Patient Administration System

Healthcare Wide Scheduling Waiting Lists
(HCWL)

Version 1.3
July 2011

CONTENTS

Patient Administration System (P.A.S) Course

1. GENERAL COURSE INFORMATION

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COURSE TITLE	**HEALTHCARE WIDE SCHEDULING: WAITING LISTS**
METHOD OF TRAINING	Classroom
DURATION	3 hours
PRE-REQUISITES	**PMI Add & Revise, HC1**

_____

ABOUT THE COURSE

This course specifically concerns using Waiting List functions within the Healthcare Wide Scheduling function set.

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SUITABLE FOR

All staff - clinical & clerical, within a Healthcare environment using a waiting list facility.

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OBJECTIVES

This course will enable the student to:

1. Log on and off of the PAS system

2. Find and select a patient

3. Record (Add/Revise/Delete) Waiting List activity

4. Book appointments from a Waiting List using the correct procedures

Course Name – v#

2. INFORMATION GOVERNANCE

Information Governance (IG) sits alongside the other governance initiatives of clinical, research and corporate governance. **Information Governance is to do with the way the NHS handles information about patients/clients and employees, in particular, personal and sensitive information.** It provides a framework to bring together all of the requirements, standards and best practice that apply to the handling of personal information.

Information Governance includes the following standards and requirements:

- Information Quality Assurance
- NHS Codes of Conduct:
  - o Confidentiality
  - o Records Management
  - o Information Security
- The Data Protection Act (1998)
- The Freedom of Information Act (2000)
- Caldicott Report (1997)

> *Further information can be accessed through the Trust Intranet:*
>
> **Information Governance** *(Departments sections), and*
> **Management Policies** *(Policies section)*

2.1. What can you do to make Information Governance a success?

2.1.1. Keep personal information secure

Ensure confidential information is not unlawfully or inappropriately accessed. Comply with the Trust ICT Security Policy, Confidentiality Code of Conduct and other IG policies. There are basic best practices, such as:
- Do not share your password with others
- Ensure you "log out" once you have finished using the computer
- Do not leave manual records unattended
- Lock rooms and cupboards where personal information is stored
- Ensure information is exchanged in a secure way (e.g. encrypted e-mails, secure postal or fax methods)

2.1.2. Keep personal information confidential

Only disclose personal information to those who legitimately need to know to carry out their role. Do not discuss personal information about your patients/clients/staff in corridors, lifts or the canteen or other public or non-private areas.

2.1.3. Ensure that the information you use is obtained fairly

Inform patients/clients of the reason their information is being collected. Organisational compliance with the Data Protection Act depends on employees acting in accordance with the law. The Act states information is obtained lawfully and fairly if individuals are informed of the reason their information is required, what will generally be done with that information and who the information is likely to be shared with.

2.1.4. Make sure the information you use is accurate

Check personal information with the patient. Information quality is an important part of IG. There is little point putting procedures in place to protect personal information if the information is inaccurate.

2.1.5. Only use information for the purpose for which it was given

Use the information in an ethical way. Personal information which was given for one purpose e.g. hospital treatment, should not be used for a totally separate purpose e.g. research, unless the patient consents to the new purpose.

2.1.6. Share personal information appropriately and lawfully

Obtain patient consent before sharing their information with others e.g. referral to another agency such as, social services.

2.1.7. Comply with the law

The Trust has policies and procedures in place which comply with the law and do not breach patient/client rights. If you comply with these policies and procedures you are unlikely to break the law.

For further Information Governance training refer to:
http://www.igte-learning.connectingforhealth.nhs.uk/igte/index.cfm

Written by PHT Information Governance Manager, Sept 2010

3. CONFIRMATION OF DETAILS PROCEDURES

To ensure that the Patient Administration System (PAS) contains up to date particulars of all patients being treated, staff must verify with patients their personal details. This should be undertaken when the patient is arriving at the hospital on admission or when attending for an outpatient clinic or other types of appointment.

The types of details we must verify are those within the Patient Master Index (PMI) function within PAS and covers the following items:

- **Patient Forename, Surname and Title**
- **Date of Birth**
- **NHS Number (If not one shown on screen)**
- **Address and Postcode**
- **Telephone Number – Home and Work numbers**
- **Name and Practice Address of GP**
- **Religion**
- **Marital Status**
- **Next of Kin**
- **Ethnic Group**
- **Military No (If applicable)**

By checking the above details with the patient, we are ensuring the following:

* PAS contains the latest details for all our patients.
* Mistakes or "old" details can be amended.
* Information relating to the patient's well-being, such as Religion and Ethnic Group, can be used in patient care.
* Emergency contact details for relatives are up to date.

In some circumstances it will be difficult to verify the details highlighted above as the patient may not be coherent at time of arrival (eg emergency admission, A&E, etc). However, it is important that at the earliest opportunity, the details are verified and amended accordingly.

Important – If details are amended*, please remember to print a new set of labels, remove and destroy any incorrect labels from casenotes. We must not retain any labels that do not contain current details.

Many thanks for your cooperation.

Prepared by: ICT Information Manager
Issued: January 2003
Reviewed: July 2011
Version No: V1.2

* To amend patient details you will need to have access to PMI at level 1. Please book the course PMI Add and Revise. In the meantime make sure you ask a colleague with access to amend the patient record.

4. INTRODUCTION

Healthcare Waiting Lists

Once a Healthcare referral has been recorded on PAS it is possible to manage the referrals by adding patients to a Healthcare Waiting List. From the Healthcare Waiting List appointments can then be allocated within the Trust guidelines. The date that the patient is added to the Waiting List must be the date that the Hospital received the referral.

CAUTION

Making Appointments.

FBA (Follow Up Book Appointment) & TBA (Telephone Book Appointment) must not be used to make appointments for patients on a Waiting List. Although these functions will allocate a patient an appointment they do not remove the patients from the Waiting list.

Cancelled or Deleted Appointments.

If an appointment is cancelled or deleted the system does not return the patient to the Waiting List. This must be administered manually. You will be required to reinstate the patient to the waiting list using HWL until a new appointment is allocated or the patient is discharged.

5. LOGGING IN

Log in: prd: (if required)   <Return>

             Username: e.g. bloggsj   <Return>

             Password: _ _ _ _ _ _ _ _ _   <Return>

             Hospital: (as appropriate)

Your password lasts for 90 days; you will be warned that it is running out so you have time to think of a new one.

If you forget your password or need to reset it, please contact ICT Service Desk (see page7).

Your Default Function Set is PMI - To change function set press the **F6** function key once and select HC1.

```
Function Set :HC1       HEALTHCARE WIDE CLINICIANS
      Function :
```

6. SEARCHING FOR YOUR CLIENT/PATIENT

6.1. PMI List <LIS>

```
    Function Set :HC1      HEALTHCARE WIDE CLINICIANS
        Function :LIS
                   PMI List

                        ┤Available Functions├
DAP - Delete Appointment              DCC - Delete Community Contact
DER - Delete Service Group Referral   DFU - DNA Follow Up
 DP - Document Print                  DSD - Delete Service Group Discharge
EPI - Episode Enquiry                 FBA - Follow up Book Appointment
HWL - Waiting List Add/Rev/Del/List   LIS - PMI List
MAH - Maintain Address History        MGH - Maintain GP History
MSH - Maintain Surname History         NI - Inpatient Name Enquiry
NID - DW Inpatient Name Enquiry       OCC - SG Clinical Coding
 PE - Patient Diary : By Patient      PEL - Patient Diary : By List
PLH - Patient Letter History          PMI - PMI Add/Revise
```

The function <LIS> is the means to establish if a patient has had past contact with NHS services in Portsmouth or the Isle of Wight. If they have then all or part details will be found on the PMI (Patient Master Index).

Searches can be made using various combinations of patient demographic information, i.e. surname and forename initial, date of birth or approximate age and sex, or any combination.

If no matches are found, a list of similar sounding names may be made available to you.

To ensure entries are not duplicated, use casenote number only as a last resort.

6.2. Basic Guide

1. From the Healthcare menu select function <LIS> and press <RETURN>.

2. To search for the patient always start by using the recommended SEARCH PROCEDURE of surname, forename initial, date of birth, sex .

    Press <RETURN>. A list of possible matches will be displayed, e.g.

```
                              P M I   L i s t
      Matching Patient Records  (Name Search)           20/04/07 13:35 QAH

      Seq  PAS No.   Name              Sex   DOB      Dth   Address

      79  01124001  ANGUS              F   01/12/1940    Flat
                    &ABBY                                 21 High St
      80  01124001  ANGUS              F   01/12/1940    Flat
                    ABIGAIL                               21 High St
      81  23044203  ANNALS             M   23/04/1942    172 Northern Parade
                    FRANK                                 PORTSMOUTH
      82  01017026  ANON               M   01/01/1970    13 Redlands Ln
                    ARTHUR                                EMSWORTH
      83  01016410  ANORY              M   01/01/1964    2 Sandcroft Ave
                    JACK                                  RYDE
      84  02022202  ANOTHER_TR         M   02/02/1922

       (More Available)

     Select Patient, press <P> for previous page, or <Return> to continue   : █
```

3. Select correct patient from list by entering the appropriate Sequence Number found on the left hand side of the screen. Press <RETURN>. The patient's basic details will be displayed (see below). Check that they are correct and that you have the correct patient.

☛ **NOTE**: You must select the sequence number, even if only one patient is displayed on the screen.

```
                              P M I   L i s t
        Basic Details                                    20/04/07 13:39 QAH


         PAS No.   :01017026
         NHS No    :                 Sts :RT
         Military  :
         Surname   :ANON                    Forenames  :ARTHUR
         DOB       :01/01/1970     37Y       Age    :          Sex    :M
         Preferred Name :                    Work Ph :0771 457 6013
         Title     :MR                       Phone   :
         Address   :13 Redlands Ln
         *Full*    :EMSWORTH
                   :Hants
                   :
         Postcode  :PO10 7SN     Emsworth,Hants
         HA CODE     Q38          SOUTH CENTRAL HA
         Postal
         Comment   :

         Enter: 1-Details 1, 2-Details 2, 3-Case Notes, 4-Episodes, or <Return>   :█
       ALL DETAILS MUST BE CONFIRMED AT EVERY CONTACT WITH THE PATIENT
```

For other details select from the taskbar at bottom of screen:-

- **DETAILS 1** - Displays General Practitioner (GP) Details, Next of Kin, Religion, Marital Status, NHS Number etc.

- **DETAILS 2** – Displays General Dental Practitioner (GDP) Details, Ethnic Origin, etc.

- **CASENOTES** - Displays casenote number(s), base location of notes and status (current or withdrawn).

- **EPISODES** - Displays all previous and current activity, attendances and episodes of care; eg: inpatient, outpatient and service group events, in reverse chronological order (most recent dates are at the TOP of the list).

Press F1 to exit <LIS>, or <Enter> to return to the Search screen.

NOTE: If details need to be amended this maybe administered whilst recording a referral. Alternatively, use PMI Add and Revise.

7. SERVICE GROUP REFER AND BOOK APPOINTMENT <SBA>

7.1. Referring & adding to a healthcare waiting list

1. Select SBA from the Healthcare Function Set Menu.

```
     Function Set :HC1        HEALTHCARE WIDE CLINICIANS
          Function :SBA
                      SG Refer and Book Appointment

                      ┤Available Functions├
RAC - Record Clinician Activity       RAS - Record Actual Session Times
RBO - SG Record Block Outcomes        RCA - Reinstate Cancelled Appointmt
REA - Revise Appointment Details      RPT - Record Actual Patient Times
SBA - SG Refer and Book Appointment   SCE - Cancel Suspend Clinic Enquiry
SGD - Service Group Discharge         SGR - Service Group Referral
TBA - Telephone Book Appointment      TOA - Take on Appointments
XSC - Transfer Contacts/Appointments
```

2. Search for the patient.

   Remember: 'L' for last patient.
   Recommended search procedure: Surname, First Initial, Date of birth and Sex of patient.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
       Patient Selection Details                   08/10/07 11:13 QAH

                              ┤Select Patient├
PAS Number        :L              Casenote No    :
NHS Number        :               Old NHS No     :
Military Number   :
Surname           :
Forenames         :

Date of Birth     :                   Age    :        Years +/-   :

Sex               :               Postcode   :
```

3. Revise the Basic Details if necessary.

☞ **NOTE:** This screen works in the same way as PMI – PMI Add & Revise.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
       Basic Details                                08/10/07 11:14 QAH

Do you wish to revise the following ? :NO

PAS No.   :01018604
NHS No    :                Sts :RT
Military  :
Surname   :TRIAL                      Forenames  :MANNIE
DOB       :01/01/1986      21Y        Age    :            Sex    :M
Preferred Name :                      Work Ph :023 92313252
Title     :MR                         Phone   :023 92516897
Address   :1 Westways
*Full*    :HAVANT
          :Hants
          :
Postcode  :PO9 3LN      Havant,Hants
HA CODE    Q38          SOUTH CENTRAL HA
Postal                                Maintain Postal Address    :
Comment   :                                          Enter?  :
```

4. You will be shown the **Select Episode** screen. If a Service Group referral is already recorded for your speciality/ department select the referral episode, do not duplicate. To add a new referral press return to continue.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
    Select Episode                              08/10/07 11:15 QAH
 ┌─Name├
 │ TRIAL, MANNIE                                   PAS No. 01018604 │
 └                                                                  ┘

 No Status      Date    Cons   Spec Hosp Ward Cat Casenote      WL-Cd A/P
 -- --------    -------- ------ ---- ---- ---- --- -----------   ----- ---

    OP REG      08/07/07 ITAJ   110  QAH       NHS Q1075869
```

5. F9 to select the Patient's current case note number (Service Group specific number).

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
    Command and Case Note Details                08/10/07 11:15 QAH
 ┌─Name├
 │ TRIAL, MANNIE                                   PAS No. 01018604 │
 └                                                                  ┘


    Casenote No  :Q1075869
```

6. .Update Registration Details if required.

☛ **NOTE:** This screen works in the same way as PMI – PMI Add & Revise.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
    Registration Details                         08/10/07 11:16 QAH
 ┌─Name├
 │ TRIAL, MANNIE                                   PAS No. 01018604 │
 └

 Blood Group                   Allergies
                               Recorded                 By
 Patient Needs? NO

 Patient's GDP is not recorded yet        Do you wish to view? :NO
 Patient's GP is  DR HA BAGSHAW           Do you wish to view? :NO
 Next of Kin is   MRS TRIAL               Do you wish to view? :NO

 Do you wish to revise the following patient details? :NO

 Religion     :CE     CHURCH OF ENGLAND        Carer Support  :
 Marital Status :S     SINGLE        Place of Birth :
 Ethnic Group :A      BRITISH

 Occupation   :BUILDER                  School    :
 Occn(Spouse) :
```

7. Complete details about the referrer. You must change the field 'Referred by' to reflect the referral source to the Trust; for example; GP, Consultant, Self referral etc.

```
        S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
   Registration Details                            08/10/07 11:16 QAH
 Name
 TRIAL, MANNIE                                    PAS No. 01018604

 Do you wish to revise any of the following details  :YES
 Agreement      :                              Episodic Address
                                               1 Westways
 Commission Ref :                Line :        HAVANT
 Referred by    :GP                            Hants
 GP Code        :830968   Org Code :5FD
 Surname        :BAGSHAW            Postcode    PO9 3LN    Q38
 Title          :DR      Initials :HA

 Address        :280 HAVANT ROAD      Temporary Address is not recorded
                :DRAYTON              Do you wish to view? :NO
                :PORTSMOUTH
                :HANTS
 Postcode       :PO6 1PA
 Phone          :023 92374022
 Reason For Change           :
```

8. Record the referral details. Referral date/ time must reflect the date the hospital received the referral.

```
            S e r v i c e   G r o u p   R e f e r r a l
   Patient Referral                              12/10/07 14:07 QAH
 Name
  TRIAL, MANNIE                                  PAS No. 01018604

 Service Group    :IMT       INFORMATION AND TECH
 Lead Clinician   :AG        GILLIAM,ANN


 Referral date/time :08/10/2007 11:31
 Referral Source  :GP        GENERAL PRACTITIONER

 Referral Type    :NEW
 Patient Category :NHS       NHS PATIENT INFORMAL
 Priority         :ROUTINE


 Predicted Outcome  :
```

☞ **NOTE**: Predicted Outcome field is not used.

9. Record the Primary Diagnosis for your Service Group.

☞ **NOTE**: Comments recorded here are only shown on this screen.

```
                S e r v i c e   G r o u p   R e f e r r a l
   Patient Referral                            12/10/07 14:09 QAH
 ┤Name├
  TRIAL, MANNIE                                PAS No. 01018604

              Referral Diagnosis/          Severity
              Diagnosis Outcome

Primary    :1111  DIAGNOSIS DESCRIPTION     :R     ROUTINE
           :
Subsidiary :                                :
           :
Secondary  :                                :
           :
           :                                :
           :

Comment   1 :
          2 :
Referral Outcome   :

Enter?  :Y
```

10. If you are only recording the referral select Option 1 – No further Action. To add a patient to a Healthcare Waiting List select Option 3.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
   Patient Referral                            12/10/07 14:12 QAH
 ┤Name├                                      ┤Valid Codes├
  TRIAL, MANNIE                              1  No Further Action
                                             2  Book Appointment
              Referral Diagnosis/     Severit 3  Add to Waiting List
              Diagnosis Outcome

Primary    :1111  DIAGNOSIS DESCRIPTION     :R     ROUTINE
           :
Subsidiary :                                :
           :
Secondary  :                                :
           :
           :                                :
           :

Comment   1 :
          2 :
Referral Outcome   :

 Select Option   :3
```

11. Select option **ADD** (*press F9 to give valid codes*) to <u>add</u> this patient to a Waiting List.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
   Appointment Pending Details                08/10/07 11:43 QAH
 ┤Name├                                      ┤Valid Codes├
  TRIAL, MANNIE                              ADD     ADD RECORD
                                             DELETE  DELETE RECORD
                                             LIST    LIST RECORD
Command        :                             REINST  REINSTATE WL
                                             REMOVE  REMOVE RECORD
WL Code        :                             REVISE  REVISE RECORD

                  Clinician      :


Date Required  :                 Urgency     :
Appointment type:
Transport code  :
Comment         :
Category        :

Date on List   :
```

12. Complete the **Appointment Pending Details** screen with the appropriate details.

👉 **NOTES:** F9 (super help) is available for many of the fields and may help you select the options for you department/area.

Waiting List Codes will be unique for your area/department. Many of the fields are not mandatory but your department requires this information for reports and statistics.

Date on List **must** reflect the referral date.

```
        S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
    Appointment Pending Details                        08/10/07 11:46 QAH
┤Name├
 TRIAL, MANNIE                                         PAS No. 01018604


Command      :ADD

WL Code      :NEWWL    NEW WAITING LIST

                  Clinician     :RK

          Warning: Clinician does not match with Referral's

Date Required  :01/2008           Urgency      :4    ROUTINE
Appointment type:NEW  NEW
Transport code  :11  NOT REQUIRED
Comment         :WAITING LIST LETTER SENT
Category        :NHS  NHS PATIENT INFORMAL

Date on List    :08/10/2007
Enter?          :Y ▮
```

13. You will be returned to the Command field (*as shown above*), press F1 to continue to the **Select Document** screen where you will be given the opportunity to print patient documentation.

```
             S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
   Select Document                                    08/10/07 11:49 QAH
 ┌Name├
 │ TRIAL, MANNIE                                      PAS No. 01018604

 Select Document  :PID          PATIENT IDENT SHEET


 Case note        :Q1075869

 Destination      :QAH79R

 Copies           :1

 Enter?           :Y
```

☞ **NOTE**: To print a document: Type in (F9 for valid codes) Document ID code, F9 to find the correct case note number (to appear on document), type in destination code (printer code), copies 1 (unless more required). At the 'Enter?' prompt type 'Y' (yes) to confirm your selection.

7.1.1. Episode Enquiry View

Service Group referral **with** Healthcare Waiting List activity:

```
               E p i s o d e   E n q u i r y
   Select Episode                                    08/10/07 13:37 QAH
 ┌Name├
 │ TRIAL, MANNIE                                      PAS No. 01018604


 No Status      Date     Cons   Spec Hosp Ward Cat Casenote     WL-Cd A/P
 -- --------    -------- ------ ---- ---- ---- --- -----------  ----- ---

 1  SG REG      08/10/07 Cli:TRAIN7   SGp:IMT   NHS Q1075869    NEWWL
```

Service Group Referral with **no** Healthcare Waiting List Activity:

```
               E p i s o d e   E n q u i r y
   Select Episode                                    08/10/07 13:51 QAH
 ┌Name├
 │ TRIAL, LYDIA                                       PAS No. 01018605


 No Status      Date     Cons   Spec Hosp Ward Cat Casenote     WL-Cd A/P
 -- --------    -------- ------ ---- ---- ---- --- -----------  ----- ---

 1  SG REG      08/10/07 Cli:TRAIN7   SGp:IMT   NHS Q1087965
```

Service Group Referral Details screen:

```
                      E p i s o d e    E n q u i r y
     Service Group Referral Details                      08/10/07 13:38 QAH
  ┤Name├
   TRIAL, MANNIE                                        PAS No. 01018604

  Service Group      :IMT        INFORMATION AND TECH
  Lead Clinician     :TRAIN7     TRAIN,7
  Patient Category   :NHS        NHS PATIENT INFORMAL

  Referral Source    :GP         GENERAL PRACTITIONER

  Referral Type      :NEW
  Referral date/time :08/10/2007 11:31
  Priority           :ROUTINE

  Discharge Date/Time :
  Reason              :
  Discharge Outcome   :
                                                         <Press Return> ■
```

Appointments within Episode screen **with** Waiting list Activity:

```
                      E p i s o d e    E n q u i r y
     Appointments within Episode                         08/10/07 13:38 QAH
  ┤Name├
   TRIAL, MANNIE                                        PAS No. 01018604

    Status Department     Date      Day  Time   Clinic  Appt With Type
    Site                            By   Date/Time        Rev Date/Time    CAB

    SG WL:  NEWWL      Cli: TRAIN7    SGp:  IMT    Date Reqd: 01/2008      NEW
                              ** End of List **
```

Appointments within Episode screen with **no** Waiting list Activity:

```
                      E p i s o d e    E n q u i r y
     Appointments within Episode                         08/10/07 14:06 QAH
  ┤Name├
   TRIAL, LYDIA                                         PAS No. 01018605

    Status Department     Date      Day  Time   Clinic  Appt With Type
    Site                            By   Date/Time        Rev Date/Time    CAB
  here are no appointments for this patient episode.
                              ** End of List **
```

7.2. Other Actions Using SBA

Once the patient is on a Waiting List it is possible to use SBA to update the waiting list activity (revise, remove, reinstate) or to book the appointment.

1. Follow steps 1 – 4 of SBA (Recording a Referral and Adding a patient to the Waiting List).

2. At the Command field F9 and to select List; or Revise if the referral needs revising.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
     Command and Case Note Details                  08/10/07 14:57 QAH
┤Name├                                              ┤Valid Codes├
 TRIAL, MANNIE                            LIST    LIST PATIENT RECORD
                                          REVISE  REVISE PATIENT RECORD

     Command      :▮▮▮▮▮
```

3. Enter through the following screens; update information if appropriate to do so. At the **Patient Referral** screen select the required option.

```
          S G   R e f e r   a n d   B o o k   A p p o i n t m e n t
       Patient Referral                            10/10/07 15:54 QAH
┤Name├                                             ┤Valid Codes├
 TRIAL, MANNIE                             1   No Further Action
                                           2   Book Appointment
                                           4   Book from Waiting List
 Comment   1 :                             5   Update Waiting List
           2 :
 Referral Outcome   :
```

☛ **NOTE**: The actions "Book from Waiting List" and "Update Waiting List" can also be managed by the individual functions BWL and HWL which are covered separately later in this manual.

8. WAITING LIST ADD/REV/DEL/LIST <HWL>

HWL is a multi functional function, it is possible to add; delete; list; reinstate; remove; revise Waiting List details.

8.1. Adding a Patient to a Healthcare Waiting List

1   From the Function Set menu select HWL.

```
        Function Set :HC1       HEALTHCARE WIDE CLINICIANS
           Function :HWL█
                      Waiting List Add/Rev/Del/List
                       ┤Available Functions├
DAP - Delete Appointment              DCC - Delete Community Contact
DER - Delete Service Group Referral   DFU - DNA Follow Up
 DP - Document Print                  DSD - Delete Service Group Discharge
EPI - Episode Enquiry                 FBA - Follow up Book Appointment
HWL - Waiting List Add/Rev/Del/List   LIS - PMI List
MAH - Maintain Address History        MGH - Maintain GP History
MSH - Maintain Surname History         NI - Inpatient Name Enquiry
NID - DW Inpatient Name Enquiry       OCC - SG Clinical Coding
 PE - Patient Diary : By Patient      PEL - Patient Diary : By List
PLH - Patient Letter History          PMI - PMI Add/Revise

Press 'PREV' for previous page or 'NEXT' for next page
```

2   Search for the patient that you wish to add to a Healthcare Waiting List.

At the **Basic Details** screen it is possible to update the patient's demographic details if required. If you do not wish to update basic details press return to continue.

```
        W a i t i n g   L i s t   A d d / R e v / D e l / L i s t
    Basic Details                             03/10/07 07:36 QAH

Do you wish to revise the following ? :NO█

PAS No.   :01018604
NHS No    :                  Sts :RT
Military  :
Surname   :TRIAL                    Forenames  :MANNIE
DOB       :01/01/1986    21Y        Age    :              Sex    :M
Preferred Name :                    Work Ph :023 92313252
Title     :MR                       Phone   :023 92516897
Address   :1 Westways
*Full*    :HAVANT
          :Hants
          :
Postcode  :PO9 3LN      Havant,Hants
HA CODE    Q38          SOUTH CENTRAL HA
Postal                              Maintain Postal Address    :
Comment   :                                         Enter?  :
```

ICT Training
"Improving patient care through ICT"
NHS IPHIS
www.training.iphis.nhs.uk

3. Select the patients' Service Group Referral (SG REG) that requires adding to your Healthcare Waiting list.

```
        W a i t i n g   L i s t   A d d / R e v / D e l / L i s t
    Select Episode                              03/10/07 07:40 QAH
┤Name├
 TRIAL, MANNIE                                   PAS No. 01018604


No Status      Date     Cons   Spec Hosp Ward Cat Casenote      WL-Cd A/P
-- --------    -------- ------ ---- ---- ---- --- ------------  ----- ---

1  OP REG      08/07/07 ITAJ   110  QAH       NHS Q1075869

2  SG REG      07/06/07 Cli:RK      SGp:IMT NHS Q1075869
```

4. Complete the **Appointment Pending Details** screen with the appropriate details. F9 (super help) is available for many of the fields and may help you select the options for you department/area.

```
        W a i t i n g   L i s t   A d d / R e v / D e l / L i s t
    Appointment Pending Details                  03/10/07 07:37 QAH
┤Name├                                     ────┤Valid Codes├────
 TRIAL, MANNIE                             ADD     ADD RECORD
                                          DELETE  DELETE RECORD
                                          LIST    LIST RECORD
 Command        :██████                   REINST  REINSTATE WL
                                          REMOVE  REMOVE RECORD
 WL Code        :                         REVISE  REVISE RECORD

                    Clinician     :


 Date Required   :               Urgency       :
 Appointment type:
 Transport code  :
 Comment         :
 Category        :

 Date on List    :
```

5. Waiting List Codes will be unique for your area/department. Many of the fields are not mandatory but your department require this information for reports and statistics.

Course Name – v#

```
          W a i t i n g   L i s t   A d d / R e v / D e l / L i s t
           Appointment Pending Details                  03/10/07 07:40 QAH
        ┤Name├
         TRIAL, MANNIE                                   PAS No. 01018604


        Command       :ADD

        WL Code       :NEWWL     NEW WAITING LIST

                         Clinician      :RK



        Date Required  :12/2007            Urgency       :4     ROUTINE
        Appointment type:NEW  NEW
        Transport code  :11  NOT REQUIRED
        Comment         :NOTIFICATION LETTER SENT
        Category        :NHS  NHS PATIENT INFORMAL

        Date on List   :03/10/2007
        Enter?         :Y
```

8.2. Revising a Healthcare Waiting List

If you need to correct details on a Healthcare entry it is possible to do this within HWL. You can only revise the most recent waiting list activity for your area.

1. Select HWL.

2. Find and select the Healthcare Waiting List that you wish to revise. Enter through the **Existing Appointment** screen.

3. At the **Appointment Pending Details** screen use F9 at the Command and WL Code to select the waiting list that you wish to revise.

```
          W a i t i n g   L i s t   A d d / R e v / D e l / L i s t
           Appointment Pending Details                  03/10/07 13:12 QAH
        ┤Name├
         TRIAL, MANNIE                                   PAS No. 01018604


        Command       :REVISE

        WL Code       :


                 ┌──────────────────────────────────────────
                 │ WL Code  Status  Description
                 │
                 │ NEWWL    CURRENT NEW WAITING LIST
        Date Requ│
        Appointme│
        Transport│
        Comment  │
        Category │
                 │
        Date on L│
```

4. Revise as required.

8.3. Removing a patient from a Healthcare Waiting list

This function does not delete the Waiting List Activity. It is used if it is no longer appropriate for a patient to remain on a waiting list. For example if a patient moves out of the area or no longer requires treatment they can be removed from the waiting list.

1. Select HWL.

2. Find and select the Healthcare Waiting List that you wish to revise.

3. Enter through the **Existing Appointments** screen.

4. At the Command Field use F9 key (super help) to select 'Remove'.

5. At the 'WL Code' (Waiting List code) use the F9 key to select the appropriate Waiting List to remove the patient from.

6. At the Reason field select the code that reflects the reason that the patient has been removed from the Waiting List using the F9 key.

7. Fill in the date the removal is effective from (or return for today's date/time).

8. Add comments as necessary.

```
        W a i t i n g   L i s t   A d d / R e v / D e l / L i s t
        Appointment Pending Details                    03/10/07 13:22 QAH
┤Name├
 TRIAL, MANNIE                                      PAS No. 01018604


Command        :REMOVE

WL Code        :NEWWL     NEW WAITING LIST

                      Clinician      :RK



Date on List    :03/10/2007

Reason  :REMO    REMOVED FOR OTHER REASONS
Removal Date/Time :03/10/2007 13:22
Comment              :PATIENT MOVED OUT OF AREA


Enter?         :Y
```

8.3.1. EPI – Episode Enquiry View

The removal of the Waiting List Activity does not automatically discharge the episode of care. Do not forget to discharge **(SGD)** the patient episode.

```
                    E p i s o d e   E n q u i r y
    Select Episode                                  03/10/07 15:15 QAH
 ┤Name├
  TRIAL, MANNIE                                      PAS No. 01018604


 No Status      Date     Cons   Spec Hosp Ward Cat Casenote      WL-Cd A/P
 -- --------    -------- ------ ---- ---- ---- --- ------------  ----- ---

 1  OP REG      08/07/07 ITAJ   110  QAH       NHS Q1075869

 2  SG REG      07/06/07 Cli:RK      SGp:IMT   NHS Q1075869
```

The internal Episode Status shows as SG WL**R** (Waiting List Removed).

```
                    E p i s o d e   E n q u i r y
    Appointments within Episode                     03/10/07 15:14 QAH
 ┤Name├
  TRIAL, MANNIE                                      PAS No. 01018604

    Status Department    Date      Day  Time   Clinic  Appt With Type
    Site                           By   Date/Time        Rev Date/Time    CAB

    SG WLR: NEWWL     Cli: RK      SGp:  IMT    Date Reqd: 12/2007    NEW
                         ** End of List **
```

8.4. Reinstating a patient on a Healthcare Waiting list

```
            W a i t i n g   L i s t   A d d / R e v / D e l / L i s t
      Appointment Pending Details                      03/10/07 13:27 QAH
    ┤Name├
     TRIAL, MANNIE                                      PAS No. 01018604


    Command      :REINST

    WL Code      :NEWWL     NEW WAITING LIST

                       Clinician     :RK



    Date on List    :03/10/2007

    Reason  :REMO    REMOVED FOR OTHER REASONS
    Removal Date/Time :03/10/2007 13:27
    Comment           :PATIENT MOVED OUT OF AREA


    Enter?           :Y
```
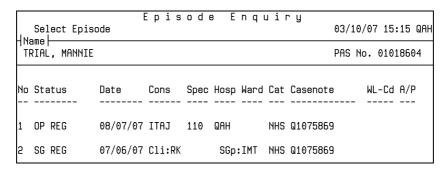
👉 **NOTE**: To re-instate a patient to a Waiting List follow instructions for removing except chose 'REINST' rather than 'REMOVE' at the command prompt.

8.4.1. Episode Enquiry View

Select Episode screen shows patient on Waiting List (see waiting list code).

```
                    E p i s o d e   E n q u i r y
      Select Episode                                    03/10/07 15:38 QAH
    ┤Name├
     TRIAL, MANNIE                                      PAS No. 01018604


    No Status      Date     Cons   Spec Hosp Ward Cat Casenote      WL-Cd A/P
    -- --------    -------- ------ ---- ---- ---- --- ------------  ----- ---

    1  OP REG      08/07/07 ITAJ   110  QAH       NHS Q1075869

    2  SG REG      07/06/07 Cli:RK      SGp:IMT  NHS Q1075869       NEWWL
```

.

9. WAITING LIST BOOK APPOINTMENT <BWL>

9.1. Booking an appointment from a Waiting List

1. Select BWL – Book for Healthcare Waiting List.

   You must not use any other function when booking an appointment for a patient on a healthcare waiting list.

```
Function Set :HC1        HEALTHCARE WIDE CLINICIANS
      Function :BWL█
                    Waiting List Book Appointments

                    ┤Available Functions├
AAD - Record Attendance and Disposal   ABT - Appointments Block Transfer
ACR - Cancel Clinic and Reschedule     ALR - Allocate Chair
APE - Appointment Enquiry              BWL - Waiting List Book Appointments
CAB - Cancel and Rebook Appointment    CAP - Cancel Appointment
```

☛ **NOTE:** SBA (Option – Book from Waiting List) & BWL (Waiting List Book Appointment) are the only functions that will remove the patient from the waiting list.

2. Search for the patient that you wish to book an appointment for.
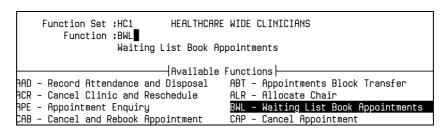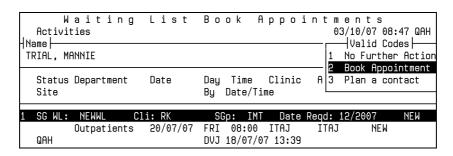
3. Revise the **Basic Details** screen if necessary.

4. At the **Activities** screen select the Service Group Waiting List that you wish to book the appointment to.

5. The Valid Codes will appear at the top right hand corner of the screen. Select option number 2 to 'Book an appointment'.

```
        W a i t i n g   L i s t   B o o k   A p p o i n t m e n t s
  Activities                                    03/10/07 08:47 QAH
┤Name├───────────────────────────────────────┤Valid Codes├
 TRIAL, MANNIE                                  1  No Further Action
                                                2  Book Appointment
  Status Department     Date     Day  Time  Clinic  A 3  Plan a contact
  Site                           By   Date/Time
─────────────────────────────────────────────────────────────
1 SG WL:  NEWWL     Cli: RK        SGp:  IMT   Date Reqd: 12/2007    NEW
          Outpatients  20/07/07  FRI  08:00  ITAJ    ITAJ     NEW
  QAH                            DVJ 18/07/07 13:39
```
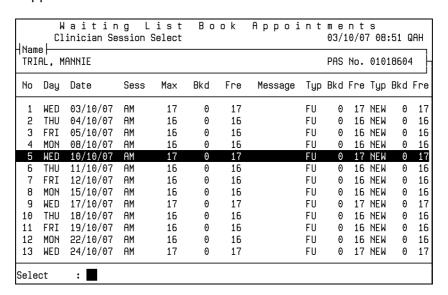
6. On the **Appointment Details** screen you will notice that all Waiting list and Outpatient activities are listed.   If this cursor has stopped at display more appointments there is more activity to view. This may help you when deciding what date & time to allocate the appointment for your speciality / department.

   Enter the Clinic, Appt Type and Date for the clinic that you wish to book to.

```
        W a i t i n g   L i s t   B o o k   A p p o i n t m e n t s
    Appointment Details                              03/10/07 08:51 QAH
 ┌─Name├─
 │ TRIAL, MANNIE                              PAS No. 01018604

   Status    Department     Date      Day  Time   Clinic    Appt With Type
                                       By   Date/Time        Rev Date/Time
   -------   ----------     --------   ---  -----  --------  --------- ----

   SG WL:  NEWWL    Cli: RK      SGp:    IMT   Date Reqd: 12/2007     NEW
           Outpatients  20/07/07  FRI  08:00  ITAJ      ITAJ        NEW
                                  DVJ   18/07/07 13:39


 Display more appointments? :
  Clinic     :RKAM        TRAINING CLINIC
  Clinician  :RK          TRAINING CLINICIAN
  Appt Type  :NEW         NEW                          Urgent ? :
  Day        :            From Time :                  To Time  :
  Date/Time  :F▓▓▓▓▓▓▓▓▓▓
```

7. Select a suitable appointment date.

```
        W a i t i n g   L i s t   B o o k   A p p o i n t m e n t s
    Clinician Session Select                         03/10/07 08:51 QAH
 ┌─Name├─
 │ TRIAL, MANNIE                              PAS No. 01018604

 No  Day  Date      Sess  Max  Bkd  Fre   Message   Typ Bkd Fre Typ Bkd Fre

  1  WED  03/10/07  AM    17    0   17               FU   0  17 NEW   0  17
  2  THU  04/10/07  AM    16    0   16               FU   0  16 NEW   0  16
  3  FRI  05/10/07  AM    16    0   16               FU   0  16 NEW   0  16
  4  MON  08/10/07  AM    16    0   16               FU   0  16 NEW   0  16
  5  WED  10/10/07  AM    17    0   17               FU   0  17 NEW   0  17
  6  THU  11/10/07  AM    16    0   16               FU   0  16 NEW   0  16
  7  FRI  12/10/07  AM    16    0   16               FU   0  16 NEW   0  16
  8  MON  15/10/07  AM    16    0   16               FU   0  16 NEW   0  16
  9  WED  17/10/07  AM    17    0   17               FU   0  17 NEW   0  17
 10  THU  18/10/07  AM    16    0   16               FU   0  16 NEW   0  16
 11  FRI  19/10/07  AM    16    0   16               FU   0  16 NEW   0  16
 12  MON  22/10/07  AM    16    0   16               FU   0  16 NEW   0  16
 13  WED  24/10/07  AM    17    0   17               FU   0  17 NEW   0  17

 Select     : ▓
```
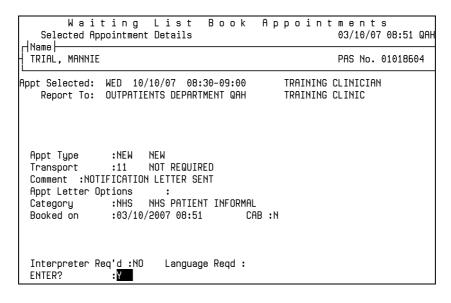
8. Select a free appointment slot(s). It is possible to book more than one timeslot if necessary. At the Select field enter 1,3 for example to book an appointment from 08:30 to 10:00.
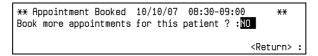
```
          W a i t i n g   L i s t   B o o k   A p p o i n t m e n t s
             Clinician Timeslot Display                03/10/07 08:51 QAH
         ┌Name├─────────────────────────────────────────────────────────
         │ TRIAL, MANNIE                                PAS No. 01018604
         └
Clinic   RKAM     Clinician  RK              Appt Type NEW    WED 10/10/07
No.  Time         CAB Typ Bkd Fre  Typ Bkd Fre  Typ Bkd Fre  TOTAL:Max Bkd Fre

Session - 08:00-17:00
  1  08:30-09:00      FU   0   1  NEW   0   1                    1    0    1
  2  09:00-09:30      FU   0   1  NEW   0   1                    1    0    1
  3  09:30-10:00      FU   0   1  NEW   0   1                    1    0    1
  4  10:00-10:30      FU   0   1  NEW   0   1                    1    0    1
  5  10:30-11:00      FU   0   1  NEW   0   1                    1    0    1
  6  11:00-11:30      FU   0   1  NEW   0   1                    1    0    1
  7  11:30-12:00      FU   0   1  NEW   0   1                    1    0    1
  8  12:00-12:30      FU   0   1  NEW   0   1                    1    0    1
  9  12:30-13:00      FU   0   1  NEW   0   1                    1    0    1
 10  13:00-13:30      FU   0   1  NEW   0   1                    1    0    1

Select    :                        Continue on warning?  :
```

9. Complete the **Selected Appointment Details** screen.

☞   **NOTE**: The Waiting List comments filter through to the **Appointment Details** screen. It is possible to delete these comments (F2) if they are not required or appropriate.

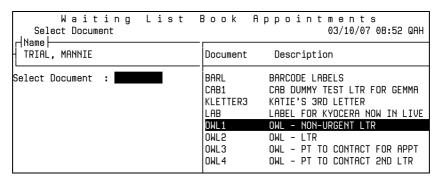Until you enter Y (for Yes) at the left hand corner of the screen the appointment will not be booked.

```
          W a i t i n g   L i s t   B o o k   A p p o i n t m e n t s
             Selected Appointment Details             03/10/07 08:51 QAH
         ┌Name├─────────────────────────────────────────────────────────
         │ TRIAL, MANNIE                                PAS No. 01018604
         └
Appt Selected:  WED  10/10/07  08:30-09:00       TRAINING CLINICIAN
    Report To:  OUTPATIENTS DEPARTMENT QAH       TRAINING CLINIC




  Appt Type      :NEW    NEW
  Transport      :11     NOT REQUIRED
  Comment   :NOTIFICATION LETTER SENT
  Appt Letter Options      :
  Category       :NHS   NHS PATIENT INFORMAL
  Booked on      :03/10/2007 08:51        CAB :N



  Interpreter Req'd :NO    Language Reqd :
  ENTER?          :Y
```

10. You will be given the option to book more appointments for this patient.

```
** Appointment Booked  10/10/07  08:30-09:00       **
Book more appointments for this patient ? :NO

                                          <Return> :
```

11. You will be given the option to print a Healthcare Outpatient Appointment letter for your patient.
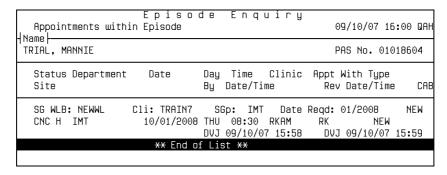
```
        W a i t i n g   L i s t   B o o k   A p p o i n t m e n t s
    Select Document                               03/10/07 08:52 QAH
  ┌─Name├
  │ TRIAL, MANNIE                    Document      Description
  │
  Select Document  : ▓▓▓▓▓▓▓      BARL          BARCODE LABELS
                                   CAB1          CAB DUMMY TEST LTR FOR GEMMA
                                   KLETTER3      KATIE'S 3RD LETTER
                                   LAB           LABEL FOR KYOCERA NOW IN LIVE
                                   OWL1          OWL - NON-URGENT LTR
                                   OWL2          OWL - LTR
                                   OWL3          OWL - PT TO CONTACT FOR APPT
                                   OWL4          OWL - PT TO CONTACT 2ND LTR
```

9.1.1. EPI - Episode Enquiry View

1. Search for the patient & select the relevant Episode of Care. The **Service Group Referral** screen will be displayed, followed by the **Activities** screen. Note the Status of the Episode is now SG WLB, as the appointment has been booked.

```
        W a i t i n g   L i s t   B o o k   A p p o i n t m e n t s
    Activities                                    03/10/07 09:17 QAH
  ┤Name├
   TRIAL, MANNIE                                  PAS No. 01018604

   Status Department     Date      Day  Time   Clinic   Appt With Type
   Site                            By   Date/Time        Rev Date/Time

   SG WLB:NEWWL       Cli: RK       SGp:  IMT   Date Reqd: 12/2007      NEW
          AUDIOLOGY     10/10/07  WED  08:30  RKAM      RK        NEW
   QAH                            DVJ 03/10/07 09:14
          Outpatients   20/07/07  FRI  08:00  ITAJ      ITAJ      NEW
   QAH                            DVJ 18/07/07 13:39
```

10.IMPERFECTIONS OF THE SYSTEM.

If an appointment is cancelled or deleted the system does not automatically return the patient to the Waiting List. Reinstating the patient to the Waiting List must be administered manually using HWL.

```
                          E p i s o d e   E n q u i r y
     Appointments within Episode                  09/10/07 16:00 QAH
 ┤Name├
  TRIAL, MANNIE                                    PAS No. 01018604

     Status Department    Date      Day  Time   Clinic  Appt With Type
     Site                           By  Date/Time        Rev Date/Time    CAB

     SG WLB: NEWWL     Cli: TRAIN7    SGp:  IMT    Date Reqd: 01/2008      NEW
     CNC H  IMT        10/01/2008 THU  08:30  RKAM      RK        NEW
                                    DVJ 09/10/07 15:58   DVJ 09/10/07 15:59
                          ** End of List **

```

The Episode above displays a cancelled appointment; however the waiting list remains as booked. (SG WLB).

11. FAULT REPORTING

From time to time you may experience problems with faulty equipment, software problems or access to the Patient Administration System (PAS) ie password non acceptance problems. To resolve your problem a call with need to be logged with the ICT Service Desk.

11.1. ICT Service Desk

Email	ict.servicedesk@porthosp.nhs.uk
Phone	023 9268 2680 or SJH (7703) 2680.

You will need to give the Service Desk certain information, so always ensure you have the following information available. They may need to know:

Your Username.

The KB Number of the equipment. This is found on a small label (usually red or blue) stuck to the equipment.

The clinical system you were working on.

The patient's details e.g. case note no.

Exactly what you were attempting to do, e.g. log on, view a patient's results.

11.2. Out of office hours

Contact the ICT Service Desk and leave a message on the answer machine. They will deal with the problem as soon as they can. Alternatively email them.

If you feel there is a major system problem contact the switchboard for them to contact the engineer on call.

11.3. ICT Training

If you identify an error in this manual or think that it would be useful to include something that has not been covered, please contact ICT Training.

Email	ict.training@porthosp.nhs.uk
External Phone	023 9228 6000
Internal Phone	QAH (7700) 5867

12. HELP WITH USING PAS

If you have only just attended the course and feel you may need additional support, help or advice, you can contact the ICT Training Office.

* If you have not used PAS for more than 12 months you will be required to re-attend your training.

Email	ict.training@porthosp.nhs.uk
External Phone	023 9228 6000
Internal Phone	QAH (7700) 5867

13.   ICT TRAINING CANDIDATE APPEALS PROCEDURE..

- Candidates who are unhappy with any aspect of the end of course/test assessment decision should first discuss the problem with the ICT Trainer at the time of receiving the result.

- The reasons must be made clear by the candidate at this time.

- If the candidate is still unhappy with the result further discussion should take place involving the ICT Training Team Leader within 3 days of the course/test date.

- The ICT Training Department will keep a record of such discussion together with date and outcome.

- Where necessary the 1st marker will be asked to re-mark and the marking checked by the ICT Training Team Leader.

- It should be noted that if the candidate was borderline double marking should already have been undertaken.

- If this does not provide satisfaction the candidate may raise a formal appeal.

- Appeals will only be accepted if made in writing (not e-mail) to the ICT Training Manager within 10 days of the candidate receiving their result, outlining clearly the circumstance of the appeal.

- The 1st & 2nd markers will meet with the Training Manager to consider if there are any aspects that should be taken into account in the candidate's performance.

- In some circumstances the candidate may be offered a re-test (e.g. hardware or software problems).

If this is not the case and the result remains unchanged then the candidate may write to the ICT Training Manager (within 5 days of receiving the 3rd result) who will consider all evidence and circumstances of the appeal also taking into consideration responsibilities to the Trust and Data Protection Act to make a final decision.

ICT Training, QAH, July 2011

14.   VERSION CONTROL/LOG

Manual Version	V.N	
Date	[July] 2011	
Revisions		**Page**
Update	Headers and Footers	All