:** Text input field
- Priority:** Dropdown menu
- Unit:** Dropdown menu
- Reports Required:** Dropdown menu
- Referring GP:** Text input field with a magnifying glass and a document icon to its right.
- Contract:** Dropdown menu

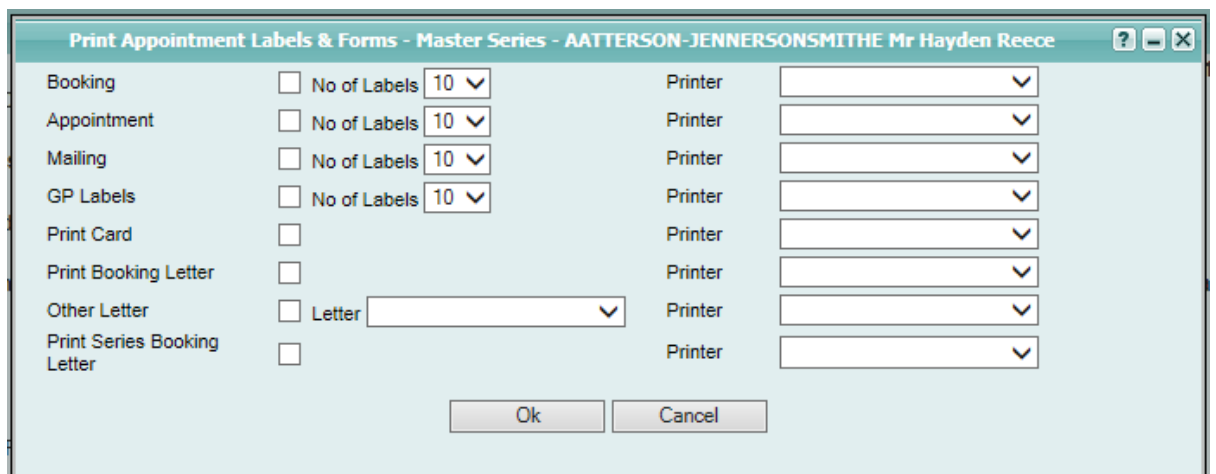
8. Complete the details as required and click **Ok**.
9. Repeat steps 5 and 6 for all reserved appointments.

The highlighting of the time slots changes to red once the appointment is booked.

Note: You can use the Book All button to make enter details for the remaining appointments that have not yet had appointment details entered.

10. Click **Finish**.

The Print Appointment Label & Forms screen will display.



The screenshot shows a window titled "Print Appointment Labels & Forms - Master Series - AATTERSON-JENNERSONSMITHE Mr Hayden Reece". It contains a list of items to be printed, each with a checkbox and a printer selection dropdown:

- Booking No of Labels: 10 (dropdown) Printer: [dropdown]
- Appointment No of Labels: 10 (dropdown) Printer: [dropdown]
- Mailing No of Labels: 10 (dropdown) Printer: [dropdown]
- GP Labels No of Labels: 10 (dropdown) Printer: [dropdown]
- Print Card Printer: [dropdown]
- Print Booking Letter Printer: [dropdown]
- Other Letter Letter: [dropdown] Printer: [dropdown]
- Print Series Booking Letter Printer: [dropdown]

At the bottom, there are "Ok" and "Cancel" buttons.

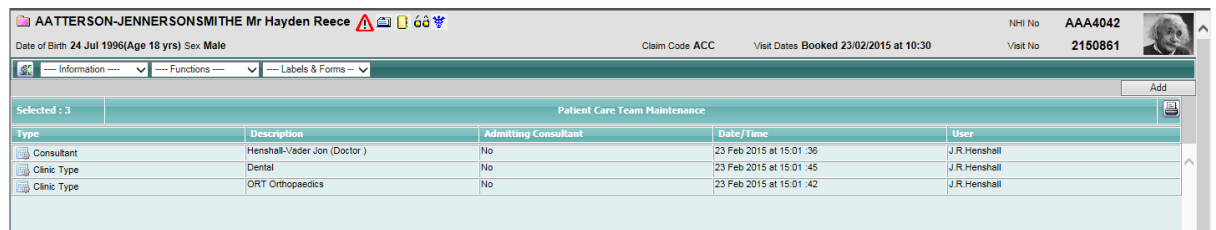
11. Select the appropriate boxes if you want to print labels and a booking letter for the series of appointments. Click **Ok** or **Cancel**.

2.1.5 Multi HCP Bookings - Via a Care Team

To book a Multi HCP Series Booking via a Care Team:

1. Select the patient that the booking is to be made for.
2. Ensure the patient has a Care Team assigned.

If a Care Team has not been assigned to the patient, refer to [Adding a Care Team](#) on page 16.

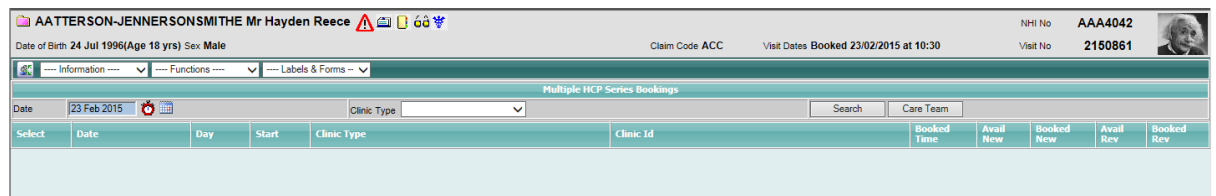


Selected : 3

Type	Description	Admitting Consultant	Date/Time	User
Consultant	Henshall-Vader Jon (Doctor)	No	23 Feb 2015 at 15:01 :36	J.R.Henshall
Clinic Type	Dental	No	23 Feb 2015 at 15:01 :45	J.R.Henshall
Clinic Type	ORT Orthopaedics	No	23 Feb 2015 at 15:01 :42	J.R.Henshall

3. Select **Multi HCP Series Booking** from the appropriate patient level drop down menu.

The Multiple HCP Series Booking screen will display.



Multiple HCP Series Bookings

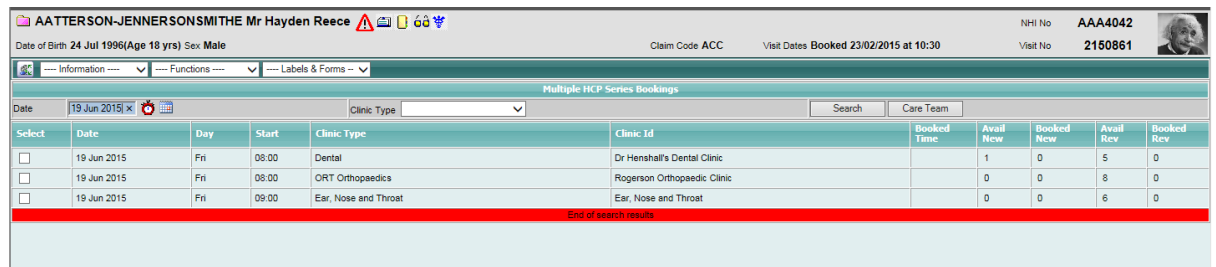
Date: 23 Feb 2015 Clinic Type: [Dropdown] Search: [Button] Care Team: [Button]

Select	Date	Day	Start	Clinic Type	Clinic Id	Booked Time	Avail New	Booked New	Avail Rev	Booked Rev
<input type="checkbox"/>										

The current date will populate the date field, however this can be changed.

4. Leave the Clinic Type field blank.
5. Click the **Care Team** button.

Search results will display based on the Care Team that has been assigned to the patient.



Multiple HCP Series Bookings

Date: 19 Jun 2015 Clinic Type: [Dropdown] Search: [Button] Care Team: [Button]

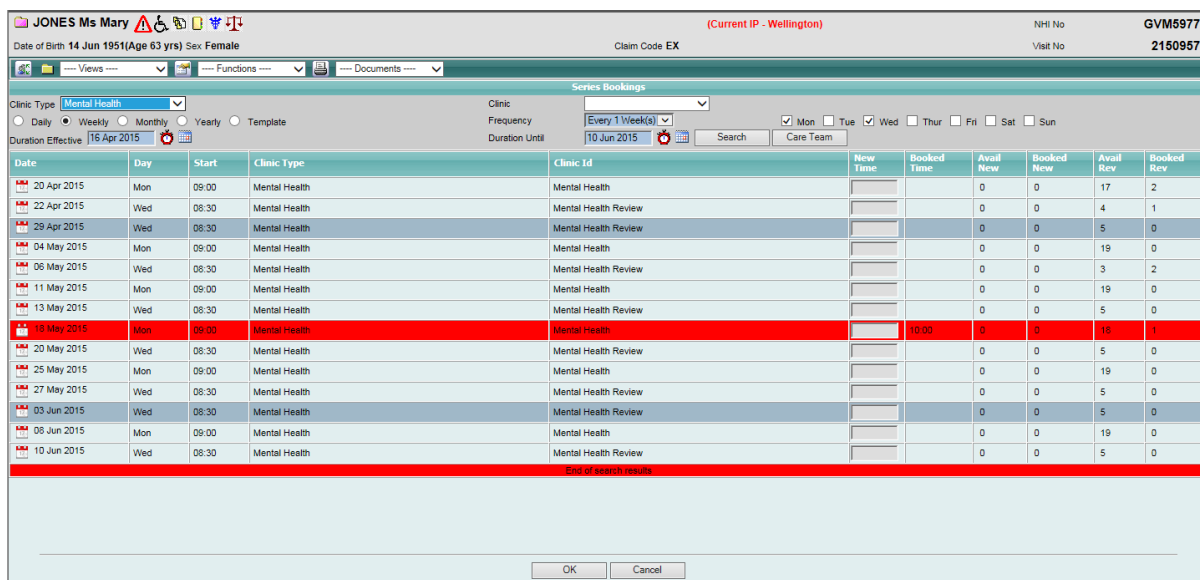
Select	Date	Day	Start	Clinic Type	Clinic Id	Booked Time	Avail New	Booked New	Avail Rev	Booked Rev
<input type="checkbox"/>	19 Jun 2015	Fri	08:00	Dental	Dr Henshall's Dental Clinic		1	0	5	0
<input type="checkbox"/>	19 Jun 2015	Fri	08:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic		0	0	8	0
<input type="checkbox"/>	19 Jun 2015	Fri	09:00	Ear, Nose and Throat	Ear, Nose and Throat		0	0	5	0

End of search results

Refer to [Booking a Series of Appointments on the same Day for Different Clinics](#), step 3 for further instructions on how to complete the Multi HCP Series Booking.

2.1.6 Clinic Colours

When the Series Bookings display a list of Clinics that meet the search criteria the Clinics will display in different if the Clinic is within 2 days of a Public Holiday or if the patient is already booked into the Clinic.



Date	Day	Start	Clinic Type	Clinic Id	New Time	Booked Time	Avail New	Booked New	Avail Rev	Booked Rev
20 Apr 2015	Mon	09:00	Mental Health	Mental Health			0	0	17	2
22 Apr 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	4	1
29 Apr 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	5	0
04 May 2015	Mon	09:00	Mental Health	Mental Health			0	0	19	0
06 May 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	3	2
11 May 2015	Mon	09:00	Mental Health	Mental Health			0	0	19	0
13 May 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	5	0
19 May 2015	Mon	09:00	Mental Health	Mental Health		10:00	0	3	18	1
20 May 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	5	0
25 May 2015	Mon	09:00	Mental Health	Mental Health			0	0	19	0
27 May 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	5	0
03 Jun 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	5	0
08 Jun 2015	Mon	09:00	Mental Health	Mental Health			0	0	19	0
10 Jun 2015	Wed	08:30	Mental Health	Mental Health Review			0	0	5	0

- **Red** = Specifies that the patient is already booked into the Clinic highlighted.
- **Blue** = Specifies the Clinic is within 2 days of a Public Holiday.

2.1.7 Updating Appointment Details

To make changes to existing appointment details:

1. On the **Appointment Details** screen, select **Update** from the **Actions** menu.


























The Update Appointment Details screen will display.

Update fields as required.

Note: Grey fields cannot be changed. To change the **Clinic** or **Date** and time you must reschedule or cancel the appointment.

Update Appointment - - APPLE Ms Annie Jane

Clinic	Rogerson Orthopaedic Clinic		
Date	Mon 29 Aug 2016 at 16:00		
Visit Type	Routine New Attend		
Mode of Delivery	Face To Face - 1 Patient - 1 Clinician		
Presenting Complaint			
Diagnosis			 
			 
			 
			 
			 
Procedure			 
			 
			 
			 
Problem			
			
			
Transport	NO	Priority	
Claim Code	Non Accident	Unit	
Source of Referral	Inpatient	Reports Required	
Special Arrangements		Referring GP	 
Preferred Contact Method		Inform GP	Yes
Contract		Purchaser	DHB Purchase
Comments	<div style="border: 1px solid gray; height: 40px;"></div>		

2. Click **OK**.

Changes to appointment details are saved.

2.2 Making Appointments – By Clinic

2.2.1 Viewing All Clinics

To view all clinics:

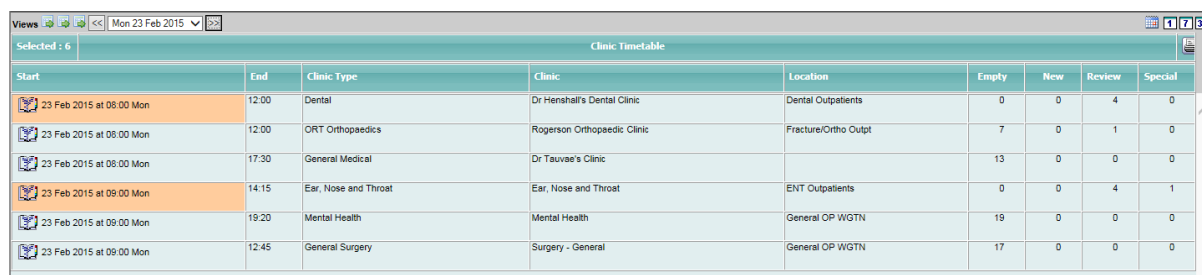
1. Select **Outpatients Clinics** from the appropriate hospital level drop down menu.

The **Clinic Timetable** for today is displayed, listing all clinics for today.




Start	End	Clinic Type	Clinic	Location	Empty	New	Review	Special
25 Feb 2015 at 08:00 Wed	15:00	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	2	0	2	0
25 Feb 2015 at 08:30 Wed	16:30	Mental Health	Mental Health Review	Kenepepu	7	0	0	0
25 Feb 2015 at 09:00 Wed	13:00	Dental	Watson Dental Surgical Clinic	Dental Outpatients	6	0	0	0
25 Feb 2015 at 13:30 Wed	17:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic	General OP WGTN	15	0	0	0

[Fully booked clinics](#) have an **orange** band over the date and time.



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

[Over-booked clinics](#) have a **red** band over the date and time.







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








To view clinics for different dates, use the Calendar Lookup facilities (as described in the webPAS Standard Conventions User Guide).





2. To view doctor and time information, click on the  icons

Examples follow of different views as a result of clicking  icons.








Views    Mon 23 Feb 2015 

Selected : 7

Clinic Timetable						
Start	End	Clinic Type	Clinic	Time Avail	Time Used	
 23 Feb 2015 at 08:00 Mon	12:00	Dental	Dr Henshall's Dental Clinic	04:00	02:00	
 23 Feb 2015 at 08:00 Mon	12:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic	04:00	00:30	
 23 Feb 2015 at 08:00 Mon	17:30	General Medical	Dr Tauvae's Clinic	09:30		
 23 Feb 2015 at 09:00 Mon	14:15	Ear, Nose and Throat	Ear, Nose and Throat	05:15	01:15	
 23 Feb 2015 at 09:00 Mon	19:20	Mental Health	Mental Health	10:20		
 23 Feb 2015 at 09:00 Mon	12:45	General Surgery	Surgery - General	03:45		
 23 Feb 2015 at 10:00 Mon	14:00	General Surgery	NURSE-LED ANGIO ASSESSMENTS	04:00	04:30	

Views    Mon 23 Feb 2015 

Selected : 7

Clinic Timetable					
Start	End	Clinic Type	Clinic	Doctor	
 23 Feb 2015 at 08:00 Mon	12:00	Dental	Dr Henshall's Dental Clinic	Henshall-Vader , Jon (Doctor)	
 23 Feb 2015 at 08:00 Mon	12:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic		
 23 Feb 2015 at 08:00 Mon	17:30	General Medical	Dr Tauvae's Clinic	Tauvae , Deborah (Prof)	
 23 Feb 2015 at 09:00 Mon	14:15	Ear, Nose and Throat	Ear, Nose and Throat	Henshall-Vader , Jon (Doctor)	
 23 Feb 2015 at 09:00 Mon	19:20	Mental Health	Mental Health	Perry , cox (Dr)	
 23 Feb 2015 at 09:00 Mon	12:45	General Surgery	Surgery - General	Perry , cox (Dr)	
 23 Feb 2015 at 10:00 Mon	14:00	General Surgery	NURSE-LED ANGIO ASSESSMENTS		

2.2.2 Viewing Clinics by Location

To view clinics by location:

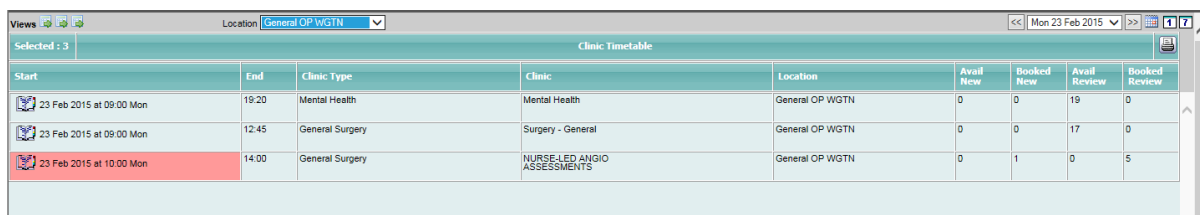
1. Select **Clinic List by Location** from the appropriate hospital level drop down menu.

The **Clinic Timetable** will display.



2. Select the relevant **Location**.
3. Select the date(s) by using the Calendar Lookup facility (as described in the webPAS Standard Conventions User Guide).

The **Clinic Timetable** for the selected clinic location and dates is displayed.



Start	End	Clinic Type	Clinic	Location	Avail New	Booked New	Avail Review	Booked Review
23 Feb 2015 at 09:00 Mon	19:20	Mental Health	Mental Health	General OP WGTN	0	0	19	0
23 Feb 2015 at 09:00 Mon	12:45	General Surgery	Surgery - General	General OP WGTN	0	0	17	0
23 Feb 2015 at 10:00 Mon	14:00	General Surgery	NURSE-LED ANGIO ASSESSMENTS	General OP WGTN	0	1	0	5

2.2.3 Viewing Clinics by Clinic Type

To view clinics by clinic type:

1. Select **Clinic List** from the appropriate hospital level drop down menu
2. The **Clinic Timetable** is displayed.



3. Select the relevant **Clinic Type**.
4. Select the date(s) by using the Calendar Lookup facility (as described in the webPAS Standard Conventions User Guide).

The **Clinic Timetable** for the selected clinic type and date(s) is displayed.



Start	End	Clinic Type	Clinic	Location	Avail New	Booked New	Avail Review	Booked Review
23 Feb 2015 at 09:00 Mon	12:45	General Surgery	Surgery - General	General OP WGTN	0	0	17	0
23 Feb 2015 at 10:00 Mon	14:00	General Surgery	NURSE-LED ANGIO ASSESSMENTS	General OP WGTN	0	1	0	5

2.2.4 Viewing Multiple Clinics by Clinic Type

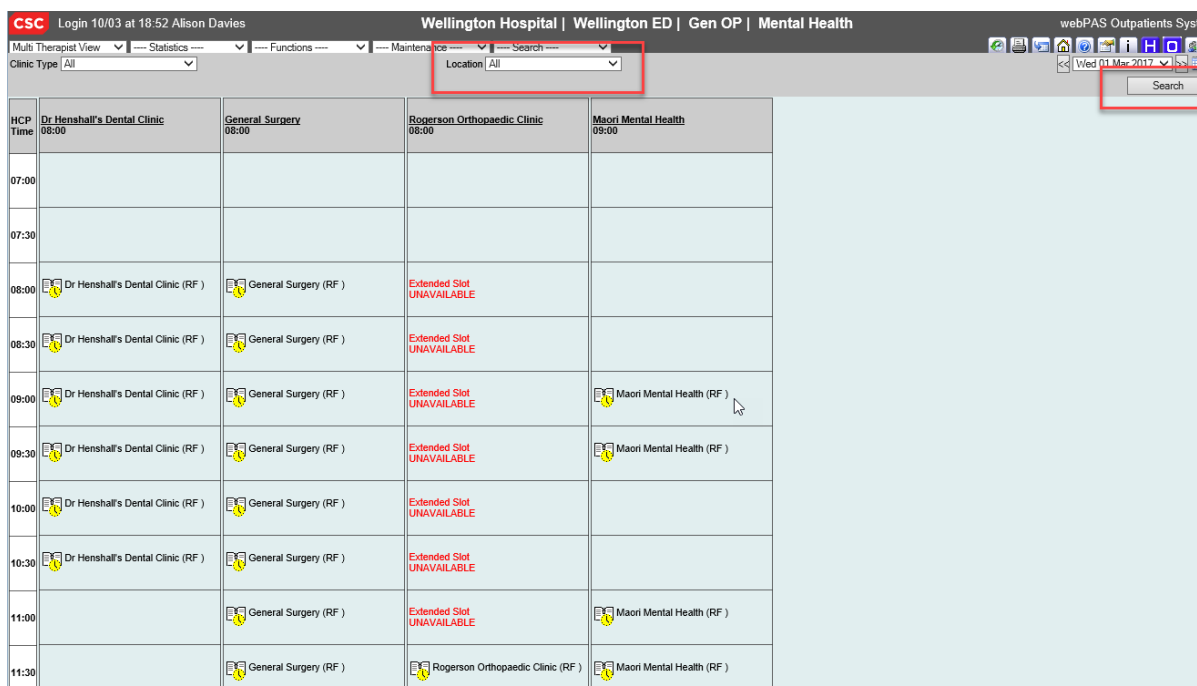
To view clinics by clinic type:

1. Select **Multi Therapist View** from the appropriate hospital level drop down menu






2. Select the relevant **Clinic Type**.
3. Select the date(s) by using the Calendar Lookup facility (as described in the webPAS Standard Conventions User Guide).
4. Select the relevant Location if wanting to filter Select SEARCH – program does not process until Search is clicked

The **Clinic Timetables** for the selected clinic type and date(s) are displayed.



HCP Time	Dr Henshall's Dental Clinic 08:00	General Surgery 08:00	Rogerson Orthopaedic Clinic 08:00	Maori Mental Health 09:00
07:00				
07:30				
08:00	Dr Henshall's Dental Clinic (RF)	General Surgery (RF)	Extended Slot UNAVAILABLE	
08:30	Dr Henshall's Dental Clinic (RF)	General Surgery (RF)	Extended Slot UNAVAILABLE	
09:00	Dr Henshall's Dental Clinic (RF)	General Surgery (RF)	Extended Slot UNAVAILABLE	Maori Mental Health (RF)
09:30	Dr Henshall's Dental Clinic (RF)	General Surgery (RF)	Extended Slot UNAVAILABLE	Maori Mental Health (RF)
10:00	Dr Henshall's Dental Clinic (RF)	General Surgery (RF)	Extended Slot UNAVAILABLE	
10:30	Dr Henshall's Dental Clinic (RF)	General Surgery (RF)	Extended Slot UNAVAILABLE	
11:00		General Surgery (RF)	Extended Slot UNAVAILABLE	Maori Mental Health (RF)
11:30		General Surgery (RF)	Rogerson Orthopaedic Clinic (RF)	Maori Mental Health (RF)

Note: The HCP Time range that appears in the left hand column is defined in your system parameter settings.

5. To book a patient directly into the slot, click the Appointment  icon corresponding to the relevant Clinic and Time.
6. To update a patient record, click the Patient Folder  icon of the patient to be updated.
7. To Reschedule a patient to another Clinic, click the Reschedule  icon of the patient to be Rescheduled.

2.2.5 Viewing Patients from Multiple Clinics for a Day

To view clinics by clinic type:

1. Select **Multi Session Patient List** from the appropriate hospital level drop down menu
2. The **Clinic Timetables** are displayed.

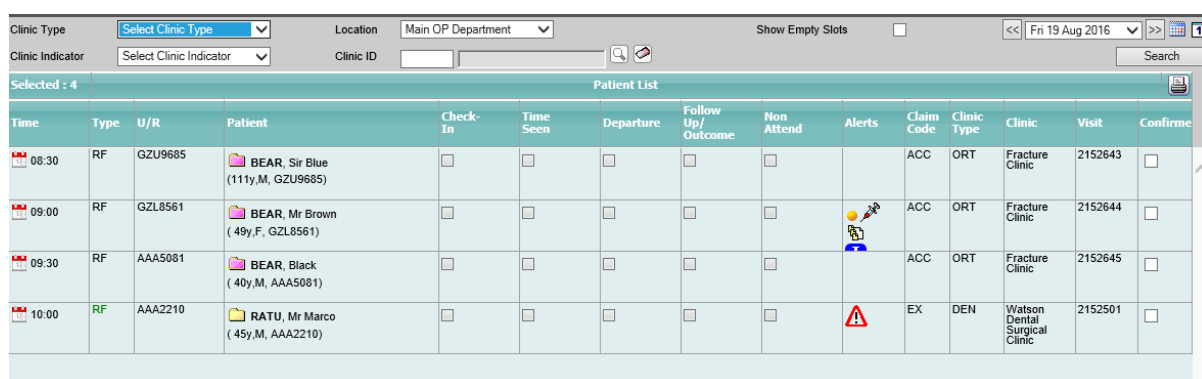


The screenshot shows a search interface with the following fields:




- Clinic Type: Select Clinic Type (dropdown)
- Location: Select Location (dropdown)
- Show Empty Slots:
- Date: Mon 23 Feb 2015 (calendar icon)
- Clinic Indicator: Select Clinic Indicator (dropdown)
- Clinic ID: [input field]
- Search: [button]

3. Select the relevant **Clinic Type** and / or **Clinic Location** and press **Search**.
4. Select the date(s) by using the Calendar Lookup facility (as described in the webPAS Standard Conventions User Guide).

The **Patients** for the selected clinic type, location and date are displayed.




The screenshot shows the Patient List table with the following data:

Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Follow Up/Outcome	Non Attend	Alerts	Claim Code	Clinic Type	Clinic	Visit	Confirm
08:30	RF	GZU9685	BEAR, Sir Blue (111y.M, GZU9685)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		ACC	ORT	Fracture Clinic	2152643	<input type="checkbox"/>
09:00	RF	GZL8561	BEAR, Mr Brown (49y.F, GZL8561)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		ACC	ORT	Fracture Clinic	2152644	<input type="checkbox"/>
09:30	RF	AAA5081	BEAR, Black (40y.M, AAA5081)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		ACC	ORT	Fracture Clinic	2152645	<input type="checkbox"/>
10:00	RF	AAA2210	RATU, Mr Marco (45y.M, AAA2210)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		EX	DEN	Watson Dental Surgical Clinic	2152501	<input type="checkbox"/>

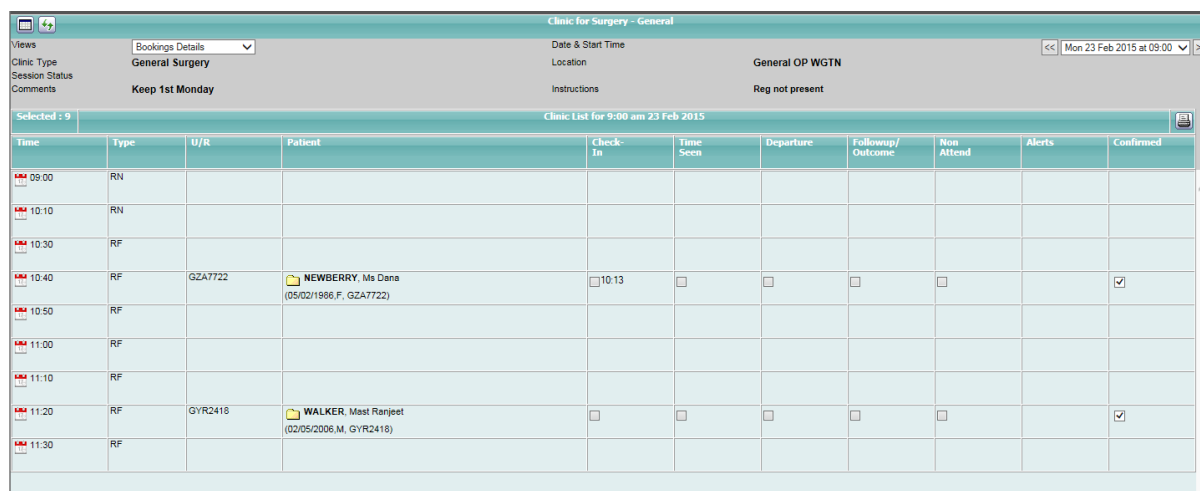
Note: Tick the Show Empty Slots to display all Slots from each Clinic.

2.2.6 Booking From the Clinic Timetable


To perform a booking from the Clinic Timetable:

1. Open the Clinic Timetable.
2. Ensure there are available slots for the relevant visit type, clinic and date.
3. Click the  icon corresponding to the clinic, date and time to which you want to book the patient.

The **Clinic List** is displayed with default booking details.



Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	RN									
10:10	RN									
10:30	RF									
10:40	RF	GZA7722	NEWBERRY, Mrs Dana (05/02/1966, F, GZA7722)	<input checked="" type="checkbox"/>	10:13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	RF									
11:00	RF									
11:10	RF									
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006, M, GYR2418)	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF									

4. To book a patient directly into the slot, click the Appointment  icon corresponding to the relevant time.

The **Patient Search** screen will display.


5. Perform a patient search or enter the patient's NHI number (as described in the webPAS PMI and NHI User Guide).

The **Make New Appointment** screen will display.

6. Record the appointment details (as described under [Booking an Appointment at the Patient Level](#) on page 8).

7. Click **OK**. The **Appointment details** screen displays:

Date	Clinic Type	Clinic	Location	Hospital	Status
Selected : 0					

Click the  icon to redisplay the **Clinic List**.

NHI No **GZM8818**
 Visit No **2152399**

Dr Kelvin S Watson Visit Dates Booked 27/07/2016 at 12:00

Appointment Details -

Appointment **Wed 27 Jul 2016 at 12:00**
 Interpreter
 Priority
 Unit
 Reports Required
 Referral Date
 Mode of Delivery
 Date **29 Jul 2016 at 10:12:51**
 Contract
 Procedures

Problems

The patient details will display in the selected slot.

Clinic for Surgery - General

Views: Bookings Details

Clinic Type: General Surgery Date & Start Time: Mon 23 Feb 2015 at 09:00

Session Status: Keep 1st Monday Location: General OP WGTN

Comments: Instructions: Reg not present

Selected: 9 Clinic List for 9:00 am 23 Feb 2015

Time	Type	U/R	Patient	Check-In	Time Secs	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	RN									
10:10	RN									
10:30	RF									
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1966,F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	RF									
11:00	RF	GVM5977	JONES, Ms Mary (14/06/1951,F, GVM5977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:10	RF									
11:20	RF	GYR2416	WALKER, Mast Ranjeet (02/05/2008,M, GYR2416)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF									

The patient is now booked.

2.2.7 Diagnosis Details

To view diagnosis details:

1. Open the **Clinic List** for the clinic you want to view.
2. Select **Diagnosis Details** from the **Views** menu.

Diagnosis details are shown for listed patients.



Time	Type	U/R	Patient	Diagnosis/Complaint	Comments
10:10	RN				
10:30	RF	GVN1276	BROWN, Mr Roger (05/05/1997, M, GVN1276)	Hist either neuroendocrine or solid papillary panc	
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1986, F, GZA7722)	ANAEMIA + GASTRIC ULCER	
10:50	RF				
11:00	RF	GVM5977	JONES, Ms Mary (14/06/1951, F, GVM5977)	Prophylactic Gastrectomy	
11:10	RF				
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006, M, GYR2418)	Abdo discomfort, distension & diarrhoea	

2.2.8 Contact Details

To view contact details:

1. Open the **Clinic List** for the clinic you want to view.
2. Select **Contact Details** from the Views menu.

Contact details are shown for listed patients.



Time	Type	U/R	Patient	Private	Business	Mobile	Address	Postal Address	GP/Practice
09:00	RN								
10:10	RN								
10:30	RF	GVN1276	 BROWN, Mr Roger (05/05/1997.M, GVN1276)	04 3213 5522		029 8852011	47 RONGOTAI ROAD		ALLCOCK Victor (DR) Kilburne Practice
10:40	RF	GZA7722	 NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	04 2200 4771	04 1000 4117	0320 336 220	12 BERRY ST	PO BOX 3389 WILLIS STREET	Rowland John () Mans Med Centre
10:50	RF								
11:00	RF	GVMS977	 JONES, Ms Mary (14/06/1951.F, GVMS977)	04 200 77782		023 0201 711	23 KINGSTON CRESCENT		Jones Susan (Dr.) Mountainside Family Practice
11:10	RF								
11:20	RF	GYR2416	 WALKER, Mast Ranjeet (02/05/2006.M, GYR2416)	04 3120 2286			9 BILLS WAY		Milne Ashley (DR) Mans Med Centre
11:30	RF								

3. **Contact Details** include Home Phone, Business Phone, Mobile Phone, Home Address, Postal Address and GP and Practice information.

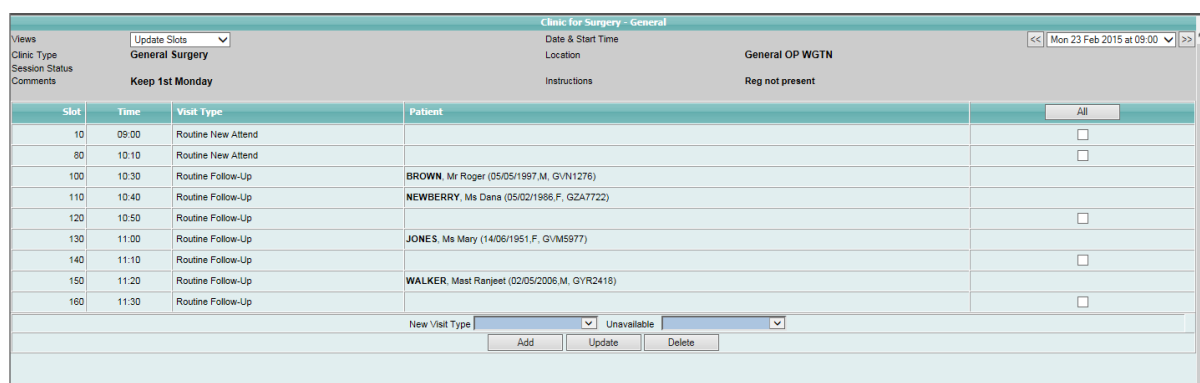
2.2.9 Updating Slots

Empty appointment slots can be updated for the selected Clinic Session. You can change the Visit Type, make the time unavailable or add additional appointment slots.

To update the appointment slots:

1. Open the Clinic List for the clinic you want to view.
2. Select **Update Slots** from the **Views** menu.

The following screen will display.



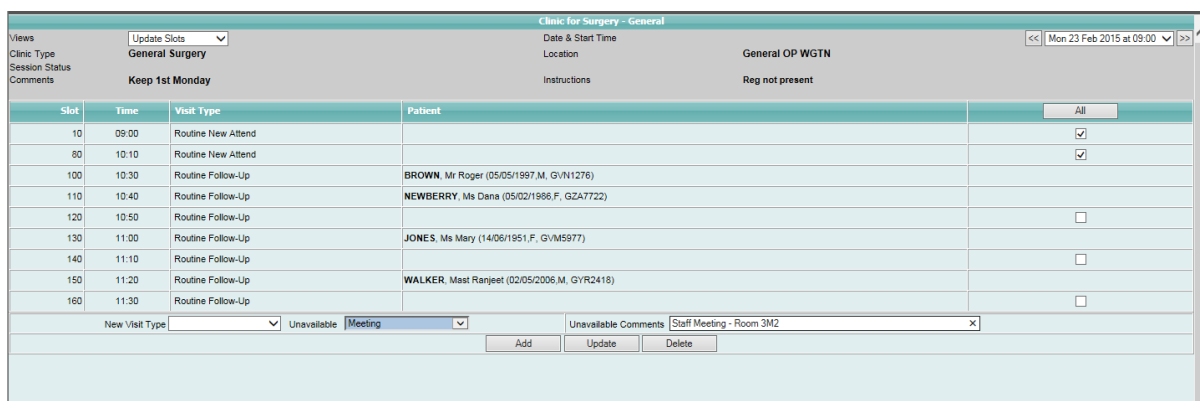
Slot	Time	Visit Type	Patient	All
10	09:00	Routine New Attend		<input type="checkbox"/>
80	10:10	Routine New Attend		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, Gv/N1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/>
120	10:50	Routine Follow-Up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, Gv/MS977)	<input type="checkbox"/>
140	11:10	Routine Follow-Up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
160	11:30	Routine Follow-Up		<input type="checkbox"/>

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.

3. Do one or more of the following:
 - Make the appointment slots unavailable.
Go to section Make Appointment Slots Unavailable.
 - Change the Visit Type.
Go to section Change Visit Type
 - Add new appointment slots.
Go to section Add New Appointment Slots

2.2.9.1 Make Appointment Slots Unavailable

1. Select the Mark fields corresponding to the slots you want to change.
2. Select the reason from the Unavailable list and enter a comment in the Comments field if required as shown.

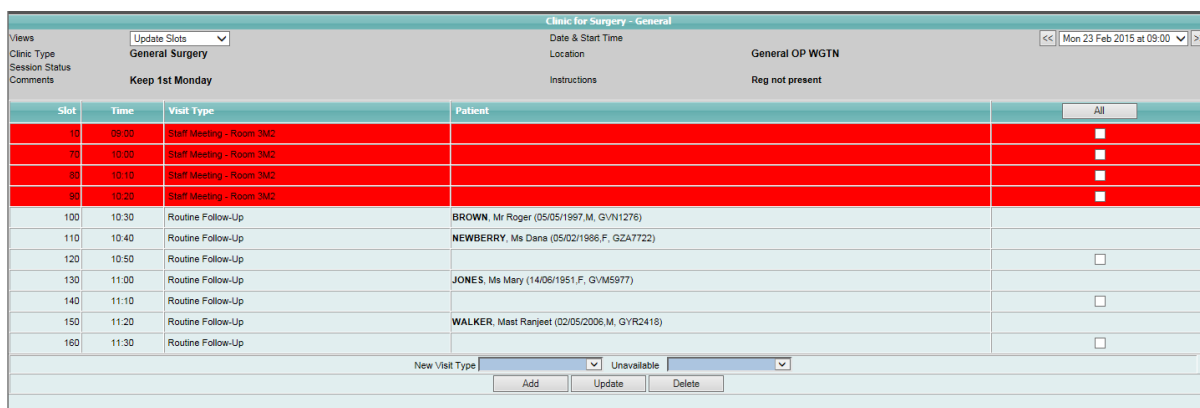


Slot	Time	Visit Type	Patient	Mark
10	09:00	Routine New Attend		<input checked="" type="checkbox"/>
80	10:10	Routine New Attend		<input checked="" type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/>
120	10:50	Routine Follow-Up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>
140	11:10	Routine Follow-Up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
160	11:30	Routine Follow-Up		<input type="checkbox"/>

New Visit Type: Unavailable: Meeting Unavailable Comments: Staff Meeting - Room 3M2

Buttons: Add, Update, Delete

3. Click **Update**. The screen refreshes with the unavailable slots with a red background.



Slot	Time	Visit Type	Patient	Mark
10	09:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
75	10:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
80	10:10	Staff Meeting - Room 3M2		<input type="checkbox"/>
90	10:20	Staff Meeting - Room 3M2		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/>
120	10:50	Routine Follow-Up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>
140	11:10	Routine Follow-Up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
160	11:30	Routine Follow-Up		<input type="checkbox"/>

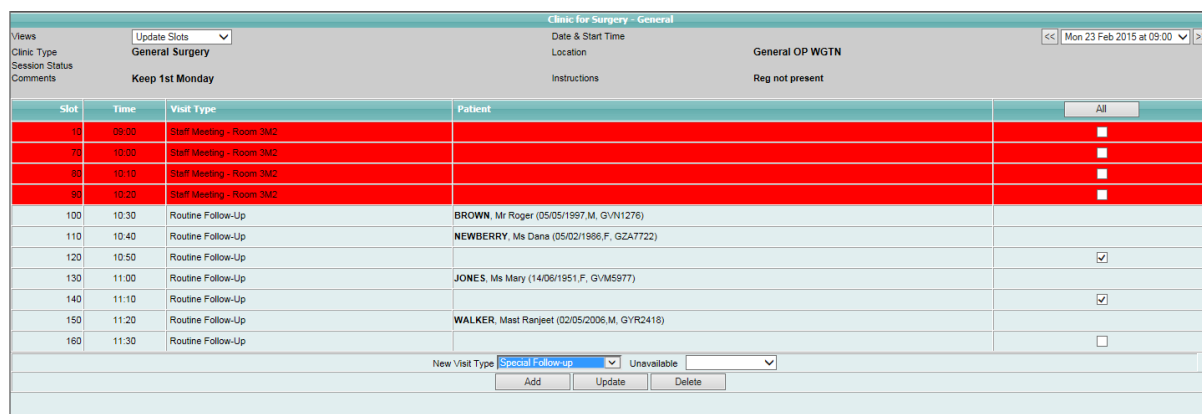
New Visit Type: Unavailable:

Buttons: Add, Update, Delete

4. Select **Booking Details** from the **Views** menu if the changes are complete; otherwise go to the next step.

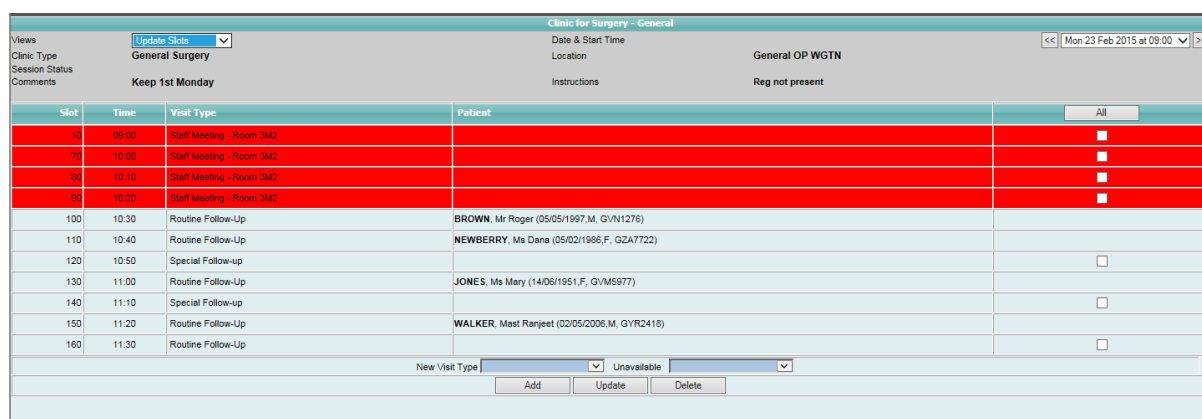
2.2.9.2 Change Visit Type

1. Select the Mark fields corresponding to the slots you want to change.
2. Select the visit type from the New Visit Type list.



Slot	Time	Visit Type	Patient	All
10	09:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
75	10:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
85	10:10	Staff Meeting - Room 3M2		<input type="checkbox"/>
95	10:20	Staff Meeting - Room 3M2		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997,M, GVN1276)	
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986,F, GZA7722)	
120	10:50	Routine Follow-Up		<input checked="" type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951,F, GVM5977)	
140	11:10	Routine Follow-Up		<input checked="" type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006,M, GYR2418)	
160	11:30	Routine Follow-Up		<input type="checkbox"/>

3. Click **Update**. The screen will refresh with the updated visit types.



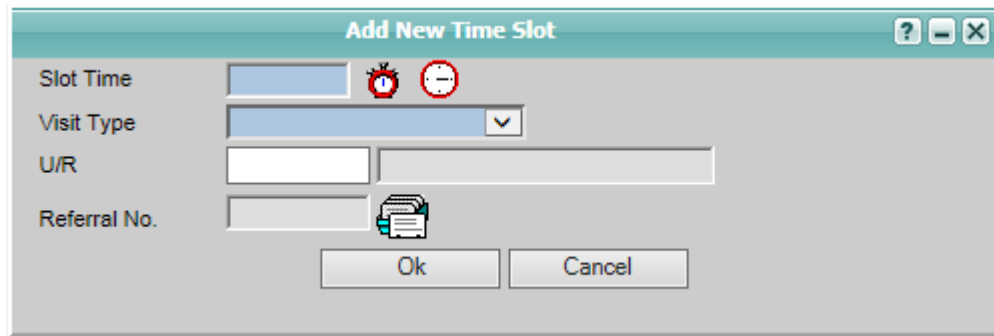
Slot	Time	Visit Type	Patient	All
10	09:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
75	10:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
85	10:10	Staff Meeting - Room 3M2		<input type="checkbox"/>
95	10:20	Staff Meeting - Room 3M2		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997,M, GVN1276)	
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986,F, GZA7722)	
120	10:50	Special Follow-up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951,F, GVM5977)	
140	11:10	Special Follow-up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006,M, GYR2418)	
160	11:30	Routine Follow-Up		<input type="checkbox"/>

4. Select **Booking Details** from the **Views** menu if the changes are complete; otherwise go to the next step.

2.2.9.3 Add New Appointment Slots


1. Click **Add**.

The Add New Time Slot screen will display.



2. Enter the additional appointment time and select a Visit Type from the list.
3. If there is a patient to fill the time, enter the NHI number and press **Tab**.



Note: If the new Appointment is to be linked to a Referral enter the Referral Number, use the Referral Search  icon to select from the Patient Referrals.

4. Click **Ok**.

The Make a New Appointment screen will display for the patient.

5. Enter the details.

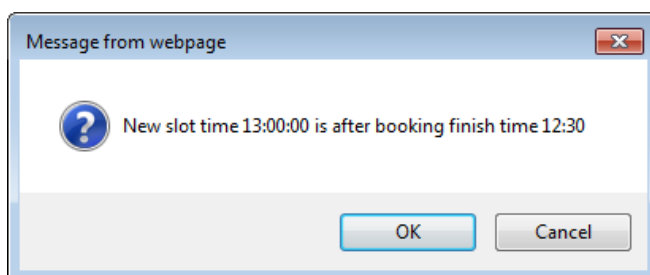
6. Click **Ok**.

The appointment details for the patient display.

Note: If you don't enter a NHI Number, the screen refreshes with the additional appointment displayed.

Slot	Time	Visit Type	Patient	
95	09:30	Staff Meeting - Room 3M2		■
96	10:00	Staff Meeting - Room 3M2		■
97	10:10	Staff Meeting - Room 3M2		■
98	10:20	Staff Meeting - Room 3M2		■
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	
120	10:50	Special Follow-up		□
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)	
140	11:10	Special Follow-up		□
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	
160	11:30	Routine Follow-Up		□

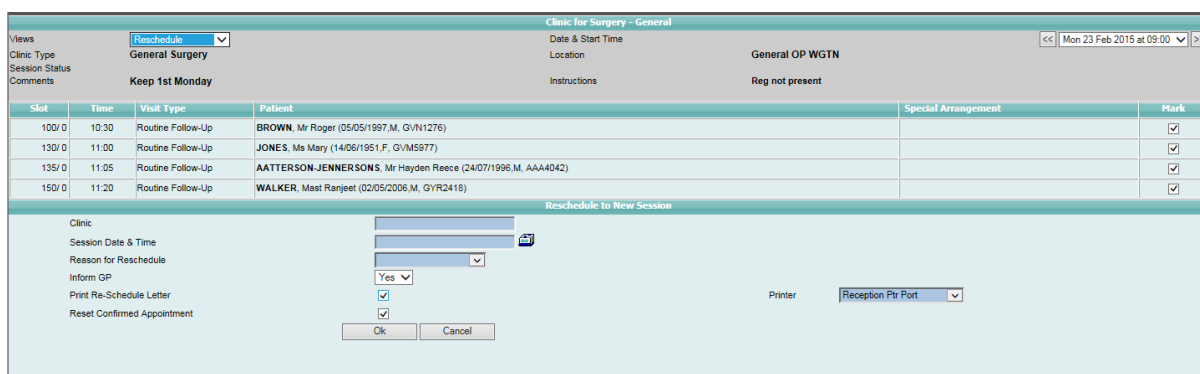
Note: If you Add a Slot at a time after the Clinic Booking End Time the following warning will display. Press **OK** to continue adding the Slot. Press **Cancel** to return without adding the Slot.




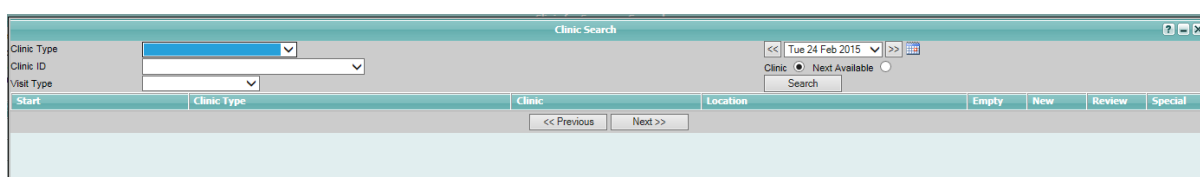
2.2.10 Rescheduling Clinic Appointments

To reschedule all appointments from the Clinic List:

1. Open the **Clinic List** for the clinic you want to view.
2. Select **Reschedule** from the **Views** menu. The following screen is displayed:



3. Click the Look Up icon  to search for a suitable clinic date and time. The Clinic search is displayed.













4. Enter the clinic details such as type and date required. Click **Search**. The search results are displayed.

Clinic Search Sun 01 Mar 2015

Clinic Type: Clinic: Next Available

Clinic ID: Search

Visit Type:

Start	Clinic Type	Clinic	Location	Empty	New	Review	Special
 02 Mar 2015 at 09:00 Mon	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
 05 Mar 2015 at 09:30 Thu	General Surgery	Surgery - General	Gynaecology Outpt	22	0	0	0
 06 Mar 2015 at 09:30 Fri	General Surgery	Surgery - General	General OP WGTN	20	0	0	0
 09 Mar 2015 at 09:00 Mon	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
 12 Mar 2015 at 09:30 Thu	General Surgery	Surgery - General	Gynaecology Outpt	22	0	0	0
 13 Mar 2015 at 09:30 Fri	General Surgery	Surgery - General	General OP WGTN	20	0	0	0
 16 Mar 2015 at 09:00 Mon	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
 19 Mar 2015 at 09:30 Thu	General Surgery	Surgery - General	Gynaecology Outpt	22	0	0	0
 20 Mar 2015 at 09:30 Fri	General Surgery	Surgery - General	General OP WGTN	20	0	0	0
 23 Mar 2015 at 09:00 Mon	General Surgery	Surgery - General	General OP WGTN	17	0	0	0


<< Previous Next >>

5. Click the Open Session  icon of the required session.

The available appointments are listed.



Time	Visit Type	Patient	Status
9:00 am	Routine Follow-Up		
10:00 am	Routine Follow-Up		
10:10 am	Routine Follow-Up		
10:20 am	Routine Follow-Up		
10:30 am	Routine Follow-Up		
10:40 am	Routine Follow-Up		
10:50 am	Routine Follow-Up		
11:00 am	Routine Follow-Up		
11:10 am	Routine Follow-Up		
11:20 am	Routine Follow-Up		
11:30 am	Routine Follow-Up		
11:40 am	Routine Follow-Up		
11:50 am	Routine Follow-Up		
12:00 pm	Routine Follow-Up		
12:10 pm	Routine Follow-Up		
12:20 pm	Routine Follow-Up		
12:30 pm	Routine Follow-Up		

6. Click on an appointment  icon. The patients to be re-scheduled are displayed.



Slot	Time	Visit Type	Patient	Special Arrangement	Mark
100/0	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, G/VN1276)		<input checked="" type="checkbox"/>
130/0	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)		<input checked="" type="checkbox"/>
135/0	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)		<input checked="" type="checkbox"/>
150/0	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)		<input checked="" type="checkbox"/>

7. Select a Reason for Reschedule from the list, confirm if a Reschedule Letter is to be printed, Reset the Confirmed Appointment flag and click **OK**. The patient appointments are transferred to the new date and time.

2.2.11 Updating Non-Attended Appointments

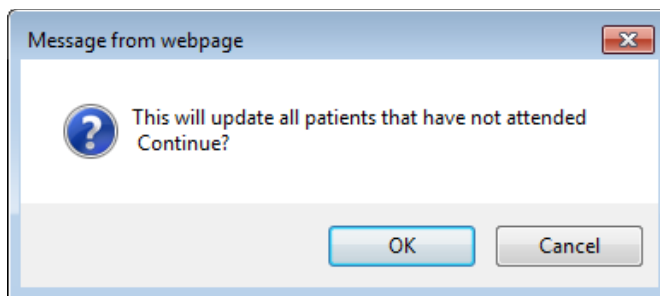
To update the clinic session with all the patients who did not attend their appointments:

1. Open the **Clinic List** for the clinic you want to view.

Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	RF	AAA2333	BOOCOCK, Ms Julie (05/01/1983.F, AAA2333)	08:52	09:01		A			
09:15	RF	T-02162	CANDISH, Mrs Lorraine (29/04/1949.F, T-02162)	09:08	09:14		A			
09:30	RF	GZJ5421	VALLEY, Mr Spy (15/01/1982.M, GZJ5421)							
09:45	RF	GXH6890	NBR.S, Testone (01/01/1950.M, GXH6890)							
10:00	SF	GZF9722	NEWMAN, Ms Debbie (30/03/1986.F, GZF9722)	10:07						
10:05	RF	GYQ6507	QWERTY, Mr Joseph Second Changed (21/03/1950.M, GYQ6507)	10:09	10:22	10:47	A			
15:00	UF	GXZ7494	FAHEY, Mr David (12/04/1952.M, GXZ7494)	15:00	15:00	15:30	A			

2. Select **Update All Non-Attended** from the appropriate hospital level drop down menu.

The following message will display.



3. Click **Ok**. The following screen displays:

Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	RF	AAA2333	BOOCOCK, Ms Julie (05/01/1983.F, AAA2333)	08:52	09:01		A			
09:15	RF	T-02162	CANDISH, Mrs Lorraine (29/04/1949.F, T-02162)	09:08	09:14		A			
09:30	RF	GZJ5421	VALLEY, Mr Spy (15/01/1982.M, GZJ5421)					DNA		
09:45	RF	GXH6890	NBR.S, Testone (01/01/1950.M, GXH6890)					DNA		
10:00	SF	GZF9722	NEWMAN, Ms Debbie (30/03/1986.F, GZF9722)	10:07						
10:05	RF	GYQ6507	QWERTY, Mr Joseph Second Changed (21/03/1950.M, GYQ6507)	10:09	10:22	10:47	A			
15:00	UF	GXZ7494	FAHEY, Mr David (12/04/1952.M, GXZ7494)	15:00	15:00	15:30	A			

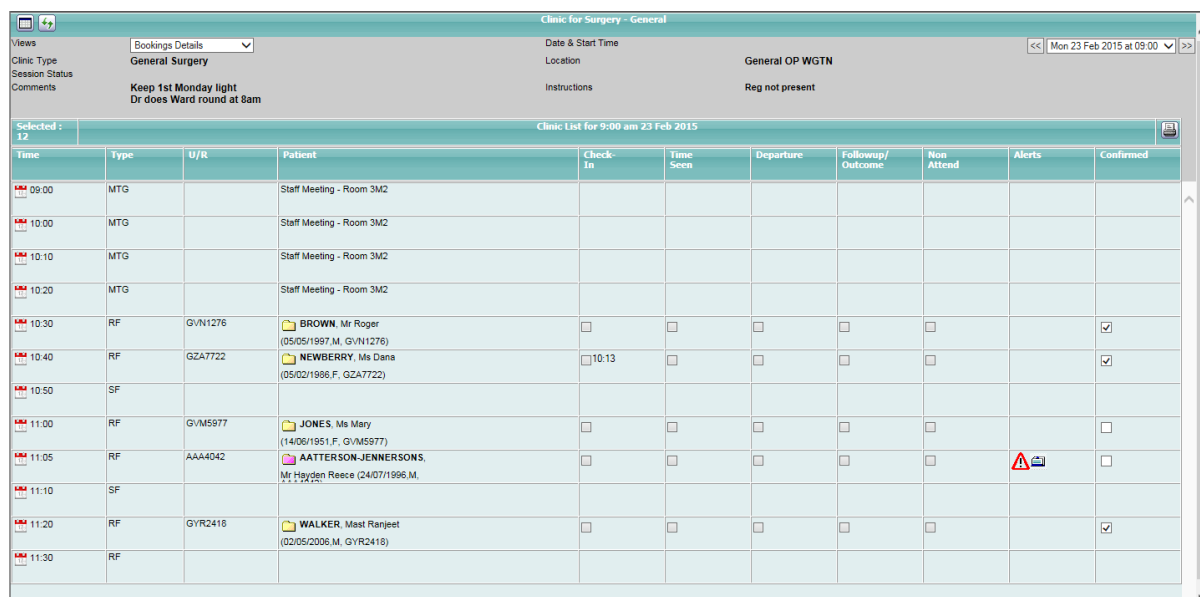
The appointments without Check-In and Time Seen times have been updated to Did Not Attend (DNA).


2.2.12 Updating Session Comments

Three lines of comments are available for display on the Clinic List screen: two of which are set up along with the instructions in the Clinic Master Maintenance. The third line of comments is available for the session and can be updated using the Views menu on the Clinic List. For example, the comments could notify the clinic staff that the attending doctor has changed for that session only.

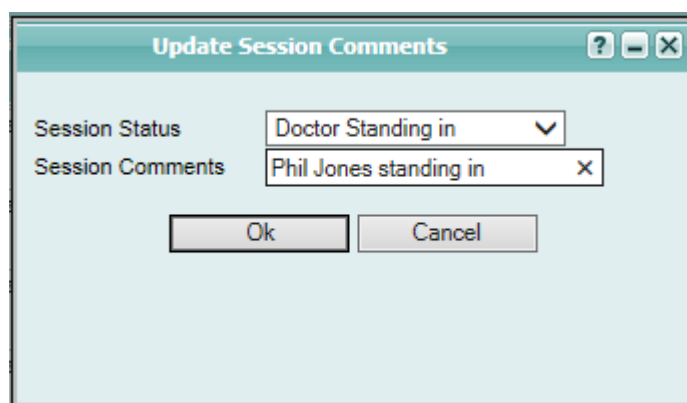
To update the session comments:

1. Open the **Clinic List** for the clinic you want to view.



Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG		Staff Meeting - Room 3M2							
10:00	MTG		Staff Meeting - Room 3M2							
10:10	MTG		Staff Meeting - Room 3M2							
10:20	MTG		Staff Meeting - Room 3M2							
10:30	RF	G/VN1276	BROWN, Mr Roger (05/05/1997.M, G/VN1276)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	SF									
11:00	RF	G/VM5977	JONES, Ms Mary (14/06/1951.F, G/VM5977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:05	RF	AAA4042	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:10	SF									
11:20	RF	G/YR2416	WALKER, Mast Ranjeet (02/05/2006.M, G/YR2416)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF									

2. Select **Update Comments** from the Views menu. The following screen displays:




Update Session Comments

Session Status: Doctor Standing in

Session Comments: Phil Jones standing in

3. Select a Session Status if required from the list and enter the session comments.
4. Click **Ok**.

The Clinic list is redisplayed with the new comment.

Clinic for Surgery - General											
Views		Bookings Details		Date & Start Time		Location		General OP WGTN		Mon 23 Feb 2015 at 09:00	
Clinic Type		General Surgery		Location		General OP WGTN					
Session Status		Doctor Standing in		Location		General OP WGTN					
Comments		Keep 1st Monday light Dr does Ward round at 8am Phil Jones standing in		Instructions		Reg not present					
Selected : 12		Clinic List for 9:00 am 23 Feb 2015									
Time	Type	U/R	Patient	Check In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed	
09:00	MTG		Staff Meeting - Room 3M2								
10:00	MTG		Staff Meeting - Room 3M2								
10:10	MTG		Staff Meeting - Room 3M2								
10:20	MTG		Staff Meeting - Room 3M2								
10:30	RF	G/VN1276	BROWN, Mr Roger (05/05/1997.M, G/VN1276)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
10:50	SF										
11:00	RF	G/VMS977	JONES, Ms Mary (14/06/1951.F, G/VMS977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
11:05	RF	AAA4042	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
11:10	SF										
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
11:30	RF										

2.2.13 Suspending a Clinic Session

A single Clinic Session can be suspended using the Views menu option rather than suspending the whole clinic. To suspend a clinic session:

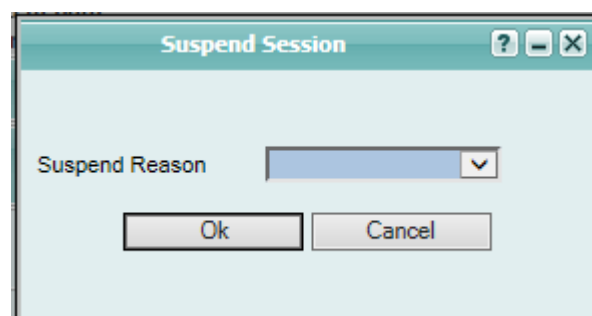
1. Open the Clinic List for the clinic you want to view.



Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG		Staff Meeting - Room 3M2							
10:00	MTG		Staff Meeting - Room 3M2							
10:10	MTG		Staff Meeting - Room 3M2							
10:20	MTG		Staff Meeting - Room 3M2							
10:30	RF	G/VN1276	BROWN, Mr Roger (05/05/1997.M, G/VN1276)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1996.F, GZA7722)	<input type="checkbox"/>	10:13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	SF									
11:00	RF	G/VM5977	JONES, Ms Mary (14/06/1951.F, G/VM5977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:05	RF	AAA4042	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:10	SF									
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF									

2. Select Suspend Clinic from the Views menu.

The Suspend Session screen will display.



3. Select a reason from the list.
4. Click Ok.

A clinic timetable for the day is displayed minus the session that was suspended.

2.2.14 Recording Clinic Usage

Actual times versus the scheduled start and end times for the session are recorded for reporting purposes. By capturing these times the clinic usage can be assessed. To record the actual start and end times for a session:

1. Open the **Clinic List** for the clinic you want to view.

Time	Type	Patient	Check In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG	Staff Meeting - Room 3M2							
10:00	MTG	Staff Meeting - Room 3M2							
10:10	MTG	Staff Meeting - Room 3M2							
10:20	MTG	Staff Meeting - Room 3M2							
10:30	RF	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:40	RF	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	SF								
11:00	RF	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:05	RF	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:10	SF								
11:20	RF	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF								

Select Clinic Usage from the Views menu.

2. Enter the start and end times and select a reason if the doctor was absent for a period of time.
3. Click **Ok**.

The times are recorded and the clinic list redisplayed.

2.2.15 Recording Attendance for Several Appointments

For group sessions where individual attendances times not necessary i.e. Ante Natal classes you can record the attendances times for several patients at a time.

To record times for several patients:

1. Open the **Clinic List** for the clinic you want to view.

Time	Type	Patient	Check-In	Time-Sec	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG	Staff Meeting - Room 3M2							
10:00	MTG	Staff Meeting - Room 3M2							
10:10	MTG	Staff Meeting - Room 3M2							
10:20	MTG	Staff Meeting - Room 3M2							
10:30	RF	G/VN1276 BROWN, Mr Roger (05/05/1997.M, G/VN1276)	<input type="checkbox"/>						<input checked="" type="checkbox"/>
10:40	RF	GZA7722 NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/> 10:13						<input checked="" type="checkbox"/>
10:50	SF								
11:00	RF	G/MS977 JONES, Ms Mary (14/06/1951.F, G/MS977)	<input type="checkbox"/>						<input type="checkbox"/>
11:05	RF	AAA4042 AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M)	<input type="checkbox"/>						<input type="checkbox"/>
11:10	SF								
11:20	RF	GYR2418 WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>						<input checked="" type="checkbox"/>
11:30	RF								

2. Select **Bulk Attendance** from the Views menu. The following screen displays:

Slot	Time	Visit Type	Patient	Special Arrangement	Check-In	Time-Sec	Departure	Mark
95	09:00	Meeting						
96	10:00	Meeting						
98	10:10	Meeting						
99	10:20	Meeting						
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, G/VN1276)					<input checked="" type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)		10:13			
120	10:50	Special Follow-up						
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, G/MS977)					<input checked="" type="checkbox"/>
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, AAA4042)					<input checked="" type="checkbox"/>
140	11:10	Special Follow-up						
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)					<input checked="" type="checkbox"/>
160	11:30	Routine Follow-Up						

3. Leave the default Check in Time or enter the required time and click **Attend All**.

Note: All patients are selected by default. To exclude a patient clear the Mark check box. Patients that have already been Attended are not able to be selected in the Bulk Attendance.

2.2.16 Recording Departures for Several Appointments

Where individual departure times are not required for each patient, you can update several appointments in the clinic session with the same departure time.

To record the departure time for several appointments:

1. Open the **Clinic List** for the clinic you want to view.

Time	Type	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG	Staff Meeting - Room 3M2							
10:00	MTG	Staff Meeting - Room 3M2							
10:10	MTG	Staff Meeting - Room 3M2							
10:20	MTG	Staff Meeting - Room 3M2							
10:30	RF	BROWN, Mr Roger (05/05/1997.M, GVN1276)	10:30						<input checked="" type="checkbox"/>
10:40	RF	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	10:13						<input checked="" type="checkbox"/>
10:50	SF								
11:00	RF	JONES, Ms Mary (14/06/1951.F, GVM5977)							<input type="checkbox"/>
11:05	RF	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, AAA4042)	10:30						<input type="checkbox"/>
11:10	SF								
11:20	RF	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	10:30						<input checked="" type="checkbox"/>
11:30	RF								

2. Select **Bulk Departure** from the **Views** menu. The following screen displays:

Slot	Time	Visit Type	Patient	Special Arrangement	Check-In	Time-Seen	Departure	Mark
90	09:30	Meeting						
100	10:00	Meeting						
110	10:10	Meeting						
120	10:20	Meeting						
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)		10:30			<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)		10:13			<input checked="" type="checkbox"/>
120	10:50	Special Follow-up						
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)					
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, AAA4042)		10:30			<input checked="" type="checkbox"/>
140	11:10	Special Follow-up						
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)		10:30			<input checked="" type="checkbox"/>
160	11:30	Routine Follow-Up						

Departure Time: 11:15:00

Buttons: Depart All, Cancel

3. Modify the departure time if required and click **Depart All**. The screen refreshes with a departure time listed.

Note: If you clear the Mark field for a patient they will be excluded from the departure time update.

2.2.17 Recording Discharges for Several Appointments

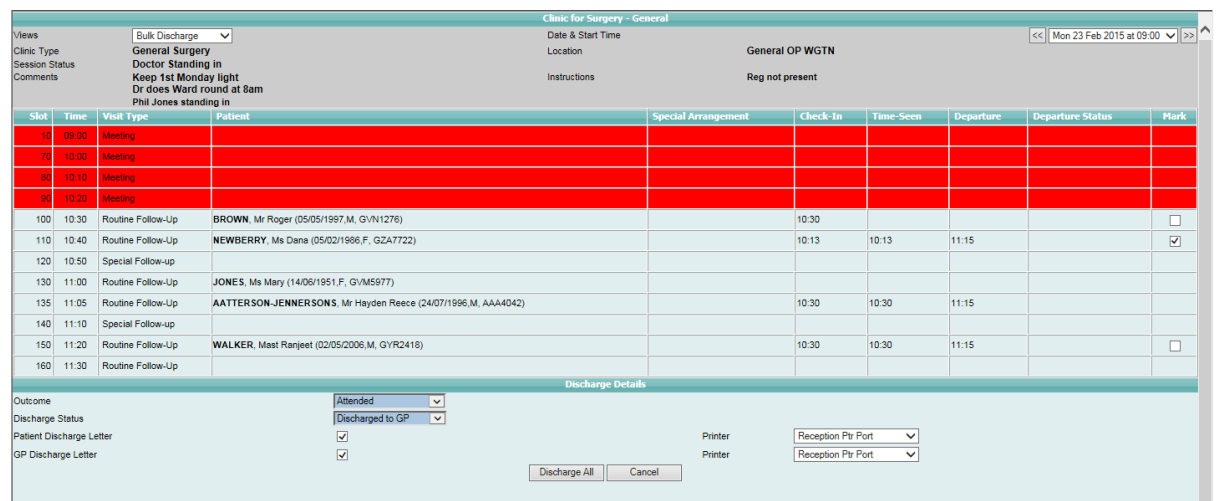
Where individual discharge details are not required for each patient, you can update several appointments in the clinic session with the same discharge details.

To record the departure time for several appointments:

1. Open the **Clinic List** for the clinic you want to view.



2. Select **Bulk Discharge** from the **Views** menu. The following screen displays:



3. Enter the Outcome and Discharge Status from the lists available **Discharge All**. The screen refreshes with a Departure Status listed.

Note: If you clear the Mark field for a patient they will be excluded from the discharge update. Only patients that have Attended the Clinic and do not have future bookings into the Clinic are able to be selected in the Bulk Discharge.

2.2.18 Adding Follow up Appointments for Several Patients

When recording follow-up appointments for a group of patients you to ensure that there are sufficient appointments available for the group. When you select the first appointment in the list the Outpatients module books the remaining patient in the group into the subsequent appointment slots.

To add follow-up appointments for several appointments:


1. Open the **Clinic List** for the clinic you want to view.

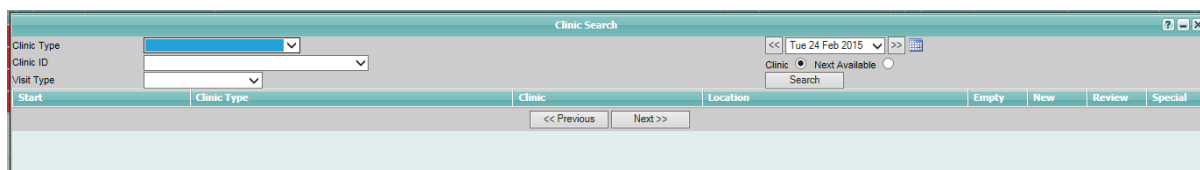
Time	Type	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG	Staff Meeting - Room 3M2							
10:00	MTG	Staff Meeting - Room 3M2							
10:10	MTG	Staff Meeting - Room 3M2							
10:20	MTG	Staff Meeting - Room 3M2							
10:30	RF	BROWN, Mr Roger (05/05/1997.M, GVN1276)	10:30						<input checked="" type="checkbox"/>
10:40	RF	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	10:13	10:13	11:15	A			<input checked="" type="checkbox"/>
10:50	SF								
11:00	RF	JONES, Ms Mary (14/06/1951.F, GVM5977)							<input type="checkbox"/>
11:05	RF	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, AAA4042)	10:30	10:30	11:15				<input type="checkbox"/>
11:10	SF								
11:20	RF	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	10:30	10:30	11:15				<input checked="" type="checkbox"/>
11:30	RF								


2. Select **Bulk Follow Up** from the **Views** menu.

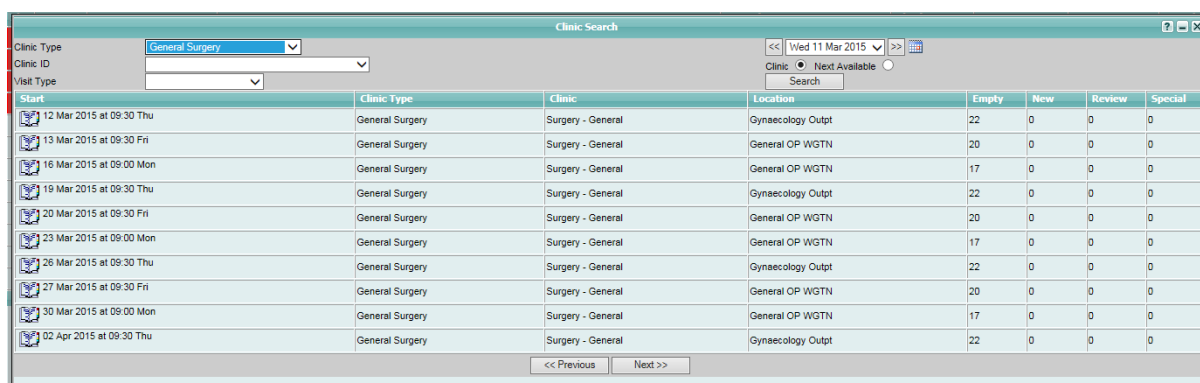
The following screen will display.

Slot	Time	Visit Type	Patient	Special Arrangement	Check-In	Time Seen	Departure	Mark
95	09:00	Meeting						
96	10:00	Meeting						
97	10:10	Meeting						
98	10:20	Meeting						
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)		10:30			<input checked="" type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)		10:13	10:13	11:15	<input checked="" type="checkbox"/>
120	10:50	Special Follow-up						
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)					<input checked="" type="checkbox"/>
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, AAA4042)		10:30	10:30	11:15	<input checked="" type="checkbox"/>
140	11:10	Special Follow-up						
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)		10:30	10:30	11:15	<input checked="" type="checkbox"/>
160	11:30	Routine Follow-Up						

- Click the Look Up icon  to select the appropriate Clinic session. The Clinic Search screen displays.



- Enter the search criteria and select the required date by clicking the Session icon .




Start	Clinic Type	Clinic	Location	Empty	New	Review	Special
12 Mar 2015 at 09:30 Thu	General Surgery	Surgery - General	Gynaecology Outpt	22	0	0	0
13 Mar 2015 at 09:30 Fri	General Surgery	Surgery - General	General OP WGTN	20	0	0	0
16 Mar 2015 at 09:00 Mon	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
19 Mar 2015 at 09:30 Thu	General Surgery	Surgery - General	Gynaecology Outpt	22	0	0	0
20 Mar 2015 at 09:30 Fri	General Surgery	Surgery - General	General OP WGTN	20	0	0	0
23 Mar 2015 at 09:00 Mon	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
26 Mar 2015 at 09:30 Thu	General Surgery	Surgery - General	Gynaecology Outpt	22	0	0	0
27 Mar 2015 at 09:30 Fri	General Surgery	Surgery - General	General OP WGTN	20	0	0	0
30 Mar 2015 at 09:00 Mon	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
02 Apr 2015 at 09:30 Thu	General Surgery	Surgery - General	Gynaecology Outpt	22	0	0	0

The Clinic List will display available appointments.



Time	Visit Type	Patient	Status
9:30 am	Routine Follow-Up		
9:40 am	Routine Follow-Up		
9:50 am	Routine Follow-Up		
10:00 am	Routine Follow-Up		
10:10 am	Routine Follow-Up		
10:20 am	Routine Follow-Up		
10:30 am	Routine Follow-Up		
10:40 am	Routine Follow-Up		
10:50 am	Routine Follow-Up		

- Click on the first appointment time  into which you want to book the first patient.
- Click **OK**. Appointments will be made in the new Clinic for each patient selected.

2.2.19 Confirming Appointments

Use the Confirmed Appointments option to keep track of patients whose appointments you have confirmed.

To confirm appointments:

1. Open the **Clinic List** for the clinic you want to view.

Time	Type	Patient	Check-In	Time Secn	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:30	RF								
09:40	RF								
09:50	RF								
10:00	RF								
10:10	RF	G/VN1276 BROWN, Mr Roger (05/05/1997.M, G/VN1276)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:20	RF	GZA7722 NEWBERRY, Ms Dana (05/02/1998.F, GZA7722)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:30	RF	GVM5977 JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
10:40	RF	AAA4042 AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M,	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
10:50	RF	GYR2418 WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:00	RF								
11:10	RF								
11:20	RF								
11:30	RF								

2. Select **Confirmed Appointments** from the **Views** menu.

The Confirmed Appointments screen will display.

Slot	Time	Visit Type	Patient	Special Arrangement	Private	Business	Mobile	Confirmed
10	09:30	Routine Follow-Up						
20	09:40	Routine Follow-Up						
30	09:50	Routine Follow-Up						
40	10:00	Routine Follow-Up						
50	10:10	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, G/VN1276)		04 3213 5522		029 8852011	<input checked="" type="checkbox"/>
60	10:20	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1998.F, GZA7722)		04 2200 4771	04 1000 4117	0320 336 220	<input checked="" type="checkbox"/>
70	10:30	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)		04 200 77782		023 0201 711	<input type="checkbox"/>
80	10:40	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)		03 220 1100	03 123 45678	024 1177741	<input type="checkbox"/>
90	10:50	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)		04 3120 2288			<input checked="" type="checkbox"/>
100	11:00	Routine Follow-Up						
110	11:10	Routine Follow-Up						
120	11:20	Routine Follow-Up						
130	11:30	Routine Follow-Up						
140	11:40	Routine Follow-Up						
150	11:50	Routine Follow-Up						
160	12:00	Routine Follow-Up						

3. Select the **Confirmed** field for those appointments that are confirmed.
4. **Note:** Appointments can also be Confirmed on the Multi Session Patient List.

2.2.20 Recording Contact Details for Several Patients

Use the Bulk Contact option to record episode information for a group of patients attending a clinic, for example, for a Physiotherapy rehabilitation session for Cardiology patients.

This option is not available unless the clinic session is set up to collect Contact details.

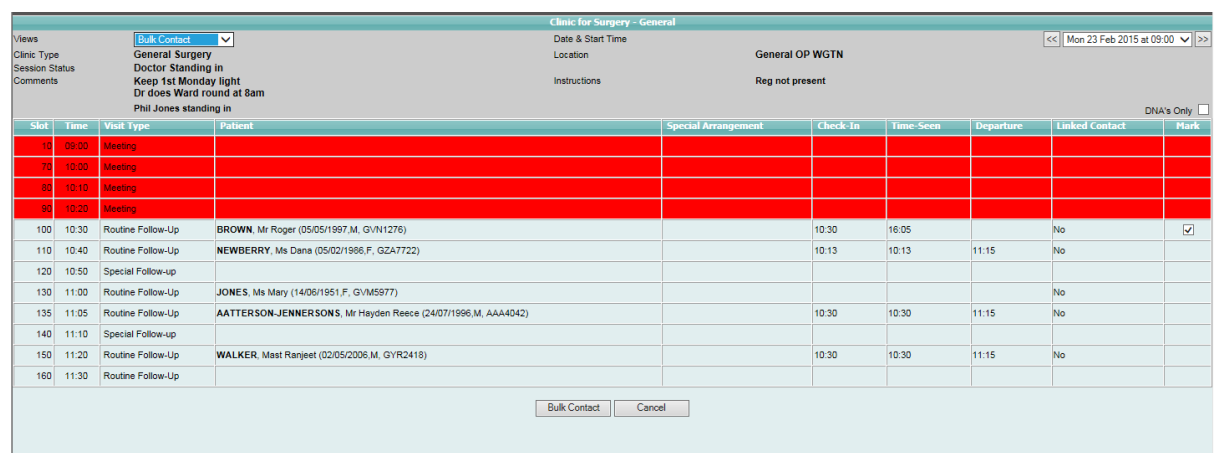
To record bulk contacts:

1. Open the **Clinic List** for the clinic you want to view.



Time	Type	Patient	Check In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG	Staff Meeting - Room 3M2							
10:00	MTG	Staff Meeting - Room 3M2							
10:10	MTG	Staff Meeting - Room 3M2							
10:20	MTG	Staff Meeting - Room 3M2							
10:30	RF	BROWN, Mr Roger (05/05/1997.M, GVN1276)	10:30	16:05					<input checked="" type="checkbox"/>
10:40	RF	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	10:13	10:13	11:15	A			<input checked="" type="checkbox"/>
10:50	SF								
11:00	RF	JONES, Ms Mary (14/06/1951.F, GVM5977)							<input type="checkbox"/>
11:05	RF	AATERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, AAA4042)	10:30	10:30	11:15	A			<input type="checkbox"/>
11:10	SF								
11:20	RF	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	10:30	10:30	11:15				<input checked="" type="checkbox"/>
11:30	RF								

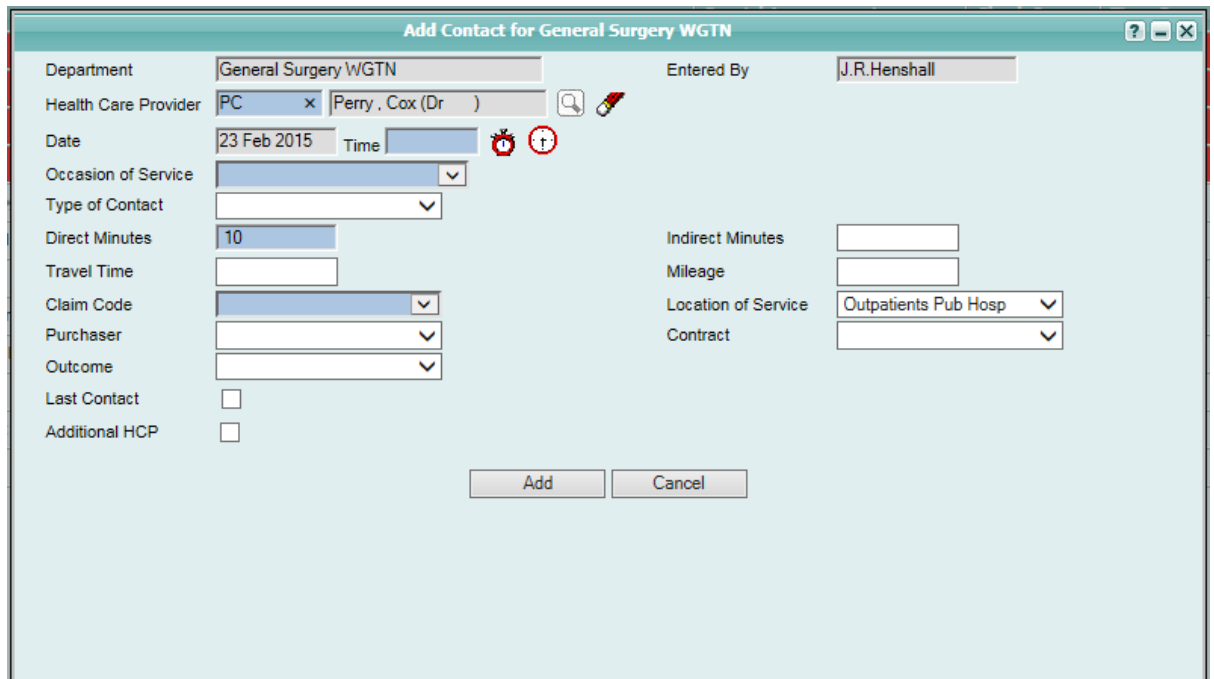
2. Select **Bulk Contacts** from the **Views** menu. The following screen displays:



Slot	Time	Visit Type	Patient	Special Arrangement	Check In	Time Seen	Departure	Linked Contact	Mark
76	09:00	Meeting							
77	10:00	Meeting							
78	10:10	Meeting							
79	10:20	Meeting							
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)		10:30	16:05		No	<input checked="" type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)		10:13	10:13	11:15	No	
120	10:50	Special Follow-up							
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)					No	
135	11:05	Routine Follow-Up	AATERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, AAA4042)		10:30	10:30	11:15	No	
140	11:10	Special Follow-up							
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)		10:30	10:30	11:15	No	
160	11:30	Routine Follow-Up							

5. **Note:** Only Appointments linked to a Referral are able to be selected to enter Contacts.

3. Click **Bulk Contact**. The Add Contact for *[Referral Department Name]* screen displays:



The screenshot shows a web form titled "Add Contact for General Surgery WGTN". The form is organized into several sections:

- Department:** General Surgery WGTN
- Entered By:** J.R.Henshall
- Health Care Provider:** PC x Perry, Cox (Dr)
- Date:** 23 Feb 2015, Time [blank]
- Occasion of Service:** [dropdown menu]
- Type of Contact:** [dropdown menu]
- Direct Minutes:** 10
- Indirect Minutes:** [input field]
- Travel Time:** [input field]
- Mileage:** [input field]
- Claim Code:** [dropdown menu]
- Purchaser:** [dropdown menu]
- Outcome:** [dropdown menu]
- Location of Service:** Outpatients Pub Hosp
- Contract:** [dropdown menu]
- Last Contact:**
- Additional HCP:**

At the bottom of the form, there are two buttons: "Add" and "Cancel".

4. Enter the Contact details and click **Add**. The Contact for *[Referral Department Name]* is added to the patient Referral details.

2.3 Recording the Details of a Patient's Attendance at a Clinic

This section describes how to record:

- The check-in time of a patient
- The time at which a patient was seen
- The departure time of a patient as well as the diagnosis and outcome
- Attend to a patient from the Appointment Details screen, enabling you to record the above details all at once.

2.3.1 Recording Patient Check-In Time

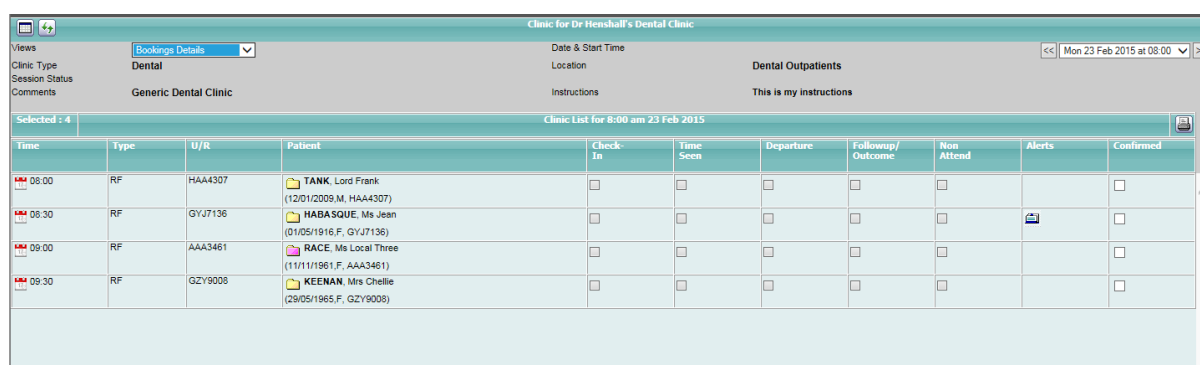
To record a patient's check-in time:


1. Select **Outpatients Clinics** or **Clinic List** from the appropriate hospital level drop down menu.

The **Clinic Timetable** for the current date will display.

2. Click the Open Session  icon for the required clinic.

The **Clinic List** will display.



Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
08:00	RF	HAA4307	TANK, Lord Frank (12/01/2009.M, HAA4307)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
08:30	RF	GYJ7136	HABASQUE, Ms Jean (01/05/1916.F, GYJ7136)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
09:00	RF	AAA3461	RACE, Ms Local Three (11/11/1961.F, AAA3461)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
09:30	RF	GZY9008	KEENAN, Mrs Chellie (29/05/1965.F, GZY9008)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

3. Click the icon in the **Check In** column for the required patient.

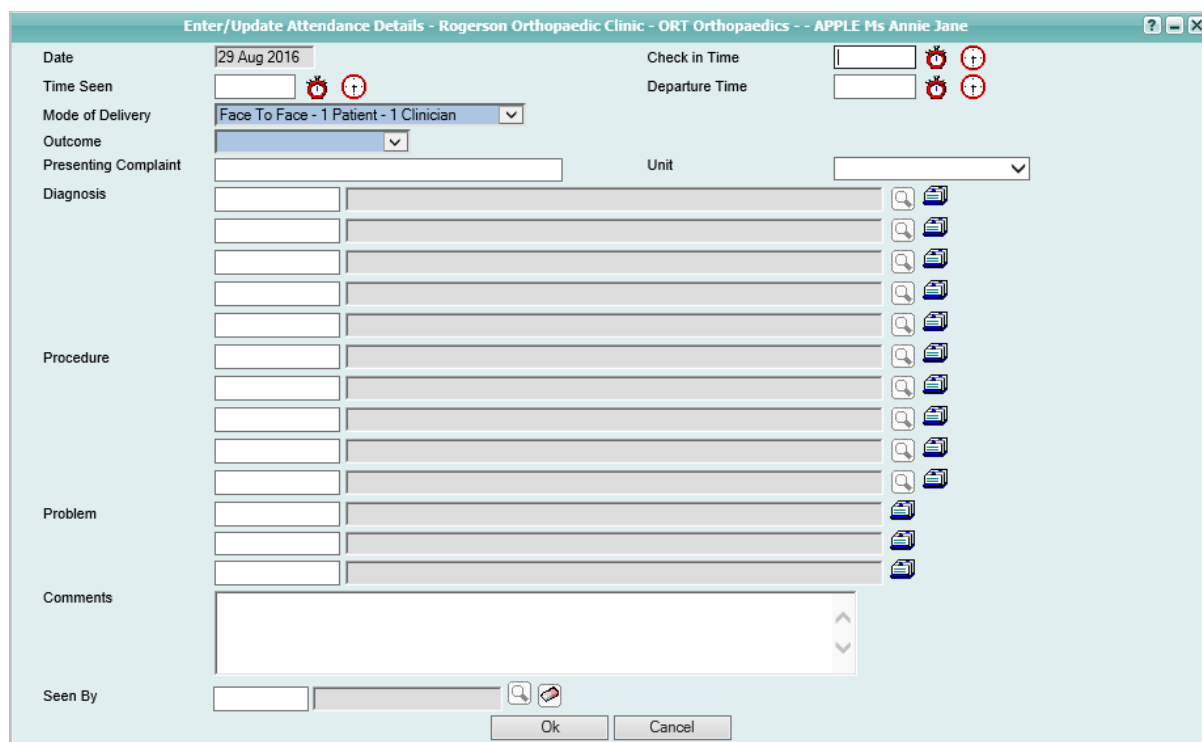
The current time is recorded as the patient's arrival time and the status of the patient is changed from **Booked** to **Attended**.

2.3.2 Recording Time Seen

To record the time at which the patient was seen:

1. On the **Clinic List** screen click the  icon in the **Time Seen** column for the required patient.

The **Enter/Update Attendance Details** screen is displayed.



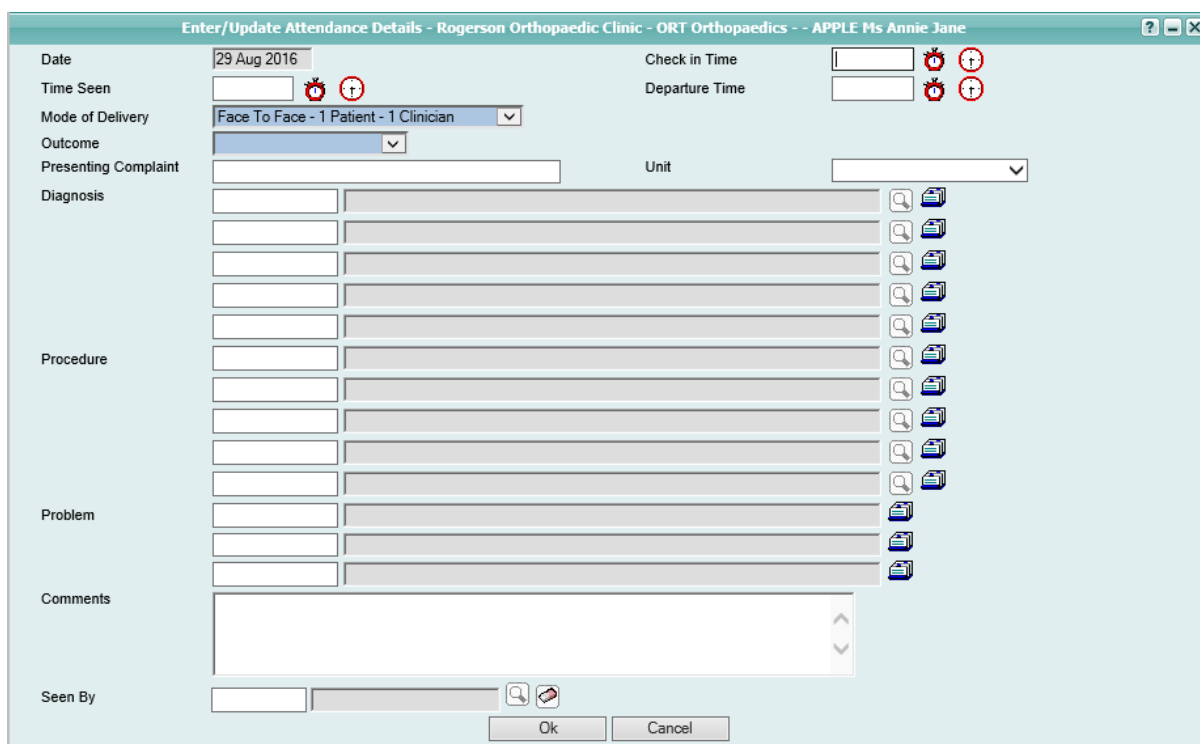
2. Click **OK**.

The **Clinic List** is redisplayed, and the time seen is recorded.

2.3.3 Recording Departure Time

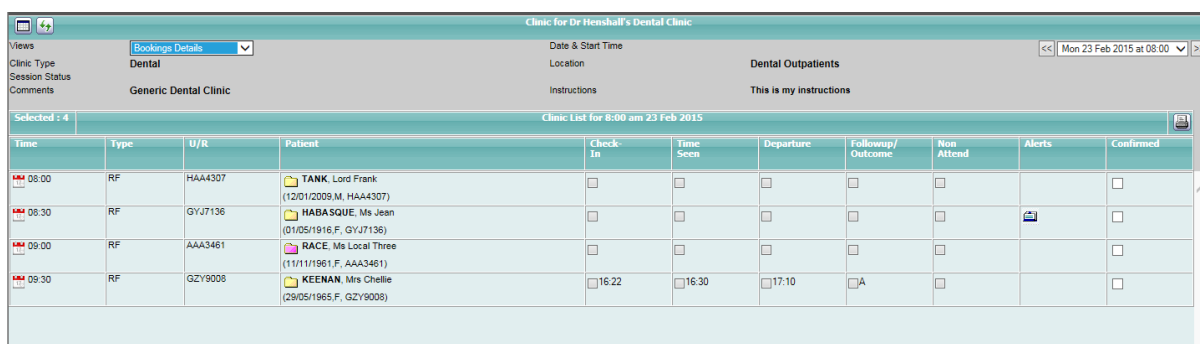
1. On the **Clinic List** screen, click the  icon in the **Departure** column for the patient.

The **Enter/Update Attendance Details** screen is displayed.



2. Select the relevant outcome.
3. Supply other details as necessary, including **Diagnosis**, **Comments** and **Seen By** (if required).
4. Click **OK**.

The **Clinic List** is redisplayed and the departure time is recorded.



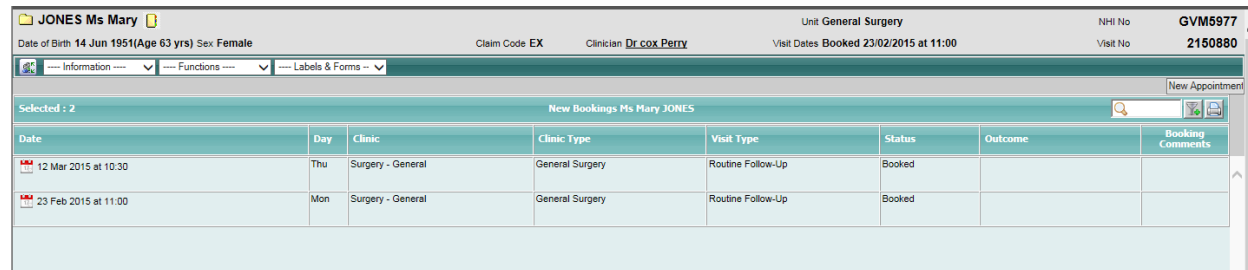
Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
08:00	RF	HAA4307	TANK, Lord Frank (12/01/2009.M, HAA4307)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
08:30	RF	GYJ7136	HABASQUE, Ms Jean (01/05/1916.F, GYJ7136)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
09:00	RF	AAA3461	RACE, Ms Local Three (11/11/1961.F, AAA3461)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
09:30	RF	GZY9006	KEEMAN, Mrs Chelle (29/05/1965.F, GZY9006)	<input type="checkbox"/> 16:22	<input type="checkbox"/> 16:30	<input type="checkbox"/> 17:10	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>

Note: Depending on how parameters are set up for your site, the Make Follow Up Appointment screen or Discharge screen may be displayed (depending on the Outcome code entered), enabling you to immediately start recording details for a follow-up appointment or the discharge details.

2.3.4 Attending a Patient from the Appointment Details Screen

To attend to a patient from the Appointment Details screen:

1. Search for the patient, and display details in the Patient Demographics screen (as described in the webPAS PMI and NHI User Guide).
2. Select **Appointments** from the appropriate patient level drop down menu.



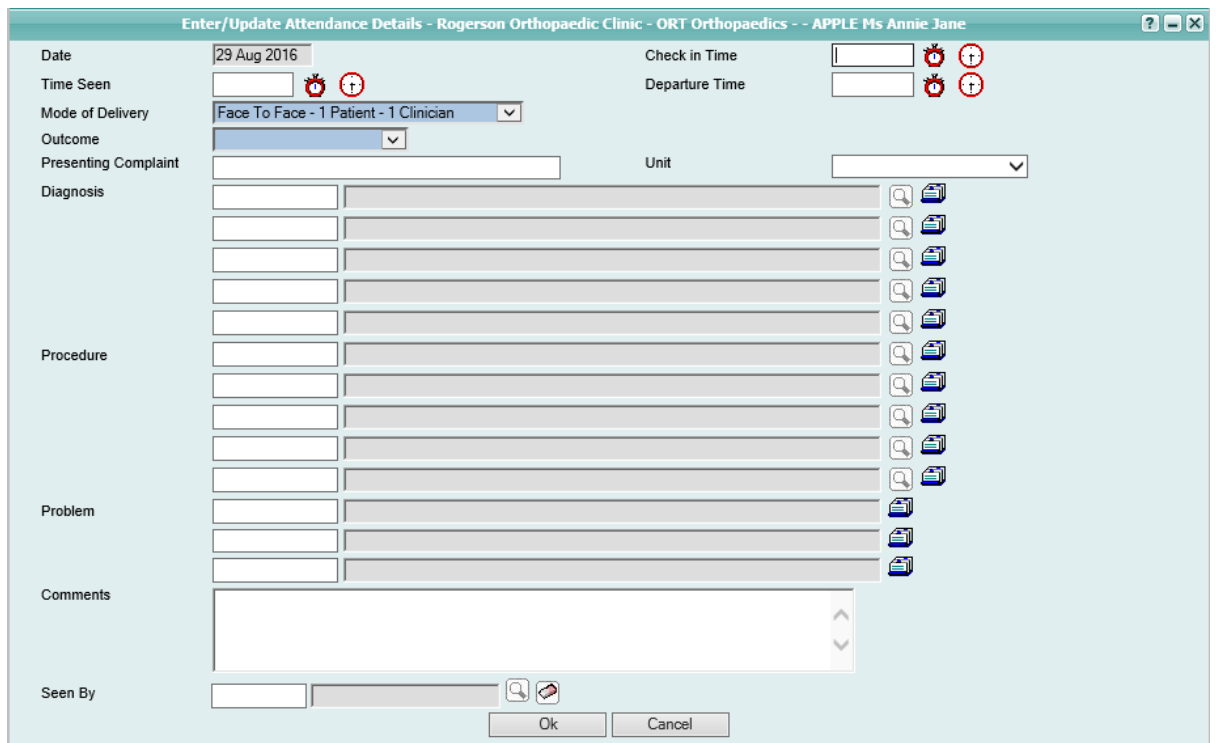
3. Click the Appointment  icon corresponding to the booking you want to work with.

The **Appointment Details** screen will display.





Select **Attendance** from the **Actions** menu.

The Enter/Update Attendance Details screen displays:



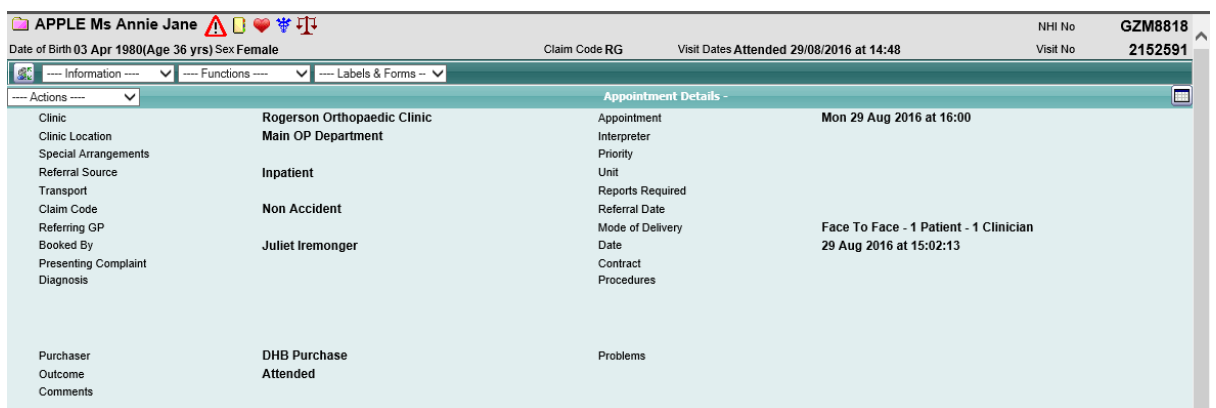
4. Record the **Check In Time**, **Time Seen** and **Departure Time**.

Use the Date/Time Stamp  icons to set fields to the current time, or the Time Lookup  icon to select a time.

5. Select the relevant **Outcome**.

6. Click **OK**.

The **Appointment Details** screen is displayed, with the **Outcome** field completed.



3 Managing Appointments

This section describes how to:

- Reschedule an appointment
- Cancel an appointment
- Make a follow-up appointment
- Mark appointments as not attended (DNA)

3.1 Rescheduling an Appointment

To reschedule an appointment:

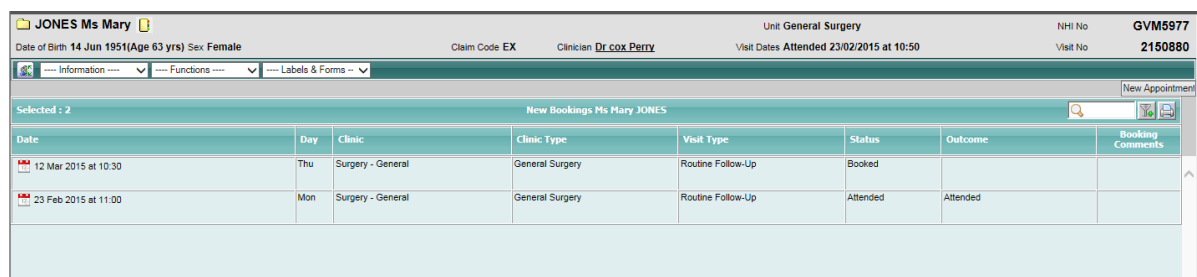
1. Display the Appointment Details screen.

Appointment details can be accessed in one of two ways.


Via the Patient Search facility:

2. Search for the patient, and display details in the Patient Demographics screen (as described in the webPAS PMI and NHI User Guide).
3. Select **Appointments** from the appropriate patient level drop down menu.

The Appointment Details screen for the patient will display.

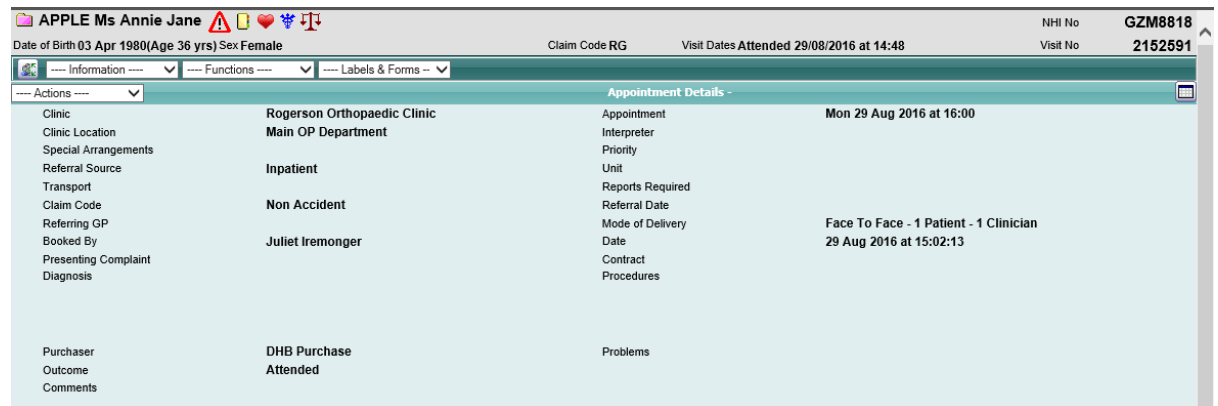


JONES Ms Mary								
Date of Birth 14 Jun 1951(Age 63 yrs) Sex Female			Unit General Surgery		NHI No GVM5977			
Claim Code EX			Clinician Dr Cox Perry		Visit Dates Attended 23/02/2015 at 10:50		Visit No 2150880	
Selected: 2								
New Bookings Ms Mary JONES								
Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments	
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Booked			
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended		

4. Click the Appointment  icon corresponding with the booking that is to be rescheduled.

5. The **Appointment Details** screen displays.

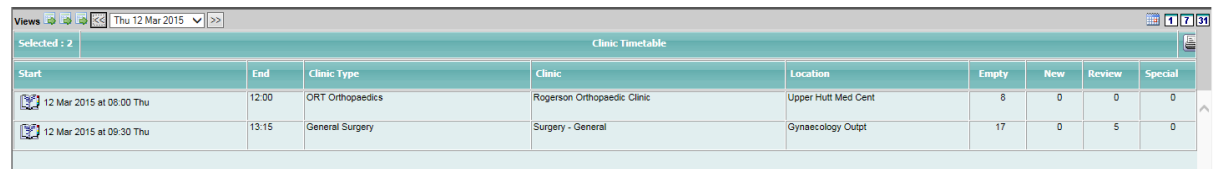
Proceed to step 4 in the section below to reschedule the appointment.




Via the Clinic List:

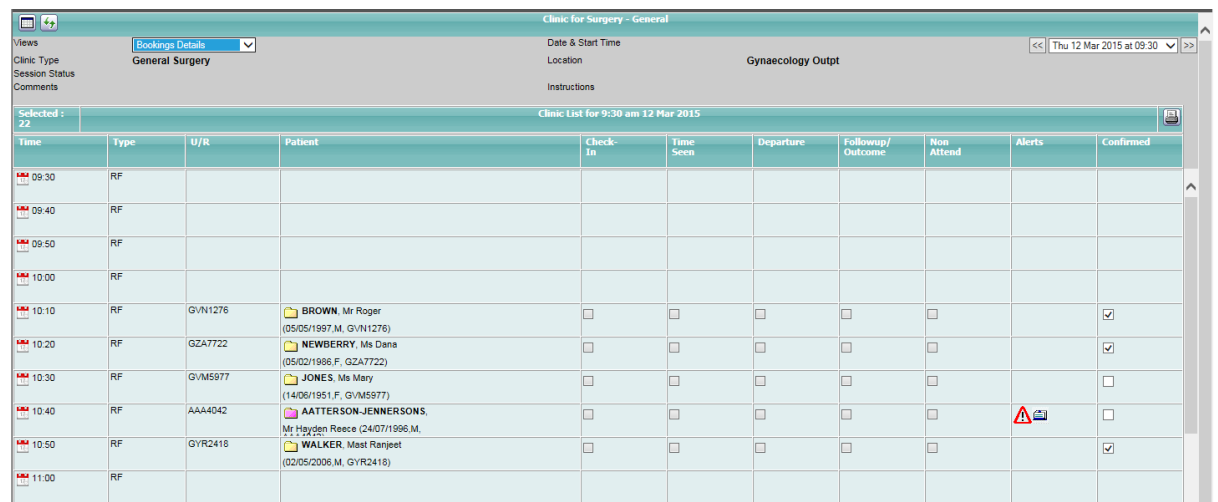
1. Select **Outpatients Clinics** or **Clinic List** from the appropriate hospital level drop down menu.
2. Select the relevant **Clinic Type** and / or **Date**.

The Clinic Timetable will display.



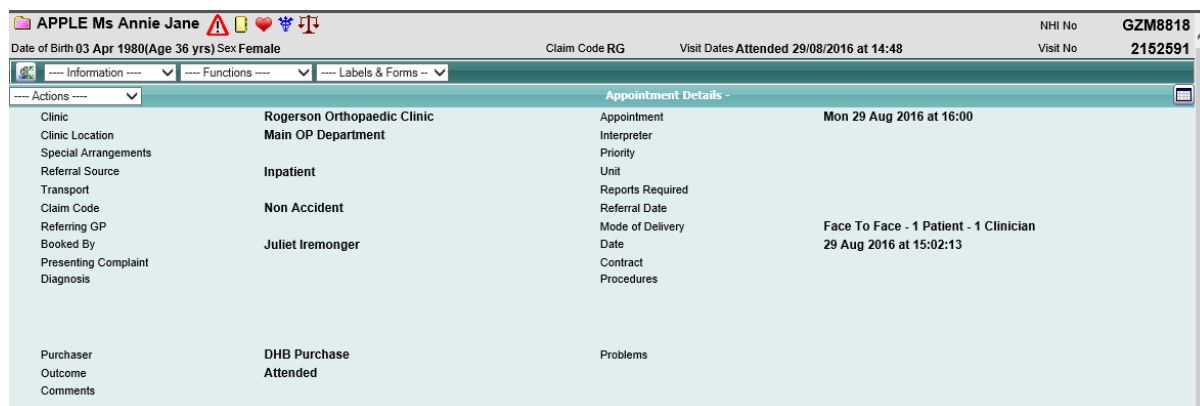
3. Click the  icon corresponding to the clinic, date and time relevant to the patient.

Current appointments are displayed.



4. Click the Appointment  icon corresponding to the booking you want to reschedule.

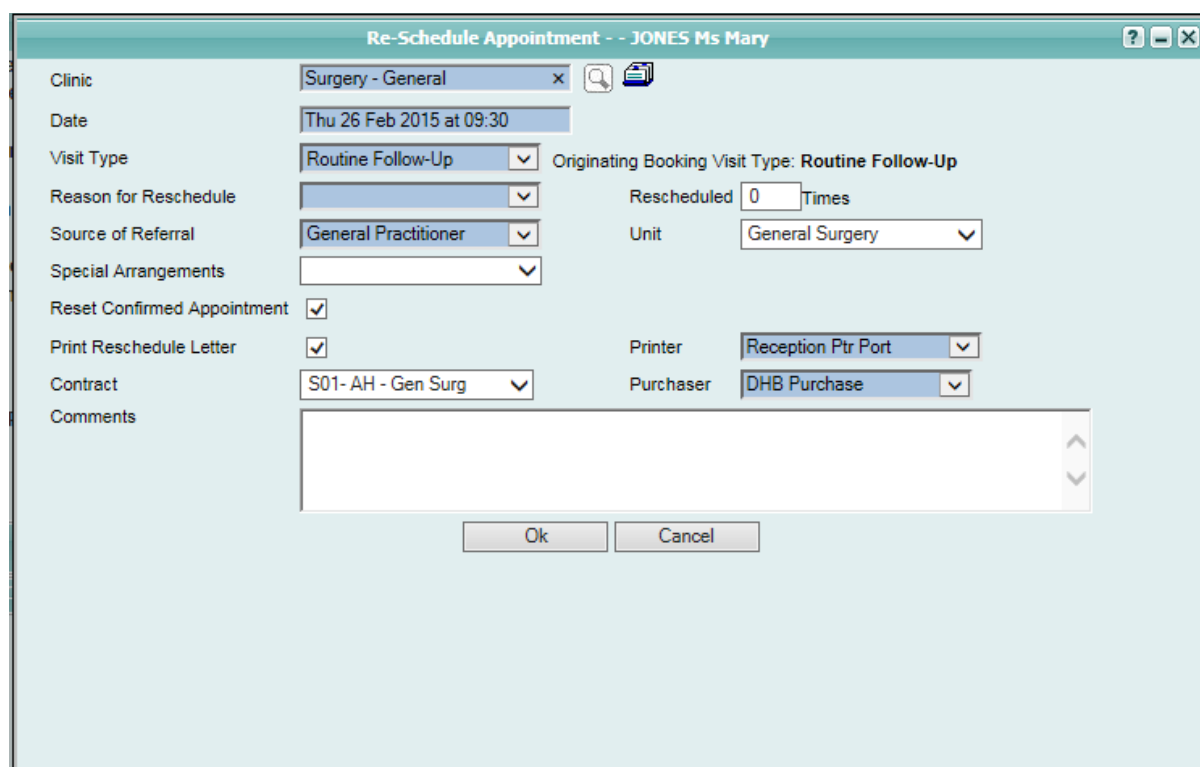
The **Appointment Details** screen will display.



Appointment Details -	
Clinic	Rogerson Orthopaedic Clinic
Clinic Location	Main OP Department
Special Arrangements	
Referral Source	Inpatient
Transport	
Claim Code	Non Accident
Referring GP	
Booked By	Juliet Iremonger
Presenting Complaint	
Diagnosis	
Purchaser	DHB Purchase
Outcome	Attended
Comments	
Appointment	Mon 29 Aug 2016 at 16:00
Interpreter	
Priority	
Unit	
Reports Required	
Referral Date	
Mode of Delivery	Face To Face - 1 Patient - 1 Clinician
Date	29 Aug 2016 at 15:02:13
Contract	
Procedures	

5. Select **Reschedule** from the **Actions** menu.


The **Reschedule Appointment** screen is displayed, showing current booking details.



Re-Schedule Appointment - - JONES Ms Mary

Clinic	Surgery - General
Date	Thu 26 Feb 2015 at 09:30
Visit Type	Routine Follow-Up
Reason for Reschedule	General Practitioner
Source of Referral	General Practitioner
Special Arrangements	
Reset Confirmed Appointment	<input checked="" type="checkbox"/>
Print Reschedule Letter	<input checked="" type="checkbox"/>
Contract	S01- AH - Gen Surg
Comments	
Originating Booking Visit Type	Routine Follow-Up
Rescheduled	0 Times
Unit	General Surgery
Printer	Reception Ptr Port
Purchaser	DHB Purchase

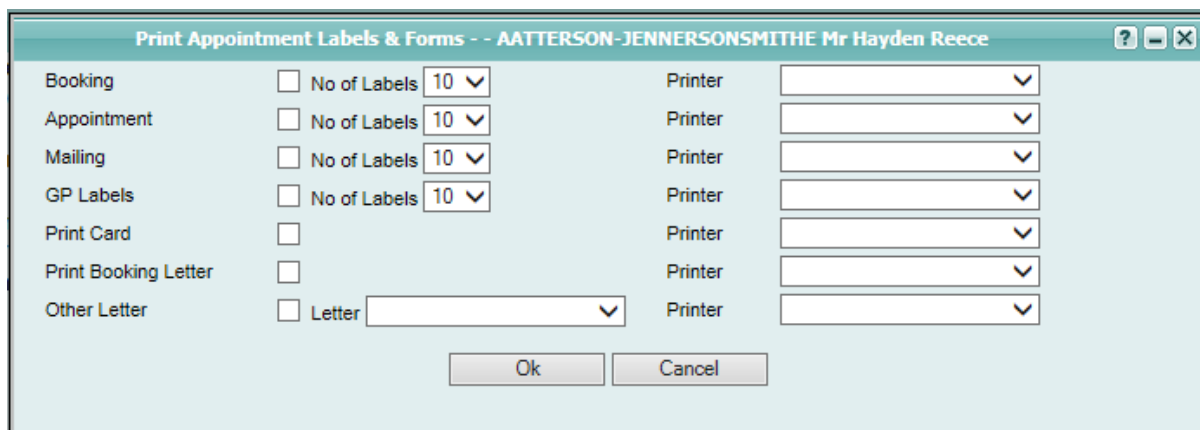
Ok Cancel

6. Click the Search  icon to perform a search of appointments (as described under [Booking an Appointment at the Patient Level](#) on page 8).

7. Select a **Reason for Reschedule**.

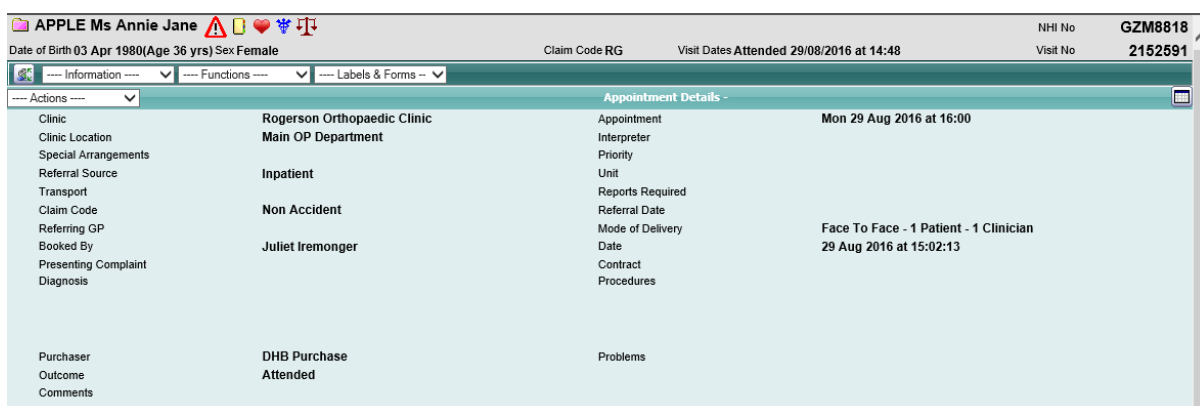
By default, a Reschedule letter is printed automatically.

8. De-select **Print Re-Schedule Letter** if you do not want to print the letter.
9. Select the relevant printer if you have opted to print the Reschedule letter.
10. Click **OK**.
11. The Print Appointment Labels & Forms template will display.



12. Tick the check box beside each of the items required.
13. Select the number of labels required for each type of label that has been selected.
14. Select a printer for the items to print to.
15. Click **OK**.

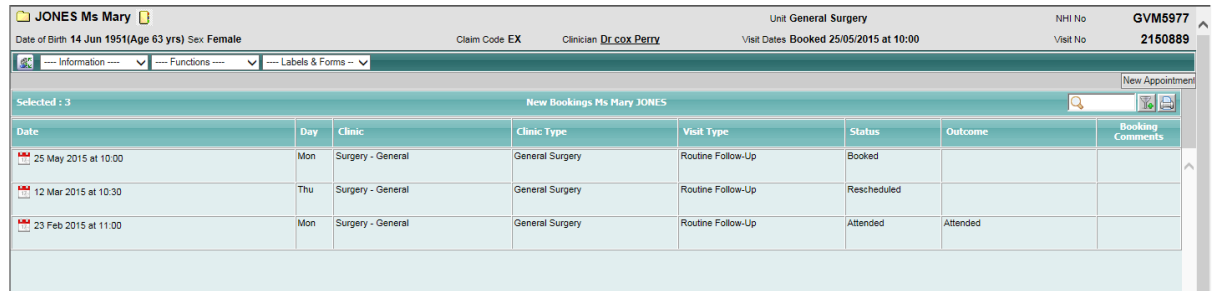
The **Appointment Details** Screen is displayed, showing the rescheduled booking.



Appointment Details	
Clinic	Rogerson Orthopaedic Clinic
Clinic Location	Main OP Department
Special Arrangements	
Referral Source	Inpatient
Transport	
Claim Code	Non Accident
Referring GP	
Booked By	Juliet Iremonger
Presenting Complaint	
Diagnosis	
Purchaser	DHB Purchase
Outcome	Attended
Comments	
Appointment	Mon 29 Aug 2016 at 16:00
Interpreter	
Priority	
Unit	
Reports Required	
Referral Date	
Mode of Delivery	Face To Face - 1 Patient - 1 Clinician
Date	29 Aug 2016 at 15:02:13
Contract	
Procedures	
Problems	

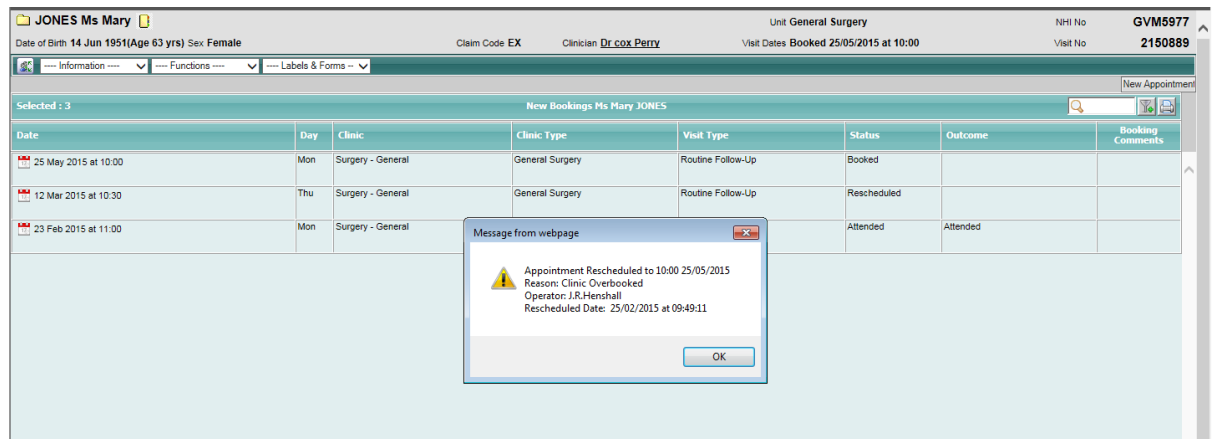
16. Select **Appointments** from the appropriate patient level drop down menu.

The **Appointment List** is displayed, showing the rescheduled booking.



Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
25 May 2015 at 10:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Booked		
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Rescheduled		
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended	

When a **Rescheduled** booking is selected the details of the new **Appointment** are displayed.



Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
25 May 2015 at 10:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Booked		
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Rescheduled		
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended	

Message from webpage

Appointment Rescheduled to 10:00 25/05/2015
 Reason: Clinic Overbooked
 Operator: J.R.Henshall
 Rescheduled Date: 25/02/2015 at 09:49:11

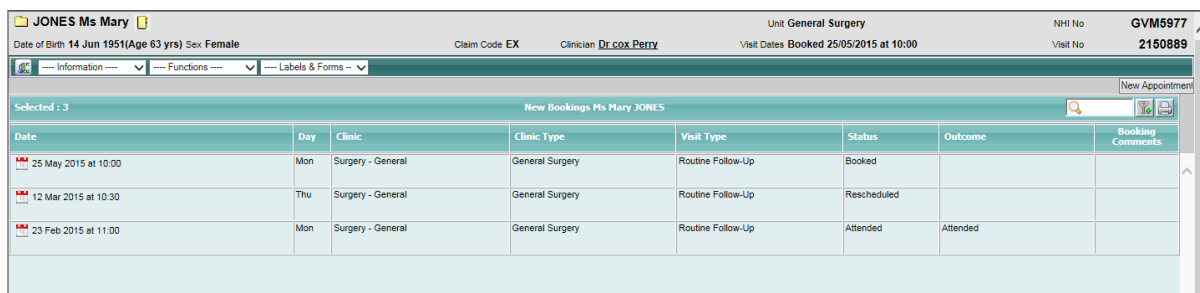
OK

3.2 Cancelling an Appointment

To cancel an appointment:

1. Search for the patient, and display details in the Patient Demographics screen (as described in the webPAS PMI and NHI User Guide).
2. Select **Appointments** from the **Information** menu (available from the **Patient** menu bar).

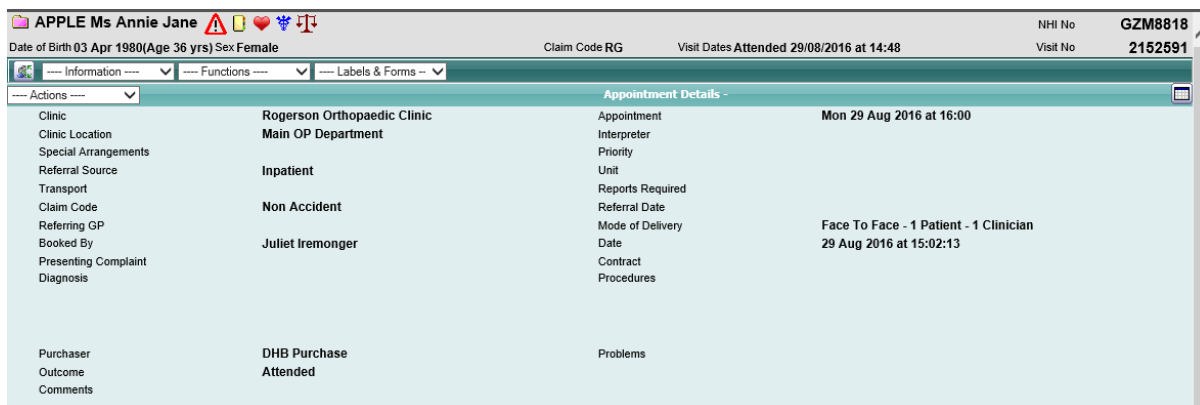
The Appointment Details screen will display.



Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
25 May 2015 at 10:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Booked		
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Rescheduled		
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended	

3. Click the Appointment  icon corresponding to the booking you want to **Cancel**.

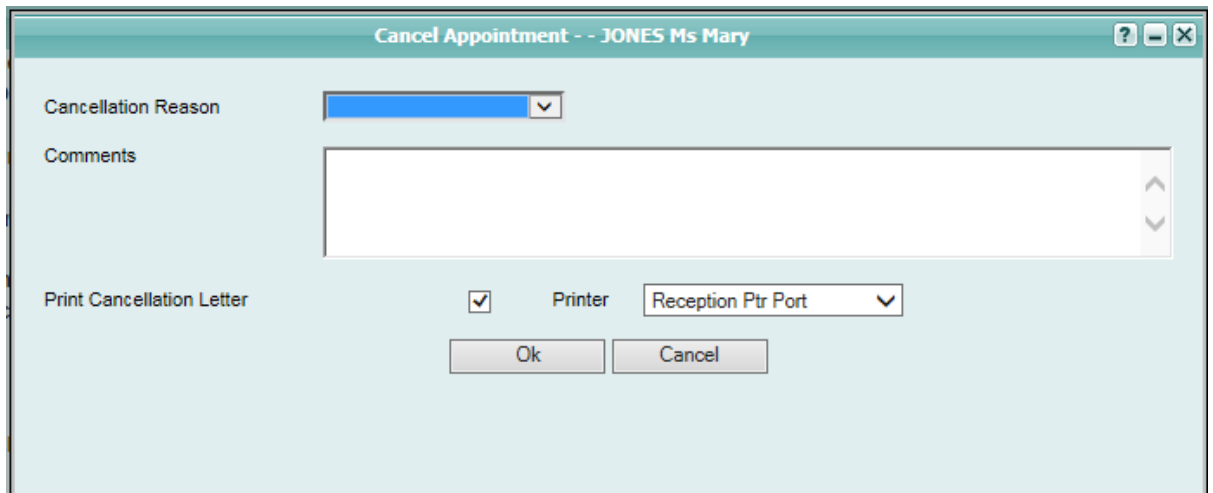
The Appointment Details screen will display.



Appointment Details -	
Clinic	Rogerson Orthopaedic Clinic
Clinic Location	Main OP Department
Special Arrangements	
Referral Source	Inpatient
Transport	
Claim Code	Non Accident
Referring GP	
Booked By	Juliet Iremonger
Presenting Complaint	
Diagnosis	
Purchaser	DHB Purchase
Outcome	Attended
Comments	
Appointment	Mon 29 Aug 2016 at 16:00
Interpreter	
Priority	
Unit	
Reports Required	
Referral Date	
Mode of Delivery	Face To Face - 1 Patient - 1 Clinician
Date	29 Aug 2016 at 15:02:13
Contract	
Procedures	
Problems	

Note: You can also access this screen via the Clinic list (available from the **Hospital** menu bar by selecting **Outpatients Clinics** or **Clinic List** from the **Views** menu). This alternative means of access is described under [‘Rescheduling an Appointment’](#) on page 65.

4. Select **Cancellation** from the Actions menu. The Cancel Appointment screen displays:



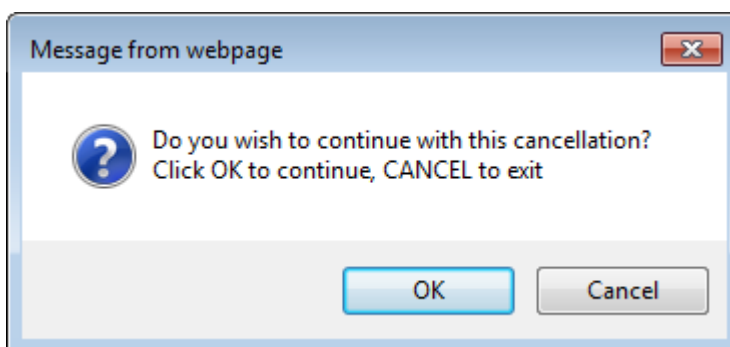
5. Select the relevant **Cancellation Reason**.
6. Enter any relevant **Comments**.

By default, a Cancellation letter will print automatically.

7. De-select Print Cancellation Letter if you do not want to print a letter.
8. Select the relevant printer if you have opted to print the letter.
9. Click **OK**.

10. A confirmation warning message displays:

Click **OK** to Cancel the Booking, or **CANCEL** to return to the patient without Cancelling the Booking.



11. Click **OK**.
12. The **Appointment** is Cancelled.

13. The **Cancelled Appointments** List displays:

JONES Ms Mary NHI No GVM5977							
Date of Birth 14 Jun 1951(Age 63 yrs) Sex Female ---							
--- Information --- --- Functions --- --- Labels & Forms ---							
Cancelled Appointment							
Appointment	Clinic	Date Cancelled	Reason	Operator	Rescheduled	Cancellation Comments	Appointment Comments
25 May 2015 10:00	SUR	25 Feb 2015	No Test Results	J.R.Henshall	12 Mar 2015 10:30 - Surgery - General - Clinic Overbooked		


3.3 Making a Follow-Up Appointment

There are two ways to make a follow-up appointment:

- From the Clinic List
- From the Appointment Details screen

3.3.1 Follow-Ups from the Clinic List

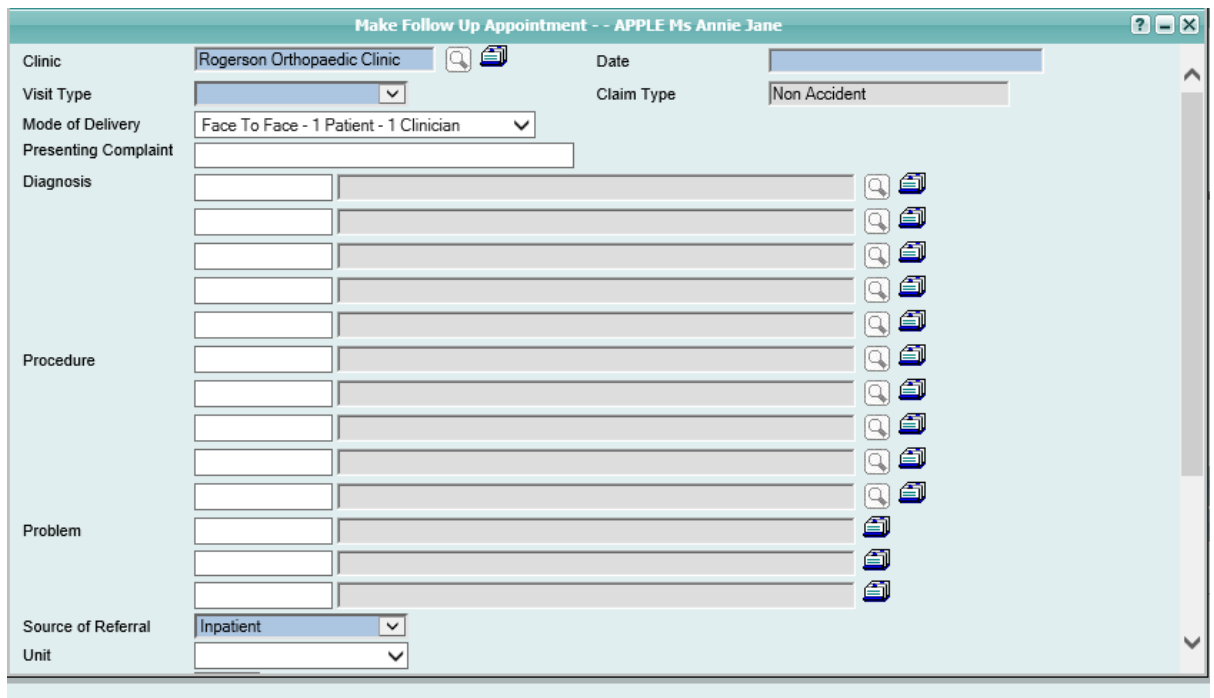
To make a follow-up appointment from the Clinic List:


1. On the Clinic List, click the  icon in the Follow Up column for the patient.

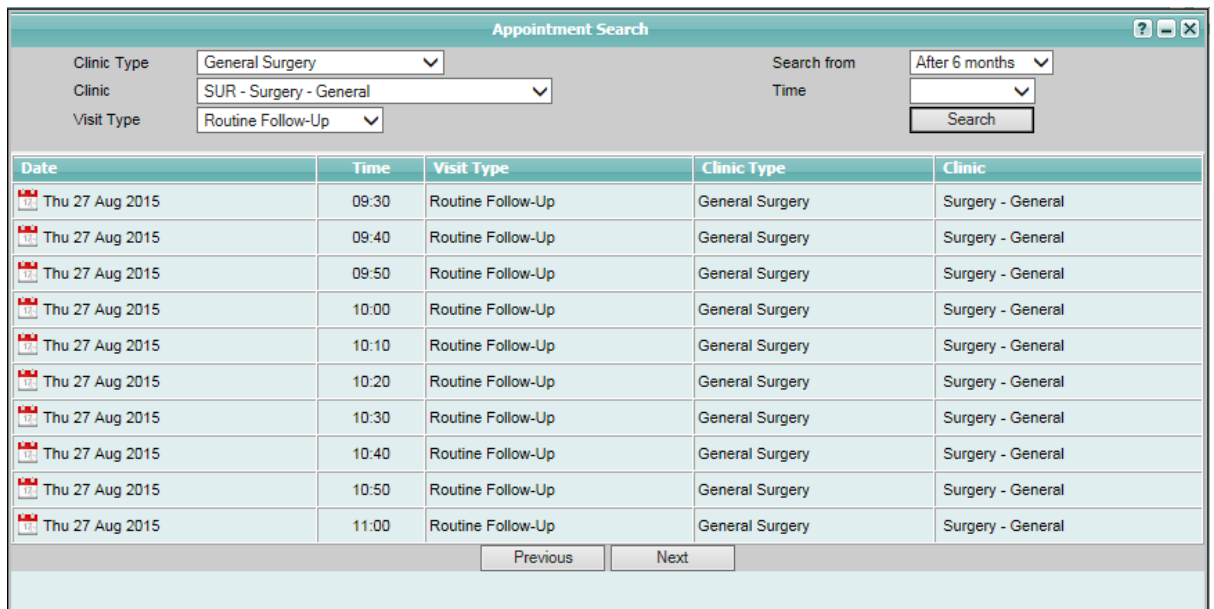


Time	Type	U/R	Patient	Check-In	Time Secs	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG		Staff Meeting - Room 3M2							
10:00	MTG		Staff Meeting - Room 3M2							
10:10	MTG		Staff Meeting - Room 3M2							
10:20	MTG		Staff Meeting - Room 3M2							
10:30	RF	GVN1276	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 16:05	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1996.F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/> 10:13	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	SF									
11:00	RF	GVMS977	JONES, Ms Mary (14/08/1951.F, GVMS977)	<input type="checkbox"/> 10:50	<input type="checkbox"/> 11:02	<input type="checkbox"/> 11:27	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:05	RF	AAA4042	AATTERSON-JENNERSONS, Mr Hyzen Reece (24/07/1996.M)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:10	SF									
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF									

The Make Follow Up Appointment screen will display.



2. Click the Search  icon to perform a search of appointments (as described under [Booking an Appointment at the Patient Level](#) on page 8).
3. Select the relevant Date & time.

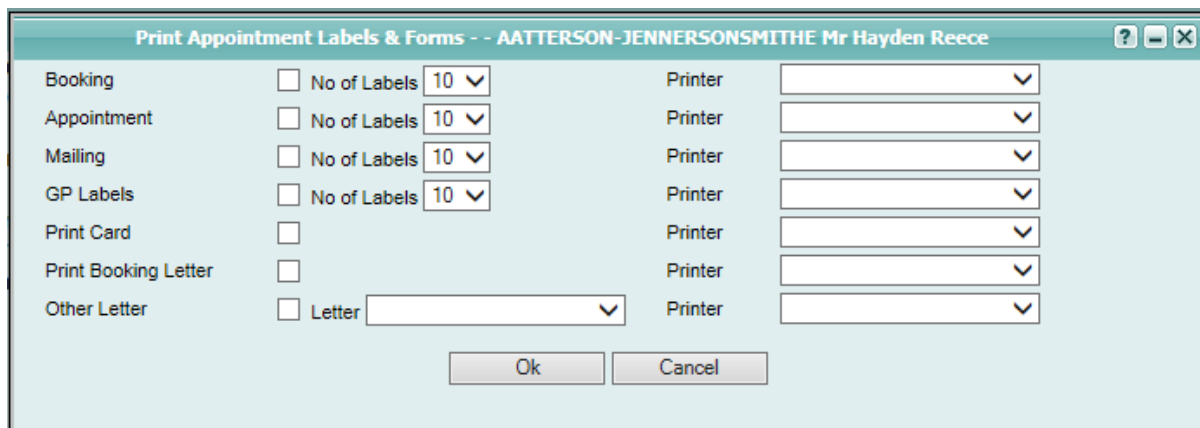


Date	Time	Visit Type	Clinic Type	Clinic
Thu 27 Aug 2015	09:30	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	09:40	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	09:50	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:00	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:10	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:20	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:30	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:40	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:50	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	11:00	Routine Follow-Up	General Surgery	Surgery - General

By default, a Follow-up letter will print automatically.

4. De-select Print Follow Up Letter if you do not want to print a letter.
5. Select the relevant printer if you have opted to print the letter.
6. Click **OK**.

7. The Print Appointment Labels & Forms template will display.



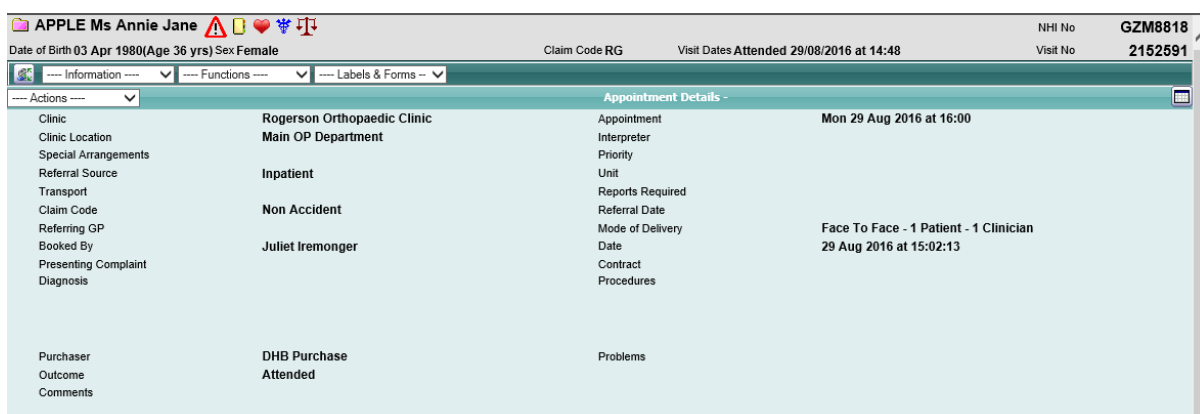
8. Tick the check box beside each of the items required.

9. Select the number of labels required for each type of label that has been selected.

10. Select a printer for the items to print to.

11. Click **OK**.

The **Appointment Details** screen will display the follow-up booking.



3.3.2 Follow-Ups from the Appointment Details Screen

To make a follow-up appointment from the Appointment Details screen:


1. Search for the patient, and display details in the Patient Demographics screen (as described in the webPAS PMI and NHI User Guide).
2. Select **Appointments** from the appropriate patient level drop down menu.

The Appointment Details screen for the patient will display.

JONES Ms Mary | Unit General Surgery | NHI No GVM5977
 Date of Birth 14 Jun 1951(Age 63 yrs) Sex Female | Claim Code EX | Clinician Dr Cox Perry | Visit Dates Attended 23/02/2015 at 10:50 | Visit No 2150880

Selected : 2 | New Bookings Ms Mary JONES

Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Booked		
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended	

- Click the Appointment  icon corresponding with the booking that is to have a Follow Up booking made.
- The **Appointment Details** screen displays.

APPLE Ms Annie Jane | NHI No GZM8818
 Date of Birth 03 Apr 1980(Age 36 yrs) Sex Female | Claim Code RG | Visit Dates Attended 29/08/2016 at 14:48 | Visit No 2152591

Appointment Details -


Clinic	Rogerson Orthopaedic Clinic	Appointment	Mon 29 Aug 2016 at 16:00
Clinic Location	Main OP Department	Interpreter	
Special Arrangements		Priority	
Referral Source	Inpatient	Unit	
Transport		Reports Required	
Claim Code	Non Accident	Referral Date	
Referring GP		Mode of Delivery	Face To Face - 1 Patient - 1 Clinician
Booked By	Juliet Iremonger	Date	29 Aug 2016 at 15:02:13
Presenting Complaint		Contract	
Diagnosis		Procedures	
Purchaser	DHB Purchase	Problems	
Outcome	Attended		
Comments			

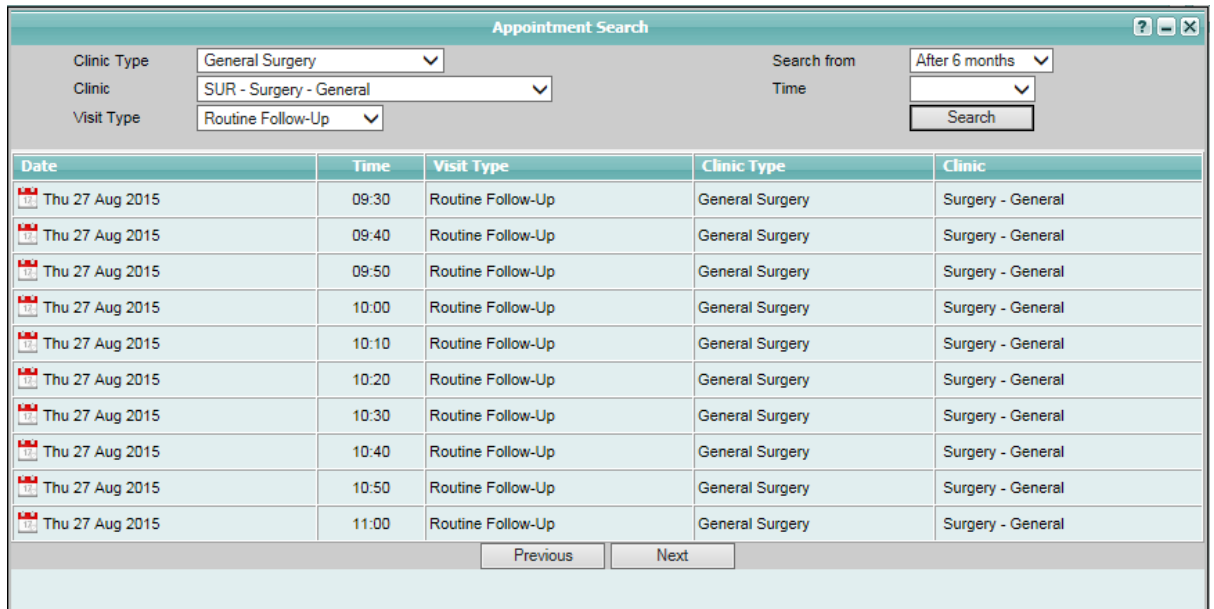
- Select **Follow up Appointment** from the Actions menu.

The Make Follow Up Appointment screen will display:

Make Follow Up Appointment - - APPLE Ms Annie Jane

Clinic	Rogerson Orthopaedic Clinic	Date																					
Visit Type		Claim Type	Non Accident																				
Mode of Delivery	Face To Face - 1 Patient - 1 Clinician																						
Presenting Complaint																							
Diagnosis	<table border="1"> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> </table>																						
Procedure	<table border="1"> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> </table>																						
Problem	<table border="1"> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> </table>																						
Source of Referral	Inpatient																						
Unit																							

6. Click the Search  icon to perform a search of appointments (as described under [Booking an Appointment at the Patient Level](#) on page 8).
7. Select the relevant Date & time.



Appointment Search

Clinic Type: General Surgery
 Clinic: SUR - Surgery - General
 Visit Type: Routine Follow-Up

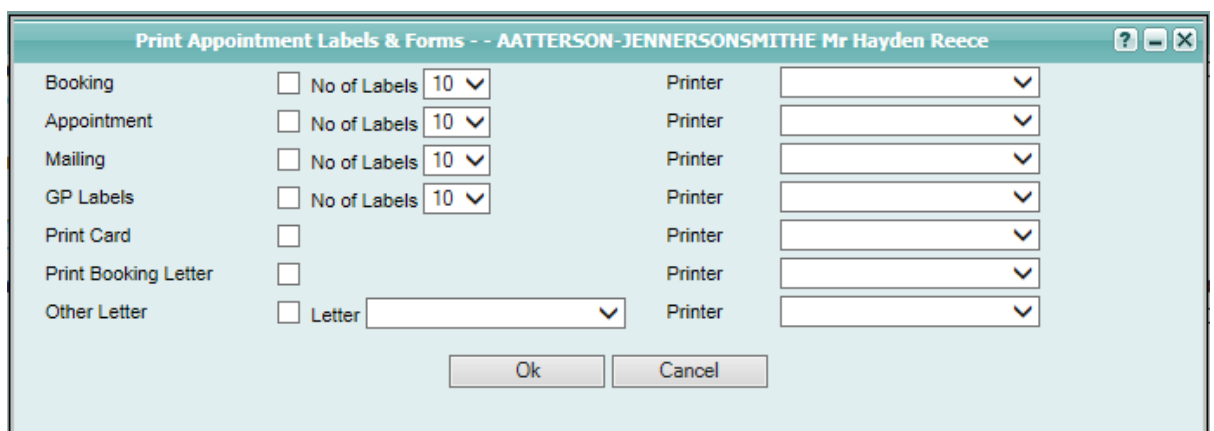
Search from: After 6 months
 Time: [Dropdown]
 Search

Date	Time	Visit Type	Clinic Type	Clinic
Thu 27 Aug 2015	09:30	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	09:40	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	09:50	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:00	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:10	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:20	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:30	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:40	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	10:50	Routine Follow-Up	General Surgery	Surgery - General
Thu 27 Aug 2015	11:00	Routine Follow-Up	General Surgery	Surgery - General

Previous Next

By default, a Follow-up letter will print automatically.

8. De-select Print Follow Up Letter if you do not want to print a letter.
9. Select the relevant printer if you have opted to print the letter.
10. Click **OK**.
11. The Print Appointment Labels & Forms template will display.



Print Appointment Labels & Forms - - AATTERSON-JENNERSONSMITHE Mr Hayden Reece

Booking	<input type="checkbox"/> No of Labels	10	Printer	[Dropdown]
Appointment	<input type="checkbox"/> No of Labels	10	Printer	[Dropdown]
Mailing	<input type="checkbox"/> No of Labels	10	Printer	[Dropdown]
GP Labels	<input type="checkbox"/> No of Labels	10	Printer	[Dropdown]
Print Card	<input type="checkbox"/>		Printer	[Dropdown]
Print Booking Letter	<input type="checkbox"/>		Printer	[Dropdown]
Other Letter	<input type="checkbox"/> Letter	[Dropdown]	Printer	[Dropdown]

Ok Cancel

12. Tick the check box beside each of the items required.
13. Select the number of labels required for each type of label that has been selected.
14. Select a printer for the items to print to.

15. Click **OK**.

The **Appointment Details** screen will display the follow-up booking.



The screenshot shows the 'Appointment Details' screen for a patient named APPLE Ms Annie Jane. The patient's date of birth is 03 Apr 1980 (Age 36 yrs) and sex is Female. The appointment is scheduled for Mon 29 Aug 2016 at 16:00 at Rogerson Orthopaedic Clinic, Main OP Department. The appointment is an inpatient, non-accident referral by Juliet Iremonger. The mode of delivery is Face To Face - 1 Patient - 1 Clinician, with a referral date of 29 Aug 2016 at 15:02:13. The purchaser is DHB Purchase and the outcome is Attended.

Patient Information		Appointment Details	
NAME	APPLE Ms Annie Jane	Appointment	Mon 29 Aug 2016 at 16:00
DOB	03 Apr 1980 (Age 36 yrs) Sex Female	Interpreter	
Claim Code	RG	Priority	
Visit Dates	Attended 29/08/2016 at 14:48	Unit	
NHI No	GZM8818	Reports Required	
Visit No	2152591	Referral Date	
Information		Mode of Delivery	Face To Face - 1 Patient - 1 Clinician
Functions		Date	29 Aug 2016 at 15:02:13
Labels & Forms		Contract	
Actions		Procedures	
Clinic	Rogerson Orthopaedic Clinic	Problems	
Clinic Location	Main OP Department		
Special Arrangements			
Referral Source	Inpatient		
Transport			
Claim Code	Non Accident		
Referring GP			
Booked By	Juliet Iremonger		
Presenting Complaint			
Diagnosis			
Purchaser	DHB Purchase		
Outcome	Attended		
Comments			

3.4 Marking Appointments as Not Attended (DNA)

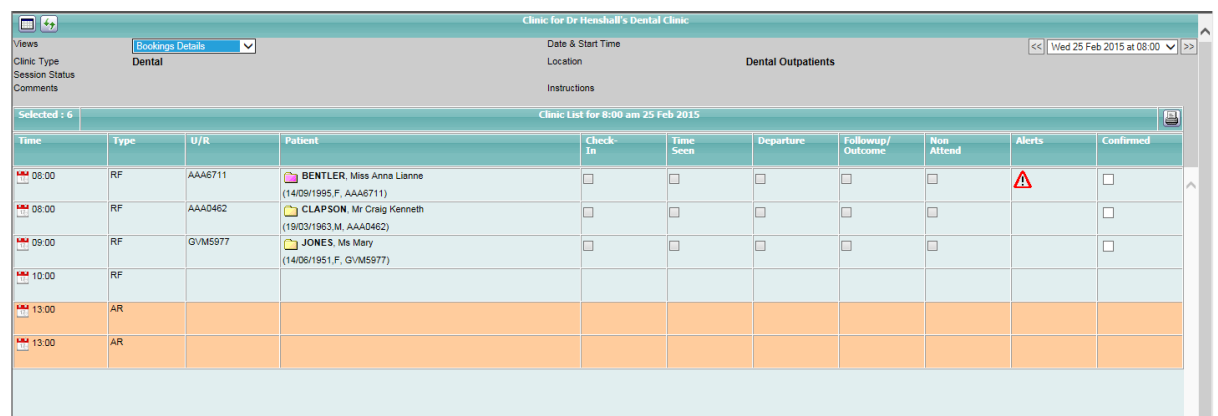
There are two ways to mark appointments as not attended:

- One appointment at a time
- In bulk

3.4.1 Marking a Single Appointment as Not Attended (DNA)

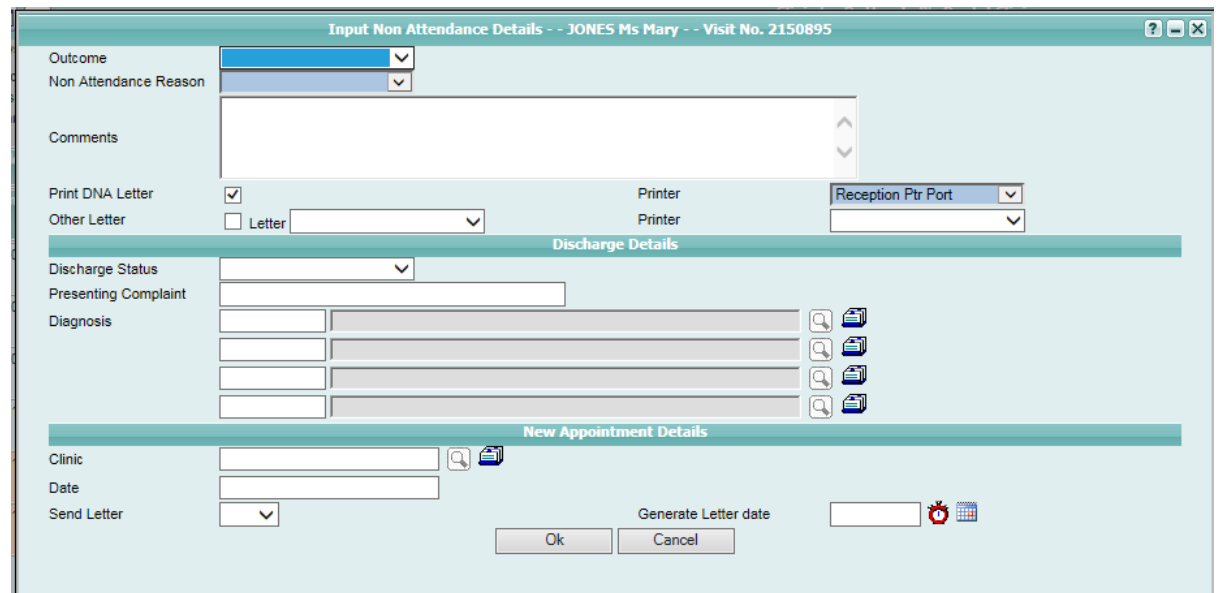
To indicate non-attendance of an appointment:

1. On the **Clinic List** click on the icon in the **Non Attend** column for the patient.




Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
08:00	RF	AAA6711	BENTLER, Miss Anna Lianne (14/09/1995.F, AAA6711)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
08:00	RF	AAA0462	CLAPSON, Mr Craig Kenneth (19/03/1963.M, AAA0462)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
09:00	RF	GVM5977	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
10:00	RF									
13:00	AR									
13:00	AR									

The Input Non Attendance Details screen displays:

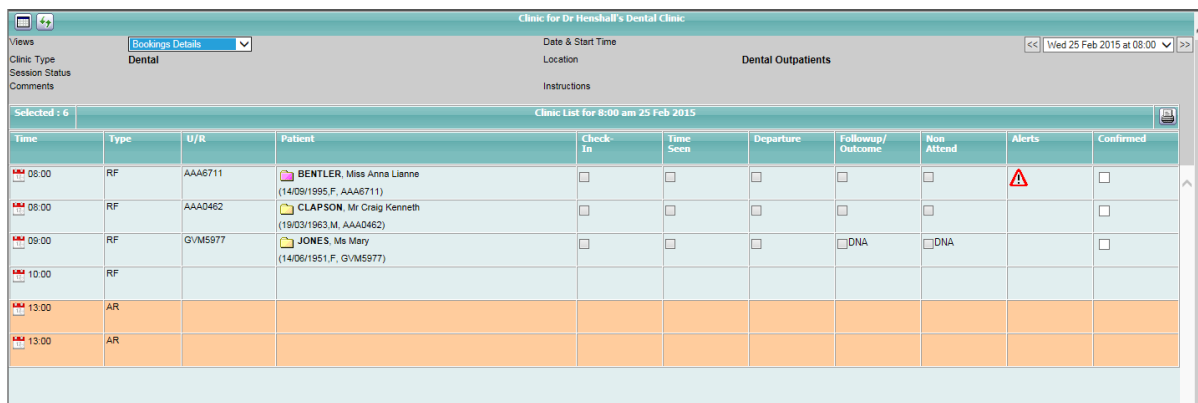



2. Select an **Outcome**.
3. Select a **Non Attendance Reason**.
4. Select a **Discharge Status** if the patient has been discharged from the clinic.

5. Click the Search  icon to perform a search of appointments (as described under [Booking an Appointment at the Patient Level](#) on page 8).

6. Click **OK**.

The **Clinic List** will display the **DNA** status in the **Non Attend** column.

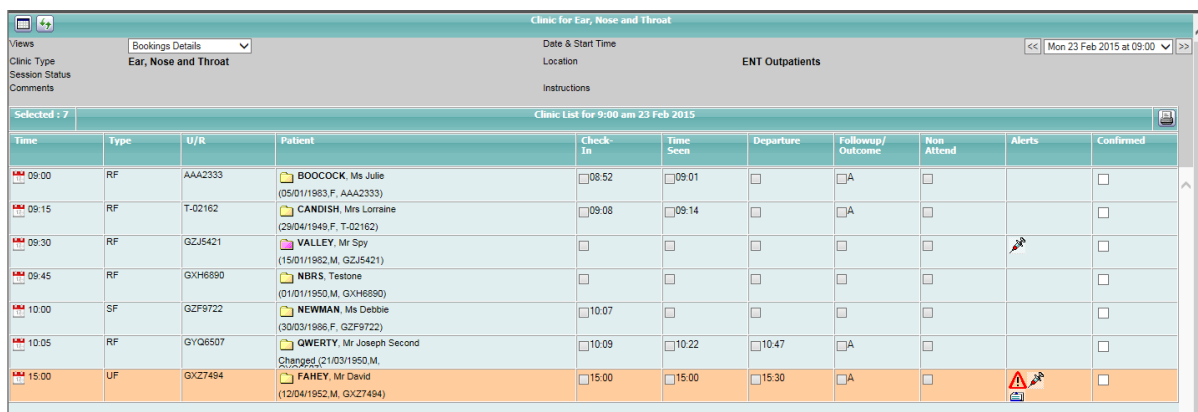



Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
08:00	RF	AAA6711	BENTLER, Miss Anna Lianne (14/09/1995.F, AAA6711)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
08:00	RF	AAA0462	CLAPSON, Mr Craig Kenneth (19/03/1963.M, AAA0462)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
09:00	RF	GVM5977	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> DNA	<input type="checkbox"/> DNA		<input type="checkbox"/>
10:00	RF									
13:00	AR									
13:00	AR									

3.4.2 Marking Several Non-Attendances at Once (DNA)

To update the clinic session with all the patients who did not attend their appointments:

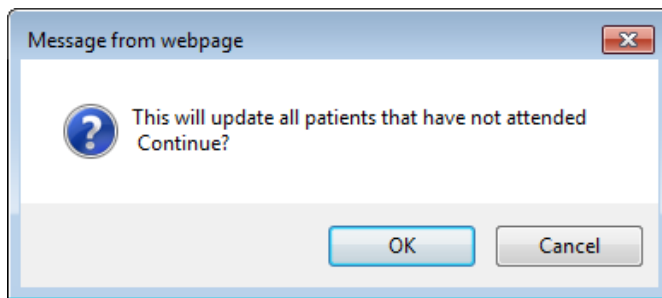
1. Open the **Clinic List** for the clinic you want to view.



Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	RF	AAA2333	BOOCCOCK, Ms Julie (05/01/1983.F, AAA2333)	<input type="checkbox"/> 08:52	<input type="checkbox"/> 09:01	<input type="checkbox"/>	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
09:15	RF	T-02162	CANDISH, Mrs Lorraine (29/04/1949.F, T-02162)	<input type="checkbox"/> 09:08	<input type="checkbox"/> 09:14	<input type="checkbox"/>	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
09:30	RF	GZJ5421	VALLEY, Mr Spy (15/01/1982.M, GZJ5421)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
09:45	RF	GXH6890	NBRS, Testone (01/01/1950.M, GXH6890)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
10:00	SF	GZF9722	NEWMAN, Ms Debbie (30/03/1986.F, GZF9722)	<input type="checkbox"/> 10:07	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
10:05	RF	GYQ6507	QWERTY, Mr Joseph Second Changed (21/03/1950.M)	<input type="checkbox"/> 10:09	<input type="checkbox"/> 10:22	<input type="checkbox"/> 10:47	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
15:00	UF	GXZ7494	FAHEY, Mr David (12/04/1952.M, GXZ7494)	<input type="checkbox"/> 15:00	<input type="checkbox"/> 15:00	<input type="checkbox"/> 15:30	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>

2. Select **Update All Non-Attended** from the Views menu.

The following message will display.



3. Click **Ok**.

The **Clinic List** will display **DNA** in the **Non Attend** column for all patients without check-in details.

Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	RF	AAA2333	BOOCOCC, Ms Julie (05/01/1983, F, AAA2333)	<input type="checkbox"/> 08.52	<input type="checkbox"/> 09.01	<input type="checkbox"/>	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
09:15	RF	T-02162	CANDISH, Mrs Lorraine (28/04/1949, F, T-02162)	<input type="checkbox"/> 09.08	<input type="checkbox"/> 09.14	<input type="checkbox"/>	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
09:30	RF	GZJ5421	VALLEY, Mr Spy (15/01/1982, M, GZJ5421)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> DNA		<input type="checkbox"/>
09:45	RF	GXH6890	NBRS, Testone (01/01/1950, M, GXH6890)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> DNA		<input type="checkbox"/>
10:00	SF	GZF9722	NEWMAN, Ms Debbie (30/03/1986, F, GZF9722)	<input type="checkbox"/> 10.07	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
10:05	RF	GYQ6507	QWERTY, Mr Joseph Second Changed (21/03/1950, M)	<input type="checkbox"/> 10.09	<input type="checkbox"/> 10.22	<input type="checkbox"/> 10.47	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
15:00	UF	GXZ7494	FAHEY, Mr David (12/04/1952, M, GXZ7494)	<input type="checkbox"/> 15.00	<input type="checkbox"/> 15.00	<input type="checkbox"/> 15.30	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>

The appointments without Check-In and Time Seen times have been updated to Did Not Attend (DNA).

4 Managing Clinics

This chapter describes how to:

- Determine clinic availability
- Make certain slots unavailable for bookings
- Make unavailable slots available once again for bookings
- Create additional slots (for overbooking)
- Delete slots

4.1 Clinic Availability at a Glance

The Clinic Timetable screen displays important information about clinics including the availability of slots. Depending on the status of clinic, coloured shading may display over the date and time in the Start column on the Clinic Timetable screen.

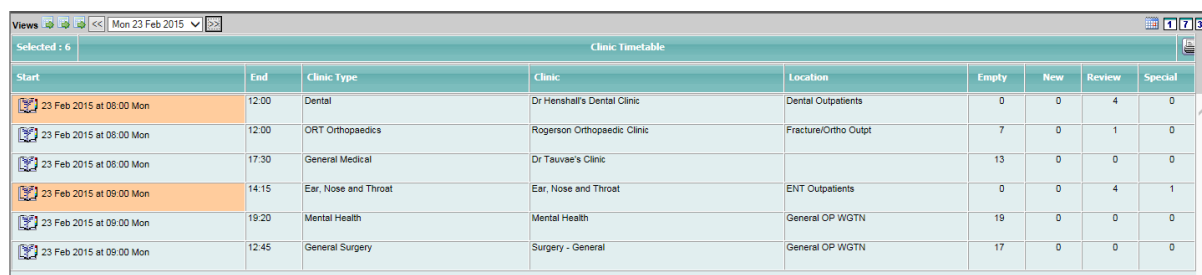
4.1.1 Clinics Booked to Capacity

An orange band will display in the Start column to indicate that a clinic is booked to capacity. The clinic is booked to capacity when all available minutes have been booked.

Note: Available minutes are established by calculating Booking End Time (11:30) minus Session Start Time (09:00).

- Available minutes = 150 minutes
- Used minutes = 150 minutes (five slots booked)

The band will deactivate if a booking is cancelled or rescheduled; leaving a slot available and therefore minutes available also.



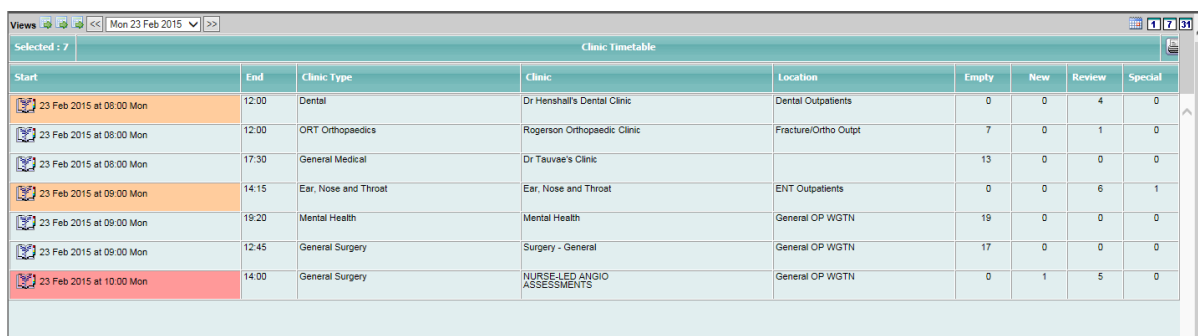
Start	End	Clinic Type	Clinic	Location	Empty	New	Review	Special
23 Feb 2015 at 08:00 Mon	12:00	Dental	Dr Henshall's Dental Clinic	Dental Outpatients	0	0	4	0
23 Feb 2015 at 08:00 Mon	12:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic	Fracture/Ortho Outpt	7	0	1	0
23 Feb 2015 at 08:00 Mon	17:30	General Medical	Dr Tavuae'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

4.1.2 Overbooked Clinics

A red band will display in the Start column to indicate that a clinic is over-booked.

The clinic will be assigned the status of over-booked when the total number of minutes booked exceeds the number of available minutes.

- Available minutes = 150 minutes
- Used minutes = 180 minutes (six slots booked)
- Additional 'over-booking'¹ slots may also have been set up in the clinic and booked.



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 06:00 Mon	12:00	ORT Orthopaedics	Rogerson Orthopaedic Clinic	Fracture/Ortho Outpt	7	0	1	0
23 Feb 2015 at 08:00 Mon	17:30	General Medical	Dr Tauvae's Clinic		13	0	0	0
23 Feb 2015 at 09:00 Mon	14:15	Ear, Nose and Throat	Ear, Nose and Throat	ENT Outpatients	0	0	6	1
23 Feb 2015 at 09:00 Mon	19:20	Mental Health	Mental Health	General OP WGTN	19	0	0	0
23 Feb 2015 at 09:00 Mon	12:45	General Surgery	Surgery - General	General OP WGTN	17	0	0	0
23 Feb 2015 at 10:00 Mon	14:00	General Surgery	NURSE-LED ANGIO ASSESSMENTS	General OP WGTN	0	1	5	0

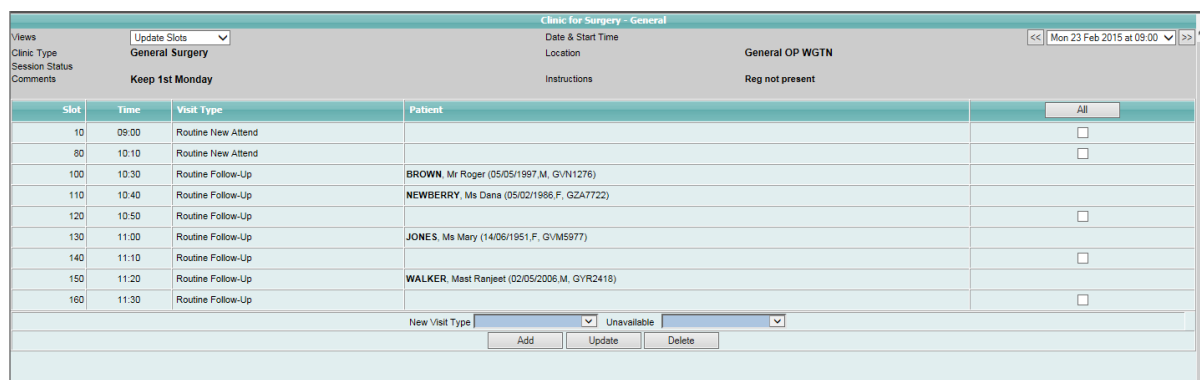
¹ An 'over-booking' slot is set up under category CV with Indicator 2 = Z. Refer to the Outpatient Configuration Guide for further details.

4.2 Making Slots Unavailable

To make specific slots unavailable for bookings:

1. Open the Clinic List for the clinic you want to view.
2. Select **Update Slots** from the **Views** menu.

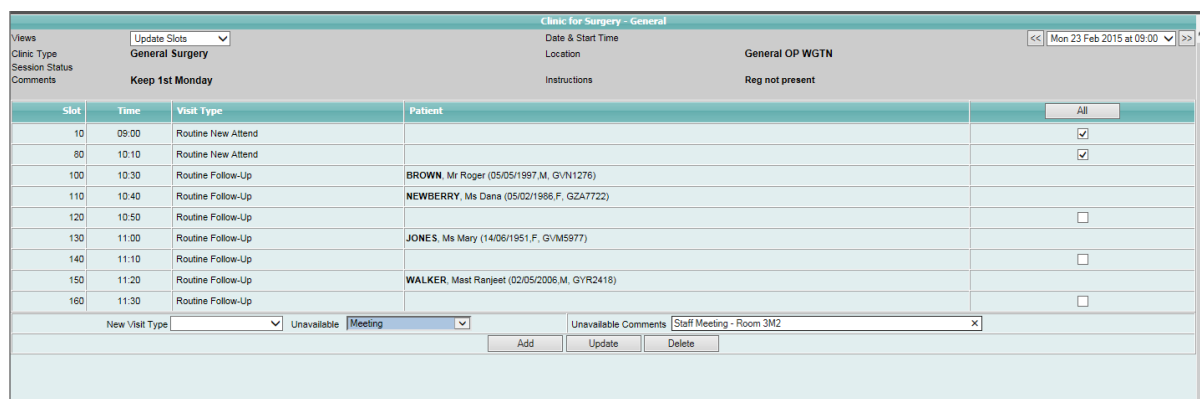
The following screen will display.



Slot	Time	Visit Type	Patient	All
10	09:00	Routine New Attend		<input type="checkbox"/>
80	10:10	Routine New Attend		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, Gv/N1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1988.F, GZA7722)	<input type="checkbox"/>
120	10:50	Routine Follow-Up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, Gv/M5977)	<input type="checkbox"/>
140	11:10	Routine Follow-Up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
160	11:30	Routine Follow-Up		<input type="checkbox"/>

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.

3. Select the Mark fields corresponding to the slots you want to change.
4. Select the reason from the Unavailable list and enter a comment in the Comments field if required as shown.



Slot	Time	Visit Type	Patient	All
10	09:00	Routine New Attend		<input checked="" type="checkbox"/>
80	10:10	Routine New Attend		<input checked="" type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, Gv/N1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1988.F, GZA7722)	<input type="checkbox"/>
120	10:50	Routine Follow-Up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, Gv/M5977)	<input type="checkbox"/>
140	11:10	Routine Follow-Up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
160	11:30	Routine Follow-Up		<input type="checkbox"/>

5. Click **Update**. The screen refreshes with the unavailable slots with a red background.

Slot	Time	Visit Type	Patient	All
95	09:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
96	10:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
97	10:10	Staff Meeting - Room 3M2		<input type="checkbox"/>
98	10:20	Staff Meeting - Room 3M2		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	
120	10:50	Routine Follow-Up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	
140	11:10	Routine Follow-Up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	
160	11:30	Routine Follow-Up		<input type="checkbox"/>

6. Select **Booking Details** from the **Views** menu if the changes are complete; otherwise go to the next step.

The slots appear in the **Clinic List** as **Unavailable** showing the Reason and Comments entered.

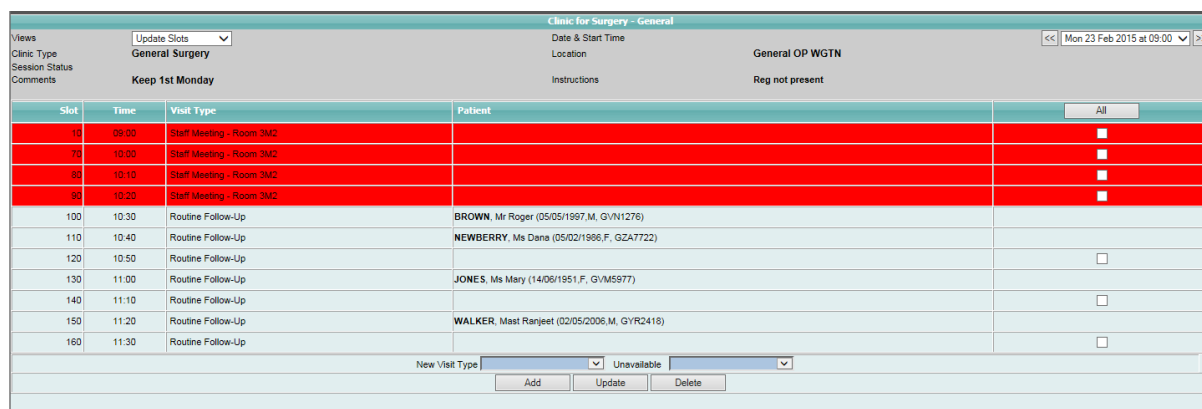
Time	Type	U/R	Patient	Check-In	Time Seen	Departure	Followup/Outcome	Non Attend	Alerts	Confirmed
09:00	MTG		Staff Meeting - Room 3M2							
10:00	MTG		Staff Meeting - Room 3M2							
10:10	MTG		Staff Meeting - Room 3M2							
10:20	MTG		Staff Meeting - Room 3M2							
10:30	RF	GVN1276	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 16:05	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/> 10:13	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	SF									
11:00	RF	GVM5977	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/> 10:50	<input type="checkbox"/> 11:02	<input type="checkbox"/> 11:27	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:05	RF	AAA4042	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, ...)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:10	SF									
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF									

4.2.1 Reversing Unavailable Slots (Making Slots Available Again)

To make unavailable slots available for bookings again:

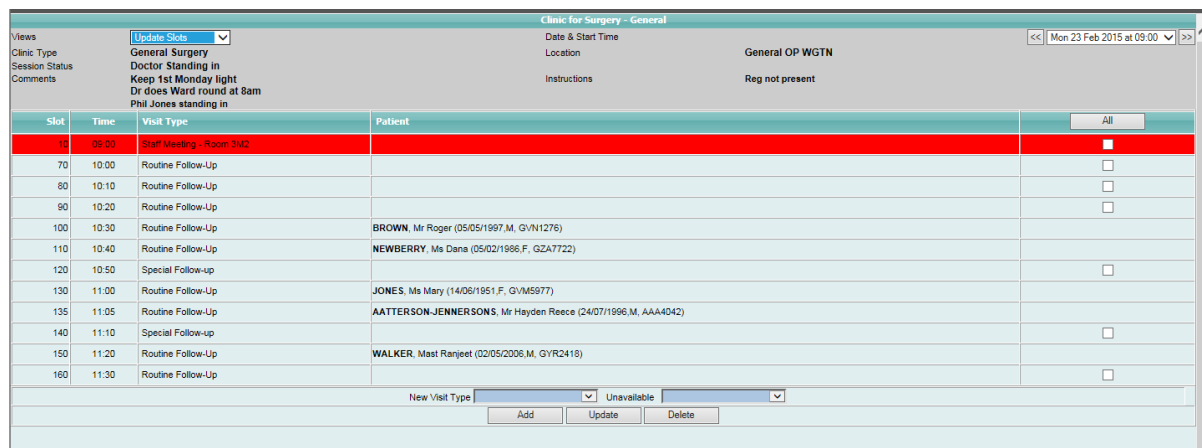
1. Open the **Clinic List** for the relevant clinic.
2. Select **Update Slots** from the **Views** menu.

The Slot update screen displays:



Slot	Time	Visit Type	Patient	Mark
65	09:00	Staff Meeting - Room 3M2		<input checked="" type="checkbox"/>
66	10:00	Staff Meeting - Room 3M2		<input checked="" type="checkbox"/>
67	10:10	Staff Meeting - Room 3M2		<input checked="" type="checkbox"/>
68	10:20	Staff Meeting - Room 3M2		<input checked="" type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/>
120	10:50	Routine Follow-Up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>
140	11:10	Routine Follow-Up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
160	11:30	Routine Follow-Up		<input type="checkbox"/>

3. Select check boxes in the **Mark** column to select the slots you want to make available.
4. Select the required **Visit Type** for the Slots in the **New Visit Type** field.



Slot	Time	Visit Type	Patient	Mark
65	09:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
70	10:00	Routine Follow-Up		<input type="checkbox"/>
80	10:10	Routine Follow-Up		<input type="checkbox"/>
90	10:20	Routine Follow-Up		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/>
120	10:50	Special Follow-up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)	<input type="checkbox"/>
140	11:10	Special Follow-up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
160	11:30	Routine Follow-Up		<input type="checkbox"/>

5. Click **Update**.

Slots are available once again in the **Clinic List**.

Clinic for Surgery - General										
Views		Bookings Details		Date & Start Time		Mon 23 Feb 2015 at 09:00				
Clinic Type		General Surgery		Location		General OP WGTN				
Session Status		Doctor Standing in		Instructions		Reg not present				
Comments		Keep 1st Monday light Dr does Ward round at 8am Phil Jones standing in								
Selected : 12		Clinic List for 9:00 am 23 Feb 2015								
Time	Type	U/R	Patient	Check In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed
09:00	MTG		Staff Meeting - Room 3M2							
10:00	RF									
10:10	RF									
10:20	RF									
10:30	RF	G/VN1276	BROWN, Mr Roger (05/05/1997.M, G/VN1276)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 16:05	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/> 10:13	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	SF									
11:00	RF	G/VMS977	JONES, Ms Mary (14/06/1951.F, G/VMS977)	<input type="checkbox"/> 10:50	<input type="checkbox"/> 11:02	<input type="checkbox"/> 11:27	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:05	RF	AAA4042	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1986.M, ***22222)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:10	SF									
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RF									

4.3 Entering Additional Slots

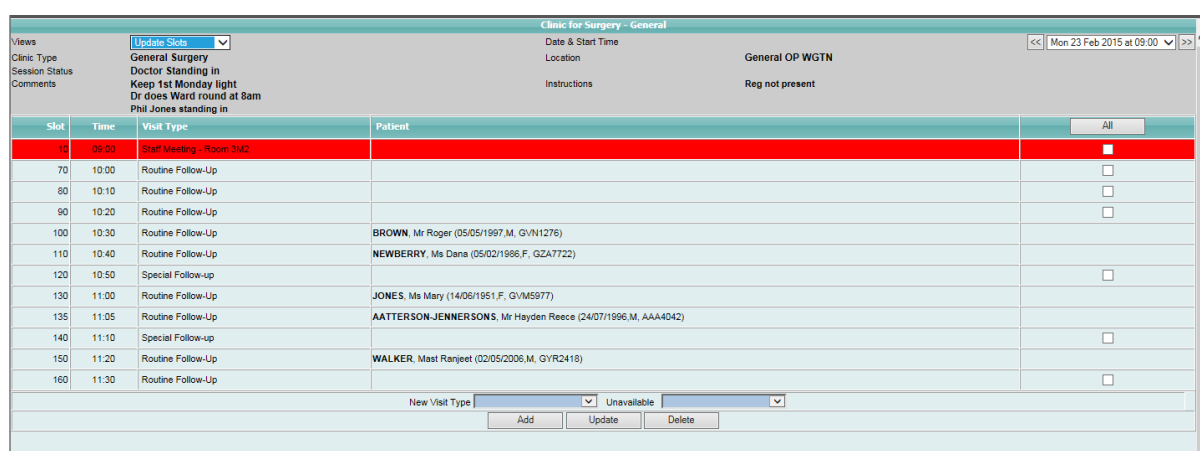
Additional slots can be added to a clinic.

Note: If the additional slot/s is to be added for the purpose of overbooking a clinic, it is recommended that overbooking slots be used. (These visit types [Category CV] have Indicator 2 = Z) Refer to [Overbooking a Clinic](#) on page 92 for further details.

To create additional slots for a clinic:

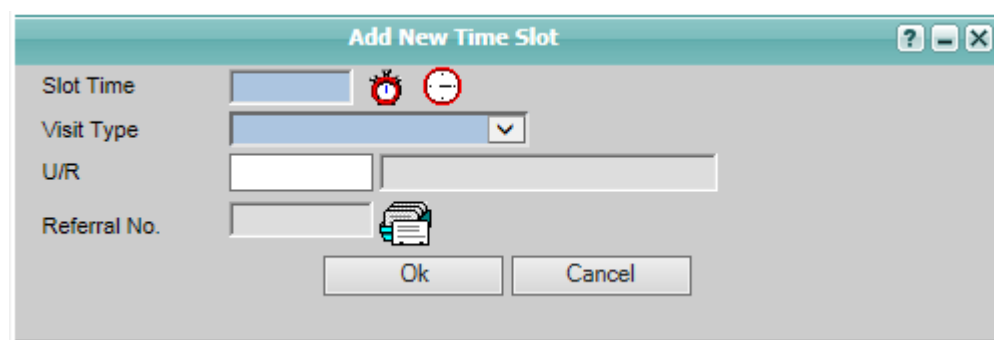
1. Open the Clinic List for the clinic you want to view.
2. Select **Update Slots** from the **Views** menu.

The following screen will display.



3. Click **Add**.


The Add New Time Slot screen will display.



4. Enter the additional appointment time and select a Visit Type from the list.

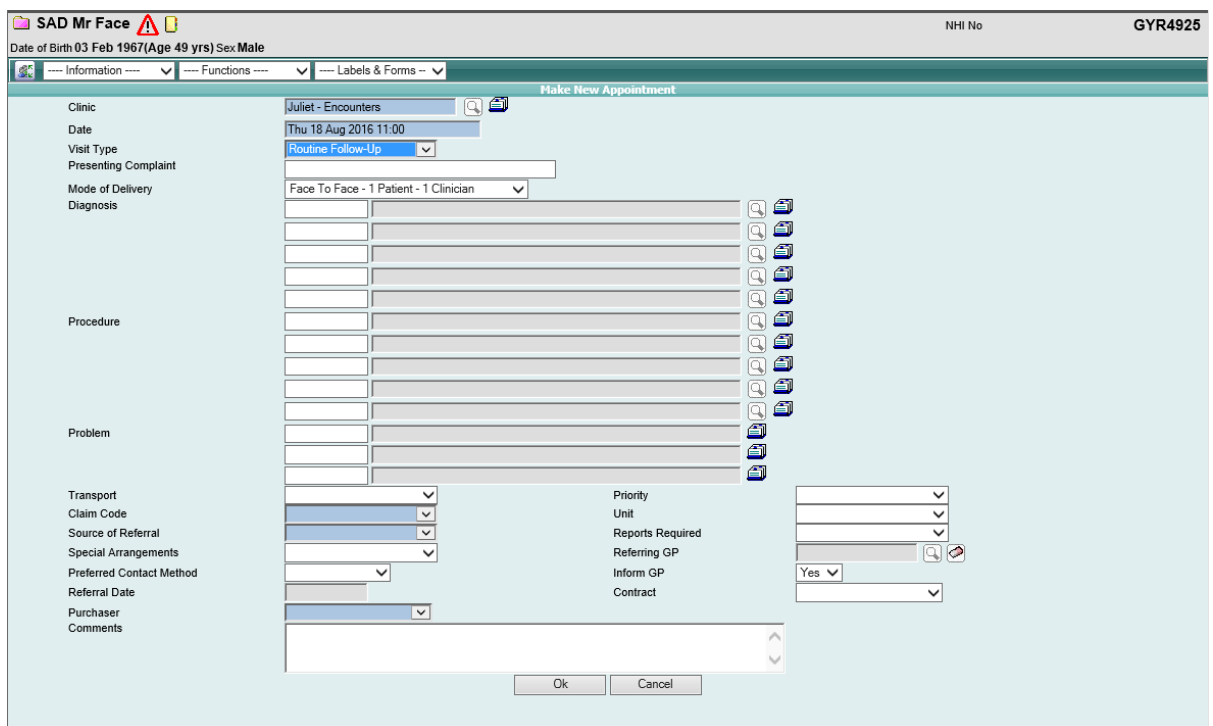
- If there is a patient to fill the time, enter the NHI number and press **Tab**.



Note: If the new Appointment is to be linked to a Referral enter the Referral Number, use the Referral Search  icon to select from the Patient Referrals.

- Click **Ok**.

The Make a New Appointment screen will display for the patient.



- Enter the details.

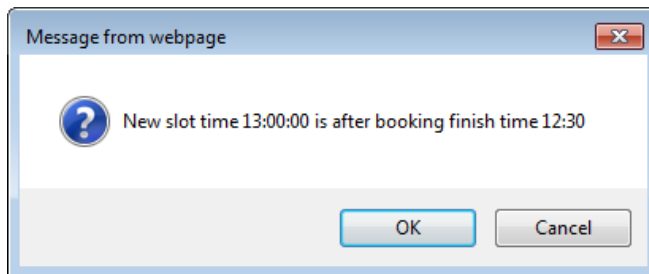
- Click **Ok**.

The appointment details for the patient display.

Note: If you don't enter a NHI Number, the screen refreshes with the additional appointment displayed.

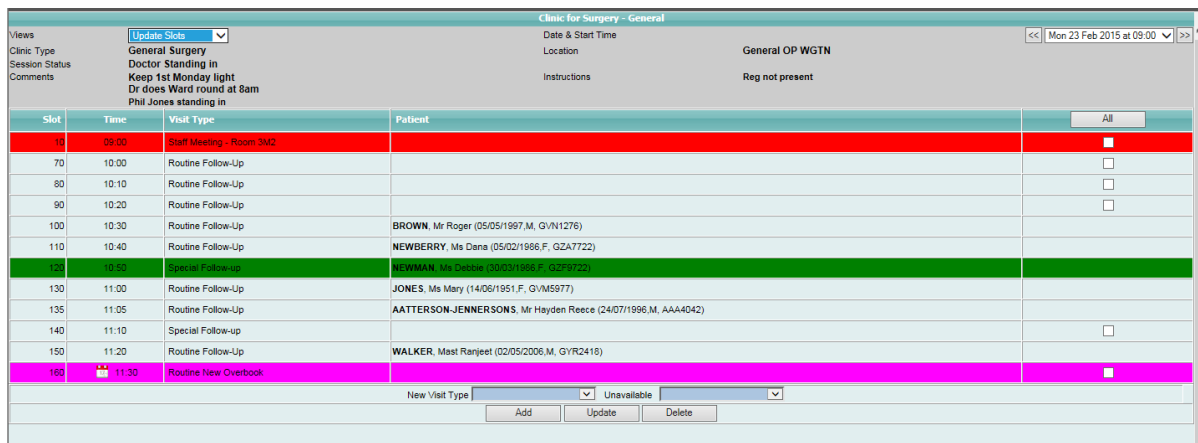
Slot	Time	Visit Type	Patient	All
75	09:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
76	10:00	Staff Meeting - Room 3M2		<input type="checkbox"/>
85	10:10	Staff Meeting - Room 3M2		<input type="checkbox"/>
86	10:20	Staff Meeting - Room 3M2		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	
120	10:50	Special Follow-up		<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)	
140	11:10	Special Follow-up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	
160	11:30	Routine Follow-Up		<input type="checkbox"/>

Note: If you Add a Slot at a time after the Clinic Booking End Time the following warning will display. Press **OK** to continue adding the Slot. Press **Cancel** to return without adding the Slot.



4.3.1 Slot Colours

When the Clinic List is set to the **Update Slots** view, appointment slots will display in different colours depending on the type of slot that has been added to the clinic.



Slot	Time	Visit Type	Patient	
66	09:00	Staff Meeting - Room 3M2		<input checked="" type="checkbox"/>
70	10:00	Routine Follow-Up		<input type="checkbox"/>
80	10:10	Routine Follow-Up		<input type="checkbox"/>
90	10:20	Routine Follow-Up		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997, M, G/V/N1276)	
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1988, F, GZA7722)	
120	10:50	Special Follow-up	NEWMAN, Ms Debbie (30/03/1966, F, GZP9722)	
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951, F, G/V/M5977)	
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996, M, AAA4042)	
140	11:10	Special Follow-up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006, M, G/YR2416)	
180	11:30	Routine New Overbook		<input checked="" type="checkbox"/>

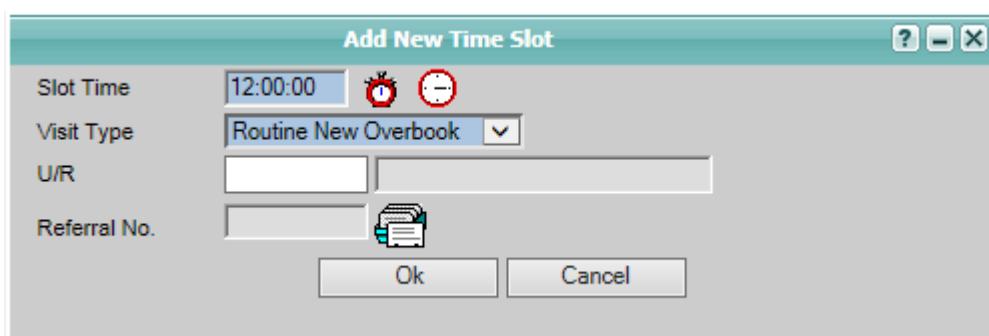
- **Green = Series Booking Slot** (This slot has been booked by a Patient that has a Series booking)
- **Red** = Specific slot has been made **Unavailable** due to a meeting or other reason. (Category CV-Specific Visit type has Indicator 6 = U)
- **Pink** = Specific slot has been created/added as an **Overbooked** slot (Category CV-Specific Visit type has Indicator 2 = Z).

4.4 Overbooking a Clinic

Overbookings are created the same as additional slots but display differently.

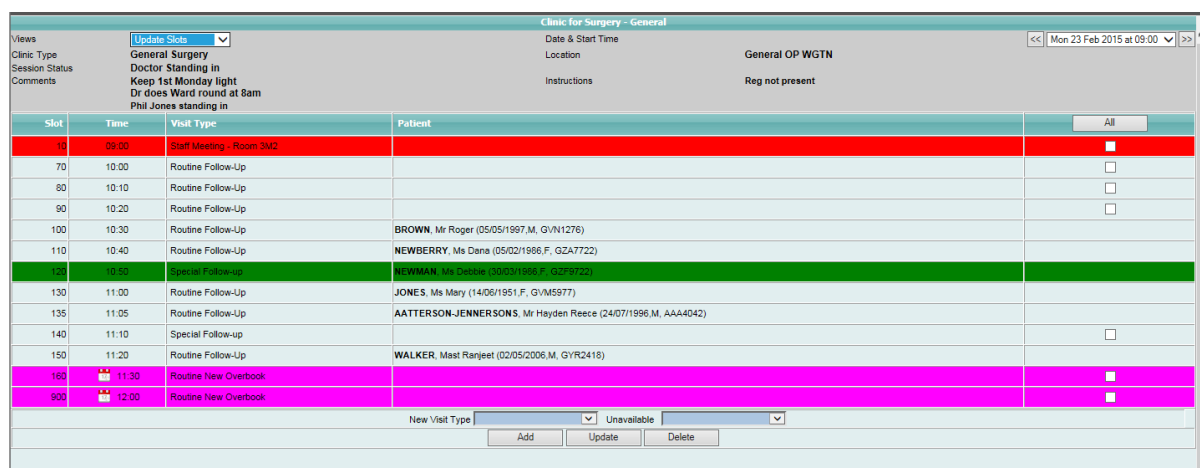
1. Open the required Clinic List.
2. Select **Update Slots** from the **Views** drop down arrow.
3. Click **Add**.

The Add New time slot pop-up box will display.



4. Populate the **Slot Time** and **Visit Type** fields.
5. Click **OK**.

The slot will display at the bottom of the Clinic List (regardless of the slot time) with a purple band over it.



Slot	Time	Visit Type	Patient	All
65	09:00	Staff Meeting - Room 3M2		<input checked="" type="checkbox"/>
70	10:00	Routine Follow-Up		<input type="checkbox"/>
80	10:10	Routine Follow-Up		<input type="checkbox"/>
90	10:20	Routine Follow-Up		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	
120	10:50	Special Follow-up	NEWMAN, Ms Debbie (20/02/1958.F, GZD79722)	
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)	
140	11:10	Special Follow-up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2416)	
180	11:30	Routine New Overbook		<input checked="" type="checkbox"/>
200	12:00	Routine New Overbook		<input checked="" type="checkbox"/>

6. Change the view back to **Booking Details** and the overbooked slot will be sorted chronologically.

Clinic for Surgery - General										
Views		Bookings Details			Date & Start Time		Mon 23 Feb 2015 at 09:00			
Clinic Type		General Surgery			Location		General OP WGTN			
Session Status		Doctor Standing in			Instructions		Reg not present			
Comments		Keep 1st Monday light Dr does Ward round at 8am Phil Jones standing in								
Selected : 13		Clinic List for 9:00 am 23 Feb 2015								
Time	Type	U/R	Patient	Check In	Time Seen	Departure	Followup/ Outcome	Non Attend	Alerts	Confirmed
09:00	MTG		Staff Meeting - Room 3M2							
10:00	RF									
10:10	RF									
10:20	RF									
10:30	RF	G/VN1276	BROWN, Mr Roger (05/05/1997.M, G/VN1276)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 16:05	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:40	RF	GZA7722	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/> 10:13	<input type="checkbox"/> 10:13	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input checked="" type="checkbox"/>
10:50	SF	GZF9722	NEWMAN, Ms Debbie (30/03/1986.F, GZF9722)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
11:00	RF	G/VMS977	JONES, Ms Mary (14/06/1951.F, G/VMS977)	<input type="checkbox"/> 10:50	<input type="checkbox"/> 11:02	<input type="checkbox"/> 11:27	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:05	RF	AAA4042	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, 11.1.1.1)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/> A	<input type="checkbox"/>		<input type="checkbox"/>
11:10	SF									
11:20	RF	GYR2418	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/> 10:30	<input type="checkbox"/> 10:30	<input type="checkbox"/> 11:15	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11:30	RNO									
12:00	RNO									

7. Follow steps 2 to 5 to add more slots.

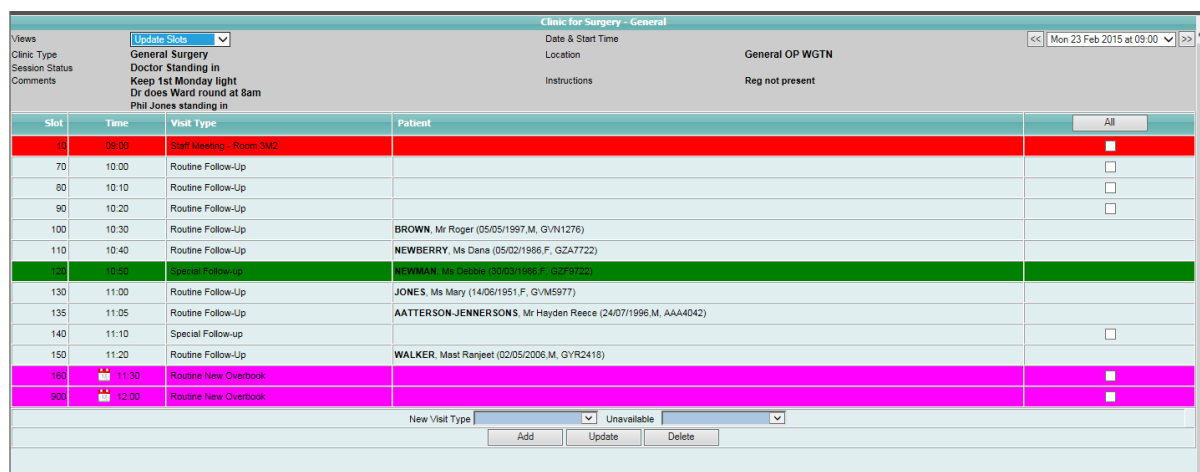
Note: If the booking that is made in an over-booked slot is cancelled or rescheduled, the slot will **automatically** be removed as the over-booking is no longer required.

4.5 Deleting Slots

To delete slots from a clinic:

1. Open the **Clinic List** for the clinic you want to update.
2. Select **Update Slots** from the **Views** menu.

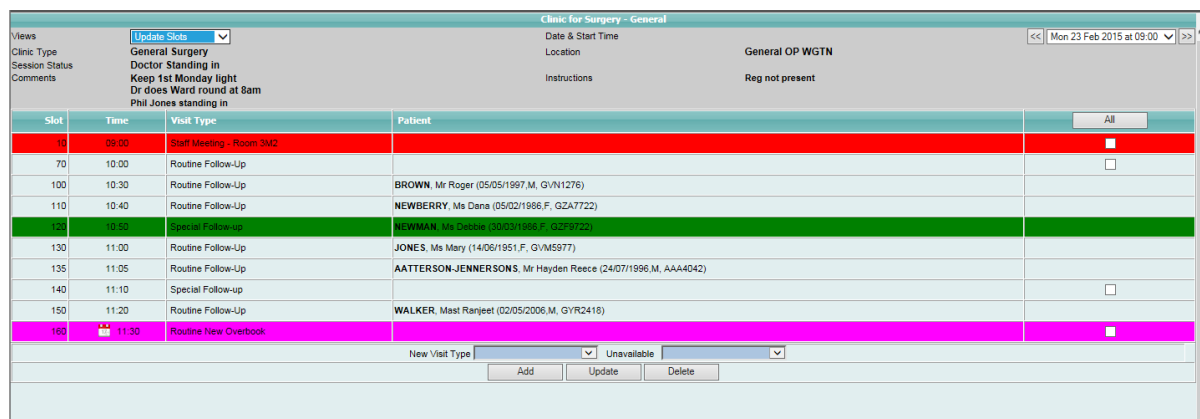
The Slot update screen will display.



Slot	Time	Visit Type	Patient	Mark
68	09:00	Staff Meeting - Room 3W2		<input checked="" type="checkbox"/>
70	10:00	Routine Follow-Up		<input type="checkbox"/>
80	10:10	Routine Follow-Up		<input type="checkbox"/>
90	10:20	Routine Follow-Up		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/>
12	10:50	Special Follow-up	NEWMAN, Ms Debbie (30/03/1996.F, GZP9722)	<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)	<input type="checkbox"/>
140	11:10	Special Follow-up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
183	11:30	Routine New Overbook		<input checked="" type="checkbox"/>
900	12:00	Routine New Overbook		<input checked="" type="checkbox"/>

3. Select check boxes in the **Mark** column to select the slots you want to delete.
4. Click **Delete**.

Selected slots are deleted from the **Clinic List**.



Slot	Time	Visit Type	Patient	Mark
68	09:00	Staff Meeting - Room 3W2		<input checked="" type="checkbox"/>
70	10:00	Routine Follow-Up		<input type="checkbox"/>
100	10:30	Routine Follow-Up	BROWN, Mr Roger (05/05/1997.M, GVN1276)	<input type="checkbox"/>
110	10:40	Routine Follow-Up	NEWBERRY, Ms Dana (05/02/1986.F, GZA7722)	<input type="checkbox"/>
12	10:50	Special Follow-up	NEWMAN, Ms Debbie (30/03/1996.F, GZP9722)	<input type="checkbox"/>
130	11:00	Routine Follow-Up	JONES, Ms Mary (14/06/1951.F, GVM5977)	<input type="checkbox"/>
135	11:05	Routine Follow-Up	AATTERSON-JENNERSONS, Mr Hayden Reece (24/07/1996.M, AAA4042)	<input type="checkbox"/>
140	11:10	Special Follow-up		<input type="checkbox"/>
150	11:20	Routine Follow-Up	WALKER, Mast Ranjeet (02/05/2006.M, GYR2418)	<input type="checkbox"/>
183	11:30	Routine New Overbook		<input checked="" type="checkbox"/>

5 Printing Labels, Forms and Reports

This chapter describes how to:

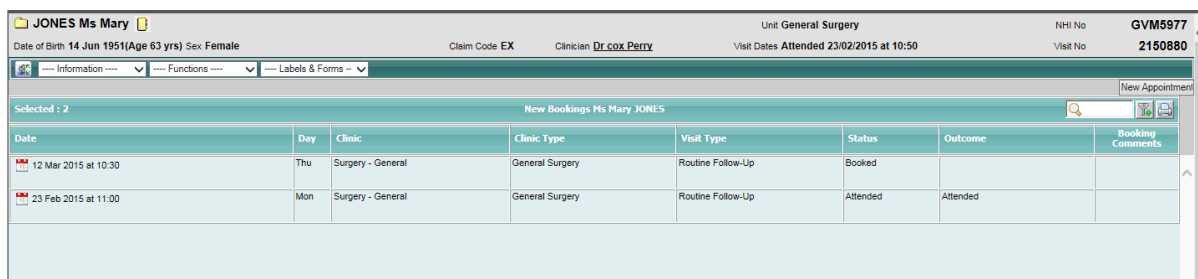
- Print labels
- Print forms
- Request reports

5.1 Printing Labels


To print labels:

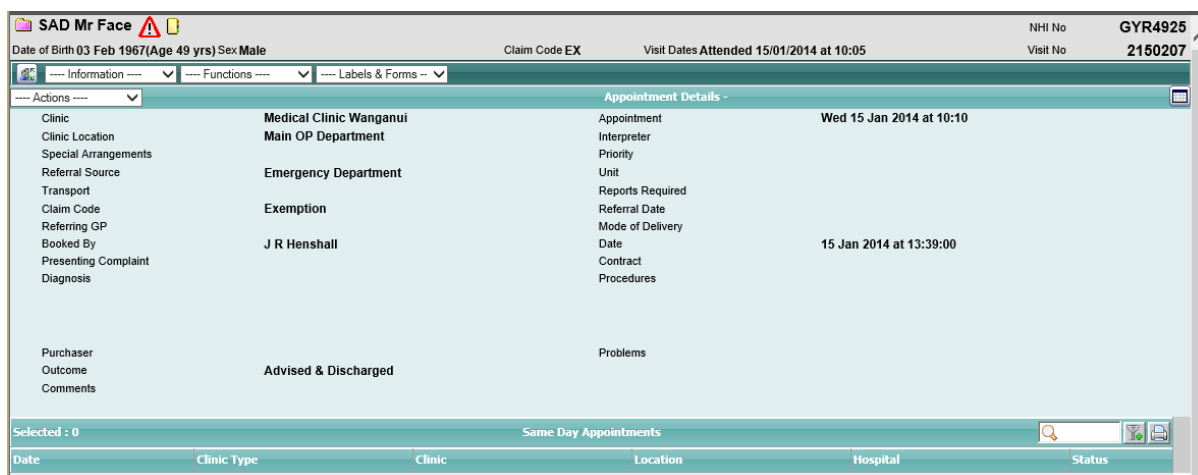
1. Search for the patient, and display details in the Patient Demographics screen (as described in the webPAS PMI and NHI User Guide).
2. Select **Appointments** from the appropriate patient level drop down menu.

The Appointment Details screen for the patient will display.



Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Booked		
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended	

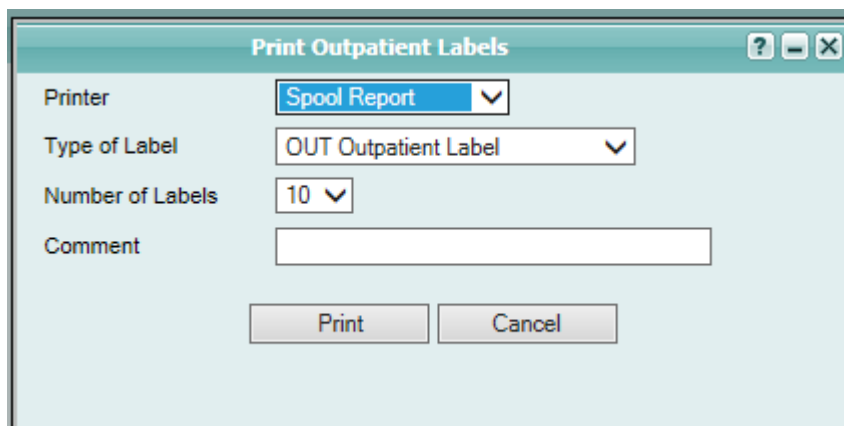
3. Click the Appointment  icon corresponding with the booking that is to be rescheduled.
4. The **Appointment Details** screen displays.



Appointment Details -	
Clinic	Medical Clinic Wanganui
Clinic Location	Main OP Department
Special Arrangements	
Referral Source	Emergency Department
Transport	
Claim Code	Exemption
Referring GP	J R Henshall
Booked By	
Presenting Complaint	
Diagnosis	
Purchaser	
Outcome	Advised & Discharged
Comments	
Appointment	Wed 15 Jan 2014 at 10:10
Interpreter	
Priority	
Unit	
Reports Required	
Referral Date	
Mode of Delivery	
Date	15 Jan 2014 at 13:39:00
Contract	
Procedures	
Problems	

5. Select **Labels** from the **Labels and Forms** menu.

The Print Patient Labels screen displays:



6. Select the relevant **Printer** (or use the default printer displayed).
7. Select the **Type of Label**.
8. Select the **Number of Labels**.
9. Click **Print**.

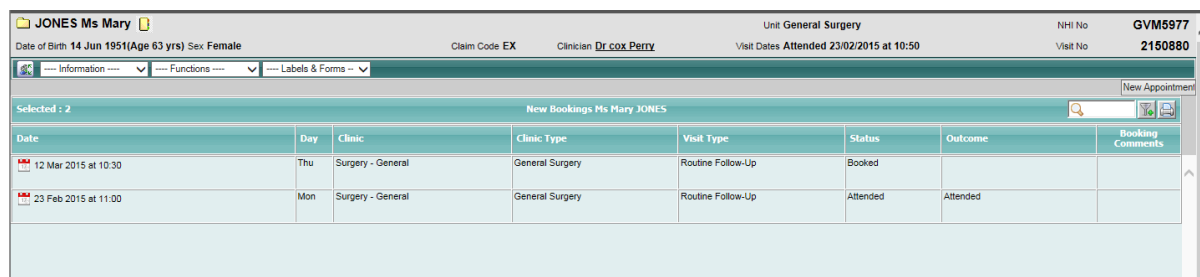
The label is printed on the selected printer.

5.2 Printing Forms


To print forms:

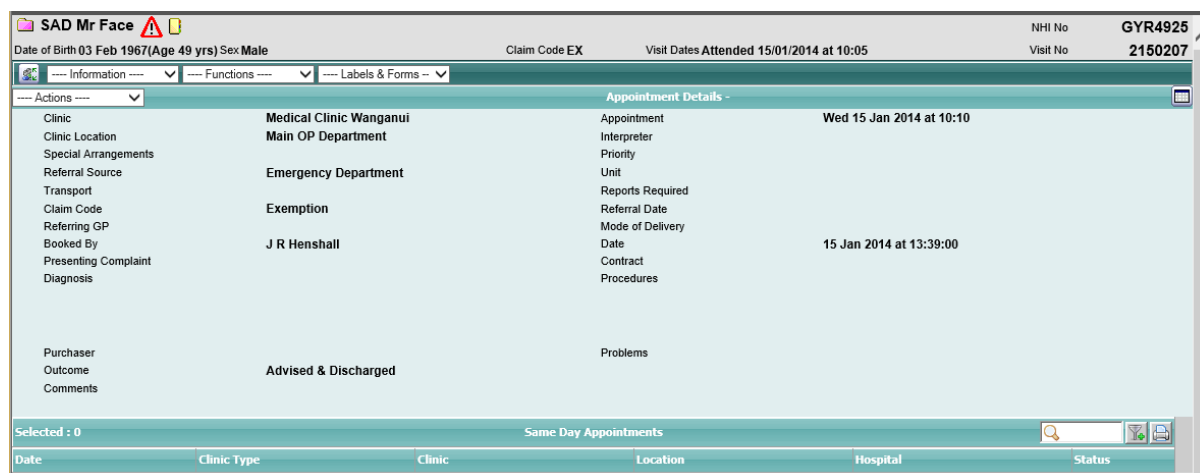
1. Search for the patient, and display details in the Patient Demographics screen (as described in the webPAS PMI and NHI User Guide).
2. Select **Appointments** from the appropriate patient level drop down menu.

The Appointment Details screen for the patient will display.



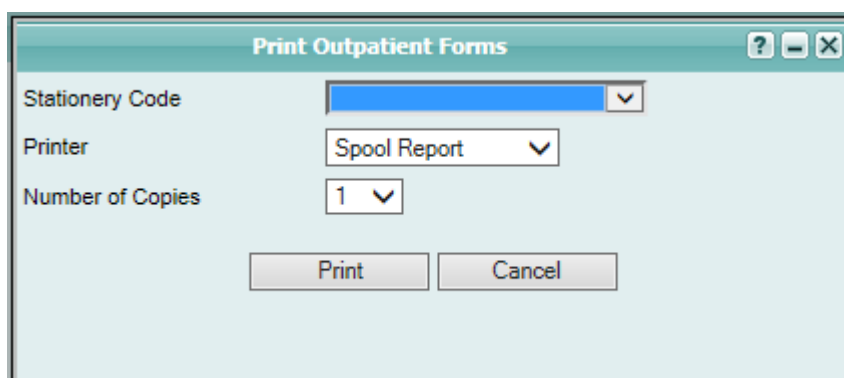
Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Booked		
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended	

3. Click the Appointment  icon corresponding with the booking that is to be rescheduled.
4. The **Appointment Details** screen displays.



Appointment Details -	
Clinic	Medical Clinic Wanganui
Clinic Location	Main OP Department
Referral Source	Emergency Department
Referring GP	J R Henshall
Booked By	J R Henshall
Presenting Complaint	
Diagnosis	
Purchaser	
Outcome	Advised & Discharged
Comments	
Appointment	Wed 15 Jan 2014 at 10:10
Interpreter	
Priority	
Unit	
Reports Required	
Referral Date	
Mode of Delivery	
Date	15 Jan 2014 at 13:39:00
Contract	
Procedures	
Problems	

5. Select **Forms** from the **Labels and Forms** menu.



6. Select the **Stationery Code**.
7. Select the relevant **Printer** (or use the default printer displayed).
8. Select the **Number of Copies** to be printed.
9. Click **Print**.

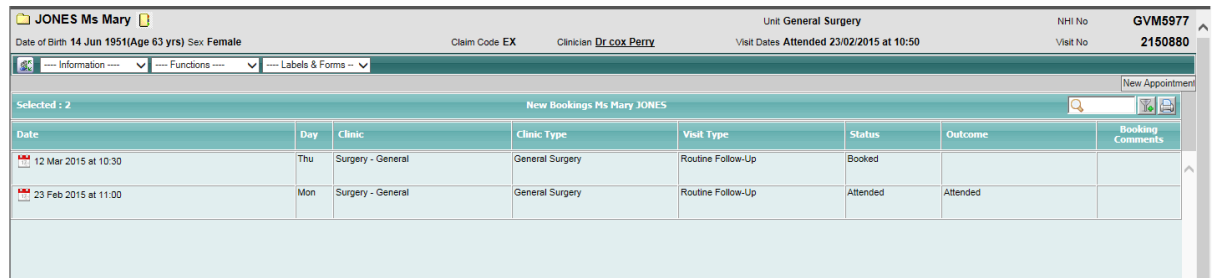
The Form is printed on the selected printer.

5.3 Printing Labels and Forms


To print labels, forms and letters:

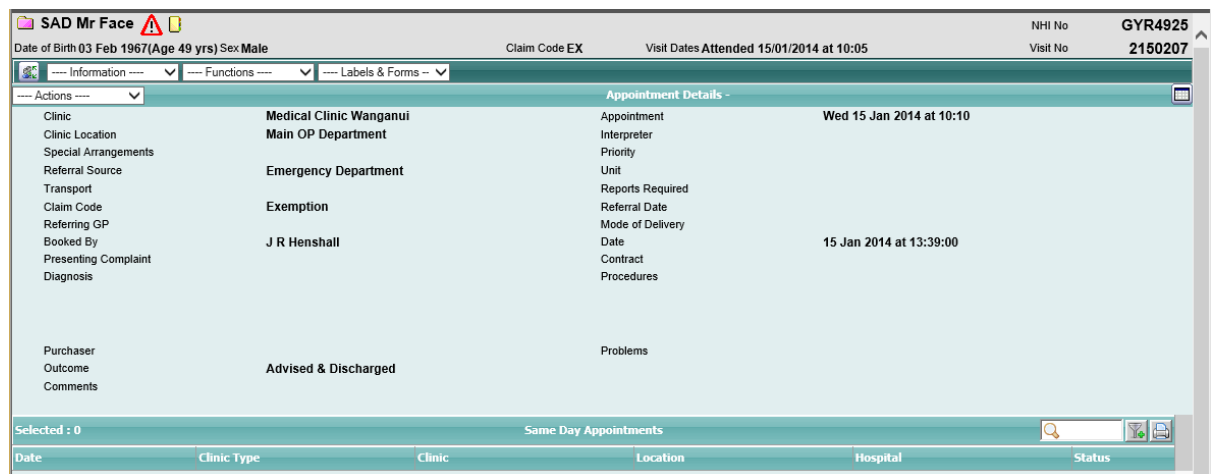
1. Search for the patient, and display details in the Patient Demographics screen (as described in the webPAS PMI and NHI User Guide).
2. Select **Appointments** from the appropriate patient level drop down menu.

The Appointment Details screen for the patient will display.



Date	Day	Clinic	Clinic Type	Visit Type	Status	Outcome	Booking Comments
12 Mar 2015 at 10:30	Thu	Surgery - General	General Surgery	Routine Follow-Up	Booked		
23 Feb 2015 at 11:00	Mon	Surgery - General	General Surgery	Routine Follow-Up	Attended	Attended	

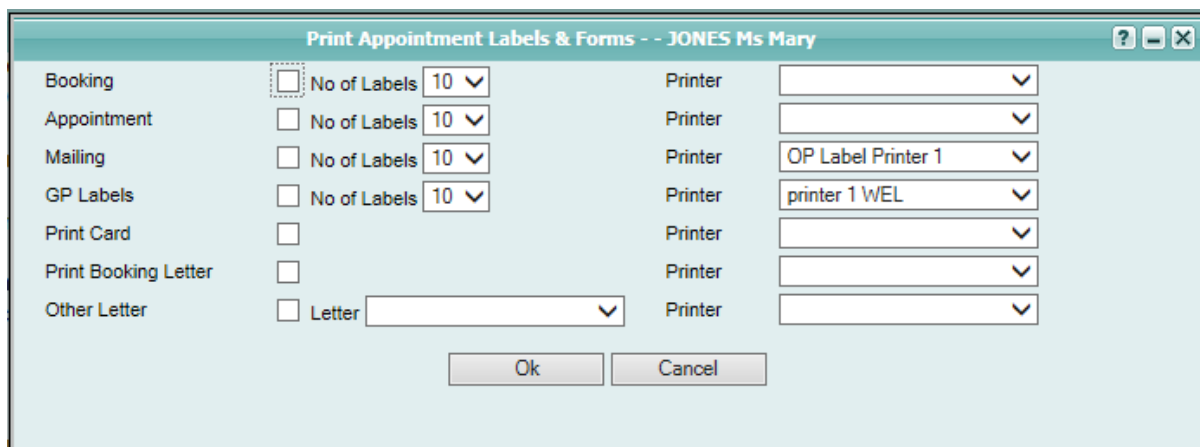
3. Click the Appointment  icon corresponding with the booking that is to be rescheduled.
4. The **Appointment Details** screen displays.



Appointment Details -	
Clinic	Medical Clinic Wanganui
Clinic Location	Main OP Department
Referral Source	Emergency Department
Referring GP	J R Henshall
Appointment	Wed 15 Jan 2014 at 10:10
Referral Date	15 Jan 2014 at 13:39:00
Outcome	Advised & Discharged

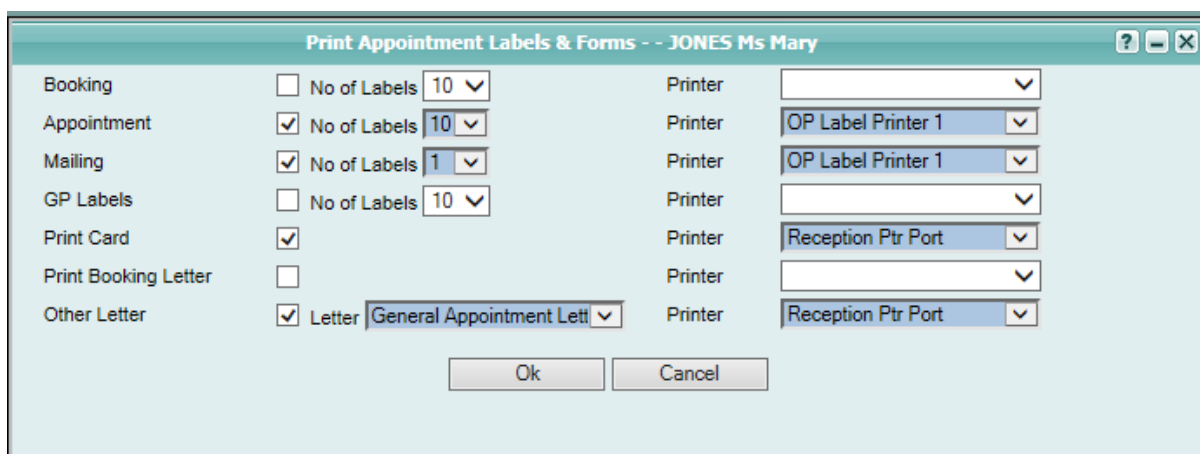
5. Select **Labels and Forms** from the **Actions** menu.

The Print Patient Labels screen displays:



Item	Checked	No of Labels	Printer
Booking	<input checked="" type="checkbox"/>	10	
Appointment	<input type="checkbox"/>	10	
Mailing	<input type="checkbox"/>	10	OP Label Printer 1
GP Labels	<input type="checkbox"/>	10	printer 1 WEL
Print Card	<input type="checkbox"/>		
Print Booking Letter	<input type="checkbox"/>		
Other Letter	<input type="checkbox"/>	Letter	

6. Select the required **Labels, Forms** or **Letters** to be printed.
7. Select the **Number of Labels**.
8. Select the relevant **Printer** (or use the default printer displayed).
9. Select the **Card/Form** to be printed.
10. Select the relevant **Printer** (or use the default printer displayed).
11. Select the **Letter** to be printed.
12. Select the relevant **Printer** (or use the default printer displayed).



Item	Checked	No of Labels	Printer
Booking	<input type="checkbox"/>	10	
Appointment	<input checked="" type="checkbox"/>	10	OP Label Printer 1
Mailing	<input checked="" type="checkbox"/>	1	OP Label Printer 1
GP Labels	<input type="checkbox"/>	10	
Print Card	<input checked="" type="checkbox"/>		Reception Ptr Port
Print Booking Letter	<input type="checkbox"/>		
Other Letter	<input checked="" type="checkbox"/>	Letter	Reception Ptr Port

13. Click **Print**.

The label, forms and letters are printed on the selected printers.

5.4 Requesting a Report

To access Reports

1. Click the reports icon  in the hospital menu bar.

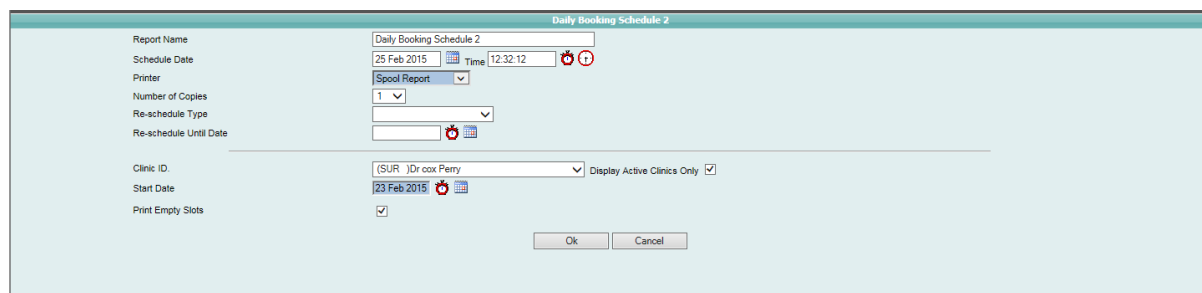


Alternative menus are displayed in the Hospital menu bar. These menus provide access to all available reports.



2. Select the required report from either the **Standard** or **Statistical** menus, depending on the type of report.

A Report screen is displayed, enabling you to specify options on how the report is to be produced. Report screens differ, depending on the report selected. The example screen below is for the Daily Booking Schedule 2 report.

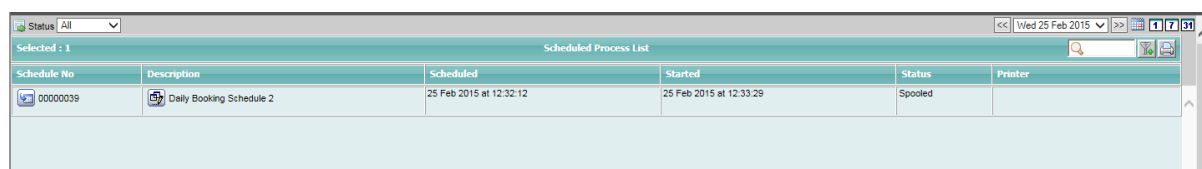


The screenshot shows a configuration window for 'Daily Booking Schedule 2'. Fields include: Report Name (Daily Booking Schedule 2), Schedule Date (25 Feb 2015), Time (12:32:12), Printer (Spool Report), Number of Copies (1), Re-schedule Type, Re-schedule Until Date, Clinic ID (SUR - JDr cox Ferry), Start Date (23 Feb 2015), and Print Empty Slots (checked). There are 'Ok' and 'Cancel' buttons at the bottom.


3. Complete details as required.
4. Click **OK**.

The report is printed on the selected printer.

The Report Scheduler showing the Status of the Report will display:



Schedule No	Description	Scheduled	Started	Status	Printer
00000039	Daily Booking Schedule 2	25 Feb 2015 at 12:32:12	25 Feb 2015 at 12:33:29	Spooled	

Click the reports  icon to return to the Processing screens.

6 Outpatient Reports

The Outpatients module has an extensive range of utilization and statistical reports to assist in Clinic and Session Management.

The outpatient reports are divided into two categories: Standard and Statistical.

6.1 Standard Reports Menu

The following table is a list of the main reports available from the Standard menu and a description of those reports.

Report Name	Description
Pulling List	<p>This report lists patients attending a clinic on a specified date and is used for retrieving patient case notes in time for the clinic.</p> <p>The report can run be run by:</p> <ul style="list-style-type: none"> • Site code • Clinic code • Hospital ID <p>The details on the report can be restricted to new additions to the list or all patients.</p> <p>The reports includes:</p> <ul style="list-style-type: none"> • Medical Record Bay • Patient UR and Name • Appointment Time • Case Notes Location • Previous Visits.
A & E Referral Source Report	<p>This report lists Booked Outpatients on the specific date with an A&E Referral Source code.</p> <p>The Outpatients module reads the Clinic Session booking file extracting Clinics with a matching Site code, a Clinic date equal to the key in date and a Slot Status of Booked. The outpatient booking details are read and only patients with an A&E Referral Source are extracted. Additional details read from the Patient Master Index and A&E Details file.</p> <p>Use the System Parameter (IBAOUT98) User Screen 1 "A & E Attendance Source Code" to define the appropriate Source of Referral code (Category S) for the system.</p>
Current Bookings by Clinic Type or Clinic ID	<p>These reports list all clinic sessions for a range of clinics and dates with the number of Booked patients as New, Follow-Up or Special and number of vacant New, Follow-Up or Special.</p> <p>This reports can be selected by:</p> <p style="padding-left: 40px;">Clinic Type Sequence</p> <p style="padding-left: 40px;">Clinic Id Sequence</p> <p>Or all for both reports.</p> <p>This report is used on an outpatient reception desk for confirming the patients' address and attendance.</p>

Report Name	Description
Daily Booking Schedule	<p>This report lists all clinics and bookings for the specified date range.</p> <p>The selection criteria include the Hospital ID.</p> <p>The system parameter (IBAOUT98) IBA Screen 2 "Clinic List Format for OUT49/OUT66" defines the report layout.</p>
Daily Booking Schedule 2	<p>This report lists all clinics and bookings for the specified date range, however the report selection is by Clinic ID not Hospital ID.</p>
Clinic Appointment Listing	<p>This report lists all appointments for a Clinic on a specific date or date range.</p>
Cancelled Clinic Report	<p>This report displays a list of all cancelled clinics with cancellation reasons on screen with a (P)rint option, if required.</p> <p>The report has the following two options:</p> <ul style="list-style-type: none"> All Clinics for a date range Single clinic for a date range <p>This report is used statistically and maybe used to manage staffing levels.</p>
Waiting Time Analysis Report	<p>This report lists clinics with an analysis of Waiting Times for early and late arrivals. This uses the time of Check-In and Time Actually Seen entered in the Outcomes program (IBAOUT18).</p> <p>This is for a range of Session Ids and a date range.</p>
Transport Listing	<p>This report lists patients who require transport for a specific hospital and date, including a list of patients' details such as Patient Name, Address, Clinic, Time, Doctor and type of transport required.</p> <p>The Transport department would use this listing to organise their transport arrangements.</p>
Clinic Appointments Summary	<p>This report lists in details patients for each clinic for a range of Hospitals, Clinics and dates. Information displayed in this report includes U/R, Patient Name, Slot Number, Slot Time, Visit Type, Weeks waited and Priority.</p> <p>This report may be used in clinics that prefer the layout to any of the other standard reports.</p>
Clinic Lists	<p>This report lists patients booked into clinic for a specific date and range of hospitals. Information displayed in this report includes Slot Number, Slot Time, Visit Type, Patient Name, U/R, Date of Birth and Comments.</p> <p>The report has the following two options:</p> <ul style="list-style-type: none"> All clinics Single clinic <p>This report is used on the outpatient reception desk and in clinic for more than one consultant to see patients and can also be used in other departments such as x-ray to enable staff to retrieve x-ray details in time for the clinic.</p>

Report Name	Description
Outpatient Attendances by Hospital	<p>This report displays a list of Specialties and Consultants with details on Sessions held, cancelled, New appointments (Seen & D.N.A), Follow-Up appointments (Seen & DNA), %DNAs and % Walk-Ins for a specified date range and hospitals.</p> <p>This report is used for information purposes.</p>
Bookings and Vacancies by Clinic Type	<p>This report lists clinics with details regarding number of New Bookings, Star, Review, Overbooks and vacancies for a range of Clinic types, Sessions, Clinic Ids and date range.</p> <p>This report is used in the outpatient clinic for Consultants to see their future bookings.</p>
Arrival Time Analysis Report	<p>This report is similar to the Waiting Time Analysis report, except that it is an analysis of arrival times for early and late arrivals.</p> <p>This report is used for information purposes for Patients Charter requirements.</p>
Occasions of Service Report	<p>Run the Monthly Statistical Update program for the required period prior to running this program.</p> <p>The Outpatients module reads the Occasions of Service file and extracts all entries for the site through which the report is being run and the specified report period.</p> <p>This report provides the Number of Services for each Group Code (Category GC) and Clinic Type. The MBS details are based on the primary procedure. The report is in surgeon code then ascending order for each MBS Item Number. The report calculates totals for each surgeon as well as a grand total.</p> <p>The number of A&E Attendances is obtained from the A&E Statistics File (aaestaaf). If there is no data in this file then it ignores this part of the report. If there is data in this file then it writes to a Site dependant temporary file after validating the date it increments by one the appropriate period field.</p>

6.2 Statistical Reports

The Statistical menu reports include:

- **Statistics Report 2**
Lists the number of visits with waiting times analysis for each clinic and doctor.
- **Outpatient Clinic Statistics Report**
A booking and utilization report for the period specified and lists information by Clinic Type.
- **Attendee Statistics Report**
Lists the numbers of attendees by doctor and Clinic type, with totals for the Clinic group.
- **Average Waiting Time Report**
Lists the waiting times for each clinic by visit type with averages for the clinic group.
- **Attendance by Locality Report**
Lists the attendance figures for each clinic type and group within a locality, which is defined by Category code **CH** – Catchment code. If you want to use this report you will also need to set up the appropriate LGA and Catchment codes in the IT Management module.
- **Attendance by Referral Type Report**
Lists patient numbers for clinic groups by referral source, for example: GP, Casualty.
- **Monthly Statistical Update**
Must be run each month to update the statistics reports.

7 Glossary

A

Appointment

An appointment is a block of time reserved or booked for a patient with a particular health care provider.

C

Clinic

An outpatient practice is referred to as a clinic. For example, a Physiotherapy practice is referred to as a clinic.

Clinic Master

The clinic master acts as a template for the maintenance of clinic schedules. It holds all of the scheduling information for a clinic and its health care providers, including slot definitions, dates and hours of operation, leave dates, and public holidays.

N

New Slot

A new slot is a block of time reserved on the clinic schedule for a health care provider to meet with a new patient.

R

Re-appointment

A follow-up appointment for a patient in treatment is referred to as a re-appointment.

Reschedule

A patient appointment whose date and/or time has changed is referred to as a rescheduled appointment.

Review Slot

A review slot is a block of time reserved on the clinic schedule for a health care provider to provide follow-up treatment to a returning patient.

S

Session

A session refers to the hours during which the outpatient clinic is available to patients for appointments with its health care providers.

Session Template

The parameters of the session, including operating hours and days, health care providers, the standard length of patient appointments is defined in the session template.

Slot

A slot is a block of open time on the clinic schedule, available for booking by a patient. There are three types of slots, or patient appointments; new, review and special.

Special Slot

A special slot is a block of time reserved on the clinic schedule for a health care provider to meet with a patient who may require attention outside the parameters of a new or review slot.

U

Unit

A unit represents a pre-defined number of minutes a health care provider will spend with his/her patients.

8 Revision History

Date	Version	Description	Author
31 December 2007	9.09		Alison Shaw
27 November 2008		Added Clinic Availability at a Glance Modified Additional Slots Added Overbooking a Clinic	Kara Thompson
2 February 2009	9.10	Removed Outpatient Referrals	Kara Thompson
16 February 2009	9.10	Added Care Teams Added Adding a Care Team Added Removing a Care Team Added Single HCP Series Booking – via a Care Team Added Multi HCP Bookings – via a Care Team	Kara Thompson
11 June 2009	9.11	Updated template.	Kara Thompson
15 September 2010	9.12	Updated template and general formatting.	Kara Thompson
2 February 2011	10	Updated template.	Kara Thompson
23 February 2011	10	Added Slot Colours	Kara Thompson
7 August 2014	10	Updated to CSC template.	Kara Jaffe
23 February 2015	10	Updated for NZ market	Jonathan Henshall
05 September 2016	10	Updated screen shots	Juliet Iremonger
10 March 2017	10.09	Updated Multi Therapist View process and screen shots	Alison Davies